

Downloading Plan Information

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Document Module

Depending on your needs, you may either print generated documents or save plan information through available reports.

Please review the following resources for instructions:

- [Printing Documents](#)
- [Reports - Document Provisions by Checklist](#)

Compliance Module

There is currently no standard report or export that downloads all Compliance module data at one time. If you wish to retain information from Compliance, you should review the reports and tests associated with the plan year(s) and download any items you would like to keep for your records before proceeding.

Many users save year-end compliance reports and testing results for plan sponsor delivery and internal recordkeeping purposes. Please note that once plan year ends are deleted, the related data, reports, tests, and results will no longer be available within the software.

Additional Areas to Review

- [5500 Module: Upload and Download Center](#) - Provides access to downloadable data across plans for certain items, such as Form 5500 filings.
- [Portal Communications](#): Within the Communications tab, you can download posted communications and any associated attachments for your records.

Deleting the Plan

After you have saved all information you wish to retain, you can delete the plan so it no longer counts toward your active plan totals. Please refer to the following resource for detailed instructions:

- [Delete Plan](#)

Please note that there is currently no single process for exporting all data across all modules at once, so any information you need to keep should be downloaded separately from the applicable modules before deleting the plan.
