Lock/Unlock Master Plan Parameters

12/05/2025 9:27 am CST

In the Master Plan, the lock/unlock feature in the checklist allows you to indicate which parameters an adopting employer may have that are different than what the Master Plan has selected. There are certain parameters which are not permitted to be unlocked as those can only apply to the Master Plan. There are three types of padlocks:

1. Gray closed padlocks - these indicate parameters which only apply to the Master Plan and cannot be different for an Adopting Employer.

2. Green closed padlocks - these indicate parameters that are locked. The selected options in the Master Plan checklist with green padlocks will apply to the linked Adopting Employer(s).

3. Yellow open padlocks - these indicate parameters that are unlocked. Allowing the linked Adopting Employer to make a different selection for that parameter.

At the top of the checklist, you have the option to "Lock All" or "Unlock All" parameters in the Master Plan.

To select specific parameters to lock or unlock, click on the padlock next to the checklist question. Clicking on a closed green padlock will change it to a yellow open padlock, allowing the linked Adopting Employer to have that parameter selected different than the Master Plan.

After modifying the parameters or updating the padlocks in the Master Plan, a message will appear at the top of the Master Plan checklist indicating that the Adopting Employer plans are not in sync with the Master Plan. To sync your plans, click on the "Update Linked" button at the top of the checklist. This will sync the Master Plan parameters to the

linked Adopting Employer(s) checklist. Selected parameters that are locked in the Master Plan will flow over to the linked Adopting Employer(s) checklist.

A warning window will appear verifying you want to continue. Click "Yes".

A progress bar will appear, followed by "Updating Plans" status window. Click "Ok".

To access your linked Adopting Employer(s) Edit Plan checklist, click on the number next to "Plans Linked" at the top of the page by "Details".

On the Adopting Employer page, you can select the adopting employer you want to update by clicking on the Plan Name next to the company. This will take you to the Edit Plan page of that Adopting Employer.

You can now update parameters that have open padlocks.

▼ B. Service Requirement for Plan Participation

🔓	**10a. Elective Deferrals/Voluntary Contributions - minimum service requirement**	❓	one (1) Year - Hours of Service ⌄
🔓	10a.i. Enter the Hours of Service that must be completed in the period described above (without commas)	❓	1000
➕			
➕			
🔓	10a.iv. In addition to the foregoing, the Plan provides for additional requirements for eligibility to make Elective Deferrals/Voluntary Contributions	❓	○ Yes / ◉ No

Once you have updated your Adopting Employer's parameters that are different than the Master Plan, and have run the Edit Checks, you are ready to generate your Adopting Employer's Joinder Agreement and supporting documents. Please refer to "Generate Adopting Employer Joinder Agreement, Supporting Forms/Notices and Master Plan Documents" in this guide for those steps.