Reviewing the plan sponsor website

To help plan sponsors navigate the features of the new plan sponsor website, here is a map of the site's many features and reports. Access the new plan sponsor website by visiting www.bpas.com, selecting **Employer Accounts** / **Retirement Account**, and then click **New Website Login**.

Daily Plan Reports	
Fund Summary	Plan level summary of shares and market value for all funds offered in the plan based on the most recent price. The grand total includes total value and total vested balance. Links to fund fact sheets are also available. There is an option to select a printer friendly page.
Source Summary	Plan level summary of market value by source based on most recent price. There is an option to select a printer friendly page.
Fund Detail	Plan level summary detailing the sources a fund is in that make up the fund balances. The page includes price, shares, and market value as of the most recent price.
Source Detail	Plan level summary detailing the funds within a source that make up the source balance. The page includes price, shares, and market value as of the most recent price.
Transaction Detail	This feature allows you to select a date range for viewing transaction history. Additional filtering is available including transaction category, source, and fund. Sort order can be customized as well.
Statement on Demand	Shows plan level statement of account for a time period you define. The activity shown includes summary by fund and by source outlining beginning balance, subsequent activity, and ending balance at a plan level. There is an option to select a printer friendly page.

Resource Center	
Resource Center	This page contains links to various documents including general information, plan information, annual reports, quarterly reports, action items, educational materials, administrative forms, and product specific documents.
Action Items	This section provides plan sponsors with various reports containing important plan information that may require sponsors to take action on. Plan sponsors should review the Action Items prior to processing each payroll period to avoid missing critical action steps. The welcome page of the plan sponsor website also provides a shortcut to accessing the Action Items section of the Resource Center.
Deferred Reports	Certain reports on the site take several minutes to complete if there are a large number of participants in your plan. You will be given the option to select to defer the report, which allows you to navigate to other areas of the website as well as any other sites on the internet. You can then return to this site and view your report under the Deferred Reports menu. If you are still logged in at the time of completion, you will be notified via a pop-up message.

Fund Information	
Fund Links	All funds offered in a plan appear on this page with links to additional information including historical information, fund fact sheets, current quote information, and fund prospectus information.
Performance	Performance information for funds offered in a plan is provided for 1 month, 3 month, 1 year, 3 year, 5 year, and 10 year time periods. Additionally, there are links to fund fact sheets.

Participant Reports	
Employee List	Various filtering options are available to either find a specific participant or generate a listing of a group of participants within a certain hire date range. Sort options are available as well.
Login History	This feature allows you to see the history of participant logins for a period ranging from 1 day to 90 days. The display includes participant social security number, name, and the number of logins during the specified time period.
Pending Web Transactions	This option allows you to view pending transactions by a single participant or entire plan for a custom defined date range. Information includes requested data and time, confirmation number, type of transaction, web/vru initiated indicator and participant name. Further details are available by selecting the drill down arrow.
Name and Address Export	On this menu item, an export of participants and their address information can be exported in excel, mail merge, or text output. You have the option to export all participants or filter by age, number of funds invested in, termination date, total assets, and/or a specific fund.
Disbursement Status	Participant level report showing details regarding disbursements for a specified date range. You can view all participants or select one specific participant by ssn or last name search. The report includes date received, participant name and social security number, and request details/status.

Access to Participant Site	
Access Participant Account	This option allows you to select a specific participant and click a link to be taken directly into the participant site.

Maintenance	
Unlock Account	The option allows you to reset participant accounts that have been locked. Upon confirming the reset, the participant can immediately access the participant site with the default password.
Change Password	Password changes are made on this page of the site. A hint can also be established to help in the event you ever forget your password.
Email Addresses	Email addresses entered in this section can be used as an additional means of communication from your recordkeepr.

Notifications	
Plan Message	You can create and post a message to the participant site using this feature. After creating the message, you set the date for when the message first appears and when it should be removed.
Disable Web Message	After posting a message to the participant site, you can disable it prior to the removal date originally defined using this menu item.
Message History	Any messages that have been posted for your plan will be listed in this section of the website for historical look up.