

Link Adopting Employer(s)

12/05/2025 9:23 am CST

1. To link your Adopting Employer(s), click on the "0" next to "Plans Linked" at the top of the Edit Plan page in the "Details" box. The number of plans linked will initially be "0". As you add Adopting Employers, this number will increase to reflect the number of Adopting Employers.

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 • Plans Linked: 0		

2. On the "Adopting Employers" window is where you can add your Adopting Employers. Click on the "Add Plans" button near the top of the menu. The software will open a window displaying a list of all plans on your account that match the checklist type of the Master Plan.

Adopting Employers

Add Plans

Adopting Employers

	Company	Plan Name	Plan ID		Admin
<input type="checkbox"/>	Company	Plan Name	Plan ID	Error	Admin

No records available

3. Filters at the top of the window may be utilized to narrow the list of plans. You can choose to select plans individually or by checking the select all box. Once you have selected your desired plans, click on the "Add Plans" button.

Add Plans

Only plans that match the Master plan will appear in this list.
Master Plan Type: Non-Standardized 401(k) (Adoption Agreement Format)
Selected plans will be updated with the Master plan parameters.

	Company	Plan Name	Admin
<input type="checkbox"/>	Company	Plan Name	Admin
<input type="checkbox"/>	Default Company	Default 401(k) Non-Std Plan - PT Format - Post PPA	
<input type="checkbox"/>	Default Company	Default Company NonStd 401(k) Plan	
<input type="checkbox"/>	Wolters Kluwer (ftwilliam.com)	Demo Company 401(k) Plan	
<input type="checkbox"/>	Company Upload Test	JC SH Match Co 401(k) Plan	
<input type="checkbox"/>	Jodi's Test Company DC POST	Jodi's Test 401(k) Non-Std Plan - PT Format - Post PPA	
<input checked="" type="checkbox"/>	MEP Tool Company 3	MEP Tool Master Plan	
<input type="checkbox"/>	Company Upload Test	MEP Tool POST Co MASTER Plan	
<input type="checkbox"/>	Company Upload Test	MEP Tool POST Co MASTER Plan	
<input type="checkbox"/>	Jodi's LLC	MEP Tool POST Co MASTER Plan	
<input type="checkbox"/>	PDS Testing Company	PDS Testing Company	
<input type="checkbox"/>	Sample Company	Sample Company 401(k) Plan	
<input type="checkbox"/>	Jodi's Test Company DC POST	SIMPLE 401(k) Plan Post	

Add Plans

Current View Total: 14 / Number Selected: 1

[Export current view to CSV](#)

4. A confirmation window will appear letting you know that your selected plans will be updated with the Master Plan. Click "Yes" to continue.

By clicking "Yes", the selected plans will be updated with the Master plan parameters.

Yes
No

5. A progress bar window will appear to indicate you are ready to proceed. Click on the "Ok" button.

Updating Plans

100%

Adopting Plans Updated to Master

OK

6. After plan(s) have been added, the number of plans linked will increase at the top of the page in the "Details" box.

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 • Plans Linked: 1

7. To view the list of Adopting Employer(s), click on the number next to "Plans Linked".

Adopting Employers

Add Plans

Adopting Employers					
	Company	Plan Name	Plan ID		Admin
	Company	Plan Name	Plan ID	Error	Admin
	MEP Tool Company 3	MEP/PEP Tool Sample Plan		⚠	