Pe+
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Getting Started with *PensionEdge® Plus*

This guide is designed to provide you with a quick understanding of the many features of the PensionEdge® Plus portal. The portal allows you fast, convenient access to information 24 hours a day, 7 days a week.

Each page in this guide corresponds to a different page in the portal, making it easy for you to navigate the system and learn its features. By understanding all of the features of this tool, you will be better equipped to streamline your company's pension administration.

PensionEdge® Plus is constantly evolving to best serve our clients' needs. As a result, the images in this guide may not appear exactly as shown on your screen.

The PensionEdge® Service Center is ready to assist you.

Representatives are available Monday through Friday, 8:30 am to 4:30 pm ET to answer your questions. Multilingual services available.

Toll-free: 1.866.495.3548

Voice response system is available at all times, including nights and weekends.
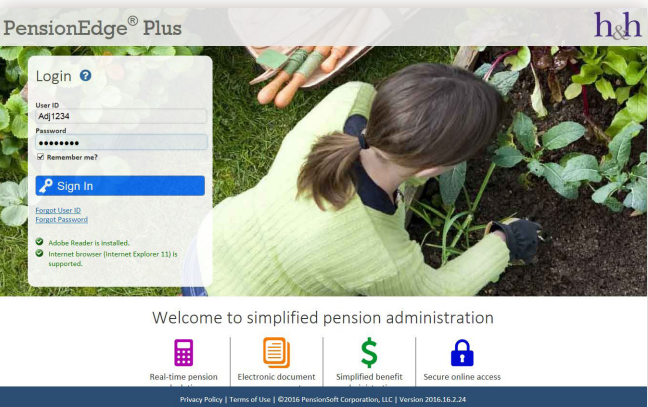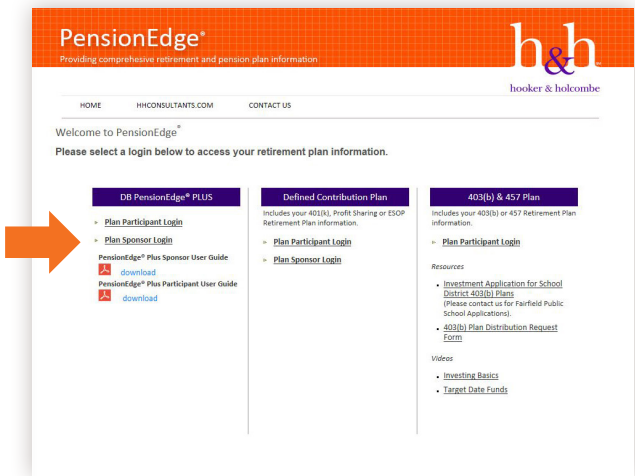
ServiceCenter@PensionEdge.com
Please note your company name when sending us an email message.

www.PensionEdge.com

What It Does
The home page is the first screen to appear when you visit PensionEdge.com

How to Use It
Select **Plan Sponsor Login** under PensionEdge® Plus to access the login screen.

Please note that background image on Login page changes daily.

Temporary passwords are issued to all users. Enter your User ID and Password to login to your plan data. Users are required to change their passwords after first login. Links to reset User IDs and passwords are provided at the bottom of the login screen.

Pop-up Blocker
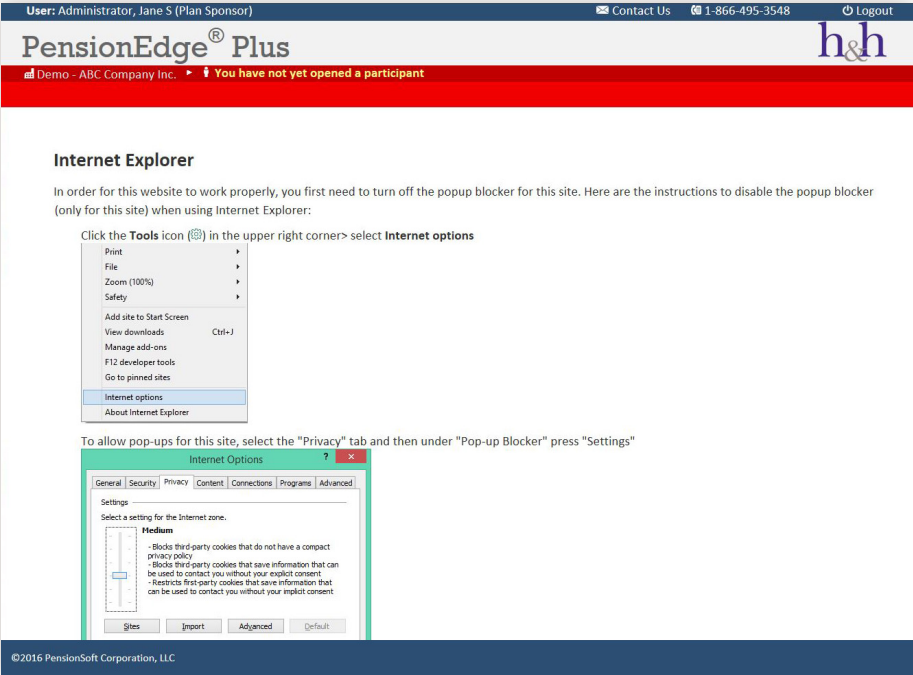
What It Does

Documents may be provided through a pop-up window, so you will need to enable pop-ups to use this system. The screen above will appear if pop-ups are being blocked for this website.

How to Use It

If pop-ups are being blocked, instructions will be provided on how to allow them. Once pop-ups are enabled on your computer, this screen will not appear again.

Summary Page

What It Does

The Summary Page is the first screen you will see after login. It displays important information for sponsors.
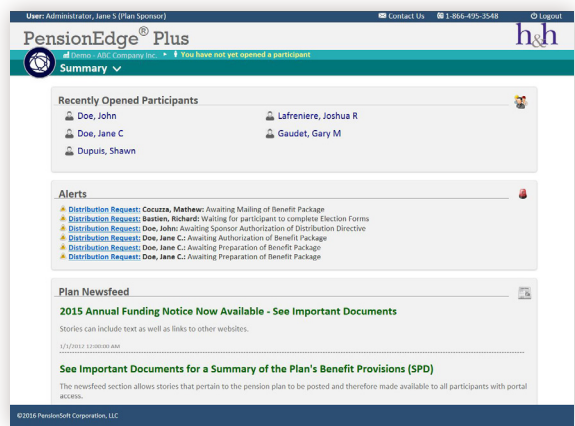
How to Use It

When the page opens, Recently Opened Participants, Alerts and Plan Newsfeed sections are visible:

Recently Opened Participants — Allows quick access to participants you have recently been working on.

Alerts — Identifies Worktrack items that require your attention. Click on the **Worktrack Action Required** links to take action on a specific item.

Plan Newsfeed — Displays messages that have been posted for viewing by plan sponsors.
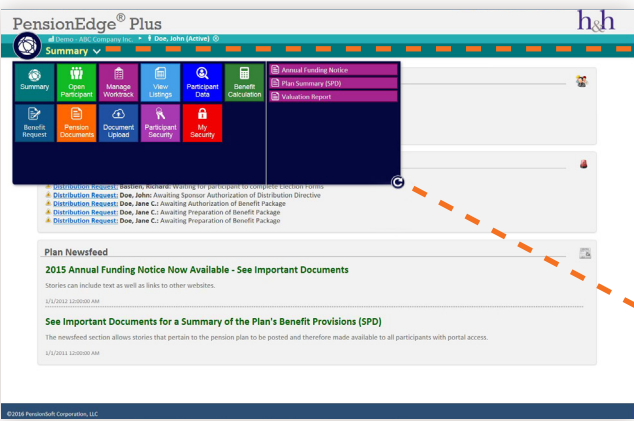
Click the dropdown arrow to reveal the **Quick Link Icons** at anytime during your session.

Refresh session

Quick Link Icons — Allow easy access to portal functions (i.e., Open Participant, Manage Worktrack, Pension Documents, My Security, etc.).

Opening a Participant Record
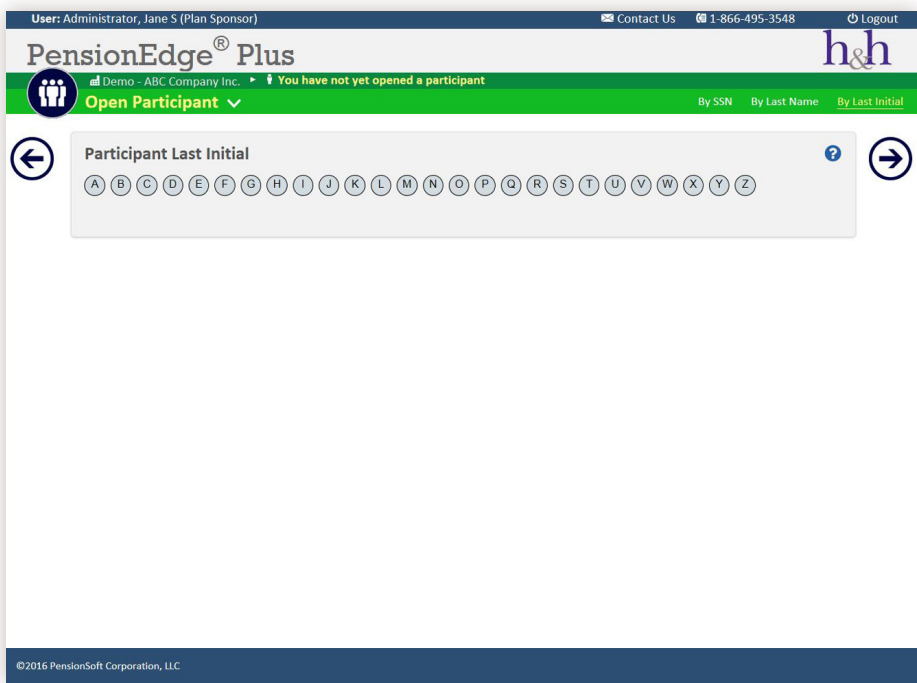
QUICK LINK

What It Does
Allows you to open and view a participant record By Social Security Number (SSN), By Last Name, or By Last Initial.

How to Use It
Select **Open Participant** to choose from one of the three options: By SSN, By Last Name, By Last Initial (default).

Manage Worktrack

QUICK LINK

Manage Worktrack

What It Does

The Worktrack feature makes it easy to track and update your benefit-related tasks.

How to Use It

Choose **Manage Worktrack** to access your task checklist. Your checklist can be customized to conform to your current process.

The Task Filter allows you to choose which tasks appear on your checklist. To view a task, click on the row containing that task. The task will open and provide additional information required to update or complete the task. Each step has the appropriate completion and authorization requirements to move to the next step. Document uploads can be completed within each step of the process. Additional details for the task can be found to the left of the checklist. Email notifications, associated documents, comments and history may be associated with any step of the process.

View Listings

QUICK LINK

What It Does
Allows you to generate and display real-time reports. Database updates shown in the reports are refreshed automatically.

How to Use It
Choose **View Listings** to view your reports.

To download and view the selected report, click on the corresponding icon. Reports can be customized by contacting your H&H consultant.

Participant Security

QUICK LINK

What It Does
Participants may forget their login information. For security reasons, a participant will be locked out of the system after five invalid password attempts. The Participant Security feature enables plan sponsors to assist participants with login-related issues such as forgotten User IDs, portal lockouts or password resets.

How to Use It
Open the participant, then choose **Participant Security** to access the features that allow sponsors to manage passwords, User IDs and lockout resets. Use the **Reset Password** button to generate a new password for the participant.

The system can also generate a standard or customized email that plan sponsors can send to participants. Select **Send** to email participant their new password (optional). Select **Cancel** to void the request.

Participant Data

QUICK LINK

What It Does
Allows you to view, edit and update participant data.

How to Use It
Participant data is organized in several ways to give plan sponsors flexibility when viewing and editing data. You can scroll through the available data by clicking the left and right arrows on the data screen. The blue menu bar located above the data may also be used to navigate to each screen (i.e., Basic Data, Beneficiary, Dates, etc.).

If data can be edited, an **Update** button will appear in the bottom-right corner of the screen. Once your changes have been made, click the **Update** button to save.

Authorization to view and edit data is customized for your plan. Access rights are generally different for participants and plan sponsors.

Benefit Calculation

QUICK LINK

What It Does

Allows you to model pension benefit scenarios using real or estimated termination dates, benefit payment start dates, future salary increase rates and more.

How to Use It

Select **Benefit Calculation** to perform estimated benefit calculations for a selected participant. Once you enter your data and click the **Calculate** button at the bottom of the screen, a separate window will display calculation results that can be printed and saved. All calculations will require you to provide a termination date (estimated or actual) as well as a benefit payment start date.

Benefit Request

QUICK LINK

What It Does
Allows you to request a final pension benefit election forms package for a participant. Plan sponsors determine if they want to also provide this feature to participants.

How to Use It
Select **Benefit Request** to initiate the final benefit calculation package for a participant. Once a benefit request has been initiated, the task can be tracked within the portal's Worktrack system. Contact your HR department or PensionEdge® Service Center to cancel requests.

Pension Documents

Quick Access

What It Does
Allows pension-related documents to be securely stored and retrieved online.

How to Use It
Use this tool to view commonly opened documents or to access archived documents. By double clicking on the document line, it can be opened or saved to your computer. Documents can be stored in the database under various formats including PDF, Microsoft Excel or Word, comma delimited or text. The access column indicates whether a document is accessible by the Participant, Plan Sponsor or both.

*Quick Access
The most commonly opened documents (i.e., Annual Funding Notice, Plan Summary, Validation Reports, etc.) generally appear as options to the right of the icons in the Quick Links dropdown menu.
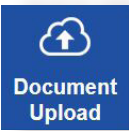
Document Upload

What It Does
Plan sponsors can upload documents to the archive for easy retrieval when needed. For your security, the system automatically checks documents for viruses and notifies you if an infected document cannot be uploaded to the archive.

How to Use It
Choose **Document Upload** to upload documents to the secure server. The system can be configured to allow users you specify to securely upload documents to the archive. You also control whether documents can be viewed by sponsors, participants or both. Documents can be saved as PDF, Microsoft Excel or Word, comma delimited or text formats. Select **Upload** to add the document to the archive. Select **Cancel** to void the request.

My Security

QUICK LINK

Security is a key component of PensionEdge® Plus. Plan Sponsors can control password configurations to ensure that their participants meet pre-determined requirements such as minimum length, certain characters, or upper/lower restrictions. Once password configurations are in place, participants can simply enter their email address and answer the Security Question to retrieve their forgotten User ID and password.

What It Does
Allows plan sponsors to reset their own passwords, change email or update security questions.

How to Use It
Select **Security** and **Email Address**, **Change Password** or **Security Question**. To modify information use the left and right arrows to scroll through all three items. The red menu bar located above the data may also be used to navigate to each screen (i.e., Email Address, Change Password or Security Question). Select **Update** to save your changes. Select **Cancel** to void the request.

About Hooker & Holcombe

Hooker & Holcombe opened its doors in 1956 as a full-service pension and actuarial consulting firm. Over the years, the firm has expanded its services to include comprehensive, integrated consulting and investment advisory services for all types of employer-sponsored retirement plans. In addition, wealth management services are available to individuals seeking customized financial planning services. Hooker & Holcombe's reputation for integrity, combined with its ability to deliver outstanding professional services, has made it one of the premier actuarial, retirement services and investment advisory firms in the Northeast. For more information, visit hhconsultants.com.

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