

Document History

11/14/2025 10:29 am CST

The Document History page enables users to review modifications made to the document checklist. To access the Document History page, click on the "Document History" link located under the "Plan Menu" on the Edit Plan page.

Plan Menu

• Convert Plan

• Clone Plan

• Delete Plan

• Show History

• Document History

• MEP/PEP Options

• Post PPA Reference Guide

• Archive Plan ☐

This page will show only changes made to the document checklist by User, Date/Time, Section, Line Number, and Question. In addition, it will display the Old Value and New Value. To expand the item, click on the "+" next to the User name. You can also download to a CSV.

Document History

Company: Sample Company

Plan: Sample Company 401(k) Plan

Effective Date: January 1, 2021

	User	Date/Time	Section	Line No	Question	Old Value	New Value
+	jcalhoun	2024-08-21 09:06:34					
+	jcalhoun	2025-10-20 11:20:14					
+	jcalhoun	2025-10-20 11:36:59					
+	jcalhoun	2025-10-20 14:21:05					
-	jcalhoun	2025-11-10 11:34:07					
			C	13a	This is a safe harbor plan exempt from most testing	Yes - safe harbor match	No
			D	14	Continuing Eligibility for Non-Elective Contributions	Pursuant to options selected below	Same as Employer Matching Contributions

Download as CSV