

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.*



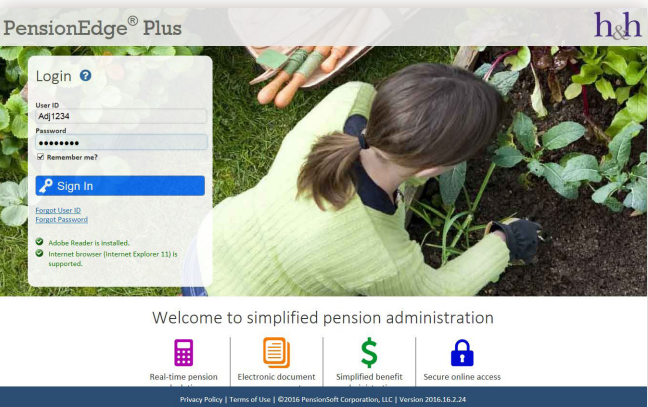
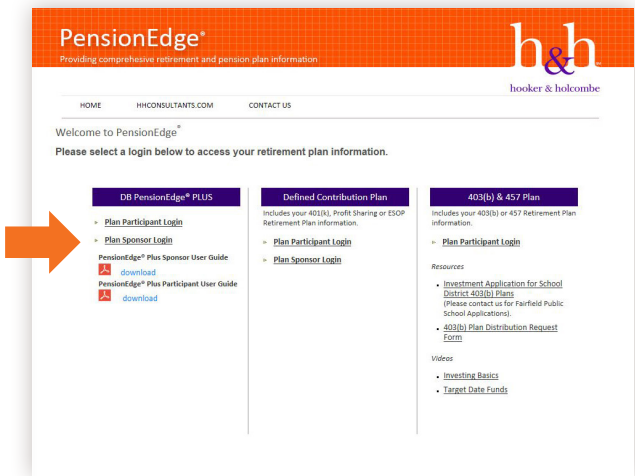
ServiceCenter@PensionEdge.com
*Please note your company name
when sending us an email message.*

What It Does

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

How to Use It

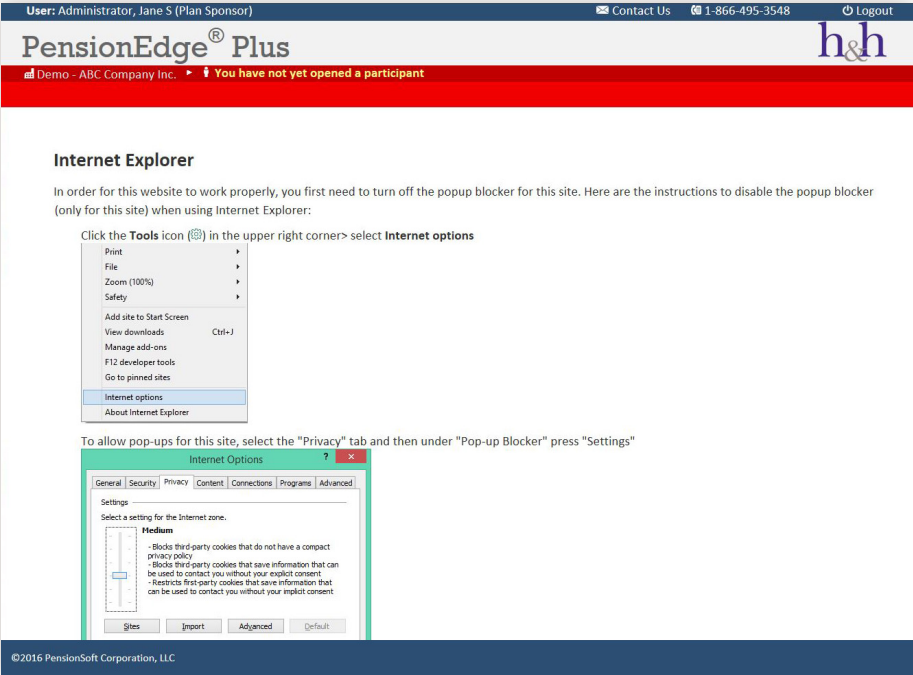
Select **Plan Sponsor Login** under PensionEdge® Plus to access the login screen.



◀ 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.

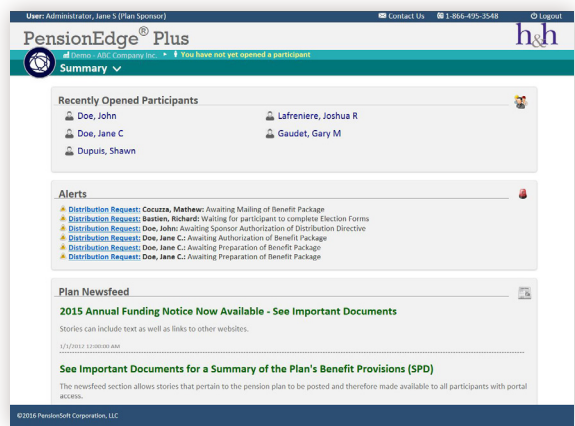
How to Use It

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.



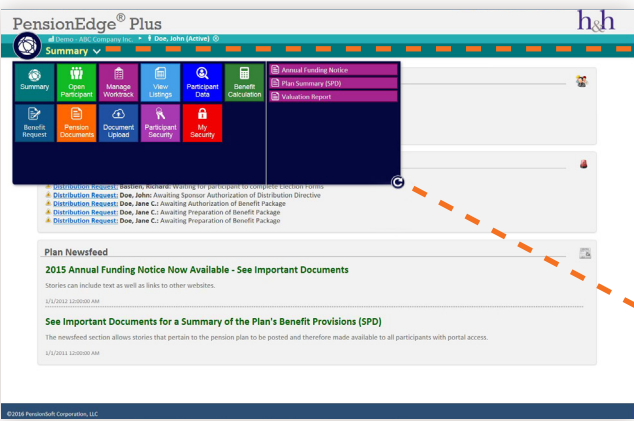
How to Use It

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.



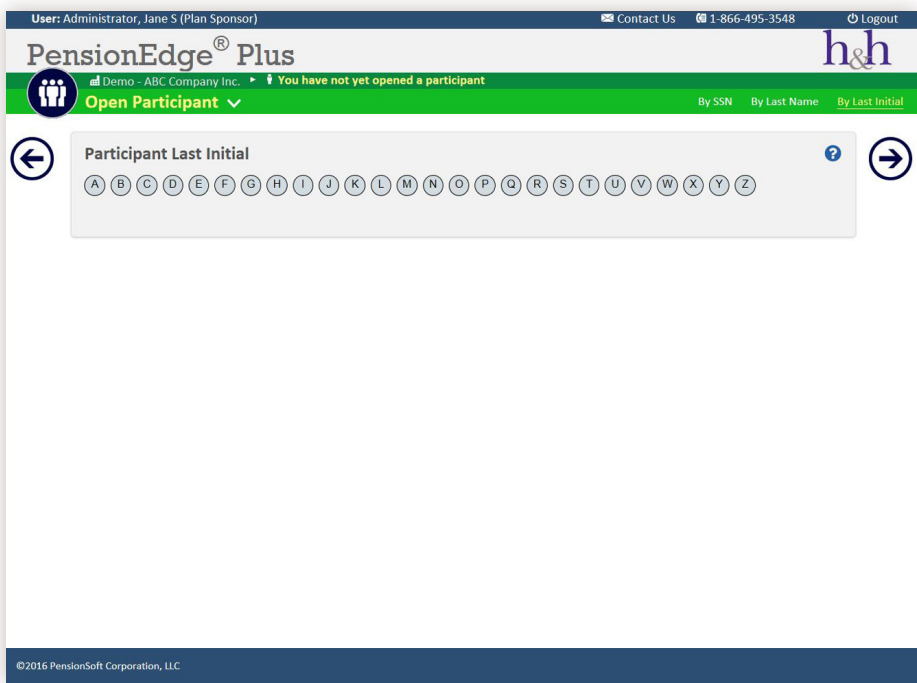
Click the dropdown arrow to reveal the **Quick Link Icons** at anytime during your session.



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

User: Administrator, Jane S (Plan Sponsor)

Contact Us1-866-495-3548Logout

PensionEdge® Plus

Demo - ABC Company Inc. ▾

Do, John (Active)

Manage Worktrack ▾

h&h

Task Filter

☒ Active - waiting for you

☒ Active - waiting for others

☒ On Hold

☐ Cancelled

☐ Completed

Update

Note: all tasks started more than 6 months ago are excluded from the listing of Worktrack items shown above.

Progress	Started/ ACD ▾	Task Type/ Name	Name	Status/ Next Step	Target/ Completed
0%	4/20/2016 5/1/2016	Distribution Request Benefit Request	Do, Jane C.	Request received Complete Benefit Package Prepared	5/18/2016 N/A
0%	4/20/2016 5/17/2016	Distribution Request Benefit Request	Do, Jane C.	Request received Complete Benefit Package Prepared	5/18/2016 N/A
0%	4/20/2016 5/1/2016	Distribution Request Benefit Request	Do, Jane C.	Benefit Package Prepared Completed Authorize Benefit Package Prepared	5/18/2016 N/A
20%	4/13/2016 6/1/2016	Distribution Request Benefit Request	Cocuzza, Mathew	Benefit Package Prepared Authorized Complete Benefit Package Mailed	5/11/2016 N/A
40%	4/13/2016 10/1/2016	Distribution Request Benefit Request	Bastien, Richard	Benefit Package Mailed Completed Complete Election Forms Received	5/11/2016 N/A
60%	4/13/2016 6/1/2016	Distribution Request Benefit Request	Do, John	Payment Authorized Completed Authorize Payment Authorized	5/11/2016 N/A

User: Administrator, Jane S (Plan Sponsor)

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Demo - ABC Company Inc. ▾

Do, John (Active)

Edit Worktrack Item ▾

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Do, John - 4/13/2016 - Active

Checklist

Details

Documents

Comments

History

1

Benefit Package Prepared

Complete

Authorize

Skip

Required

2

Benefit Package Mailed

Complete

Authorize

Skip

Required

3

Election Forms Received

Complete

Authorize

Skip

Required

4

Payment Authorized

Complete

Authorize

Skip

Required

5

Benefit Submitted for Payment

Complete

Authorize

Skip

Required

Add

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





User: Administrator, Jane S (Plan Sponsor)Contact Us1-866-495-3548Logout

PensionEdge® Plus

Demo - ABC Company Inc. ▶ Doe, John (Active) Ⓢ

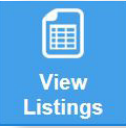
View Listings ▼

h&h

Name	Description	View
Plan 2 - Participant Listing	Listing of Valuation Data for Plan 2	 
Over NRD Listing	Report showing participants past NRD	 

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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

User: Administrator, Jane S (Plan Sponsor)

Contact Us1-866-495-3548Logout

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Demo - ABC Company Inc. ▶ Doe, John (Active) ⓘ

Participant Security ▼

Participant Account Information

Participant's User ID: DoJ3401

✔ Participant account is not locked

✔ User has logged in to this portal (latest login: 5/1/2016 at 12:58 PM)

✔ Email address has been provided (ttt@website.com)

✔ Password has been changed at least once (last changed 4/25/2016 at 1:39 PM)

✔ Security question has been provided

Reset Password

Email to Participant

To: ttt@website.com

Subject: Pension Website User ID

Dear John:

We received your request to provide you with your User ID for the ABC Company Inc. Retirement Income Plan pension portal.

Your User ID is: DoJ3401

You may login by going to <https://www.mypensionbenefit.com/Default.aspx?co=HH>. Please contact us at 1-866-495-3548 or

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SendCancel

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

User: Administrator, Jane S (Plan Sponsor)

Contact Us1-866-495-3548Logout

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Demo - ABC Company Inc. ▾

Do, John (Active) ⓘ

Participant Data ▾

Basic DataBeneficiaryAddressBankWithholdingDatesAmounts

←

Participant Name ⓘ

First Name: John

Middle Name/Initial:

Last Name: Doe

→

Other Information ⓘ

Date of Birth: 1/1/1951

Date of Death: mm/dd/yyyy

Gender: ☒ Male ☐ Female

Comment: Look for upcoming Quadro

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Update

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

User: Administrator, Jane S (Plan Sponsor)Contact Us1-866-495-3548Logout

PensionEdge® Plus

 Demo - ABC Company Inc. ▶ Doe, John (Active) ⓧ

Benefit Calculation ▾

What type of calculation would you like to complete?
Select from the following:

What is this participant's actual or expected last day of employment?
Termination Age/Date: ☐ Fixed Age ☒ Fixed Date

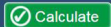
When does this participant want to begin receiving pension benefits?
Pension Start Age/Date: ☐ Fixed Age ☒ Fixed Date

Who should be designated as beneficiary, where applicable?
Relationship to you: Date of Birth:

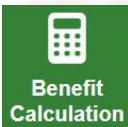
If calculating after today, assume the following:
Expected Annual Pay Increases: %

☐ Store calculation in Documents

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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

User: Administrator, Jane S (Plan Sponsor)Contact Us1-866-495-3548Logout

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Demo - ABC Company Inc. ▶ Doe, John (Active) ☰

Benefit Request ▼

What is this participant's actual or expected last day of employment?

Termination Age/Date:

☐ Fixed Age

☒ Fixed Date

When does this participant want to begin receiving pension benefits?

Pension Start Age/Date:

☐ Fixed Age

☒ Fixed Date

Marital Status/Beneficiary Information

Is this participant married?

☒ Yes

☐ No

Spouse Date of Birth:

Use non-spousal beneficiary?

☐ Yes

☐ No

Alternate Beneficiary Date of Birth:

Alternate Beneficiary Type:

Ex-spouse

▼

Mailing Address

Street Address:

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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

User: Administrator, Jane S (Plan Sponsor)Contact Us1-866-495-3548Logout

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Pension Documents ▼

Participant Documents

Description	Date ▼	Type	Access
Portal Calculation	04/26/2016 09:00 PM	Internet Calculation	👤👤
Portal Calculation	04/26/2016 09:11 AM	Internet Calculation	👤👤
Portal Calculation	04/20/2016 06:43 PM	Internet Calculation	👤👤
Portal Calculation	04/20/2016 03:42 PM	Internet Calculation	👤👤
Portal Calculation	04/20/2016 03:38 PM	Internet Calculation	👤👤
Portal Calculation	04/20/2016 03:34 PM	Internet Calculation	👤👤
01/01/2016 Benefit Statement	04/13/2016 02:13 PM	Benefit Statement	👤👤
Payment Directive	04/13/2016 02:03 PM	Payment Directive	👤👤
Signed Election Forms Received	04/13/2016 01:45 PM	Benefit Election Forms	👤👤
Election Forms Mailed	04/13/2016 01:31 PM	Benefit Calculation Results	👤👤
01/01/2015 Benefit Statement	06/05/2015 10:31 AM	Benefit Statement	👤👤
01/01/2014 Benefit Statement	08/06/2014 11:13 AM	Benefit Statement	👤👤

Company Documents

No document results to display

Note: documents uploaded after you logged in to the portal might not appear above.

QUICK LINK

Pension Documents

User: Administrator, Jane S (Plan Sponsor)Contact Us1-866-495-3548Logout

PensionEdge® Plus

Demo - ABC Company Inc. ▶ Doe, John (Active) Ⓢ

Pension Documents ▼

SummaryOpenParticipantBenefit CalculationAnnual Funding NoticePlan Summary (PDF)Validation Report

DocumentsDocument UploadParticipant SecurityMy Security

Unknown/OtherBenefit Calculation ResultsBenefit Calculation ResultsBenefit Calculation ResultsInternet CalculationInternet CalculationInternet CalculationBenefit StatementPayment DirectiveBenefit Election FormsBenefit Calculation ResultsBenefit StatementBenefit Statement

Portal Calculation	04/20/2016 03:42 PM	Internet Calculation	👤👤
Portal Calculation	04/20/2016 03:38 PM	Internet Calculation	👤👤
Portal Calculation	04/20/2016 03:34 PM	Internet Calculation	👤👤
01/01/2016 Benefit Statement	04/13/2016 02:13 PM	Benefit Statement	👤👤
Payment Directive	04/13/2016 02:03 PM	Payment Directive	👤👤
Signed Election Forms Received	04/13/2016 01:45 PM	Benefit Election Forms	👤👤
Election Forms Mailed	04/13/2016 01:31 PM	Benefit Calculation Results	👤👤
01/01/2015 Benefit Statement	06/05/2015 10:31 AM	Benefit Statement	👤👤
01/01/2014 Benefit Statement	08/06/2014 11:13 AM	Benefit Statement	👤👤

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.

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Document Upload

User: Administrator, Jane S (Plan Sponsor)Contact Us1-866-495-3548Logout

PensionEdge® Plus

Demo - ABC Company Inc.

Doe, John (Active)

Document Upload

Document Information

File to Upload:

Browse...

Upload To:

Sponsor Documents

Document Type:

Unknown/Other

Document Access:

☒ Sponsor Contacts

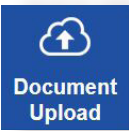
☐ Participant

Description:

Upload

Cancel

QUICK LINK



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

User: Administrator, Jane S (Plan Sponsor)Contact Us1-866-495-3548Logout

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🔒 Demo - ABC Company Inc. ⌵ Doe, John (Active) ⓧ

My Security ▾

Email AddressChange PasswordSecurity Question

⬅️

Current/New Email Address

?

➡️

Current Email Address

jsadmin@hhconsultants.com

New Email Address

Re-enter Email Address

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✔️ Update

❌ Cancel

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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