Add Company/Plan

03/19/2026 10:00 am CDT

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".