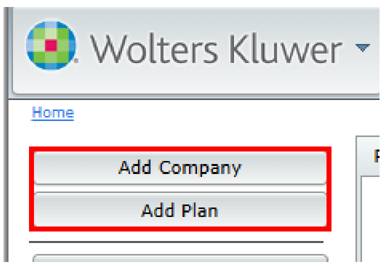
Quick Start User Guide

03/19/2026 10:00 am CDT

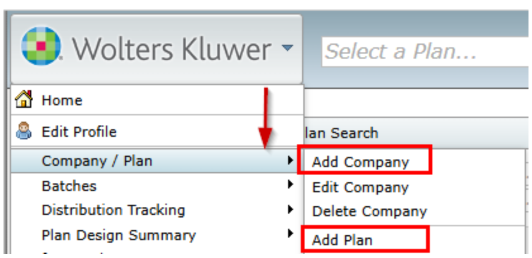
Add Company/Plan

To access the plan document module, you will need to have a plan on your account that is on a document checklist. To have a plan in place, you will first need to have a company. There are a couple of ways you can add each.

1. From the Home page, click on the "Add Company" button to add a company, and "Add Plan" button to add a plan.



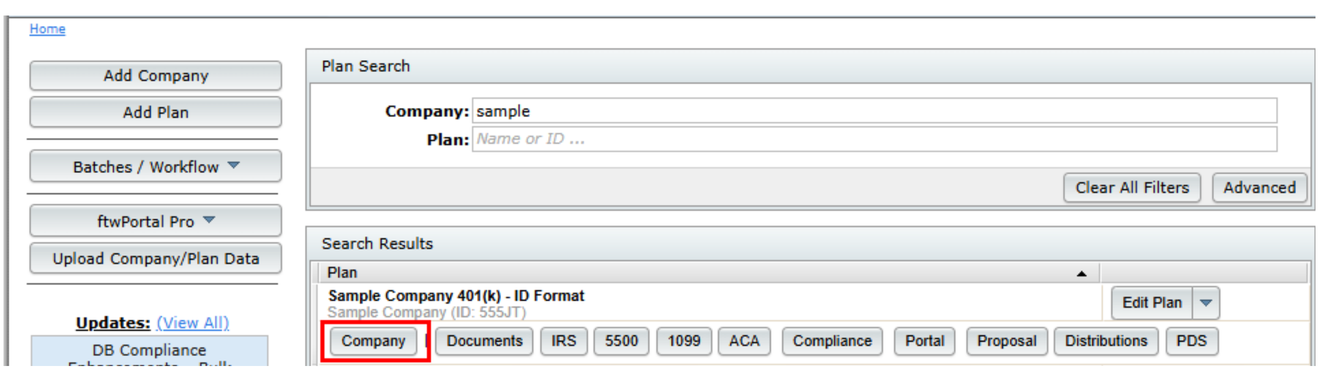
2. From the Wolters Kluwer menu, select "Company/Plan", followed by either "Add Company" or "Add Plan".



Edit Company

Follow the steps below to edit company data.

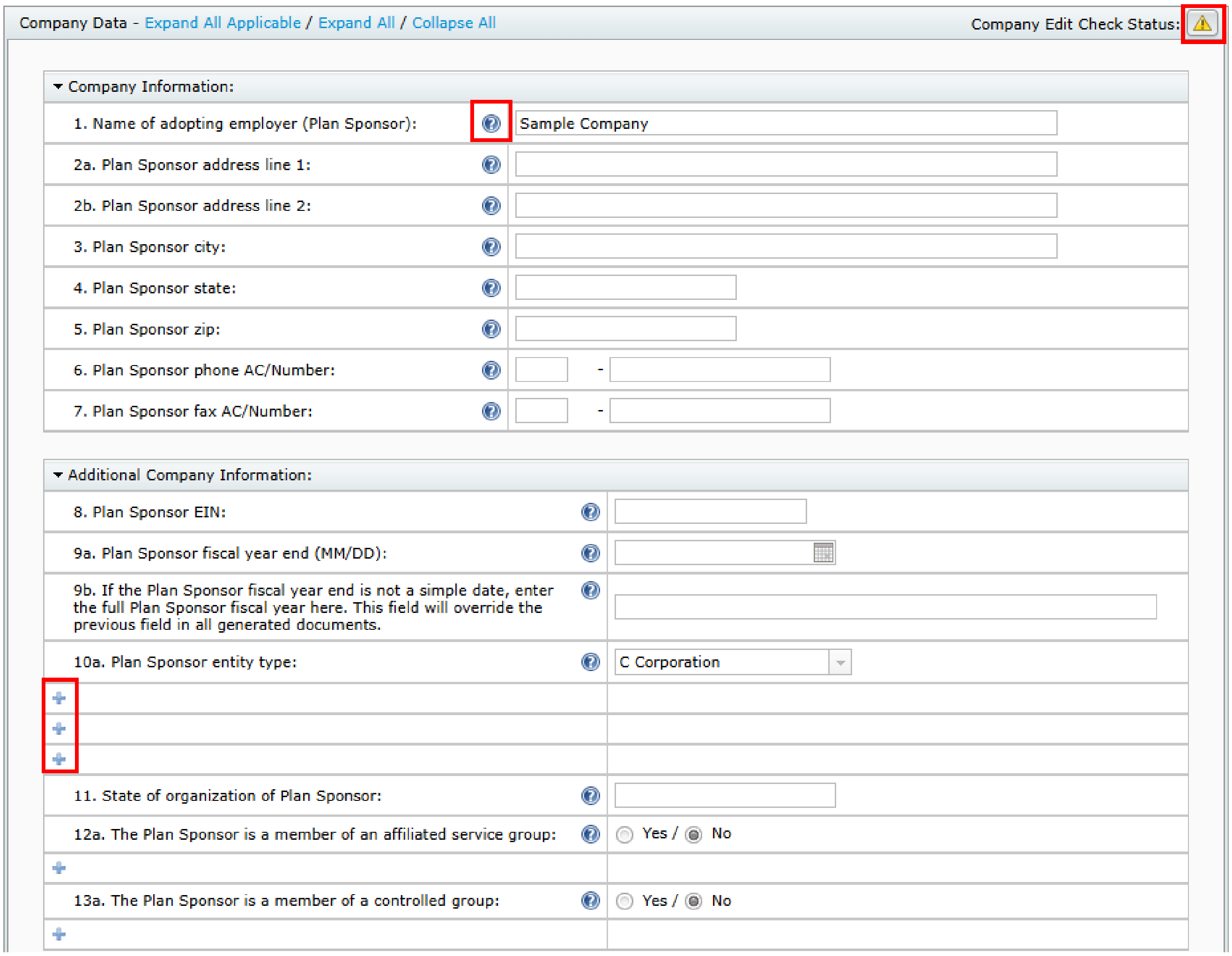
1. Select your company from the Home page that you want to update by clicking on the Company button. This will take you to the Edit Company page.



2. By default, the list will display all relevant sections of the checklist; fields which are not applicable based on other answers will not be displayed, and in their place, you will see a "+" sign to expand the section.

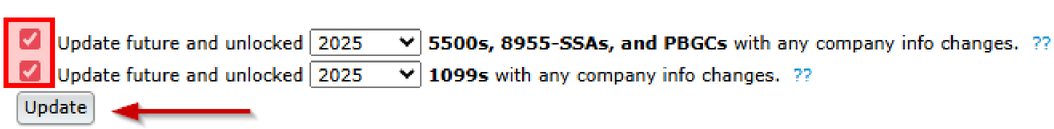
Note: For more information on each item, you can hover your cursor over the "?" icon next to see a brief summary or click on the "?" to read a longer description.

3. Run edit checks to ensure your updates meet all requirements.



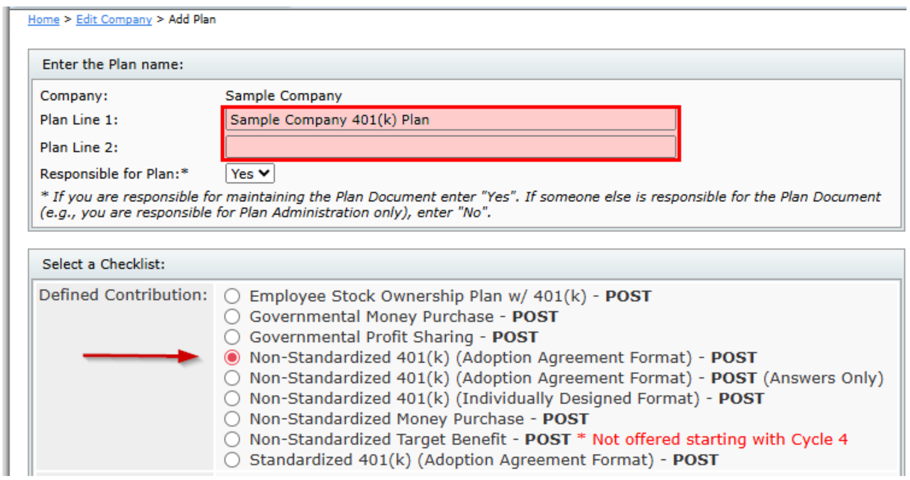
NOTE: When updating company data, you can choose to update future and unlocked 5500s, 8955-SSAs, PBGC and 1099s if you also subscribe to those other modules. To update those forms, click the box next to the applicable form, select the applicable year and click the "Update" button.

4. Checking these boxes will transfer the updates made to active forms and schedules in the year chosen and future years.

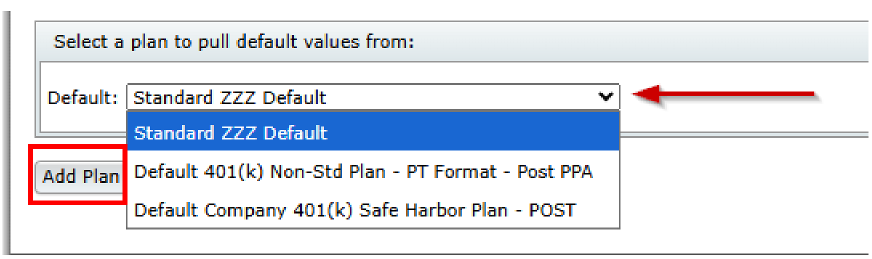


5. Once you have added your company, you can add a new plan via the "Add Plan" link under the Company Menu.

6. Enter the Plan Name and select your desired checklist type from the list.

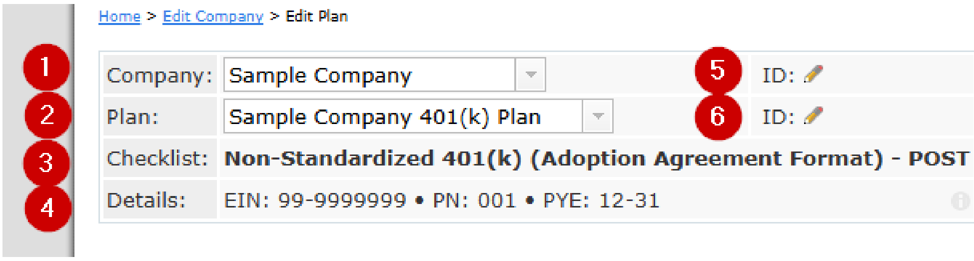


7. You can select a plan to pull default values from. If you do not have Default Plans set up on your account, your only option will be ZZZ Default. What you have selected in your ZZZ-Default checklist for the selected plan type will populate in your added plan. Click on the "Add Plan" button at the bottom of the page.



Edit Plan

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



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.