
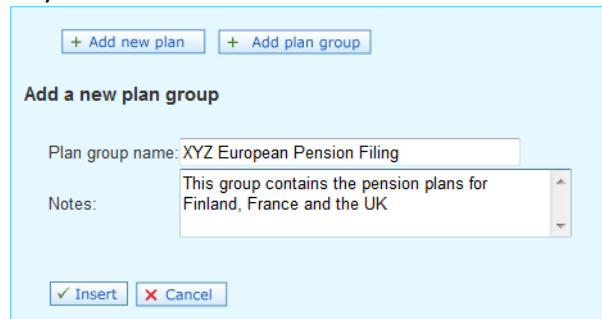



Adding and deleting plan groups

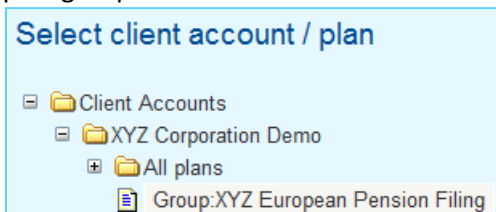
Before you can create a consolidation of two or more disclosures, you must first create a plan group containing the plans whose disclosures you wish to consolidate.

How to create a plan group

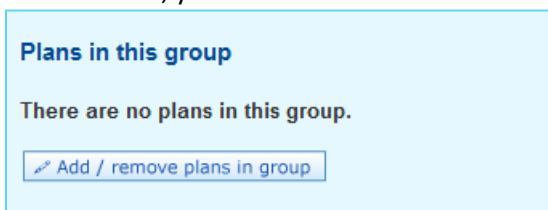
1. In the **Select client account/plan** panel on the left, click on the name of the client account to which you want to add a plan group.
2. In the panel on the bottom right, click: 
3. In the **Add a new plan group** panel, enter the following information:
 - Plan group name (this is the name that will appear on the plan group label in the tree navigator)
 - Any additional details can be added to the Notes section



4. When finished, click: 
5. The new plan group will appear in the **Select client account/plan** panel on the left. Click on the plan group name to select it.

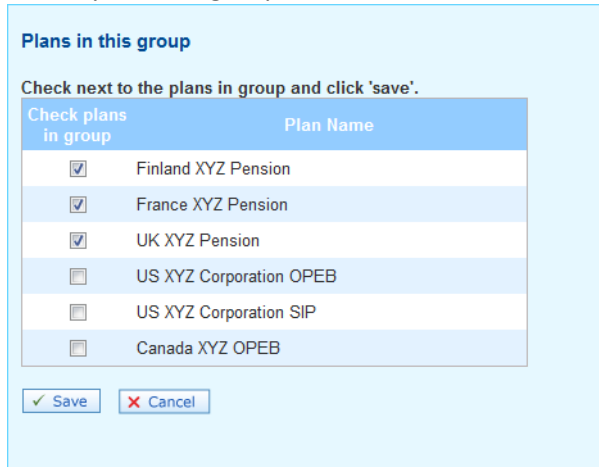


6. Note that your new group does not yet contain any plans. With the plan group selected as shown above, you should see the **Plans in this group** panel on the right:



7. Click: 

8. A list of all available plans for the client account will appear. Select the plans that you wish to add to your new group:



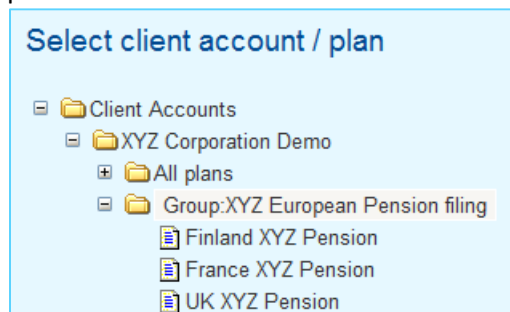
Plans in this group

Check next to the plans in group and click 'save'.

Check plans in group	Plan Name
<input checked="" type="checkbox"/>	Finland XYZ Pension
<input checked="" type="checkbox"/>	France XYZ Pension
<input checked="" type="checkbox"/>	UK XYZ Pension
<input type="checkbox"/>	US XYZ Corporation OPEB
<input type="checkbox"/>	US XYZ Corporation SIP
<input type="checkbox"/>	Canada XYZ OPEB

9. When you are finished, click: 

10. You will now see your plan group with its associated plans in the **Select client account/plan** panel:



Select client account / plan

- [-] Client Accounts
 - [-] XYZ Corporation Demo
 - [-] All plans
 - [-] Group:XYZ European Pension filing
 - [-] Finland XYZ Pension
 - [-] France XYZ Pension
 - [-] UK XYZ Pension


11. When you click on the plan group name, you should now see a **Consolidations** panel. This is where you would add new consolidated disclosures for the plans in your group.

For more information on how to create new consolidations for a plan group, please see the following Help Sheet:

➤ **Creating a new consolidation**



How to delete a plan group

1. In the **Select client account/plan** panel on the left, click on the client account folder that contains the plan group that you want to delete.
2. Click on the name of the plan group that you wish to delete.
3. In the **Plan Group Information** panel on the right, click:  **Delete plan group**
4. Confirm that you wish to delete the plan group (and all associated consolidations) by clicking **OK**.

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