Show History

12/05/2025 10:00 am CST

The Show History page enables users to review modifications made to plans across all modules that you subscribe to. Users with with Designated Administrative permissions can revert changes made to the document checklist from this page. In addition, you can view historical version of the Adoption Agreement or Plan Documents (Individually Designed format), that were generated after October 31, 2025.

To access the Show History page, click on the "Show History" link located under the "Plan Menu" on the Edit Plan page.

This page shows history of when documents were generated, updates made, etc. by User.

1. Revert : The "Revert" link allows Users with Designated Administrative permissions to revert changes made to the document checklist.

Please Note: Revert will undo all changes made during a log in session. Reverting changes also creates a record in the Show History. Even reverting can be reverted.

After clicking on the "Revert" link, a pop up window will generate of the Revert Plan Checklist Values providing a summary of all values that will be reverted. Click "Ok" at the bottom to proceed.

Revert Plan Checklist Values   x

Plan:	Sample Company 401(k) Plan
Revert To:	Values prior to 2025-10-20 14:21:05

Please confirm the resulting changes.

New values shown in **bold**.
Click 'OK' below to apply these changes.

Section	Line No	Question	Current Value	Revert Value	Imposed Default
D	19b	Modify Hour of Service requirement and/or last day requirement for a Participant who Terminates employment with the Employer during the Plan Year due to death	Yes	**(DISABLED)**	
C	17	Safe Harbor Matching Contribution formula	Single rate	**(DISABLED)**	
C	15e	Employer contributions will be offset by safe harbor contributions	No	**(DISABLED)**	
D	15b	In order to share in the allocation of Non-Elective Contributions, a Participant is required to be employed by the Employer on the last day of the applicable period	Yes	**(DISABLED)**	
D	15c	In order to share in the allocation of Non-Elective Contributions, a Participant is required to be employed by the Employer on the last day of the applicable period or complete at least the Hours of Service specified below in the applicable period	No	**(DISABLED)**	
C	16	Pay earned before participation is included in Plan Compensation for Safe Harbor contributions	Yes	**(DISABLED)**	
C	13b	Indicate the safe harbors the Plan is intended to satisfy	ADP and ACP - QACA	**(DISABLED)**	
C	17a.i	Maximum amount of Employee contributions matched (without % sign - maximum percent of compensation matched at rate above)	4	**(DISABLED)**	
D	15a.i	Hours of Service required in the applicable period for a Participant to receive an allocation of Non-Elective Contributions (not to exceed 1,000 hours in a Plan Year or a prorated version thereof)	500	**(DISABLED)**	

OK   Cancel

A pop-up dialog confirming the changes were successfully made will generate.

Revert Plan Checklist Values   x

Revert To: Values prior to 2025-10-20 14:21:05

✓ Success!
New values are shown in **bold**.

After completing the revert, you will see an entry in the Show History log.

Company:	Sample Company		ID: ✎
Plan:	Sample Company 401(k) Plan		ID: ✎
Checklist:	**Non-Standardized 401(k) (Adoption Agreement Format) - POST**		
Details:	EIN: ??? • PN: 001 • PYE: 12-31		

Select Order: Newest To Oldest ∨

	User	Type	Module	Document/Area	Date	Note
Revert	jcalhoun	UPDATE	Plan Document	VolSub-4KPT	2025-11-10 11:34:07	Revert to values prior to 2025-10-20 14:21:05

2. Update: The "Update" link will provide a Transaction List of changes made. All changes made in the Plan Document module are logged by User and the Date and Time range of the session when the changes were made. The Old Value is the value prior to the change and the New Value is replacing the Old Value.

Transaction List

Plan:	Sample Company 401(k) Plan
User:	jcalhoun
Date Time:	2025-10-20 14:21:05 -> 2025-10-20 14:26:06

Section	Line No	Question	Old Value	New Value
C	13a	This is a safe harbor plan exempt from most testing	No	Yes - safe harbor match
C	13b	Indicate the safe harbors the Plan is intended to satisfy	(DISABLED)	ADP and ACP - QACA
C	13c	Include special effective date for safe harbor provisions	(DISABLED)	Yes
C	13c.i	Enter effective date of safe harbor provisions	(DISABLED)	2024-01-01
C	13d	Safe harbor contributions will be made to another plan	(DISABLED)	No

3. VersionView: This feature automatically saves generated plan documents as archived PDF files and stores them in the Show History. This feature applies to plan documents generated on or after October, 31, 2025. To access a prior version, click on the "Download archived document" link under the Note column. Users with delete permissions can delete an archived document by clicking on the trash can.

Please Note: Deleting an archived document is permanent and cannot be retrieved or restored.

jcalhoun	GENERATE	Docs	Deferral Election Form - Spanish	2025-11-03 16:04:46	
jcalhoun	GENERATE	Docs	Deferral Election Form	2025-11-03 16:04:36	
jcalhoun	GENERATE	Docs	Adoption Agreement	2025-10-31 12:07:01	Download archived document