BPAS

VEBA/115 Trust & Funded HRA

Plan Sponsor Portal

The BPAS Plan Sponsor Portal features a wealth of information, reports, and tools to make managing your VEBA/115 Trust & Funded HRA secure, fast, and easy. Here's a quick guide to help you navigate.

Web Tab	Description	
Home	• Action Items quick link • Market dashboard chart and link • Plan summary	• Plan contact details • Participant count summaries
Daily Plan Reports	• Fund Summary • Source Summary • Fund Detail	• Source Detail • Transaction Detail • Statement on Demand
Resource Center	**Plan Links** • CensusPro Link for file uploads • Participant Site Demo and Portal Guide • Plan Sponsor Site Guide and Tour • Cost of Living Adjustments **Surveys** • Participant Feedback Center: survey to elicit feedback on BPAS services **Education** • Economic & Market Review Presentation • Enrollment Guide • Fund Performance Grid • Retirement Financial Calculators • VEBA/115 Trust & HRA FAQs **Administrative Links** • Product Options: Information on optional features • Access to Reimbursement Accounts **General Information** • Administrative Manual for BPAS product procedures • Holiday Calendar • I-Bond Application: Link to fidelity bond provider • Sponsor Newsletter • Sponsor Transaction • Newsletter Library • Policies • SAS-70/SSAE Reports **Plan Documents and Notices** • Administrative Services Agreement • Fee Summary Document • Fund Change Notice	**Plan Information and Reports** *Action Items* • Address Change • Invalid Addresses • Missing Participant Data • NACHA File • Participants Who Have Never Logged in • Participants Without Investment Direction *Information Reports* • Balance by Source • Contribution Posting History • Contribution by Source (current and prior year) • Current Month Disbursements • eDelivery Status • Participant Addresses • Participant Details • Summary of Participant Statements for Month • YTD Rate of Return Reports *Annual Reports* • Annual Rate of Return • Annual Statement Summary • Annual Summary Statement by Source • Form 5500 (if applicable) • Distribution Report • Participant Detail Report • Trust Asset Report *Quarterly Plan Reports* • Current Quarter Disbursements • Quarterly Statement Summary-by Fund • Quarterly Statement Summary-by Source *Demographic Reports (Utilization)* • Age 55 and over • Only in Cash/Stable Funds • Participant Investment Grid • Participant Status • Web Usage Report • YTD Rate of Return Report (Plan Level) *Participant Balances* • By Age, By Income, By Service
Fund Information	• Fund Links and investment performance information for all fund options in the plan	
Participant Reports	• Beneficiary Change History • Employee List • Login History	• Pending Web Transactions • Name & Address Export • Beneficiary List

Navigating the Plan Sponsor Portal

Access Participant Site	• View the participant website on an inquiry-only basis
Maintenance	• Unlock Account • Change Password • Preferences • Email Address
Notifications	• Plan Message • Disable Web Message • Message History

Overview of Participant Portal

Web 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
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
Transactions	• Pending Web Transactions • Fund-to-Fund Transfers • Rebalance • Automated Rebalance
Fund Information	• Fund Performance and Fund Restrictions
Library	• General information, newsletters, transaction policy, education resources, plan documents and notices, surveys, forms, and more
My Profile	• 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

Questions? Contact your BPAS Representative.

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