

Update Plan Parameters for Multiple Plans

10/07/2025 1:42 pm CDT

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.

Batch Options

Document Format:

Word

Edit Filenames: [Level 1](#) | [Level 2](#) | [Level 3](#)

Convert Plans

[Batch Edit Plan Grid](#)

Edit Batch Name

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

Batch Edit Plan Grid

Grid View: ▾

Currently Showing: Default

[Download Schema](#)

Default

Annual Notice

SECURE/CARES/CAA Amendment

DC POST Restatement

Company Information

Section

Section A: GENERAL INFORMATION

Section B: ELIGIBILITY

Section C: CONTRIBUTIONS-ELECTIVE DEFERRAL AND SAFE HARBOR

Section D: CONTRIBUTIONS-EMPLOYER MATCHING AND NON-ELECTIVE

Section E: VESTING

Section F: DISTRIBUTIONS

Section G: IN-SERVICE WITHDRAWALS

Section H: PLAN OPERATIONS, INVESTMENTS AND TOP-HEAVY

Section I: SECURE/CARES AMENDMENTS & CUSTOM APPENDICES

Section J: ADMINISTRATIVE ELECTIONS - TRUST, LOANS, SPD AND FORM CUSTOMIZATIONS

Section K: SECURE 2.0 OPERATION CHECKLIST

Plan Name	PlanID	PlanNumber
Plan Name	PlanID	PlanNumber
Sample Company 401(k) Plan		001

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: ▾

Currently Showing: Default

[Download Schema](#) | [Grid Key](#) | [Grid Help](#)

Company Name	Plan Name	PlanID	PlanNumber	Err Doc	Err Forms
Company Name	Plan Name	PlanID	PlanNumber	Err Doc	Err Forms
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: ▼ **Currently Showing: Section C**

<input type="checkbox"/>	Company Name	Plan Name
<input checked="" type="checkbox"/>	Sample Company	Sample Company 401(k) Plan

Do with selected: ▼

Show Selected

Change columns

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

<input type="checkbox"/>	Column	New Value
<input checked="" type="checkbox"/>	PlanFKMinMax	Yes ▼
<input type="checkbox"/>	FKMin	Yes ▼
<input type="checkbox"/>	FKMinimum	No ▼
<input type="checkbox"/>	FKMinimumAmt	percent of Compensation ▼
<input type="checkbox"/>	FKMax	<input type="text"/>
<input type="checkbox"/>	FKMaximum	Yes ▼
<input type="checkbox"/>	FKMaximumAmount	percent of Compensation ▼
<input type="checkbox"/>	FKLimitations	<input type="text"/>
<input type="checkbox"/>	FKLimitationsText	Yes ▼
<input type="checkbox"/>	FKModifications	Each pay period ▼
<input type="checkbox"/>	FKStopAnyTime	<input type="text"/>
<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="text"/>
<input type="checkbox"/>	AutoEnrollApplicationOtherText	<input type="text"/>
<input type="checkbox"/>	EACACovered	All Eligible Employees ▼
<input type="checkbox"/>	FKNegativeElectionAmount	<input type="text"/>
<input type="checkbox"/>	FKNegativeElectionIncrease	Yes ▼
<input type="checkbox"/>	FKNegativeElectionIncreasePercent	<input type="text"/>
<input type="checkbox"/>	MaxNegativeElection	<input type="text"/>
<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".

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

Print
Edit Checks
Remove
Publish
Do with selected: ▼