

Plan Menu

03/02/2026 2:50 pm CST

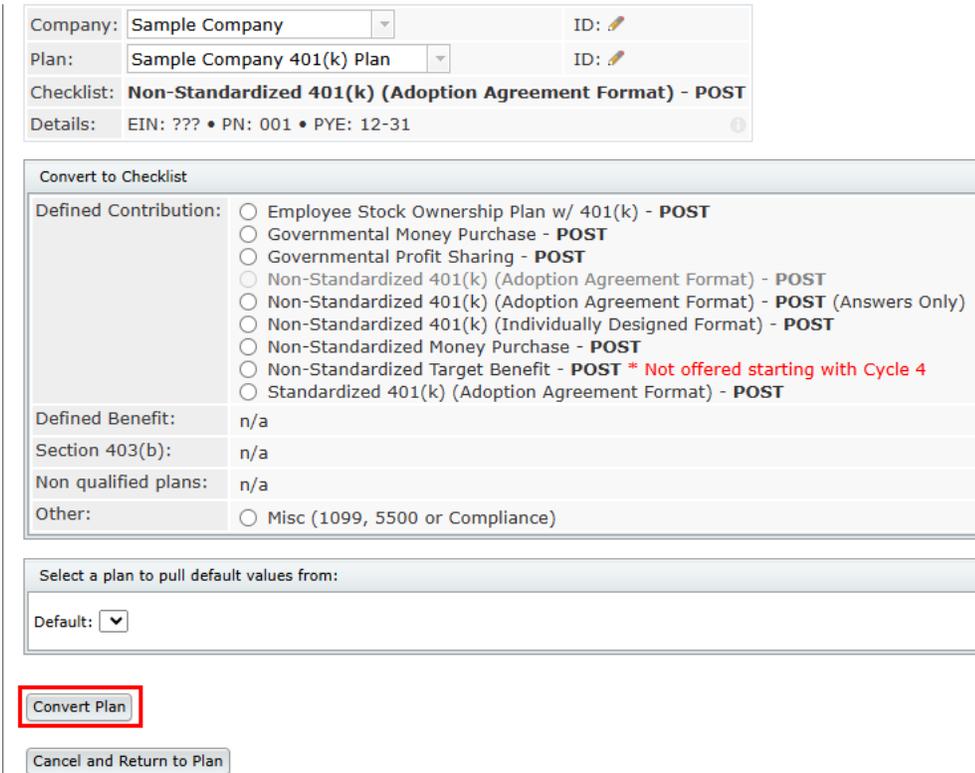
The Plan Menu is located on the Edit Plan page. Under this menu are features such as; Convert Plan, Clone Plan, Delete Plan, Show History, and Document History.

Convert Plan

To convert a plan to a different checklist type, click on the "Convert Plan" link located under the Plan Menu on the Edit Plan page.



On the next page, you can select your desired checklist type. Click on "Convert Plan" button.



All checklist questions will be copied to the selected checklist (where possible). You will be provided with a list of incompatible checklist questions if there are any. After completing the conversion, it is recommended that you review the checklist, run the edit checks and update where applicable.

Clone Plan

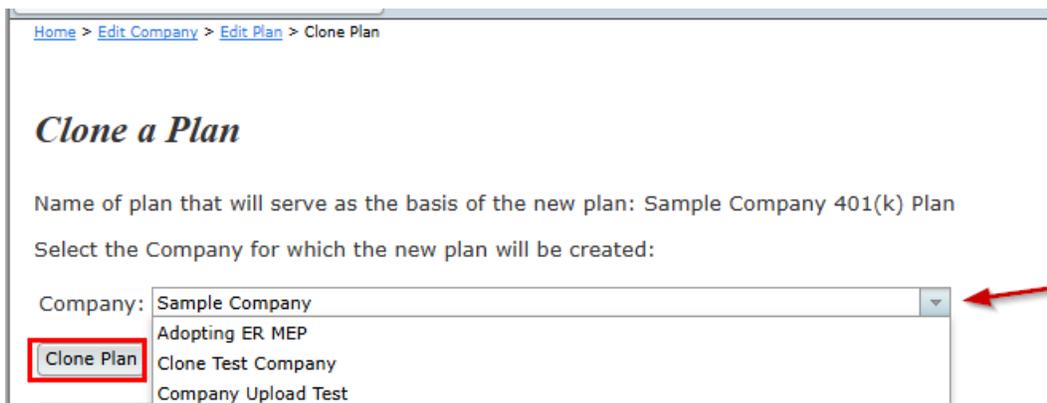
The Clone Plan feature can be used when you would like to add a plan to a company that is identical or similar to an already existing plan on your account. Cloning a plan will copy the checklist type and all checklist answers of the original checklist to a company that you designate.

1. If the plan is to be added to a new company that is not on your account, you will first need to add the company to your account.
2. Go to the Edit Plan page of the plan that you want to clone from.
3. Click on the "Clone Plan" link located under the Plan Menu.



4. From the drop-down next to "Company", select the company that you wish to clone the plan to. Click on the "Clone Plan" button.

Please note: the list will default to the company associated with the plan that is being cloned. Be sure to select from the list the new company that you want to clone the plan to.



The plan you just added will have the cloned plan's name preceded by "Created from". You can re-name the plan name as applicable in Section A. 2a.b, It is recommended to review the Edit Plan checklist to verify the plan's provisions and make any necessary adjustments.

▼ A. GENERAL INFORMATION Edit Ch...

▼ A. General

1. Plan Number	<input type="text" value="001"/>
2a. First line of Plan name	Created from Sample Company 401(k) Plan
2b. Second line of Plan name	<input type="text"/>

Delete Plan

Deleting a plan will permanently remove the plan from the system, as well as all completed forms and filings. If you might need access to the plan again in the future, we recommend you mark the plan as not responsible. You can mark a plan as not responsible from the Edit Plan page. Under "Plan Modules" select "No". The plan will no longer pull into batch features or reports.

Plan Modules

Plan Documents

Yes

Yes

No

In addition, you can convert the plan to a Misc. checklist from a document checklist. Refer to "Convert Plan" for steps in converting a document checklist.

If you have determined that the plan can be deleted (e.g. duplicate plan with no history), click on the "Delete Plan" link under the Plan Menu on the Edit Plan page.

Home > Edit Company > Edit Plan Plan Notes Help

Company:	Sample Company	ID:	<input type="text"/>
Plan:	Sample Company 401(k) Plan	ID:	<input type="text"/>
Checklist:	Non-Standardized 401(k) (Adoption Agreement Format) - POST		
Details:	EIN: ??? • PN: 001 • PYE: 12-31		

Plan Menu

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Confirm that you want to delete the plan by clicking on the "Delete Plan" button. Once a plan has been deleted, this transaction cannot be undone.

Confirm Delete Plan

Company: Clone Test Company
Plan Name: Created from Sample Company 401(k) Plan

***WARNING: Selecting 'Delete Plan' will permanently remove the plan and all associated data from the system.**

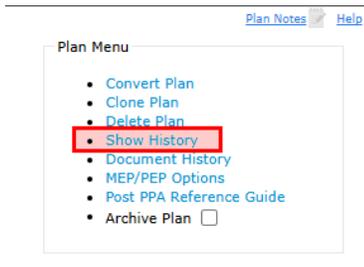
Delete Plan 

Cancel and return to previous page

Show History

The Show History page enables users to review modifications made to plans across all modules that you subscribe to. Users 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.

Home > Edit Company > Edit Plan > History Plan Notes

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
	jcalhoun	GENERATE	Docs	Summary Plan Description	2025-11-10 11:09:14	
	jcalhoun	GENERATE	Docs	Basic Plan Document	2025-11-10 11:09:14	
	jcalhoun	 GENERATE	Docs	Adoption Agreement	2025-11-10 11:09:11	Download archived document 
Revert	jcalhoun	UPDATE	Plan Document	VolSub-4KPT	2025-10-20 14:21:05	
Revert	jcalhoun	UPDATE	Plan Document	VolSub-4KPT	2025-10-20 11:36:59	Converted Checklist/PlanType/ChecklistVersion fn VolSub/4KPT/POST/AnswersOnly to VolSub/4KPT,
Revert	jcalhoun	UPDATE	Plan Document	VolSub-4KPT	2025-10-20 11:20:14	Converted Checklist/PlanType/ChecklistVersion fn VolSub/4KPT/POST to VolSub/4KPT/POST/Answer
	jcalhoun	EMAIL	Portal	08279256-a39c-11f0-bd75-6045bdf79e0a	2025-10-07 11:43:25	Test has been Uploaded

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

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

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

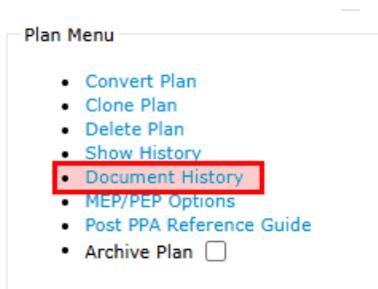
3. VersionView: This feature automatically saves generated plan documents as archived PDF files and stores them in the Show History. This feature applies to plan documents generated on or after October, 31, 2025. To access a prior version, click on the "Download archived document" link under the Note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

Document History

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.



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:

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](#)