

BPAH

Summary of reports contained in plan sponsor website

The plan sponsor website is an essential tool through which HR professionals interact with BPAH over the life of their plan. Following is the **full** list of reports available within the site. (Note that the actual reports provided for your plan will be driven by your plan's configuration, design and features.) Depending on the report, the information may be updated daily, weekly, monthly, quarterly, or annually, as noted in each report. New features will be rolled out in the plan sponsor site over time to provide additional data and optimize your administrative experience. If you have any questions concerning the plan sponsor website, please call your Plan Consultant at BPAH.



Note: To go back to the prior screen at any location of the plan sponsor site, press Alt + Left Arrow [←] on the keyboard.

Plan Information Tab

- Market Dashboard market chart and link
- Plan summary page
 - Plan name
 - General information
 - Loan information
- List of participants
- Summary information
- Privacy Statement
- CensusPro Login.

Participant Information Tab

- Login as individual participant (allows HR to view entire web experience as a participant, and look up individual participant accounts)
- Search for a participant (can search by SSN, or by name. To search by name, select the "Search" button on the left hand navigation strip and type part of the participant's last name)
- Note: the plan sponsor site can be **enabled for transactions** if desired by HR. This would allow you to help a participant with initiating an account trade or realignment, modeling or initiating a loan, initiating a distribution, and certain other needs. (To activate this feature, please call your Plan Consultant at BPAH)

Education Information Tab

- Market Dashboard (real-time insight and information on the financial markets)
- Retirement financial calculators (twenty in total, deployed through Java TM)
- Annual contribution limitations chart
- Enrollment and education presentation (a multimedia presentation)
- What mix of funds is right for you? (Homework assignment)
- A Pause Along Your Journey (Homework assignment)
- Reach for the Top workbook
- Risk tolerance worksheet

- Retirement savings calculator
- Interesting web places
 - Social Security Administration website
 - IRS website
 - Department of Labor (EBSA) website

Documents Tab

- Contribution election / enrollment form
- Beneficiary form
- Rollover form
- Application for QDRO benefits
- Important Plan Information (PPA required disclosure)
- QDRO form in text
- VRU map / guide
- Summary Plan Description for the plan
- Summary of Material Modifications
- Help

Mail Tab

- Summary Annual Report
- Quarterly statement archive
- Online quarterly statement
- Prior quarter transaction-based statement
- Current quarter detailed transaction-based statement
- Investment & Index performance
- Retirement newsletter (quarterly newsletter that was included with most recent participant statements)
- Contact us (send an email to our Customer Service Representation team. This is the team of representatives that staff our call center, not your Plan Consultant)

Administration Tab

- Reports
 - Comprehensive loan report
 - Forced (automatic) rollover report
 - Contributions by source (current and prior year)
 - Hardship withdrawal report
 - Participant details spreadsheet
 - Generic administrative forms
- Generic Administrative Forms
 - Employer Administration Manual
 - VRU map / guide
 - Beneficiary Form
 - Enrollment Form
 - Contribution Election Form
 - Sample PIN letter
 - PIN reset authorization form (use this form to authorize BPAH to enable the “PIN reset feature” within your plan sponsor site. This will allow you to assist a participant who has lost or forgotten their PIN immediately).

- Quarterly reports
 - Quarterly statement summary by fund
 - Quarterly statement summary by source
 - Loan Summary
 - Recent disbursements report
 - E-Bond application and requirements

Action Items Tab

- **Sponsor Action Items**
 - Changes to contribution rates (for plans that opt to use online enrollment, automatic enrollment or our Freedom Savings Plans program)
 - Invalid addresses (a listing of participants with an invalid address)
 - Loans completed report
 - Loans nearing default report
 - New loan issues report
 - Missing participant data report
 - Participants without investment direction
 - Participants without PINs (e.g., those who have never logged onto the website)
 - Recent disbursements
 - Suspension / hardships file
- **Eligibility**
 - Current quarter pre-tax eligibles
 - Current quarter match eligibles
 - Current quarter profit sharing eligibles
 - Next quarter pre-tax eligibles
 - Next quarter match eligibles
 - Next quarter profit sharing eligibles
- **Compliance Reports**
 - HCE report
 - Participant addressees
 - Help

Utilization Reports Tab

- Participant contribution rates
 - By age
 - By income
 - By service
- Participant Asset Allocation
 - By age
 - By income
 - By service
- Participant Balances
 - By age
 - By income
 - By service
- Participant models usage (if applicable)
 - By age
 - By income
 - By service

- ADP less than 3% report
- Age 55 and over
- Participants' funds
- Only in cash / stable value fund report

BPA News Tab

- IRS and Social Security cost of living adjustments
- Roth 401(k) Contributions
- BPA News
- BPA launches online enrollment feature

Asset Reports Tab

- Quarterly Trust Report Archive (a rolling archive)
- Balances
- Contribution Posting History
- Inception Statement
- Inception Statement – ER Only
- Interim Statement
- Plan Activity History
- Ticker Symbols

Annual Reports Tab

- Archive annual reports for all prior years plan has been with BPAH
- Relevant Documents for each prior year
- Annual Statement Summary
- Year-end loan summary
- Year-end disbursement report
- ADP / ACP test results
- ADP / ACP test correction (if applicable)
- Allocation report
- Top heavy test results
- IRC Section 415 test
- BPA SAS70 audit report
- Trust asset report
- Government Forms:
 - Form 5500 (signature-ready)
 - Schedules C, H, P, R, SSA, T, etc
 - Extension (if applicable)
 - Summary Annual Report