

# Set-Up Master Plan

12/05/2025 9:21 am CST

From the "Edit Plan" page of the plan you wish to designate as the Master Plan, click on the "MEP/PEP Options" link located under the "Plan Menu".

[Home](#) > [Edit Company](#) > [Edit Plan](#)

Company:	MEP/PEP Tool Test Company	ID:	
Plan:	MEP/PEP Tool Sample Plan	ID:	
Checklist:	Non-Standardized 401(k) (Adoption Agreement Format) - POST		
Details:	EIN: 99-9999999 • PN: 001 • PYE: 12-31		

[Plan Notes](#)

## Plan Menu

- [Convert Plan](#)
- [Clone Plan](#)
- [Delete Plan](#)
- [Show History](#)
- [Document History](#)
- **MEP/PEP Options**
- [Post PPA Reference Guide](#)
- [Archive Plan](#)

Check the box "Master MEP/PEP" to designate this plan as the Master Plan. Then, choose the applicable Form 5500 filing: single filing or a filing for each Adopting Employer. Once you have made your selection, click on the "Save & Close" button.

**MEP/PEP Options**

☒ **Master MEP/PEP**

**Form 5500 Filing?**  
☒ Single Filing  
☐ Each Adopting Employer

**Save & Close**

A pop-up window of the "Status Update" will generate. Click "Ok".

**Status Update**

Update Successful.

**OK**