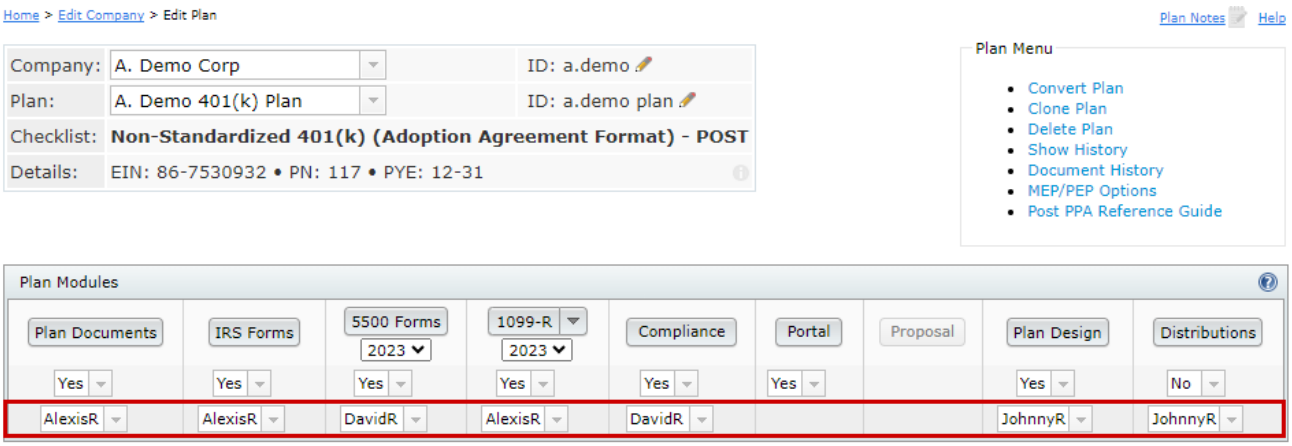
Assigning Admins to a Plan

11/16/2026 8:32 am CST

Only Master Admin Users or Designated Admins can assign admins to plans for various modules.

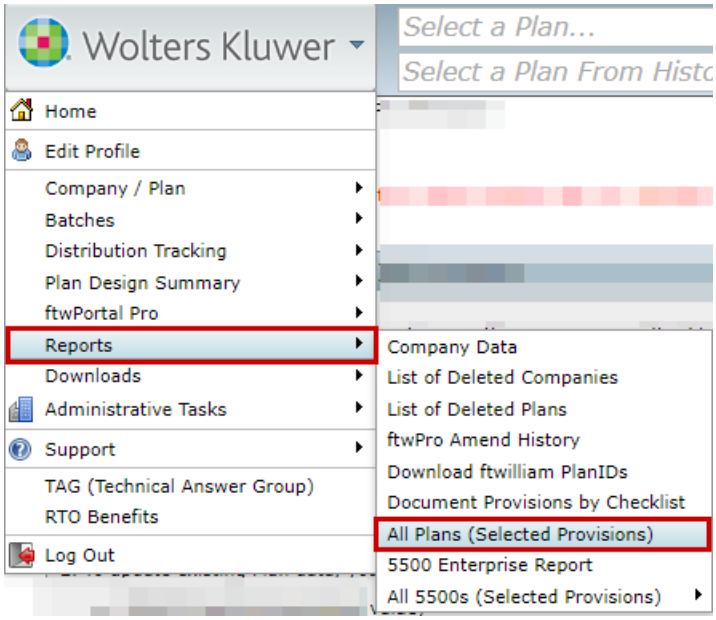
Individual Plan Update

Admins and responsibility fields may be updated on the Edit Plan screen of individual plans, by selecting the name from the dropdown directly below each module:



Mass Import

To update admin and responsibility fields via mass import, download the 'All Plans Selected Provisions' report under the Wolters Kluwer logo> Reports.



This report includes details about the companies and plans within the account and contains the necessary details for

importing admins and responsibilities. Scroll to columns T-AJ to view plan names, numbers, and associated admins or responsibilities. Update the Admin module and 'RespForPlan' fields as needed.

Note: The upload feature only adds or modifies entries; it does not remove users or responsibilities if a field is deleted.

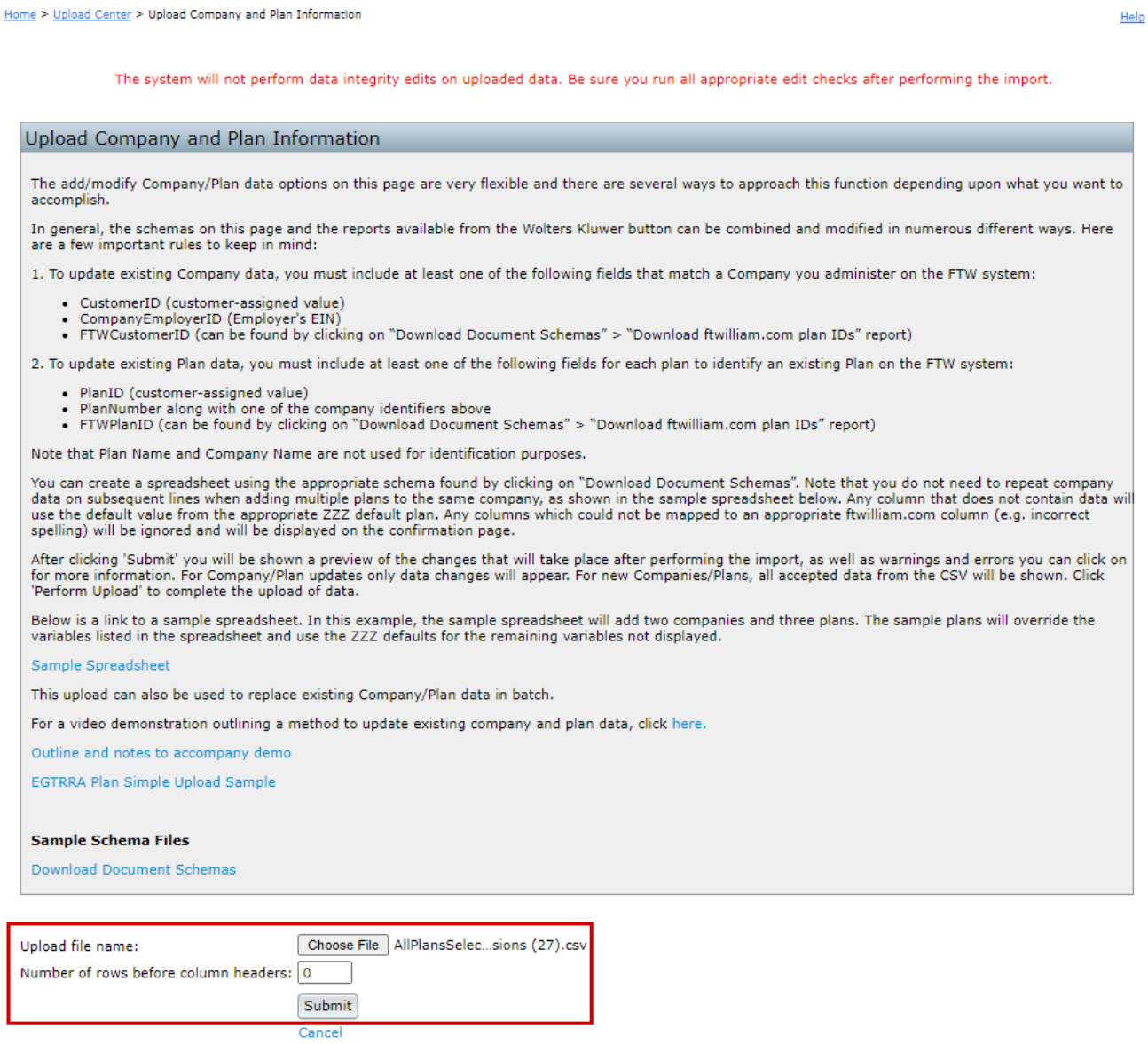
Example: *Updating the spreadsheet for the Documents, IRS Forms, and 5500 Module*:

	T	U	V	W	X	Y	Z	AA	AB	AC
1	PlanLine1	PlanLine2	PlanNumber	PlanID	DocAdmin	RespForPlan	IRSAdmin	IRSRespForPlan	Work5500Admin	Work5500RespForPlan
2	ACA Example Plan		2		AlexisR	Yes	DavidR	Yes		Yes
3	Shinra Electric Power Company		1		AlexisR	Yes	AlexisR	No	AlexisR	No

Once the spreadsheet is completed, select the Upload Company/ Plan data on the Home screen> Add/Modify Company and Plan Data.



On the next screen select the top link 'Add/Modify Company and Plan Data'. which will redirect to the screen shown below. Choose the file and select the 'Submit' Button.

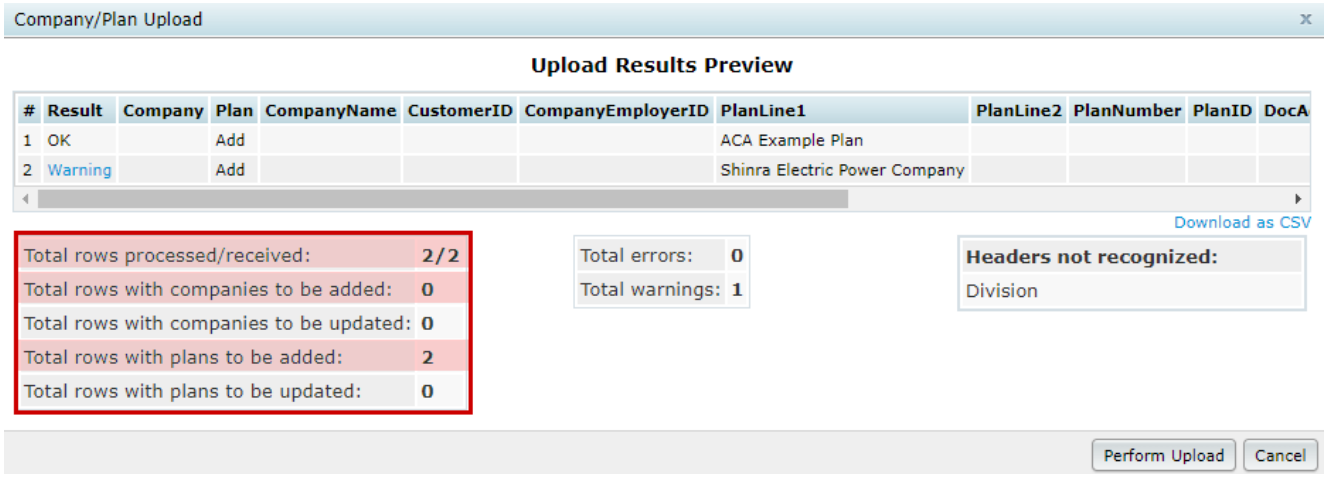


Once the file has been submitted, a confirmation screen will populate for users to review the information and confirm the import. Nothing will be altered in the account until the 'Perform Upload' button has been selected. **Please review this screen thoroughly.**

Below are the different views of what to anticipate based on the details on the spreadsheet. These are in reference to adding new plans or updating existing plans.

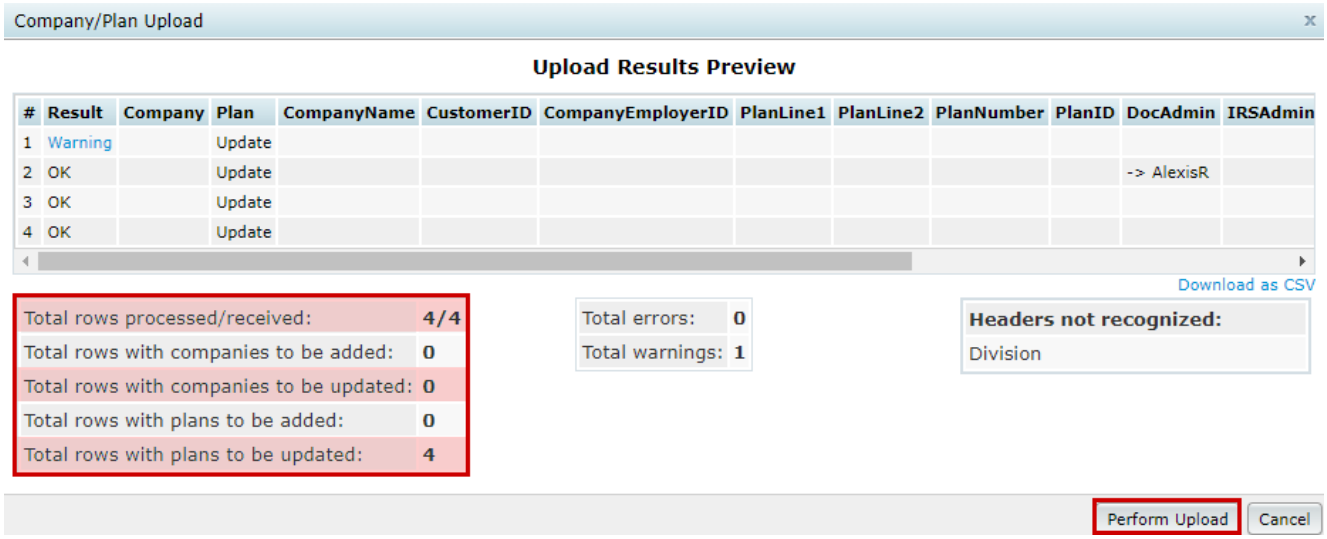
ADDED:

*The following is an example of an upload where plans were added to the software. If **ADDING** companies or plans review the highlighted sections.*



UPDATED:

The following is an example of an upload where updates to plans were made. If ***UPDATING*** *companies or plans review the highlighted sections.*



Below you will find a tutorial of the above process:

Your browser does not support HTML5 video.