

EMPLOYER QUICK START GUIDE

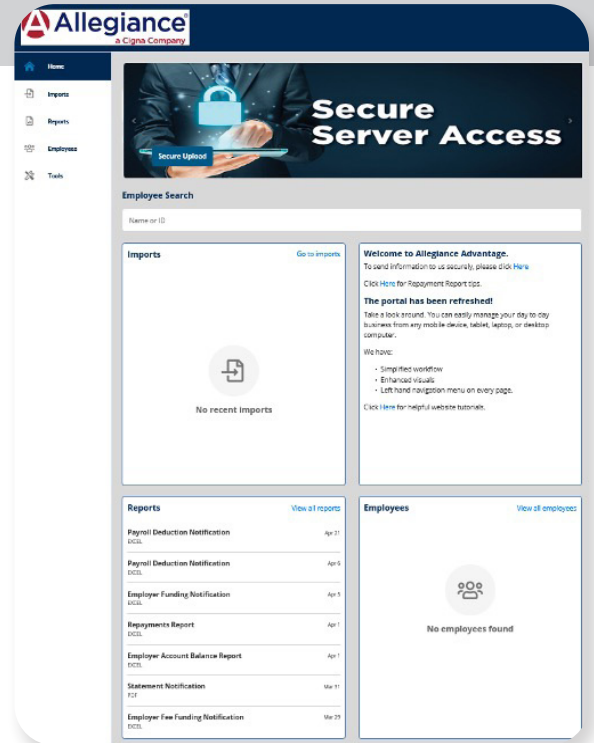
HOW DO I ACCESS THE HOME PAGE?

You and your assigned contacts will be sent a username and a password. You may also decide the access rights for each assigned contact.

Everything you need can be found on the home page. You will see a history of the reports and notifications with quick links of the latest versions.

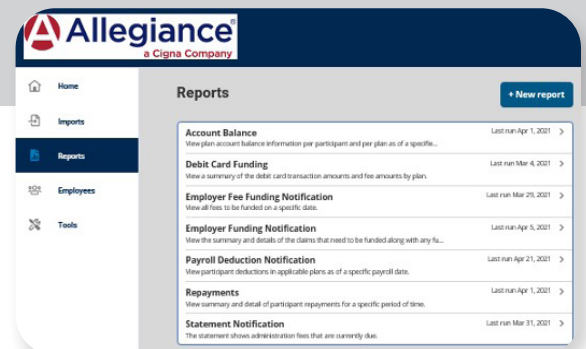
You can:

- View employee level data
- Check status of file imports
- Read Plan Documents
- Download forms



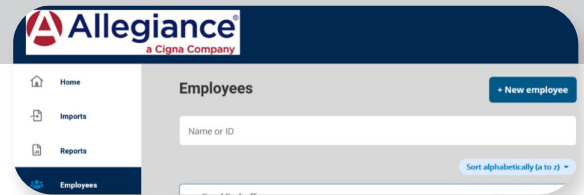
HOW DO I VIEW REPORTS AND NOTIFICATIONS?

1. Under the **Reports** tab is a list of reports that have been generated for you to view.
2. Select the relevant enrollment, financial, contribution or plan information report you wish to view.



HOW DO I ADD/ENROLL/UPDATE EMPLOYEES?

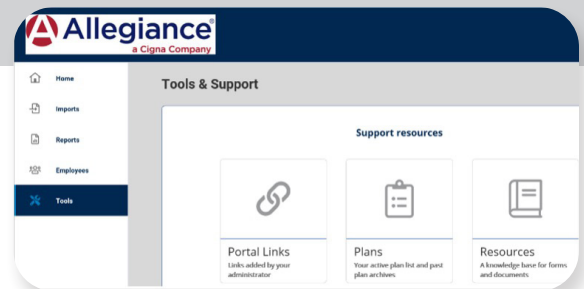
1. Locate the **Employees** Tab.
2. Select **New Employee**.
3. Enter the personal and employment information.
4. Click **Add Employee**.
5. In the confirmation section, click **Add Enrollment**.



6. Select the plan and click **Enroll**.
7. Enter the effective date and election/ employer contribution.
8. Click **Add Enrollment(s)**.

HOW DO I ACCESS MY PLAN INFORMATION?

1. Under the **Tools** tab go to **Plans**, you will find options to view the same information as the employees for all active and inactive plans.
2. Information available includes:
 - Plan summaries
 - Plan details and rules
 - Documents



HOW DO I ACCESS FORMS?

1. Under the **Tools** tab go to **Resources**, you can download and print forms and access any other documents or custom materials.

ONE OF THE FEATURES OF THE PORTAL IS THE ABILITY TO IMPORT DATA. HOW DOES THAT WORK?

1. Under the **Imports** tab, you can import contribution files directly into the portal using standard CSV or XLS formatted files.
2. Once in the Imports home page, select the **New Import** button at the top right of the screen.
3. Select the type of file you will be importing.
4. You can download a new template, or if you already have one – simply go to the next page.
5. Check for field matches by viewing setup data. Contribution date must be your actual payroll date.
6. Save to a location you will remember.
7. Upload the file.

Once imported, errors will be displayed and can be updated from the **View Errors** button. Clicking on the record number allows you to correct the error. Once updated click **Queue Record**. You can then resubmit the file to import the corrected records.

Call us at **1-877-424-3570** and ask to speak to your account specialist with any questions.