

[PLAN SPONSOR QUICK WEB GUIDANCE](#)

The Plan Sponsor Web portal provides online access to real time confidential information and reports specific to your 401k plan. Information includes reporting on a plan and participant level. Instructions to access the Plan Sponsor Web are emailed **after** the Authorization Form has been processed. Make sure you sign up to receive the monthly Sponsor Express email that provides a snapshot of key 401(k) statistics for your plan.

[NAVIGATING PLAN SPONSOR WEB](#)

Each option in the navigation menu is explained in further detail. For immediate assistance, contact customer service at 800-356-3009 option 7 or customers@slavic401k.com.



[DASHBOARD](#)

After logging in, you will be directed to your plan dashboard to view your plan summary, investment balances, and payroll contributions.

PLAN SUMMARY: You can view your Total Plan Balance by source or investment, select *Show balance by investment* or *Show balance by source* in the blue text located under the numerical value shown. You can also view the data as a graph and pie chart.

Balance by Source: Balances are displayed by Match, Roth, Pretax, Loans and other sources.

Balance by Investment: Balances are displayed by investment funds.

INVESTMENT BALANCES: Balances are displayed by investment type and include the number of participants in each investment. You can also view the number of investment units and price per unit, as well as your forfeiture balance.

PAYROLL CONTRIBUTIONS: This is the last option on the *Plan Summary* page, which includes totals for recent contribution files. By selecting the date, you can see details on the contribution amount by participant.

[EE SEARCH \(EMPLOYEE SEARCH\)](#)

Select *EE Search* from the menu to view participants in the plan, as well as their status and balance. When you select the SS# you will see the participant's account portal exactly the way they see it when they log in.

MANAGE

TRANSACTION HISTORY: This page displays detailed transactions by investment, source, type of transaction, date range, and employee. Each transaction can be expanded to provide additional details.

WEB REQUESTS: This page displays the history of participant online activity for allocations, contributions, pin changes, distributions, loan distributions, and transfers.

PLAN

Select *Plan* from the menu bar to view the Plan Summary, Plan Balance, Investment Returns, and Categories.

PLAN BALANCE: This page displays details of plan balances by investment or by source. Note that the report will always give you the date in which it was last ran.

INVESTMENT RETURNS: This page displays details of each fund offered in the plan, including the Investment Returns and Performance.

CATEGORIES: This page displays details of the number of eligible and ineligible employees. This is based on age, hour requirement, service requirement, and employee status.

FORMS & REPORTS

HOW TO GENERATE REPORTS: Under **Reports** select Generate Reports (or View Reports if you want to access previously generated reports). Under **Select Report Group** you have two options, *participant statements* or *sponsor reports*. Participant Statements show you participant level reports. Sponsor reports show you plan level reports.

PARTICIPANT STATEMENT/REPORT: If you select *Participant Statement*, you will have two Report selection options: *Participant Certificate Including PPA Requirements*, and *Online Statement*.

Participant Certificate Including PPA Requirements include the following: Account, Asset and Source Summary, Detail Summary by Fund, including beginning balance, contributions, gains/losses, loan payments/transfers, forfeitures, loan distributions, ending balance, and vested balance.

Online Statements include the following: Participant Accounts, Allocation Percent, Beginning, End and Vested Balance, Contributions and forfeitures, Gains/Losses, Loan Payments/Transfers, and Premiums/Loan Distributions

SPONSOR REPORTS:

If you select *Sponsor Report* under Select report group, you are able to generate the following reports: ***Census with Compensation, Confirmed Totals, Totals Only, Eligible but not Deferring, Addresses of Participants with Balances, and Executive Summary.***

Census with Compensation: This report is an employee census that shows: Wages, Date of Birth, Hire Date, Hours of Service, and Contribution Amounts

Confirmed Totals: This report is a summary of plan assets by asset class and includes: Beginning Balance, Contributions, Forfeitures, Gains/Losses, Loan Payments, Loan Distribution, and Ending Balance

Totals Only: This report lists employee's basic information and shows: Date of Birth, Hire Date, Total Compensation during the date range entered, Eligibility, Current Deferral Percentage, Hours of Service, Years of Service for Vesting, Highly Compensated Employee Status, and Projected Plan Eligibility

Eligible but not Deferring: This report lists all eligible employees that are not currently deferring to the plan and shows: Employee Contribution Rate or Amount (if any), Total Compensation during the date range entered, Employee and Employer Contribution Amounts

Addresses of Participants with Balances: This report shows a complete list of plan participants with a balance and includes the vested balance, full address, and employee status.

Executive Summary: The Executive Summary is a comprehensive report that many employers use for management meetings and shows: Plan Summary and Activity, Beginning, Ending and Vested Balance, Breakdown by Contribution Type, Participation Statistics, Account Totals by Source, Compliance Testing Result, Participant Overview by Eligibility Status, Investment Option Totals

TO GENERATE A REPORT: Once you have selected the report you wish to pull, go to *Options* on the right side

- Under options, you can customize your report as follows:
- **Divisions** – no selection needed
- **Select employee:** *All Employees* - will generate statements for all participants. *Select Employee*- will generate a statement for a specific participant. If *Select Employee* is chosen an Employee Listing box will appear. You can search for the employee by SSN or name or scroll down for a listing of all the employees. Select an employee from the lists.
- **Select Export file type:** *Available plan years* - you first must select the plan year for which you want to generate the report. *From*-select the start date for report. *To date*- select the ending date for the report
- **SUBMIT**

For assistance with your Sponsor Web please contact our customer service department at:

800-356-3009 option 7 or customers@slavic401k.com

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