# ZZZ - Default Plans

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When using the "Add Plan" feature, the defaults you have selected in the ZZZ-Default Plan for a particular checklist can be automatically populated. In addition, any checklist that is converted from a Misc. (1099, 5500, or Compliance) checklist to a document checklist will also populate from the ZZZ-Default Plan.

NOTE: There is only one ZZZ-Default for each checklist type. If you want to set up multiple defaults for a checklist, you can use the Plan Defaults feature. In addition, your user ID will require Designated Admin permissions to use this feature.

To update your defaults for a particular checklist, from the Wolters Kluwer menu, select Administrative Tasks, followed by Defaults, then select ZZZ-Defaults.
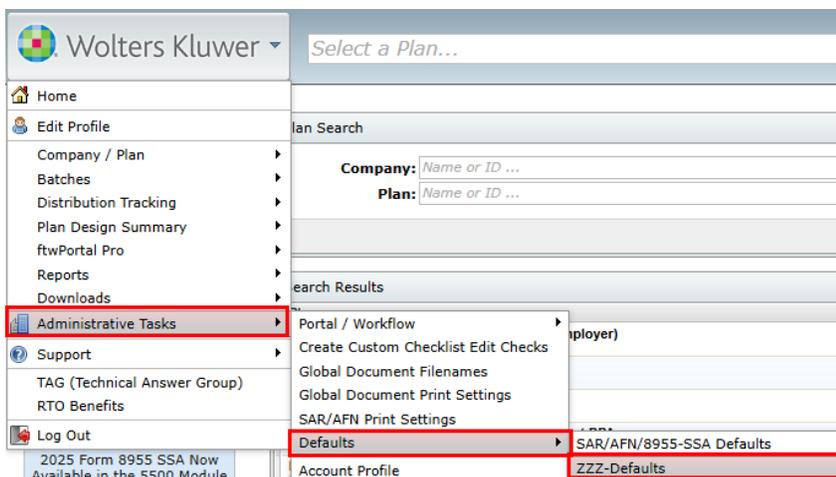
From the drop-down menu next to "Plan" select the checklist type you wish to update.
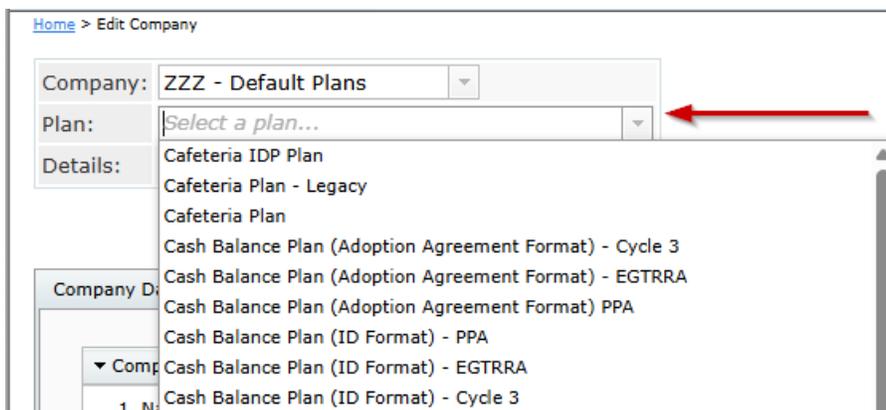
Once selected, you can update your plan defaults. You only need to select the checklist items that you wish to set as a default. It is not necessary to set a default for all checklist questions. In addition, you do not need to run the edit checklist on the ZZZ-Default Plan.

NOTES:

- *Do not change the name of the Company from "ZZZ-Default Plans". In addition, do not change the name of the default*

plan from the name of the checklist in A.2a. (e.g. Non-Standardized 401(k) (Adoption Agreement Format).

- *There is only one ZZZ-Default Plan checklist for each plan checklist type. If you use multiple types, for example, Adoption Agreement Format and ID Format, then you will want to update your defaults for each checklist.*
- *If you wish to have different default templates for different types of provisions (i.e. safe harbor and non-safe harbor), you can use the Plan Default feature.*
- *The ZZZ-Defaults will not apply when you convert from one document checklist to another (e.g. from Cycle 3 to Cycle 4).*