Plan Service Center FAQs

Contact Us

Where can I find contact information and phone numbers?
Our phone number and website support email information is available via the *Contact Us* link located at the top of our webpage. Contact information specific to your plan personnel and the associates who manage your plan is located via the *Contacts* link under the plan tab.

Username/password/preferences

How do I log in to the plan sponsor website?
Enter your username and password and click the *Sign In* button. If you experience problems logging in the first time, contact website support.

How do I change my username?
The assigned username was established when your website was created and cannot be changed; however you can create a registered username during the account setup process. If you do not choose to create a registered username upon account setup, you may do so anytime you visit the website. Simply click the *My profile* link located at the top of the webpage and select the *Change Username* option. You will be directed to choose a registered username that may be easier for you to remember. Click *Update* to complete this process. Please note: registered usernames are case sensitive and assigned usernames are not.

How do I change my password?
Passwords can be changed any time after logging in to the website via the *My profile* link located at the top of the webpage. Select the *Change Password* option and follow the prompts.

How many characters must my password contain?
Passwords must be between eight and 64 characters in length and contain at least three of the following character sets: lowercase letters, uppercase letters, numbers and/or special characters ! @ # $ * ( ) { } [ ]. -_

I forgot my password. How can I get help?
Click on the *Forgot Password?* link and follow the prompts. A temporary password will be emailed to you within 10 minutes. This temporary password expires upon first login, and you will be prompted to create a new personal password. If you are a new user, your plan administrator will send you an email with a password to use the first time you log in. After initial login you can change your password as you set up your account.

I've exceeded the maximum number of login attempts. Can I still log in?
Yes. If you successfully logged in to the website in the past, you can log in by setting up a new password via the *Forgot Password?* link and following the required prompts. A temporary password will be emailed to you within 10 minutes. The temporary password expires upon first login, and you will be prompted to create a new personal password.

If you are a new user, please call website support at the toll-free number listed under the *Contact Us* link in the *Need Help?* section to have your password reset.

I never received a password. What should I do?
Passwords are sent in a separate email from the email you received with your username. If this secondary email was not received, please call website support at the toll-free number listed under the *Contact Us* in the *Need Help?* section.

How do I change my email address?
To change your email address, log in to the website and click the *My profile* link located at the top of our webpage. Select the Email Address option and follow the prompts.

Can I transfer my username to a different user?
For security purposes, we do not allow usernames to be transferred from one person to another. Each username belongs to one specific person. To request a new username, use the *New User Request* form at the bottom of our webpage and follow the instructions.

Outstanding To-Do List work items

I received an email about *To-Do List* items, but when I log into the website, I see no items on the *To-Do List*. Why is this?

Email notifications about *To-Do List* items are system-generated and are sent to every user in your plan who has *To-Do List* access. If another user from your plan logs in and clears the existing *To-Do List* items prior to you logging on, you will no longer see those items. If the outstanding items need to be completed by the plan TPA, emails will generate only to the TPA user(s). You can view approved and completed disbursements via the Participant Disbursement Detail report listed under the *Reports* tab on the website.

How do I see what is on the *To-Do List*?

A *To-Do List* summary is presented on the plan's home landing page. Click the summary to view pending items. Additional details for each specific item are available by clicking that item.

Why do I keep receiving *To-Do List* emails?

To-Do List notifications are sent to your plan's *To-Do List* users each day there are outstanding items. If your *To-Do List* contains no items, the email will not generate. Please note: for items requiring an updated or re-faxed form, the *To-Do List* item must be completed to drop off the list.

Can I stop receiving *To-Do List* email notifications?

Users with *View Only* access to the *To-Do List* can be removed from the notifications; please email **security@retirementpartner.com** with your request. Users with *Update* access cannot be removed from the notifications.

How do I clear an item from the *To-Do List*?

If you have *Update* access, click anywhere on the outstanding item and select *click here to cancel this transaction from the checklist*.

How do I approve a *To-Do List* item?

If you have *Update* access, open the item, complete the required steps on the checklist and then click *Approve*.

Why can't I see the *Approve* button?

Either your username is not set up with *Update* access or a third party, such as a TPA, must approve the items.

How do I cancel a *To-Do List* item?

If you have *Update* access, click anywhere on the outstanding item and select the *click here to cancel this transaction* link located toward the middle of the page.

Forms

Where are forms and documents?

General and plan documents are located under the *Fiduciary Records* link under the *Plan* tab. Employee forms are located under the *Forms* link under the *Employees* tab.

How can I change our bank account information?

Users with appropriate access can view, add and update ACH information on our website by going to *Plan* → *Administration* → *View/Change Banking Information* and following the prompts.