

Edit Plan

03/19/2026 10:02 am CDT

The Edit Plan page is where you can update plan specific data. In the top left, you will see basic information about the plan, including:

Home > Edit Company > Edit Plan

1	Company:	Sample Company	5	ID:	
2	Plan:	Sample Company 401(k) Plan	6	ID:	
3	Checklist:	Non-Standardized 401(k) (Adoption Agreement Format) - POST			
4	Details:	EIN: 99-9999999 • PN: 001 • PYE: 12-31			

- 1. Company Name
- 2. Plan Name
- 3. Checklist type
- 4. Employer Identification Number, Plan Number, and Plan Year End ("EIN", "PN", and "PYE" respectively)
- 5. Company ID - this is a unique ID for the company assigned by a User with Designated Admin permissions
- 6. Plan ID - this is a unique ID for the plan assigned by a User with Designated Admin permissions

PLEASE NOTE: If you have Designated Admin permissions, a pencil icon will appear next to the ID field. Click on the pencil icon to edit the field. Your entry will automatically save.