# AccessPlanSponsor
## Frequently Asked Questions

### *How do I log in to my account?*

Click on **AccessPlanSponsor** to begin. Enter your Plan Sponsor ID (using dashes, case sensitive) and seven-digit Personal Identification Number (PIN) in the spaces provided. If you do not know your Plan Sponsor ID or PIN, please email support@cdmretirement.com with your name and the name of the plan you wish to access.

After clicking the "Login" button, a screen confirming your successful login should appear. The name of your plan(s) and the date and time of your last login will be listed. Click on the name of the plan you wish to access.

### *What should I do if my account is locked?*

Email support@cdmretirement.com.

### *How is the website organized?*

After logging in, you will be directed to the Home Page. Seven tabs are listed along the top of the page. Clicking a tab allows you to choose from a variety of menu options that appear on the left panel.

Read the information below for an overview of each tab and corresponding menu options.

**Plan Level Reports:** Information about the plan's total assets in a variety of formats.
Select the report you wish to run and add any parameters, if necessary. The report will appear on your screen. Reports listed below with an asterisk (*) may take some additional time to process and are automatically deferred until ready. When these reports are available for viewing, a pop-up message will appear (if you are still logged on to the CDM site) and will provide a link for the "*Deferred Reports*" section. If you are no longer logged on to the CDM site, you will receive an e-mail notification (if your e-mail address is current in the site's *Maintenance* section) informing you that the report is ready. The e-mail will prompt you to log back in to the site and will then take you directly to the "*Deferred Reports*" section for viewing. You may also access the "*Deferred Reports*" section directly by clicking on the *Information Center* tab.

- ***Summary by Fund*** – Current price, number of shares, and total balance for each investment option.
- ***Summary by Source*** – Vested and total balance by contribution source.
- ***Detail by Fund*** – A breakdown by investment option with contribution source detail.
- ***Detail by Source*** – A breakdown by contribution source with investment detail.
- ***Transaction Detail****– Information about transactions that have been posted to the account (several drop down menus allow you to customize this report).
- ***Plan Account Summary on Demand****– A consolidated statement of plan activity for a specified date range.
- ***Investment Demographics**** – A breakdown of plan assets including the fund ticker symbol, units, cost, and market value along with a participant count for each investment. This report also contains a graphic illustration of the percentage of plan assets by asset class.

**Information Center:** A resource for both industry and plan specific information.

- ***Links to Additional Information*** – Links to helpful websites such as the Internal Revenue Service, the Department of Labor, and the Social Security Administration as well as a place to retrieve important plan documents such as the Summary Plan Description (SPD).
- ***Deferred Reports*** – Reports you have run will appear in this section when they become available.

**Fund Information:** A list of your plan's investment options with links to detailed information.

- ***Fund Links*** – A list of the plan's investment options with links to a summary page and prospectus, where applicable.
- ***Fund Performance*** – A summary and comparison of performance for all available funds.

**Participant Reports:** Review plan activity as a whole and by participant.
Select the report you wish to run and add any parameters, if necessary. The report will appear on your screen. Reports listed below with an asterisk (*) may take some additional time to process and are automatically deferred until ready. When these reports are available for viewing, a pop-up message will appear (if you are still logged on to the CDM site) and will provide a link for the "*Deferred Reports*" section. If you are no longer logged on to the CDM site, you will receive an e-mail notification (if your e-mail address is current in the site's *Maintenance* section) informing you that the report is ready. The e-mail will prompt you to log back in to the site and will then take you directly to the "*Deferred Reports*" section for viewing. You may also access the "*Deferred Reports*" section directly by clicking on the *Information Center* tab.

- ***Completed Transactions*** – View details of web-initiated transactions within a specified date range for all participants or for a specific participant.
- ***Distribution/Loan Status*** – View the status and amount of pending and prior withdrawals and loans.
- ***Employee List*** – View name and Social Security Number for all employees or search for participants based on name, SSN, or date of hire.
- ***Loan Report**** – View a summary of all outstanding and paid off loans in the plan .
- ***Login History*** – View all participants who have logged on to their accounts during the past 90 days.
- ***Pending Web Transactions*** – View requested changes up until the time they are processed.
- ***Participant Searches and Lists*** – Search for participants using a variety of filters.
- ***Participant Balance**** – View a listing of any account in the plan with a balance.
- ***Termination Report**** – View a listing of any account in the plan with a termination date and a balance.
- ***Employee Census**** – View demographic data and balance information for all accounts with a balance in the plan.

**AccessParticipant Site:** Gain inquiry access to any participant account. Access to participant accounts is for inquiry only and transactions cannot be initiated.

**Maintenance:** Reset locked participant accounts, change your PIN, and change your sponsor email address.

- ***Reset Locked Account*** – Unlocks a locked participant account
- ***Change PIN*** – Change the PIN you use to gain Plan Sponsor access
- ***Email Address*** – Change the email address CDM has on record. This will allow you to receive important plan-related messages and deferred report notifications (*please note that participant-initiated address changes will be sent to the e-mail on file in the "Configuration" section, as noted below*).

**Configuration:** Update the e-mail address to which certain participant-initiated changes are made and post plan-wide messages.

- ***Plan Configuration*** – A selection of the following options:
  - *Plan Parameters* – Review the plan's eligibility requirements and entry dates.
  - *Targeted Email/Fax* – This is the e-mail address to which participant changes (such as online address updates) will be sent. Plan Sponsor fax can be updated.
  - *Beneficiary Settings* – This feature will be available soon.
  - *Distributions Settings* – This feature will be available soon.
- ***Create Message*** – Post a message for all participants to read when they log on to their accounts.

***Please Note***

*There are two locations for a plan sponsor e-mail address:*

- *In the "Maintenance" section, where the address will be used only for plan-related messages from CDM and for notification of deferred reports, and*
- *In the "Configuration" section, where the address will be used by CDM to communicate participant-initiated address changes.*

*Each section can have a different e-mail address if you so choose.*

### *How do I change my AccessPlanSponsor PIN?*

Go to the *Maintenance* screen and select "*Change PIN*" from the menu on the left side of your screen.

### *How can I view the Plan's assets broken down by fund or by source?*

Go to the *Plan Level Reports* tab. The first four menu options on the left panel offer different breakdowns of the account - *Summary by Fund*, *Summary by Source*, *Detail by Fund*, and *Detail by Source*. Click on "Printer-Friendly Page" on the bottom left of the screen to format the statement for an 8½ x 11 inch sheet of paper.

### *How do I find out more information about the investment options available in the plan?*

Go to the *Fund Information* page. Each fund will have a link to a Morningstar summary of fund performance information and a current prospectus. Click on the links provided and a new window will open with the information.

### *How can I see a snapshot of the funds available and their historical performance?*

Go to the *Fund Information* tab. Choose *Fund Performance* from the left menu.

### *How do I print a plan account summary statement?*

Go to the *Plan Level Reports* tab and click "*Plan Account Summary on Demand*." Enter a date range and click "Submit Query." Click on "Printer-Friendly Page" on the bottom left of the screen to format the statement for an 8½ x 11 inch sheet of paper.

### *I need a copy of a participant's actual quarterly statement. Where can I print one?*

Go to the *Access Participant Site* tab and enter the participant's name or first few letters of his/her last name. Once you have entered the participant site, go to the *Information Center* tab. Under *Links to Additional Information* click "Quarterly e-Statements." You may view, download, and print any of the statements available in the Statement Archive.

### *Why don't some reports appear immediately after I request them?*

Some reports may take more time to process and are therefore "deferred" until ready to view. These reports are clearly indicated on the site. Once a report is ready for viewing, a pop-up message will appear (if you are still logged on to the CDM site) and will provide a link for the "*Deferred Reports*" section. If you are no longer logged on to the CDM site, you will receive an e-mail notification (if your e-mail address is current in the site's *Maintenance* section) informing you that the report is ready. The e-mail will prompt you to log back in to the site and will then take you directly to the "*Deferred Reports*" section for viewing. You may also access the "*Deferred Reports*" section directly by clicking on the *Maintenance* tab.

### *What is the difference between the e-mail address in the "Maintenance" section and the address in the "Configuration" section?*

In the "Maintenance" section, the address will be used only for plan-related messages from CDM and for notification of deferred reports. In the "Configuration" section, the address will be used by CDM to communicate participant-initiated address changes.

### *How much non-vested employer money is in the Plan's account?*

Go to the *Plan Level Reports* tab and choose "*Summary by Source*" from the left menu. You can compare the difference between Total Account Balances and Total Vested Balances to determine the amount of money that is not yet vested.

### *I have more questions about the website. Is there someone I can talk to?*

You may contact your CDM Plan Consultant by calling 410-823-3788 or toll-free 800-539-6554.