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 many online tools and features all designed to make your life easier.

VEBA/115 Trust

Tab	Description
Dashboard	› List of **plans** with high-level metrics. Select a plan to view the details pertaining to that specific plan. › **Plan Messages**: create and manage messages for plan participants. › **My Profile**: shows email address and phone number on file with BPAS. › **Account Security:** Update password information every 90 days.
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 fact sheets and prospectus for each investment. › **Participants:** — **Search:** View participant details including division, status, current and vested balance, web status and login information. Unlock participant accounts and open participant portal account (if permitted). — **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. — **Important Links** to external sites or documents.
Library	› **Quick search** by keyword across entire library. › **Participant Reports**, including demographics and investments. › **Plan Reports,** including fund and source summary, fund and source detail, transaction detail, statement on demand, government filings (e.g., Form 5500 and Form SSA), annual notices, compliance, and more. Of course, actual reports provided for your plan will be driven by your plan's configuration, design and features. › **Forms and Notices**: Access Enrollment Kit, Education materials, Summary Plan Description, Required Annual Plan Notifications and other Relevant Plan Notices, Forms, and more. › **Policies and Guides**: Cybersecurity and Account Transaction policy for both Plan Portal and Participant Portal. › **Deferred Reports**: Deferred Plan Transactions or Plan Statement on Demand Reports run within past 3 days.

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

BPAS

Overview of the Participant Portal

This guide provides an overview of the interactive website features available to your plan participants. Actual options and links available in your account may vary depending on your plan's configuration, design, and features.

Main Tab	Description
Home	• **At-a-Glance:** a dashboard displaying account balance, investment balance mix, rate of return, debit card availability, access to the claims portal, and other features based on account type, plus a rotating block of announcements with quick links • **Messages:** view important account messages
My Account	**Summary** • **Balance:** view account balance total and details by investment or source • **Activity:** personalize the transaction details report within a selected date range, filtered by category, source, fund, etc.; view confirmations; and review any daily pending transactions • **Statements:** personalize a statement on demand or browse quarterly benefit statements • **History:** view a 5-year historical look at your account balance per quarter-end; run personalized rate of return for a custom date range
	Investments • **Research:** review investment details, fund performance, any restrictions, fact sheets and prospectuses • **Make Changes:** realign your account — with options to rebalance, elect investments for future contributions, and transfer investments
Library	General information, holiday calendar, newsletters, transaction policy, education, plan documents and notices, survey, and more
My Profile	**Personal:** personal demographic data, update email address and mobile number
	Account Security: change password/security questions
	Go Green: change preferences to opt out of paper statements, confirmations, and notices
Claims Portal	• View HRA balance • Submit claims for reimbursment • Check claim status • Upload receipts • Add dependent information

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