Adding and deleting plans

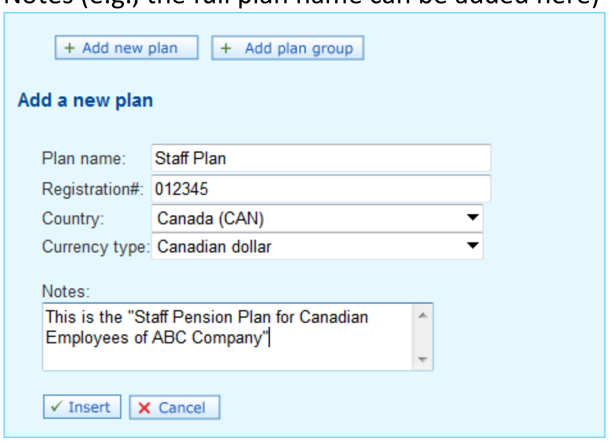
Before you can create a disclosure, you must first add a plan to your client account.

How to add a new plan

1. In the **Select client account/plan** panel on the left, click on the name of the client account to which you want to add a plan.

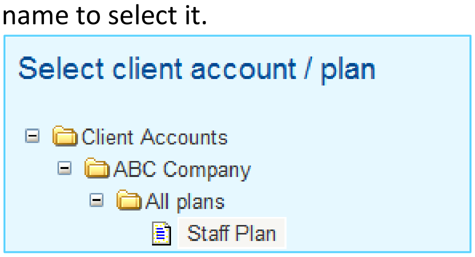
2. In the panel on the bottom right, click: 

3. In the **Add a new plan** panel, enter the following information:
   - Plan name (this is the name that will appear on the plan label in the tree navigator)
   - Plan registration number
   - Country in which the plan is registered
   - Currency in which disclosure information will be provided (i.e., the local currency for the plan)
   - Notes (e.g., the full plan name can be added here)



4. When finished, click: 

5. The new plan will appear in the **Select client account/plan** panel on the left. Click on the plan name to select it.



How to delete a plan

1. In the **Select client account/plan** panel on the left, click on the client account folder that contains the plan that you want to delete.

2. Click on the name of the plan that you wish to delete.

3. In the **Plan information** panel on the right, click: Delete plan

4. Confirm that you wish to delete the plan (and all associated disclosures) by clicking **OK**.

Note that not all users are able to delete plans – only the client account manager and lead actuaries for the plan in question are able to delete it.