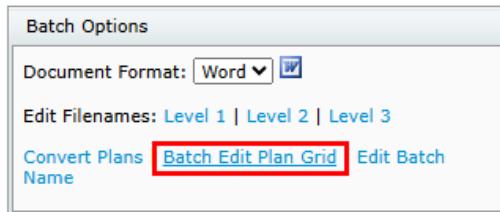


# Update Plan Parameters for Multiple Plans

12/17/2025 8:48 am CST

With the "Batch Edit Grid" link you can update plan parameters for multiple plans on the same on the checklist.

To edit plan parameters - click on the "Batch Edit Plan Grid" link located under the "Batch Options" menu.



From the "Grid View" drop-down select the Section of the checklist you wish to update.

**Please NOTE: "Section K: SECURE 2.0 Operation Checklist" is now "SECURE 2.0 Amendment 2025".**

For additional assistance with the grid, you can click on the "Grid Key" in the upper right. This key will provide an explanation of the shading in the grid. For an explanation of the column header and which question is linked to the plan document checklist, you can click on the "Grid Help" link. In addition, you can download the schema for the checklist type of your batch by clicking on the "Download Schema" link.

Batch Edit Plan Grid						
Grid View: ▾		<u>Currently Showing: Default</u>			Download Schema   Grid Key   Grid Help	
	Company Name	Plan Name	PlanID	PlanNumber	Err Doc	Err Forms
<input type="checkbox"/>	Company Name	Plan Name				
<input type="checkbox"/>	Company Name	Plan Name	PlanID	PlanNumber	Err Doc	Err Forms
<input type="checkbox"/>	Sample Company	Sample Company 401(k) Plan		001		

After you have selected a section, you can make your desired changes in the grid, or you can update certain parameters by clicking on the "Do with selected" button at the bottom and select "Change columns" from the drop down. You will want to first select the plans that you want to update.

Batch Edit Plan Grid						
Grid View: ▾		<u>Currently Showing: Section C</u>				
	Company Name	Plan Name	PlanID	PlanNumber	Err Doc	Err Forms
<input type="checkbox"/>	Company Name	Plan Name				
<input checked="" type="checkbox"/>	Company Name	Plan Name				
<input checked="" type="checkbox"/>	Sample Company	Sample Company 401(k) Plan				

Do with selected: ▾
Show Selected
<b>Change columns</b>

Then select the check box for the parameter that you want to update and then click "Ok" at the bottom of the menu. The software will update all plans selected.

Change Columns - 1 selected

Show Selected X

Column	New Value
<input checked="" type="checkbox"/> PlanFKMinMax	Yes  Yes  No
<input type="checkbox"/> FKMin	percent of Compensation 
<input type="checkbox"/> FKMinimum	
<input type="checkbox"/> FKMinimumAmt	
<input type="checkbox"/> FKMax	Yes 
<input type="checkbox"/> FKMaximum	percent of Compensation 
<input type="checkbox"/> FKMaxAmount	
<input type="checkbox"/> FKLimitations	Yes 
<input type="checkbox"/> FKLimitationsText	
<input type="checkbox"/> FKModifications	Each pay period 
<input type="checkbox"/> FKStopAnyTime	Yes 
<input type="checkbox"/> FKCatchUp	Yes 
<input type="checkbox"/> FKNegativeElection	None 
<input type="checkbox"/> FKNegativeElectionAdminPolicy	Yes 
<input type="checkbox"/> AutoEnrollApplication	Only Participants whose Plan entry date is on or after 
<input type="checkbox"/> AutoEnrollApplicationEntryDate	
<input type="checkbox"/> AutoEnrollApplicationOtherText	
<input type="checkbox"/> EACACovered	All Eligible Employees 
<input type="checkbox"/> FKNegativeElectionAmount	
<input type="checkbox"/> FKNegativeElectionIncrease	Yes 
<input type="checkbox"/> FKNegativeElectionIncreasePercent	
<input type="checkbox"/> MaxNegativeElection	
<input type="checkbox"/> FKNegativeElectionDelay	Yes 

OK Cancel

After you have updated your desired plan parameters, you can now run edit checks for all or select plans in your batch.

To run the edit checks for all plans in your batch, go to the top of the batch screen and click on the symbol next to "Error".

Count:	1	Error: 
Complete:	<input type="checkbox"/>	Print: <input type="checkbox"/>
Publish:	<input type="checkbox"/>	Status:

To run edit checks on select plans from your list, select the plans, then click on the "Do with selected".

<input type="checkbox"/>	Company Name
<input checked="" type="checkbox"/>	Company Name
<input checked="" type="checkbox"/>	Sample Company

