HRA Plan Sponsor Portal

The Plan Sponsor Portal features a wealth of information, reports, and tools to make managing your 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 • Plan Sponsor Site Guide and Tour **Surveys** • Participant Feedback Center **Education** • Economic & Market Review Presentation • Market Perspectives **Administrative Links** • Capital Gains Notice **General Information** • Administrative Manual • Newsletter Library • Policies • SAS-70/SSAE 18 Reports **Plan Documents and Notices** • Fee Summary Document • Fund Change Notice **Plan Information and Reports** *Action Items* • Address Change • Invalid Addresses • Missing Participant Data • Participants Who Have Never Logged in • Participants Without Investment Direction	**Plan Information and Reports** *Information Reports* • Balance by Source • 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) • Participant Detail Report • Trust Asset Report *Quarterly Plan Reports* • 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	• Employee List • Login History	• Pending Web Transactions • Name & Address Export
Access Participant Portal	• View the Participant Portal on an inquiry-only basis	
Maintenance	• Unlock Account • Change Password	• Preferences • Email Address
Notifications	• Plan Message • Disable Web Message	• Message History

Overview of the 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 • 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