Pension Fund's Employer Portal provides employers with secure, online access, allowing them to

- Manage and view employees and their accounts
- View and manage enrollments
- Submit support tickets
- Upload and view important organizational documents
- And more

This user guide will provide an overview of the features and guidance for navigating the Employer Portal.

Getting Started

1. Requesting Access

   To access the Employer Portal, Pension Fund will need to grant employers access. Contact your dedicated Area Director to request access.

   Two-Factor Authentication

   The Pension Fund Employer Portal uses two-factor authentication for login. Two-factor authentication provides an additional layer of security by sending a security code as a text or voice call to a phone number only the user has access to. To set up your Employer Portal access, you will need to provide Pension Fund with a phone number that can be used for two-factor authentication. We recommend the following guidelines:

   - If possible, use a mobile phone number as the preferred phone number so that you can receive your security code via text or voice call.
   - You may use your work phone or another direct landline, but you will be able to receive only a voice call with the security code. **Note: You cannot use a phone number with an extension for two-factor authentication.**
   - After initial setup, if for any reason you need to update your preferred phone number for two-factor authentication, you can contact Member Relations by phone or email or by submitting a support ticket inside your Employer Portal.

2. Receiving Your Welcome Email & Logging In

   Once Pension Fund has granted you access, you will receive a welcome email to your work email address with a link to finish setting up your Employer Portal access.

   This link will only be active for 7 days. If you do not log in using this link within 7 days, you must request to have a new welcome email sent by contacting our Member Relations team at pfcc1@pensionfund.org or 866.495.7322.

   When you click the link, you will be taken to the Employer Portal login screen, where you will enter your work email as your username, follow the prompts to generate your security code using two-factor authentication, and set up your password.

3. Termination of an Employee with Employer Portal Access

If an employee with Employer Portal access leaves your organization, contact your Pension Fund Area Director immediately so we can deactivate their user account. At that time, we will also verify which users should have access and set up any new employees with Employer Portal access.

Overview of Features

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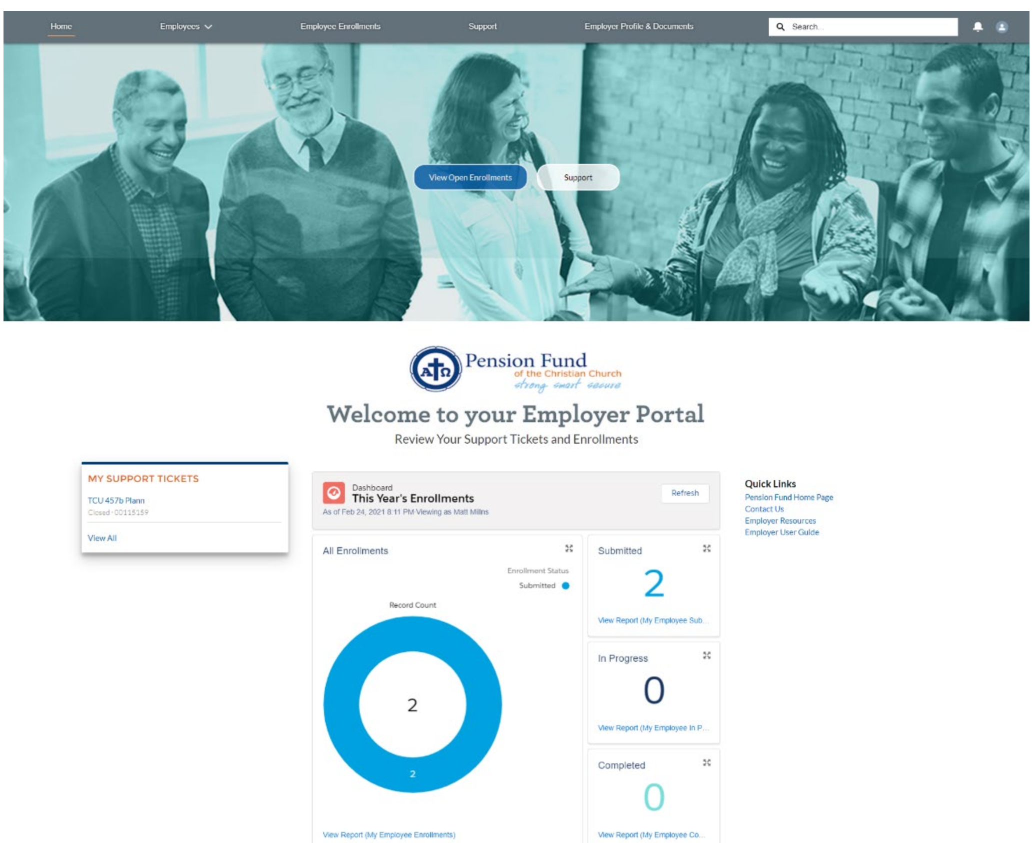
1. Home Page

The home page displays your dashboard for enrollments, open support tickets, and quick links. The enrollment dashboard has three statuses:

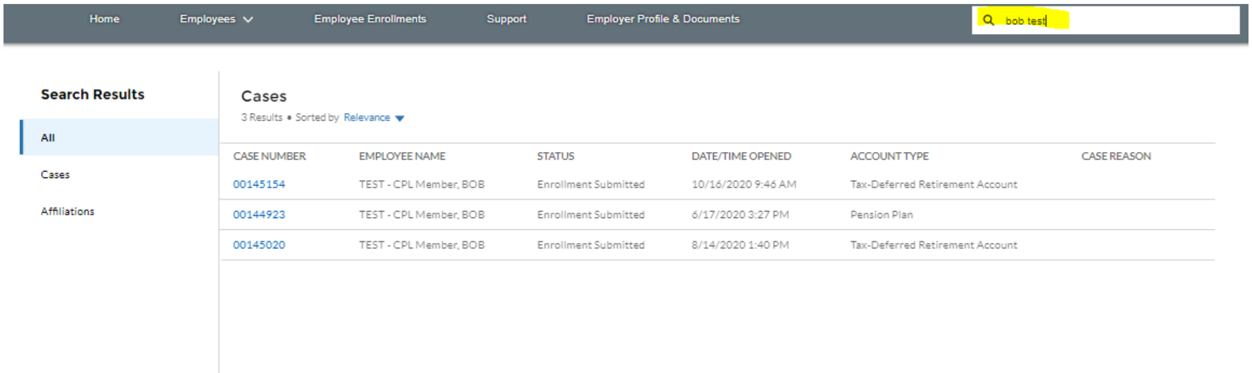
- Submitted: After your employee submits an enrollment (either online or on paper), it will show as submitted as soon as it has been affiliated with your organization.
- In Progress: An enrollment moves to In Progress status while we review the enrollment details and wait for funding.
- Complete: An enrollment moves to Complete status after all paperwork has been finalized and funding has been received. The enrollment is closed, and their account is opened and visible inside their Member Portal.

*__Note:__ The enrollment dashboard does not automatically refresh. To view the most up-to-date enrollment data, click the refresh button in the upper right corner of the dashboard.



Global Search:

From the home page, you can use global search to locate a member’s name, find their affiliation, and view enrollment cases attached to that member.



2. Employees Tab

There are two sections, Add New Employee and Employee Details, under the Employees tab.

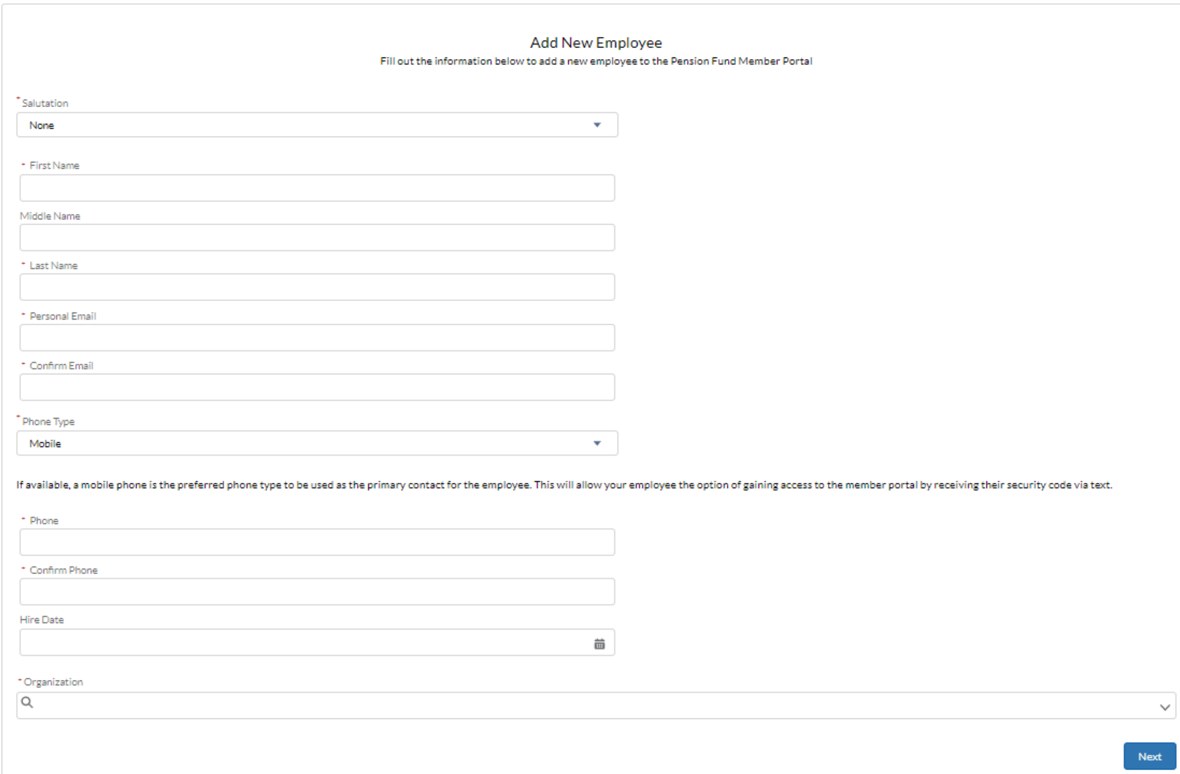
- **Add New Employee:**

Any eligible employee who would like to enroll in the Pension Plan or Tax-Deferred Retirement Account- 403(b)—can enroll securely online via Pension Fund’s Member Portal. The **Add New Employee** tab allows you to initiate the welcome email to your employee so that they can gain access to the Member Portal and enroll online. Once your employee has completed their enrollment, they can use the Member Portal to enroll in additional retirement and savings products such as a Pension Fund IRA or the Benefit Accumulation Account.

On the **Add New Employee** tab, you will enter the following:

- Employee’s first, middle, and last names
- Employee’s email address
  - We recommend using an employee’s personal email address so that they will not lose access to their Member Portal if they are no longer employed by your organization.
  - **Note:** If you receive an error message, your employee may already have Member Portal access. If their email is already in our system, it will not allow you to add the employee. If you feel this is an error, please submit a support ticket.
- Employee’s personal phone number
  - Like the Employer Portal, the Member Portal uses two-factor authentication. We recommend using a personal mobile phone so that your employee can receive the security code and gain access to the Member Portal via text or voice call.
  - A personal phone number is also important so that former employees will not lose access to their Member Portal if they are no longer employed at your organization.

- Hire date
- Organization
  - This will allow you to select your organization in the drop-down so that the data is passed through to Pension Fund and the new employee is affiliated with your organization.


Add New Employee
Fill out the information below to add a new employee to the Pension Fund Member Portal

* Salutation: None
* First Name
Middle Name
* Last Name
* Personal Email
* Confirm Email
* Phone Type: Mobile

If available, a mobile phone is the preferred phone type to be used as the primary contact for the employee. This will allow your employee the option of gaining access to the member portal by receiving their security code via text.

* Phone
* Confirm Phone
Hire Date
* Organization

Next

- After you have entered your employee's information, click Next to review and confirm that all information has been entered correctly.
- Click Next again, and your employee will be added and sent a welcome email to access the Pension Fund Member Portal.
- After adding your new employee, you can navigate to the Employee Details tab and confirm that you see the newly added employee on the Active Employees summary page.

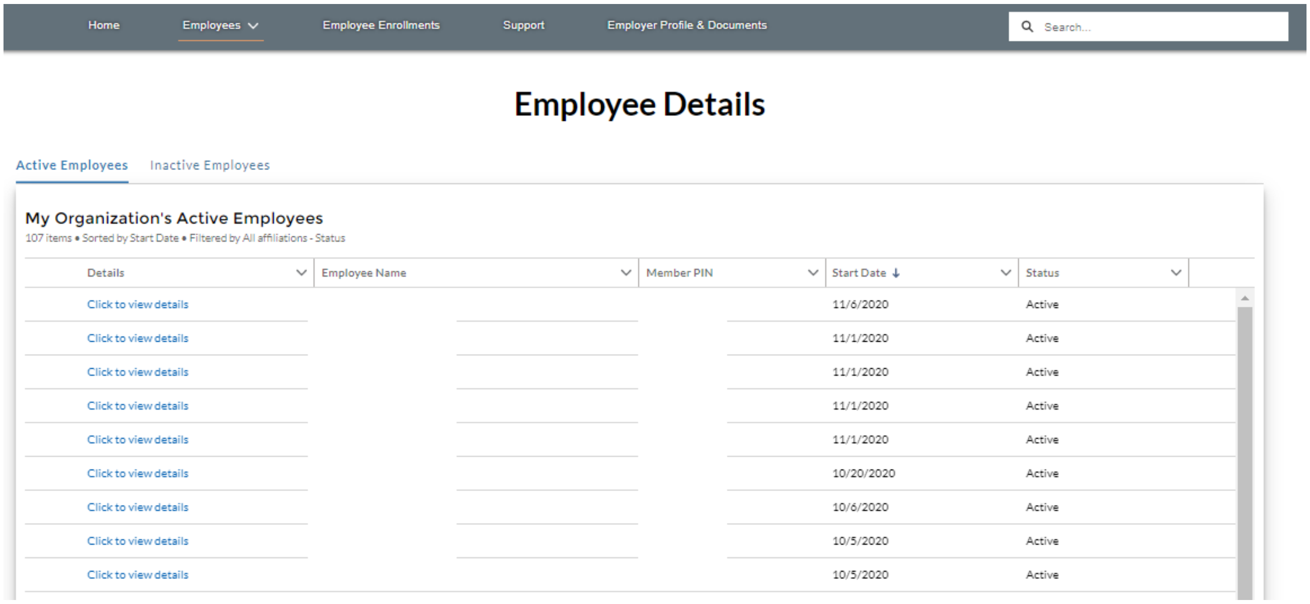
Tip: After adding a new employee to your organization, we suggest contacting your employee to confirm that they received their welcome email and that it was not filtered to a spam folder. If your employee does not receive their welcome email within 24 hours, you can submit a support ticket; someone from our Member Relations team will assist them with resetting their username and accessing the Member Portal.

- **Employee Details:**

You can view all active and inactive employees on the Employee Details page.

- Active Employees: A list of all active employees still receiving contributions for their employer-sponsored products

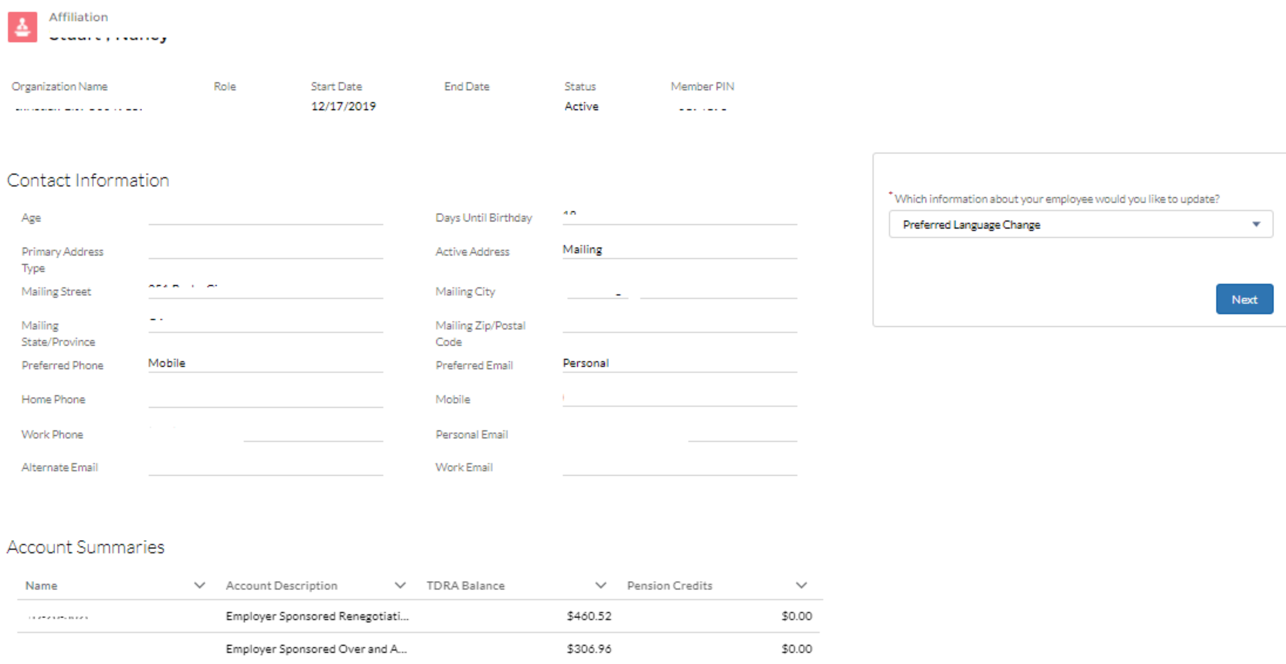
- Inactive Employees: A list of all inactive employees (and their termination dates) who no longer receive contributions for their employer-sponsored products

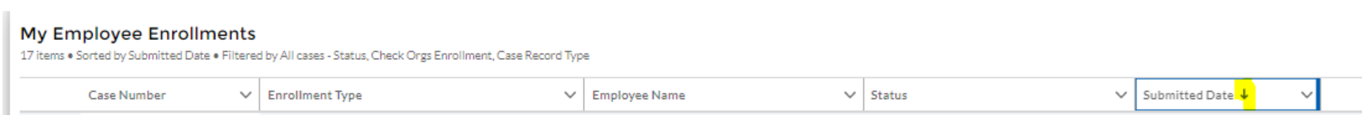


Clicking a column and then the arrow next to the header will allow you to sort the list view by the data in that column:

Clicking the "Click to view details" link on this page will allow you to view and manage an individual employee's details. On this page, you can view the employee's

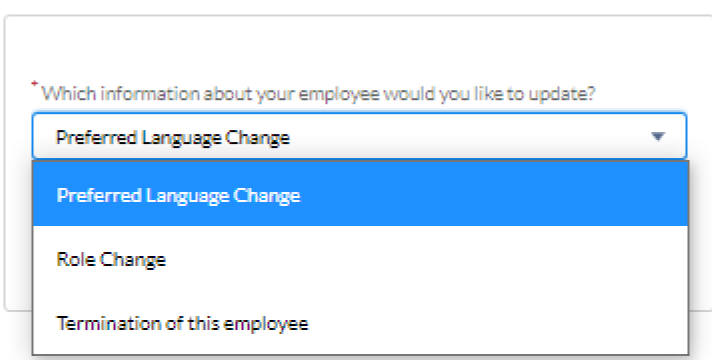
- Start and end dates,
- Status,
- Member PIN,
- Role (position),
- Contact information, and
- Account summaries.
  - **Note**: This is only for employer-sponsored products affiliated with your organization. You will not have access to view account summaries from previous employers nor any individual retirement and savings accounts the member might have with Pension Fund, such as an IRA or a Benefit Accumulation Account. After an employee becomes inactive, you can no longer view the account balances for that employee.





On the Employee Details page, there is a self-service option on the right that allows you to:

- Update the preferred language for an employee to Spanish,
  - **Note:** This will reassign your employee to a Spanish-speaking Area Director.
- Update the employee's role for a promotion or title change, or
- Terminate an employee if the employee is no longer employed at your organization. This will move the employee to the Inactive Employees list view, and you can no longer see their Account Summaries.



For security reasons, we do not allow employers to update an employee's contact information. However, you can direct your employee to log in to their Member Portal and update their personal information.

To view Inactive Employees:

- Click the Inactive Employees tab.
- On this screen, you can view the employee name, member PIN, and start and end dates.
- By clicking "Click to view details," you can open the employee details for the inactive employee, but you will be unable to take any actions on that employee or see their account summaries.

Active Employees | Inactive Employees

My Organization's Inactive Employees

5 items • Sorted by Details • Filtered by All affiliations - Status

Details ↑	Employee Name	Member PIN	Start Date	End Date
Click to view details	Young , Rhea	30049444	5/1/2001	4/30/2020
Click to view details	Young , Rhea	30049444	1/1/2020	3/31/2020
Click to view details	Mann , Pippin	40084158	6/1/2018	1/31/2020
Click to view details	Free , Betty	40072557	2/1/2018	5/31/2018
Click to view details	Masters , Lee	40065383	11/1/2015	2/29/2016

3. Employee Enrollments

Under the Employee Enrollments tab, you can view all employer-sponsored enrollments submitted to Pension Fund for your organization.

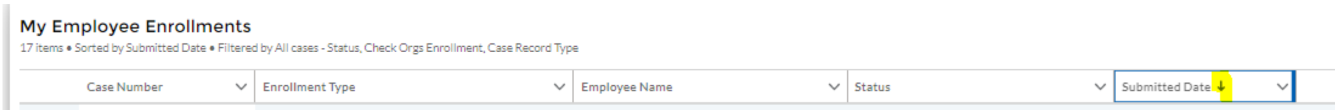
*** Note: Enrollment visibility began in Q4'20. Any enrollments made before this period will not be visible inside the Employer Portal.**

My Employee Enrollments

17 items • Sorted by Case Number • Filtered by All cases - Status, Check Orgs Enrollment, Case Record Type

Case Number ↑	Enrollment Type	Employee Name	Status	Submitted Date
00145052	Pension Plan		Enrollment Submitted	8/27/2020
00145056	Pension Plan		Enrollment Submitted	8/28/2020
00145078	Pension Plan		Enrollment Submitted	9/10/2020
00145124	Pension Plan US		Enrollment Submitted	10/5/2020
00145127	Pension Plan US		Enrollment Submitted	10/1/2020
00145128	Pension Plan US		Enrollment Submitted	10/13/2020
00145132	Pension Plan US		Awaiting Funding	10/13/2020
00145133	Pension Plan US		Missing/Invalid Information	10/13/2020
00145134	Pension Plan US		Processing	10/13/2020
00145135	Pension Plan US		Closed Enrolled	10/13/2020
00145136	Pension Plan US		Enrollment Complete	10/13/2020

Clicking a column and then the arrow next to the header will allow you to sort the list view by the data in that column (e.g. the Submitted Date column):



Clicking the Case Number will open the enrollment, and you can view your employee's enrollment details.

The Enrollment Details page will provide you with an expanded view of the enrollment case. There are four sections:

1. Case Information

   Here, you will see the basic information on the case.

   - Case Number: The number to use when communicating with Pension Fund about a specific enrollment
   - Contact Name: The employee's name
   - Status:
     - Enrollment Submitted: Enrollment was just submitted and is waiting for initial review by Pension Fund.
     - Missing/Invalid Information: This appears if Pension Fund needs a further review of the enrollment details and must receive additional information from the employee or the organization to continue processing the enrollment.
     - Processing: Enrollment has been reviewed, and all information is complete and accurate. Pension Fund is in the process of enrolling the account.
     - Closed Enrolled: Enrollment is almost complete and is waiting for validation by Pension Fund staff.
     - Enrollment Complete: Validation is complete, and the member will receive the welcome email with access to view their account in the Member Portal.
   - Case Origin: The method of submission (e.g. Member Portal, email)
   - Days Open: How many days enrollment has been open
   - Dates: Date/Time Opened, Date Signed and Certified, and Submitted Date (date the enrollment was submitted to Pension Fund)

Case Information

Case Number	Date/Time Opened
00159348	11/19/2020 12:19 PM

Contact Name	Date Signed and Certified
BOB TEST - CPL Member	11/19/2020 12:19 PM

Status	Submitted Date
Enrollment Submitted	11/19/2020

Case Origin
MemberPortal

Days Open
2

2. Employee Info

Employee Info

Contact Name	Missing/Invalid Information - Employee

Contact Phone	Missing/Invalid Information - Employer
(317) 2224444	

Contact Email
userguide_erportal@testemail.com

- Contact Phone and Contact Email: These fields list the employee's contact email and phone number.
- Missing/Invalid Information – Employee: This field will be blank unless there is something missing from the **employee** that is needed to complete the enrollment (e.g., date of birth, SSN).
- Missing/Invalid Information – Employer: This field will be blank unless there is something missing from the **employer** that is needed to complete the enrollment (e.g., initial funding).

3. Checklist

Checklist

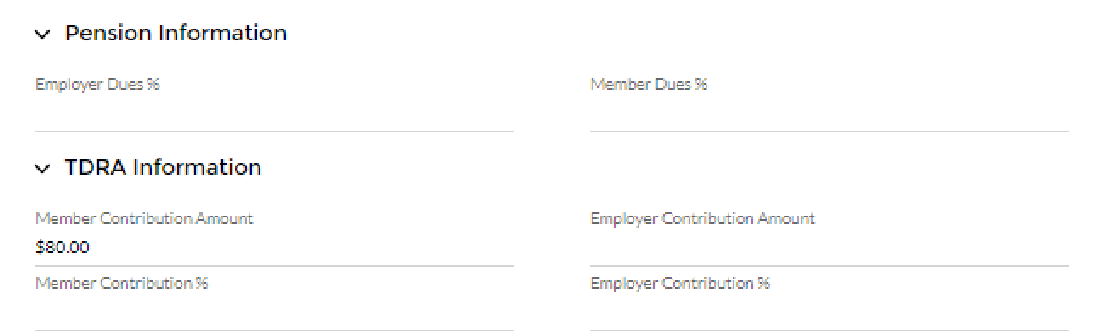
All Forms Received	Signature Received
☐	☐

Payment Received
☐

- The checklist helps you follow the enrollment steps required to complete the enrollment and to change the case's status to Enrollment Complete.
  - If All Forms Received is not checked, this means we are missing a form from either the employee or employer.
  - If Payment Received is not checked, this means we are still waiting on the initial funding from you, the employer. You will need to review the enrollment case and confirm that the contribution information the employee submitted is permitted under your Participation Agreement. If you do not have any

questions or concerns, please submit the initial funding per your normal process. If you have a question on the contribution information before submitting the initial funding, you may submit a support ticket inside the portal under the category “Enrollment Questions”.

4. Pension and TDRA Information



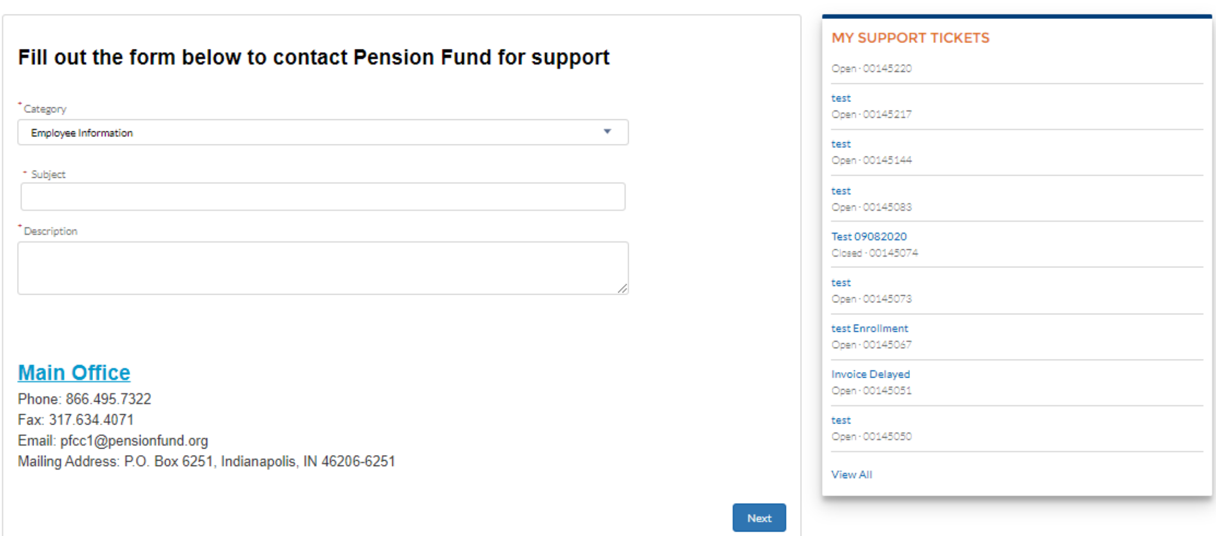
- These sections will be populated (depending on the enrollment type) with the contribution information that the employee provided to outline anticipated initial funding.

4. Support

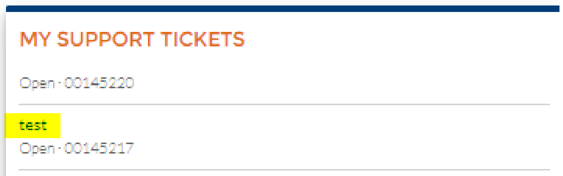
The Support page allows you to submit a support ticket to Pension Fund with questions about any of the following categories:

- Employee information
- Invoices
- General questions
- Enrollment questions
- Other questions

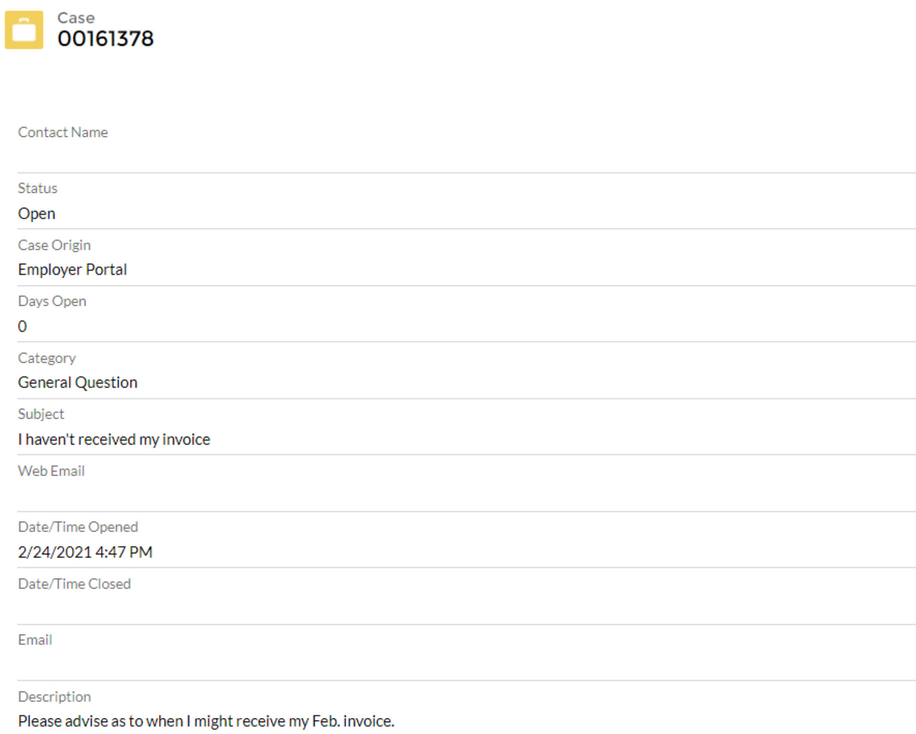
Support Page



After you have created a support ticket, you will see it listed by subject and case number in the list view on the right side of the page, and you will see its status. You can click the blue subject line hyperlink to open the support ticket and view details.



When you create a support ticket, it is assigned a case number. The case number is used to track all requests and enrollments internally at Pension Fund. If you want to follow up on your support ticket, we can easily look up your support ticket by case number and provide additional details about your request and its status.

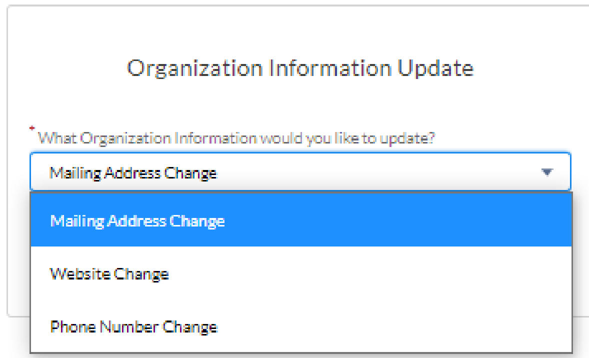


5. Employer Profile

The Employer Profile section lists your organization's information:

- The contact information on this page (phone number and email) should be your main point of contact for all employee-related questions.
- The Employee Participation section lists whether you have an active Participation Agreement (PA) and details the accepted and effective dates.
  - Accepted Date: The date that Pension Fund executed the PA
  - Effective Date: The date on which the organization will offer the benefit(s)

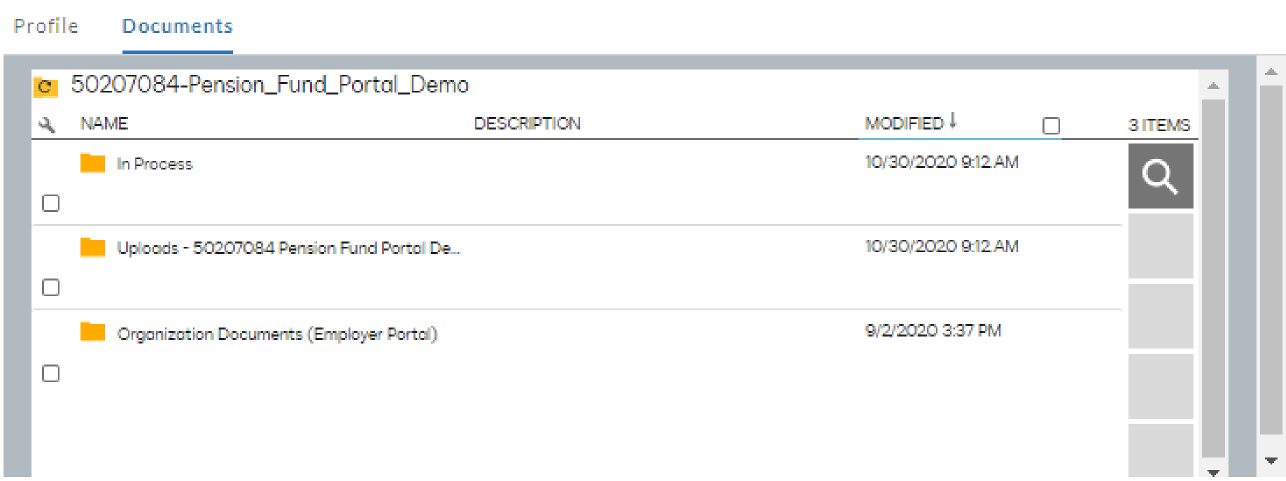
To update your organization's contact information, use the box on the right side.



- If you need to make other changes to the information on this screen, you can submit a support ticket with the updated information.
- **Note:** Mailing Address Change impacts where invoices will be mailed (if applicable). Please make sure this reflects the accurate mailing address.

6. Documents

The Documents section is where you can view and upload important files.

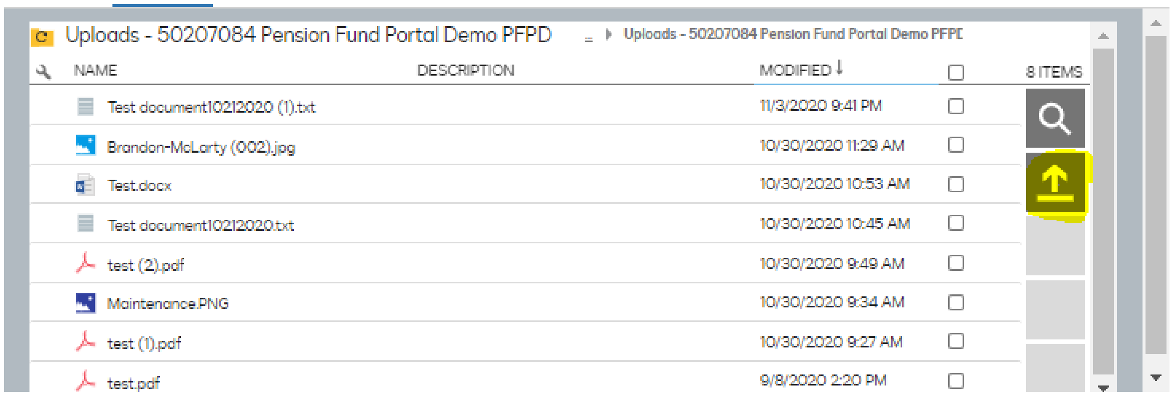


- Uploads: In this folder you can securely upload important documents with Personally Identifiable Information (PII), such as enrollment forms, payment backup, and others.
- In Process: This folder will house all uploaded and reviewed documents while they are processed. After funds are applied for enrollments or payments, the documents will be removed from the In Process folder.
- Organization Documents: Here you can find important documents, such as a copy of your Participation Agreement and Plan Documents.

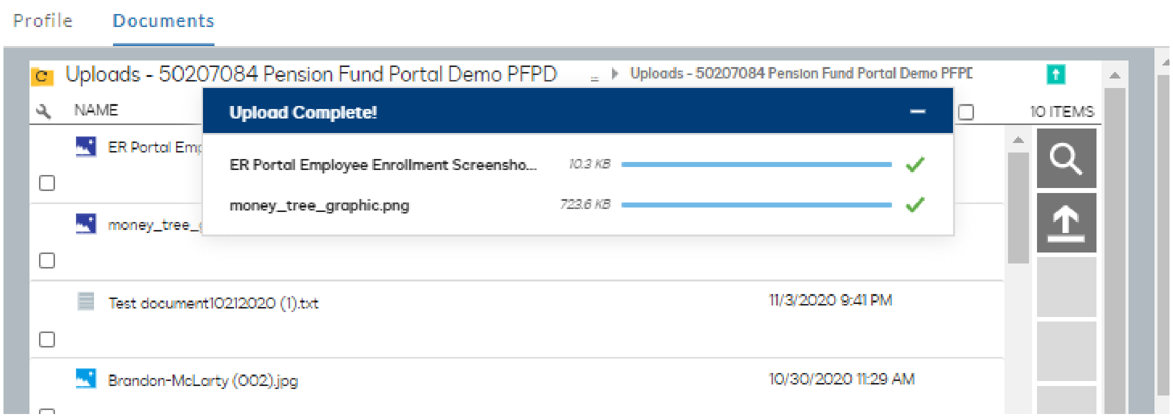
To upload a document, take the following actions:

- Click the Uploads folder.

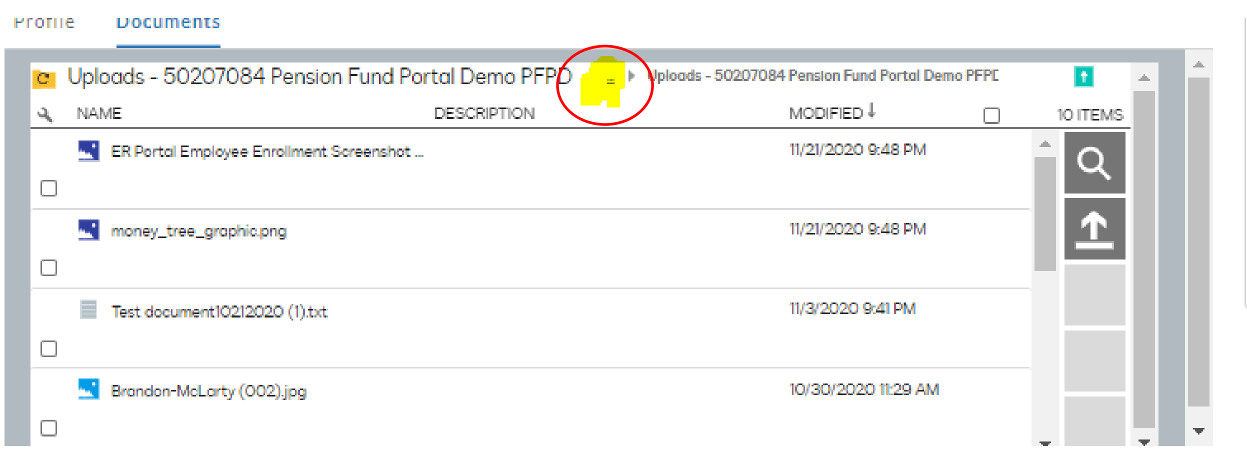
- After the folder opens, there will be an arrow (highlighted below) you will click to upload your document.



- You will select your file from your computer and then click Open.
- After the file has been uploaded, you will see an Upload Complete confirmation screen.



- To return to the folder list and go back a level, click the small dash (highlighted and circled below).



7. Who to Contact for Support

If you have general questions or need help with accessing the Employer Portal, contact our Member Relations team at pfcc1@pensionfund.org or (866) 495-7322.

Your dedicated Area Director is also available for support and to help enroll new employees.