EMPLOYER PLAN ACCESS USER GUIDE

Navigating Key Features

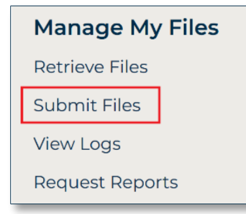
This guide is designed to help you easily navigate the Alerus plan sponsor retirement website, **employer plan access**. Whether you're uploading documents, pulling reports, or updating participant details, you'll find step-by-step instructions and tips that make each task easier.

Log in

Log into **Employer Access**, click **Plan Access,** and select your **Plan ID.**

To Submit Files

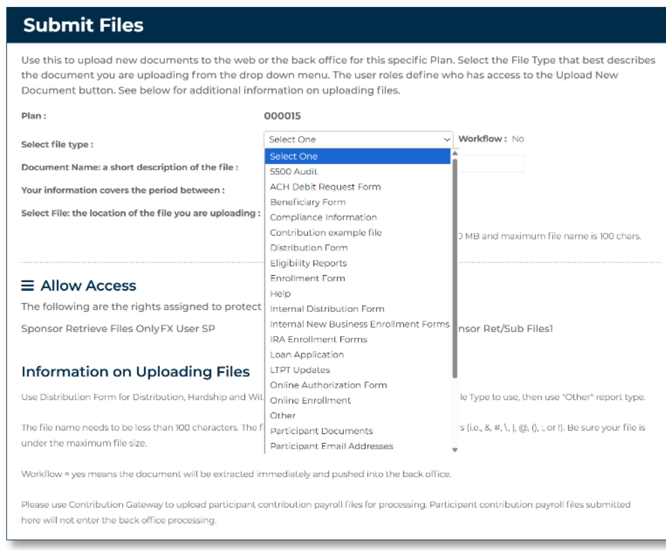
In the left menu under Manage My Files, click **Submit Files.**



Important: *Contribution files should be uploaded using Contribution Submission. Uploading them here will delay processing. Use the Payroll Contribution Submission Guide for step-by-step help – found on the Alerus Resource Center on **alerusrb.com**.*

Select your file type from the drop-down. This helps route your document to the right team or individual. Common file types include:

- Compliance Information
- Distribution Form
- Enrollment Form
- Online Enrollment
- Rollover Form



Add a brief description to help identify the file (e.g., employee name).

Drag and drop your file or click **Browse** to upload.

Click **Upload.**

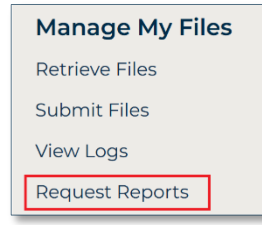
Note: *If you see an error, check the file name length and size. If it still doesn't work, reach out to your Alerus representative.*

What if I select "Other" as the file type?

Choosing "Other" means your document will be routed manually, which can slow things down. Pick the closest match to make sure it gets to the right team quickly. If you're unsure, your Alerus representative can help.

To Request Reports

Under **Manage My Files** in the left menu, click **Request Reports.**



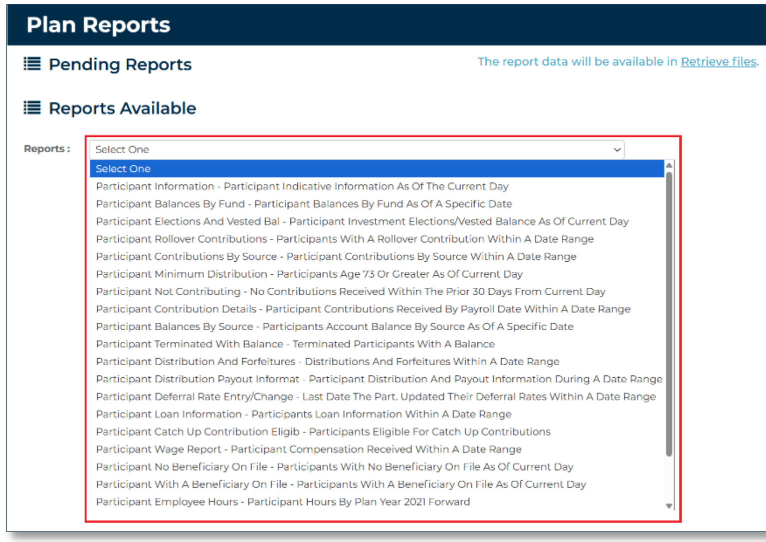
Choose a report type from the list.

Enter a date or range.

Click **Request Report.**

A pop-up will confirm the expected delivery time.

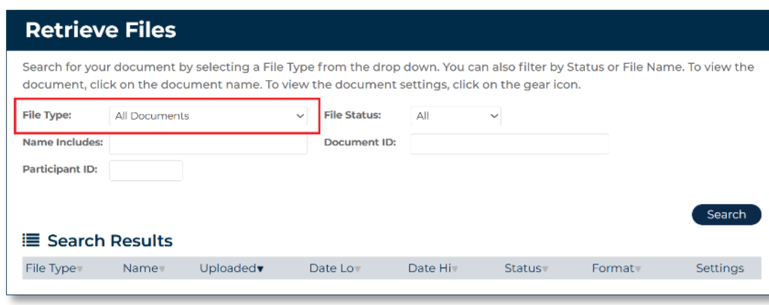
Note: *You can find descriptions of each report at the bottom of the left menu.*



Retrieve Your Report

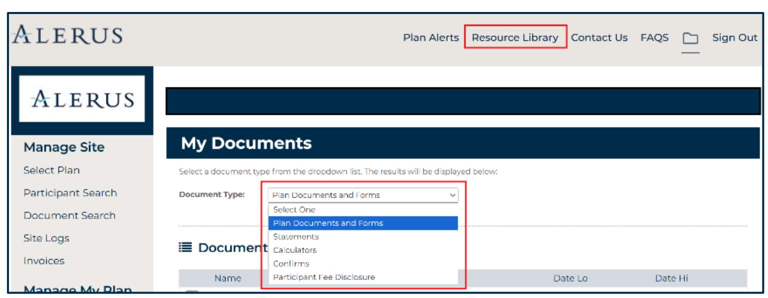
In the left menu, click **Retrieve Files.** Use Search to find recent reports quickly or filter by File Type.

Note: *Some reports may not reflect accurate data if your plan doesn't include features like online beneficiaries or online deferral rate changes. If you're not sure, your Alerus representative can confirm.*



Using the Resource Library

The Resource Library contains all of your current plan documents and forms.
To access, click **Resource Library** from the top menu, use the **Document Type** drop-down to filter.



Common items:

- Plan Documents and Forms
- Participant Fee Disclosure

If you're missing something or not sure which form to use, your Alerus representative can help.

Frequently Asked Questions

Resource Library

Where can I find plan-related documents?

Go to the **Resource Library** from the top menu. You'll find everything related to your plan in one place.

Where can I find the Participant Fee Disclosure?

In the **Resource Library**, use the Document Type drop-down menu and select **Participant Fee Disclosure**.

Where can I find the most current forms?

The latest forms are available in the **Resource Library**. If you're not sure which form fits your situation, your Alerus representative can guide you.

Participant Information

How do I enter a termination date for a participant?

Under **Manage My Participants** in the left menu, click **Select Participant.** Click the **pencil icon** next to the participant's ID (not the PartID link). You can also enter termination dates through a contribution file upload or payroll integration (if your file includes that column).

How do I update an employee's address or email?

You can update this through a contribution file upload or payroll integration (if the file includes those columns). Participants can also update their email directly through their own log-in or by calling the Alerus Client Service Center.

How do I know if an employee has completed online enrollment?

- **Active**: Enrollment complete
- **Enrolling:** Eligible but not enrolled
- **Not Eligible**: No online access

Note: *Rehired employees may appear as Active, even if they're not currently eligible. Let your Alerus representative know when someone is rehired so they can reset the account.*

What if my employee doesn't use computers or smartphones?

They can call the **Alerus Client Service Center** at **800.433.1685** for assistance.

What are the Client Service Center hours?

Monday–Friday: 7 a.m. – 6 p.m. CT (phone and website support)
Saturday**:** 8 a.m. – 1 p.m. CT (website support only)

Where can I find participant documents like statements, confirmations, or 1099s?

Under **Manage My Participants** in the left menu, click **Select Participant.** Click the PartID link to open their account. In the top menu, click the document icon

Investments

Where can I find fund fact sheets?

- Under Manage My Plan in the left menu, click **Investment Performance** tab. Locate the investment and click the blue fund name link.

Reports

Where do I find reports?

Go to **Manage My Files** in the left menu, click **Retrieve Files.** Use Search to bring recent documents to the top, or filter by File Type. Reports appear here after you've requested them or once a document is uploaded.

Fees and Invoices

Where do I find my invoice on the website?

Under **Manage Site** in the left menu near the top, click **Invoices.** You must have invoice access enabled to view this section.

Who do I contact about invoice or fee-related questions?

Your Alerus representative can help clarify charges, provide supporting documentation, or assist with access if needed.

Contact Information

How do I know who my Alerus representative is?

Under **Manage My Plan** in the left menu, click **Plan Features.**

How do I update plan sponsor contacts at Alerus?

Reach out directly to your Alerus representative with the contact information for the person you'd like to update.

How do I give someone access to the plan sponsor website, employer plan access?

Complete the **Employer Plan Access Authorization Form** (found in the Resource Library). Follow the uploading instructions listed under the signature line.

Balances

Where do I find the plan forfeiture balance?

Under **Manage My Contributions** in the left menu, click **Reserve Accounts.** The forfeiture balance is listed at the bottom of the page.

How do I view plan activity within a specific date range?

Under **Manage My Plan** in the left menu, click **Balances.** Click **Activity Summary** and choose your date range. You can view up to 365 days at a time.

Contributions

What should I do if my contribution file is incorrect?

Notify your Alerus representative as soon as possible. They can help correct or delete the file before it's processed or provide the next steps if it is already processed.

Where do I find the confirmation that my contribution file has been submitted?

Go to **Contribution Submission** in the left menu. Locate the submitted file. Click on the **PDF attachment icon** for the submitted file to view the confirmation.