Default Plans

03/19/2026 10:06 am CDT

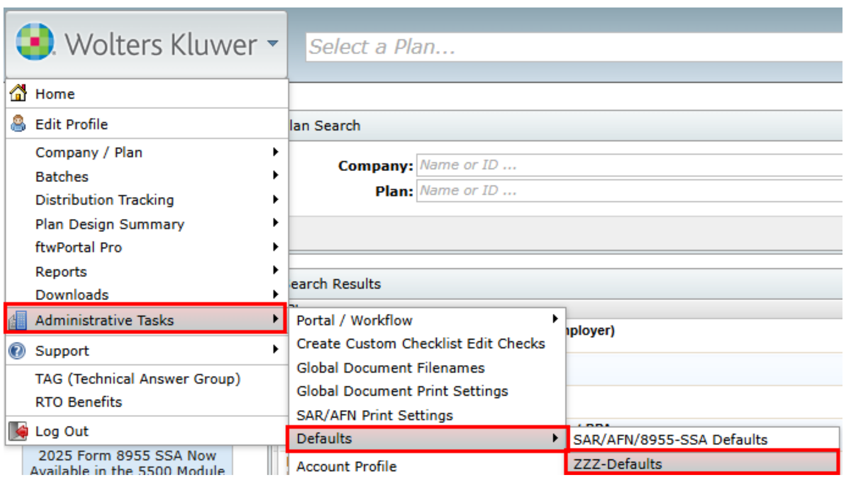
Users with Administrative Permissions can use default plan features when adding a new plan. This ensures each plan begins with your desired plan defaults.

ZZZ - Default Plans

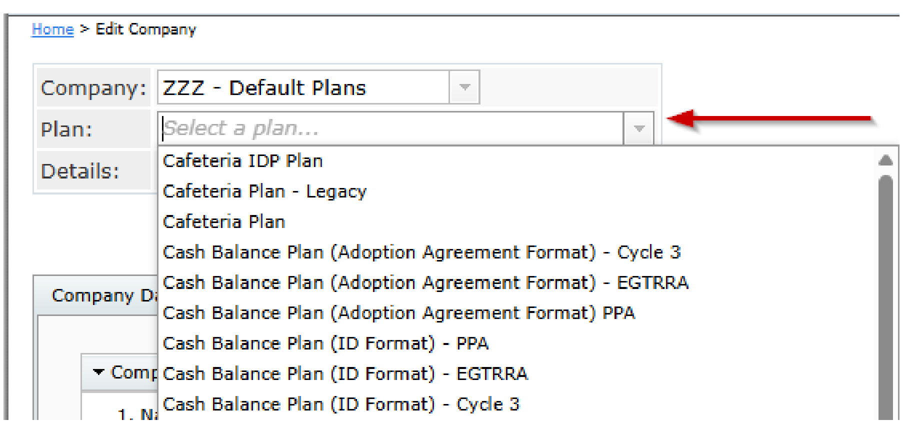
When using the "Add Plan" feature, the defaults you have selected in the ZZZ-Default Plan for a particular checklist can be automatically populated. In addition, any checklist that is converted from a Misc. (1099, 5500, or Compliance) checklist to a document checklist will also populate from the ZZZ-Default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

Default Plan Feature

The Default Plan feature allows you to streamline adding plans by designating a specific company and plan(s) as your primary choice. You can create an unlimited number of default plan checklists for the same plan type. For example, you can have multiple Default Plans with various provisions for the Non-Standardized 401(k) (Adoption Agreement Format).

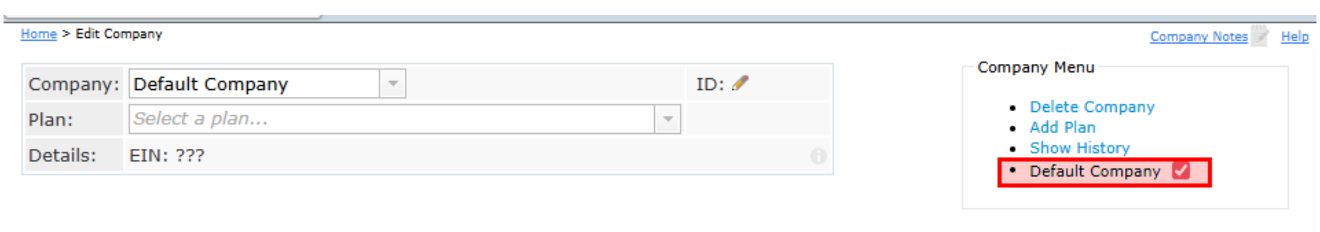
Follow the steps below to set up and begin using this feature efficiently.

Step 1: Add a Company

Add a new company to your account. Be sure to provide a name that clearly identifies this company as the default for easy recognition in future steps.

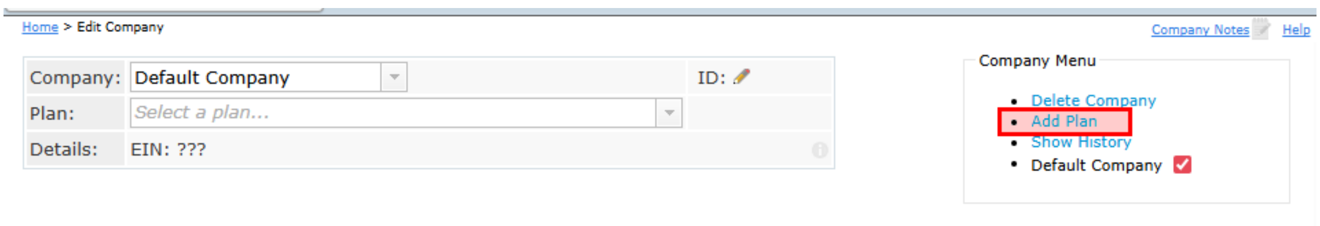
Step 2: Select Default Company

Once the company has been added, select the company as the "Default Company" by checking the box under the Company Menu. This ensures that all plans under this company will appear in the list of default options when adding a new plan to your account.



Step 3: Add a Plan

Within the default company, on the Edit Company page, you can add plans via the "Add Plan" link located under the Company Menu. As with the company, provide a name for the plan that makes it easy to identify as your default plan.



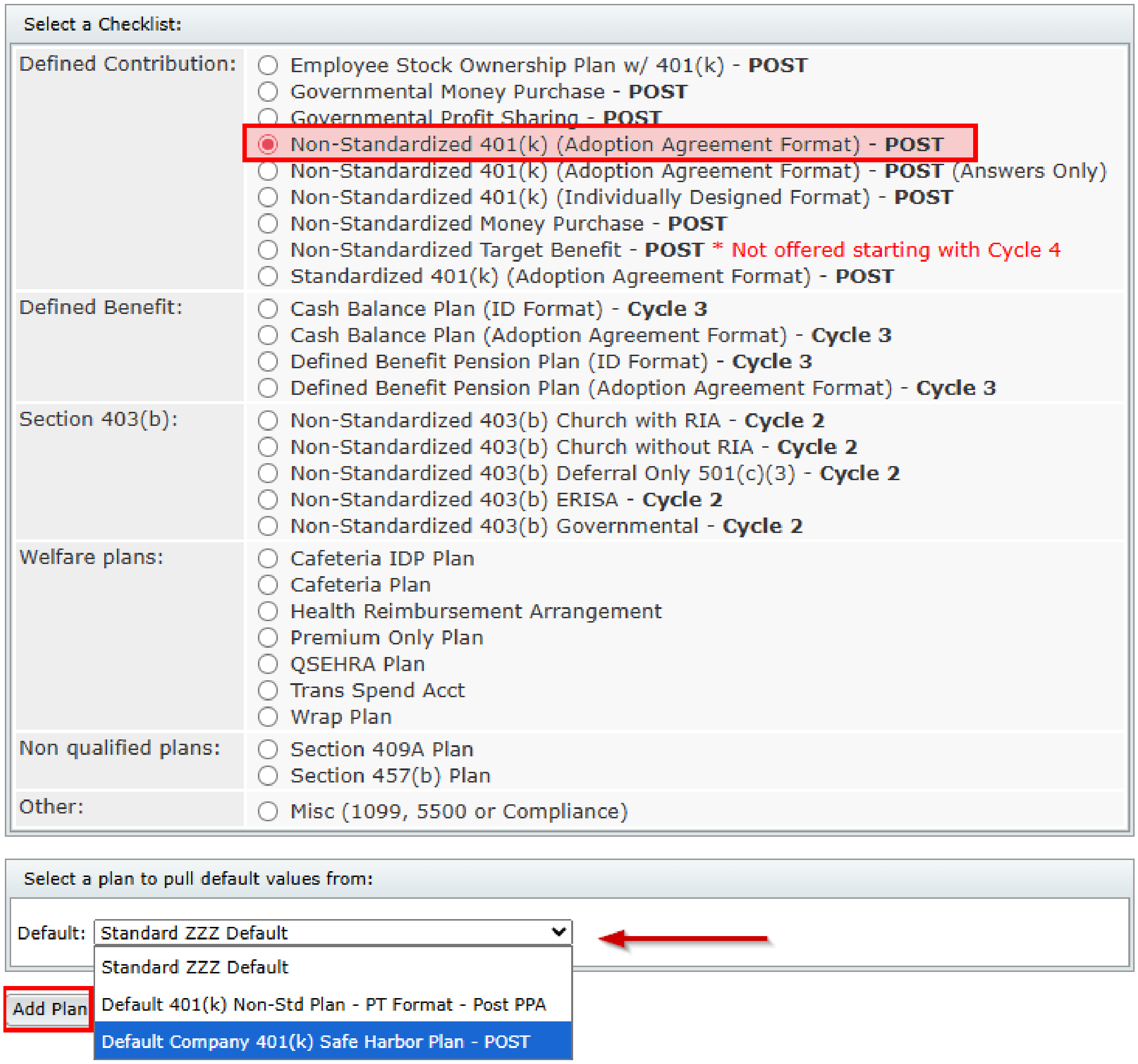
You could also choose to clone an existing plan on your account to your default company. For the steps to clone a plan, please refer to Plan Menu, article Clone Plan within the Documents User Guide.

Step 4: Begin Using the Default Plan Feature

Now when you go to add a plan to your account via the "Add Plan" feature, you can select a plan to pull default values from.

First select your desired plan checklist, then at the bottom of the page, you can choose your default plan and click the "Add Plan" button.

NOTE: "Standard ZZZ Default" will pull from the ZZZ-Default for the plan type selected.



All default options in your default plan will populate in the new plan just added.