BPAS

Plan Portal Guide

The BPAS Plan Portal delivers a library of information and reports at the simple click of a mouse. Use this handy guide to learn about the online tools and features all designed to make your life easier.

Tab	Description
Dashboard	› List of **plans** with high-level metrics. Select a plan to view details, reports, and more. › **My Profile**: shows email address and phone number on file with BPAS. — **Account Security:** Update password every 90 days. › **Plan Messages**: create and manage messages for plan participants.
Home	› At a Glance: — Plan balance highlights. — Action items quick link. — Plan Consultant contact information. — **Participant Search** quick link. › **Activity:** Select **Plan Transactions** to create a plan level report with a selected date range, category, source or investment filter. Select **Participant Transactions** to create a participant level report. Select **Pending Transactions** to view transactions submitted by participants for the current day through 4pm ET. › **Assets:** Select **Plan Statement** to create a plan level report for a specific date range. Select **Participant Statement** to create a participant level statement. › **Balance**: View a summary of plan balance by investment or source. Download investment detail or source detail. › **Investments:** Research plan investments and performance. View historical performance and fund fact sheets. › **Participants:** — **Search:** View participant details including division, status, current and vested balance, web status and login information. Unlock participant accounts and access Participant Portal (if permitted). — **Beneficiaries:** For plans using the Online Beneficiary Designation feature, view and print on-demand reporting. — **Login History:** View participant login activity and history.
Action Items	› Action Items often require your attention, including potential changes to payroll systems. — **Contribution Changes**: Reports such as Payroll, Rate and Match Changes, and Verification. — **Participant Updates**: Reports such as Invalid Addresses, Missing Data, Eligibility. — **Loan Updates**: Plans with loans will find reports for New Loans, Loans Nearing Payoff, and Paid Loans. — **Important Links** to external sites or documents.
Withdrawals	› **Requests:** Check the status of withdrawal/distribution requests submitted by date or participant. › **Reports:** Find copies of distribution reports (also available in the Library).
Loans	› **Loan Options:** Summary of plan loan options (if applicable). › **Requests:** Check status of Traditional Loan Applications submitted by date or participant. › **Details**: View loan details for active or past loans. › **Reports**: View all loan reports (also available in the Library).
Library	› **Quick search** by keyword across entire library. › **Participant Reports:** includes demographics and investments. › **Plan Reports:** View various quarterly, annual, compliance, and government filing reports. For example, you'll find plan asset reports, compliance testing, Form 5500, and more. Reports provided will vary depending on your plan's provisions and features. › **Forms and Notices**: Access enrollment and education materials, Summary Plan Description, Required Plan Notices, Administrative Forms, and more. › **Policies and Guides**: Cybersecurity and Account Transaction policy for both Plan Portal and Participant Portal. › **Deferred Reports**: Deferred Plan Reports or Plan Statement-on-Demand Reports run within past 3 days.

Questions? We're here to help. Reach out to your BPAS Plan Consultant or Representative.

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REV: 01.04.24