

# iSolved 401(k) Web User Manual

## First Time Log In

To enroll into the plan for the first time follow these steps:

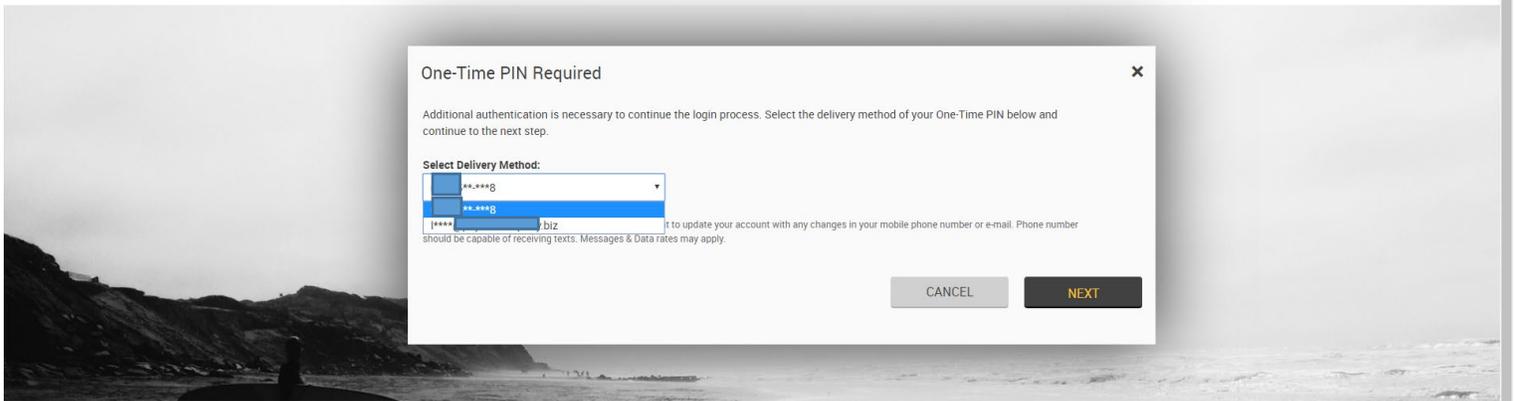
1. Access [www.my401kdata.com](http://www.my401kdata.com)
2. Select "Participant Login" under the Participants Tab
3. Enter your social security number without dashes as your user name.
4. Enter the last 4 digits of your social security number as your password.
5. Select Role = Participant
6. Login

You should change your user name and password after you first log in.

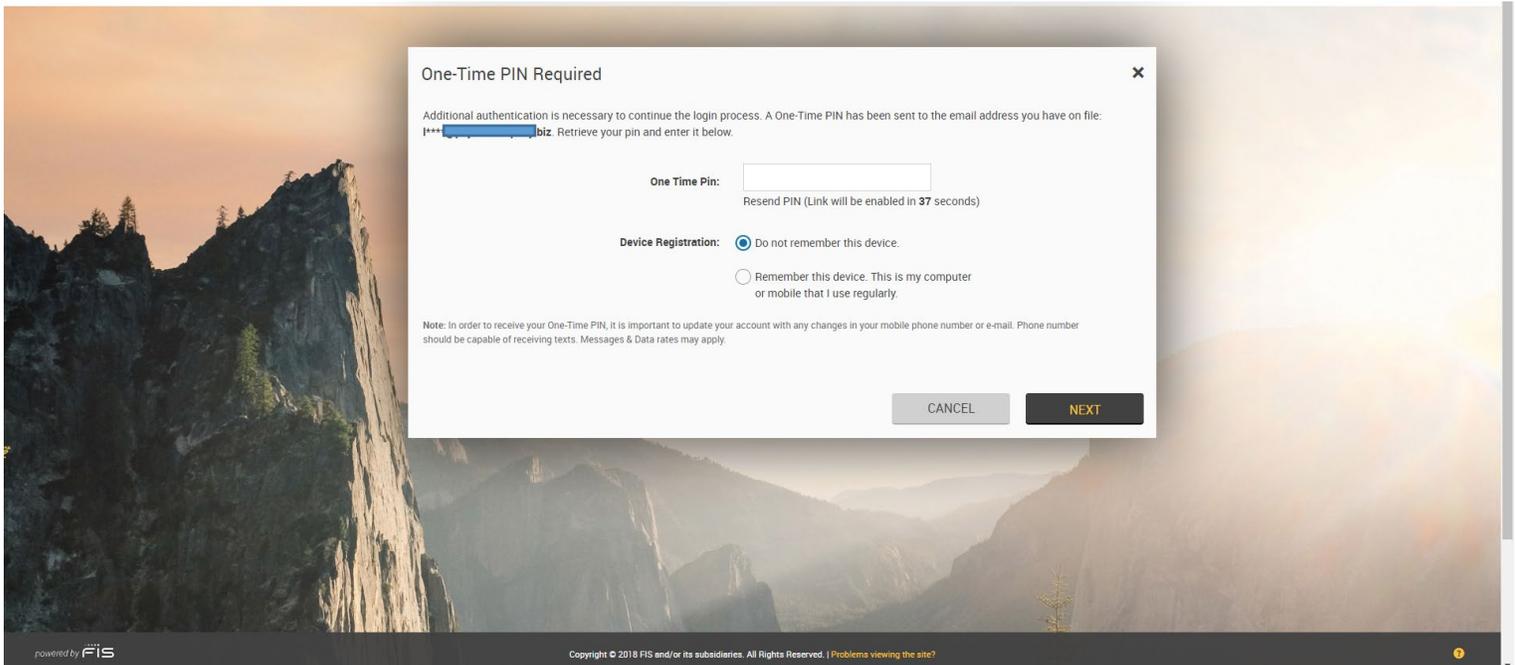
The screenshot shows the iSolved website interface. At the top, there is a navigation bar with the iSolved logo, a phone number (888-505-4484), a search bar, and a 'LOG IN' button. Below the navigation bar is a main banner with a background image of a diverse group of people. The banner text reads 'Welcome PLAN PARTICIPANTS' and 'TPC 401(K) THE PAYROLL COMPANY is now iSolved'. Below the banner is a sidebar menu with the following items: PLAN PARTICIPANTS, PARTICIPANT LOGIN, NEWS AND RESOURCES, PARTICIPANT FORMS, PARTICIPANT FAQ, 401K CALCULATORS (with sub-items: RETIREMENT INCOME CALCULATOR, ROTH 401K VS TRADITIONAL 401K, 401K CONTRIBUTION - IMPACT ON TAKE HOME PAY, RETIREMENT NEST EGG CALCULATOR, RISK PORTFOLIO QUESTIONNAIRE), and EXTERNAL QUICK LINKS. The main content area contains a welcome message and contact information.

Please keep record of User ID and password for future access to your retirement account. Please contact iSolved 401(k) at (888)505-4484 or [401kservice@isolvedhcm.com](mailto:401kservice@isolvedhcm.com) if you need a Password reset.

If you have BOTH an email address and phone number on file with us, you will be asked to pick the device to receive the one time pin on, choose the preferred method and click Next



Once you have selected your device, or if you only have one device on file with us, you will receive the below prompt to enter the One Time Pin that has been sent.



If you do not have an email or phone number on file, you will need to call our participant line at 888-505-4484 to have one generated on your behalf.

Once you have received the Pin – enter it in the One Time Pin field and click Next. If you also elect to choose to have the website remember your device, any subsequent logins will need to be made from the redirect login page:

[www.benefitwebaccess.com/tpc401k](http://www.benefitwebaccess.com/tpc401k)

# Personal Information

Upon logging in you will be prompted to complete the 5 enrollment steps.

## Step 1. Personal Information

- Verify your personal information is accurate and provide a phone number if one is not currently on file
- Enter your email address or additional email addresses you would like on file, indicate which you would like email communications sent to
- Indicate what device you would like one-time pins sent to as a default going forward
- Select a new user name and password
- Choose a verification question and answer for security purposes

### Enrollment steps

Overall Progress: 0% Complete

**1** In order to receive a One-Time PIN, required for authentication while logging into your account, it is important to update your account with any changes in your mobile phone number or email. Mobile phone numbers should be capable of receiving texts. Message & Data rates may apply.

Items marked with an asterisk (\*) must be completed before you can proceed to the next step.

▼ Your Personal Information

<b>First name</b> TEST	<b>Last name</b> EE
<b>Marital status</b> ▼	<b>Birth date</b> 01/01/1970 <input checked="" type="radio"/> Male <input type="radio"/> Female
<b>Street address 1</b>	<b>Street address 2</b>
<b>City</b>	<b>State</b> ▼ <b>Zip code</b> <b>Country</b>
<b>Home phone</b> +1 ▼ Phone Number	
<b>Office phone</b> +1 ▼	
<b>Other phone</b> +1 ▼	

> Email

> Username Information

Overall Progress: 0% Complete

Items marked with an asterisk (\*) must be completed before you can proceed to the next step.

> Your Personal Information

∨ Email

If you would like to receive confirmations of transactions, please fill out the following information:

Home <span style="color: green; font-weight: bold;">Verified</span>	Confirm home email address
<input type="text"/>	<input type="text"/>

Office	Confirm office email address
<input type="text"/>	<input type="text"/>

Other	Confirm other email address
<input type="text"/>	<input type="text"/>

I do not have an email address

Where would you like your emails sent? \*

Home
  Office
  Other
  None
  I do not have an email address

For Security purposes, a One-time PIN is needed for certain functions. Where would you like your One-time PIN sent? Make sure your phone numbers are up-to-date in the Personal Info section above.

Select One-Time PIN Delivery Method

Home email address

I wish to receive my participant statements electronically at the email address specified above  No  Yes

\*Note: Be sure to continue through all steps of the enrollment process until you receive confirmation that your enrollment is complete. If you cancel or close your browser before completing the process, your enrollment will not be processed.

> Username Information

> Security Question

RESET NEXT

Overall Progress: 0% Complete

Items marked with an asterisk (\*) must be completed before you can proceed to the next step.

> Your Personal Information

> Email

∨ Username Information

**Establish your Username** \*

(alphanumeric digits, case-sensitive)

<b>Establish your Password</b>	<b>Re-enter password:</b>
<input type="password"/>	<input type="password"/>

\*Note: Remember your Username and Password. You will need them to access your account via the plan website in the future.

> Security Question

Overall Progress: 0% Complete

Items marked with an asterisk (\*) must be completed before you can proceed to the next step.

> Your Personal Information

> Email

> Username Information

Security Question

Security question 1

- Alternate password/quote
- Alternate password/quote
- What is your mother's maiden name?
- What is your pet's name?
- What city where you born?
- What was your high school mascot?
- What year did you graduate high school? (yyyy)

Answer 1

RESET

NEXT

Click Next

Step 2. Beneficiaries

- Update your beneficiary information (it is not required to complete this step during the enrollment process.)
- Click "ADD" to add additional Beneficiaries. When all are added, click Next.

Overall Progress: 33% Complete

IMPORTANT: If you are married and you wish to elect a primary beneficiary other than your spouse, you will need to complete a hardcopy Beneficiary Designation Form and obtain your spouse's signature. To obtain a copy of this form please contact us at 888-505-4484.

This designation can have important tax and legal effects; you may wish to consult your advisor before continuing.

Beneficiary Designation 1

Items marked with asterisk (\*) must be completed before you can proceed to the next step.

Beneficiary type

Primary

Beneficiary percentage

Name

Relationship

Birth date

Social security number (optional)

Street address 1

Street address 2

City

State

Zip code

Country

DELETE

ADD

BACK

NEXT

### Step 3. Contributions

- Do not update or reset email address on this screen
- Scroll to the bottom of the Contributions screen and make an election under Action
- Make a select under the drop down from each menu bar and hit next
- Make an election regarding Automatic Contribution Acceleration if applicable

## Contributions

Overall Progress: **40% Complete**

Confirmation E-mail Address

A confirmation e-mail will be sent to @.biz  
If this address is incorrect, please correct the address in the fields provided.

Update e-mail address  Confirm e-mail address

Current Contribution Amounts

Last Web/VRU Contribution	Total
Pre-Tax Deferral	\$0.00 per pay period
Roth	\$0.00 per pay period

Change Contribution Amounts  
Please enter a contribution percentage or dollar amount that your employer will deduct from your compensation each payroll period for deposit to your account.

> Rules and Criteria

Days to complete request:

Action	Contribution Type	Percent/Dollar	Current Contribution	New Contribution Rate
<input type="text" value="No change"/>	Pre-Tax Deferral	<input type="text" value="Percent"/>	Not contributing	<input type="text" value="0.00"/> per pay period
<input type="text" value="No change"/>	Roth	<input type="text" value="Percent"/>	Not contributing	<input type="text" value="0.00"/> per pay period

Automatic Contribution Acceleration

Automatically increase my pre-tax contributions by  %  on  and  until I am deducting a maximum of

Automatically increase my ROTH contributions by  %  on  and  until I am deducting a maximum of

Click Next

## Step 4. Investment Election

- Do not update or reset email address on this screen
- Enter the desired percentage - The total allocation percent must equal 100%. The Investment Portfolios are listed first.

### Select Investments



Overall Progress: **50% Complete**

The investment elections you enter below will be applied to all sources of contributions (including any employer contributions). Please note that once you have completed the enrollment process, you can always change your investment elections. For more information, please contact your plan administrator once you have completed the enrollment process.

[Review Fund Performance and Prospectuses](#)

I elect to invest all future contributions (including employee and employer contributions) as follows.

Confirmation E-mail Address

A confirmation e-mail will be sent to the address listed below. **[REDACTED]@[REDACTED].biz**

If this address is incorrect, please correct the address in the fields provided.

Update e-mail address:

Confirm e-mail address:

RESET

> Rules and Criteria

∨ All Sources

Investment	Asset Class	Current Elections	New Elections
Aggressive	Investment Product	0.00%	<input type="text" value="0.00 %"/>
Conservative	Investment Product	0.00%	<input type="text" value="0.00 %"/>
Highly Aggressive	Investment Product	0.00%	<input type="text" value="0.00 %"/>
Moderate	Investment Product	0.00%	<input type="text" value="0.00 %"/>
Risk Averse	Investment Product	0.00%	<input type="text" value="0.00 %"/>
Vanguard Federal Money Market Fund Inves	Money Market-Taxable	0.00%	<input type="text" value="0.00 %"/>
DFA Inflation-Protected Securities Portf	Inflation-Protected Bond	0.00%	<input type="text" value="0.00 %"/>
Vanguard Short-Term Inflation-Protected	Inflation-Protected Bond	0.00%	<input type="text" value="0.00 %"/>
DFA Five-Year Global Fixed Income Portfo	World Bond	0.00%	<input type="text" value="0.00 %"/>
DFA International Real Estate Securities	Global Real Estate	0.00%	<input type="text" value="0.00 %"/>
DFA U.S. Large Cap Growth Portfolio Inst	Large Growth	0.00%	<input type="text" value="0.00 %"/>
DFA U.S. Small Cap Growth Portfolio Inst	Small Growth	0.00%	<input type="text" value="0.00 %"/>
Vanguard 500 Index Fund Admiral Shares	Large Blend	0.00%	<input type="text" value="0.00 %"/>
DFA U.S. Large Cap Value III Portfolio	Large Value	0.00%	<input type="text" value="0.00 %"/>
DFA Emerging Markets Core Equity Portfol	Diversified Emerging Mkts	0.00%	<input type="text" value="0.00 %"/>
DFA Large Cap International Portfolio In	Foreign Large Blend	0.00%	<input type="text" value="0.00 %"/>
DFA International Small Company Portfoli	Foreign Small/Mid Blend	0.00%	<input type="text" value="0.00 %"/>
Vanguard Mid-Cap Growth Index Fund Admir	Mid-Cap Growth	0.00%	<input type="text" value="0.00 %"/>
Vanguard Real Estate Index Fund Admiral	Real Estate	0.00%	<input type="text" value="0.00 %"/>
DFA U.S. Targeted Value Portfolio Insttt	Small Value	0.00%	<input type="text" value="0.00 %"/>
<b>TOTAL</b>		<b>0.00%</b>	<b>0.00%</b>

If you do not provide investment directions for your contributions, they will be defaulted to the **Moderate** until you provide other investment instructions. Once amounts are defaulted, it is your responsibility to realign them in accordance to your investment elections. For more information, please contact your plan administrator.

RESET TABLE

BACK

NEXT

Click Next

## Step 5. Confirmation

- Review your Enrollment information
- Click “Submit”
- You will receive a confirmation number if completed

### Enrollment steps

Print

Overall Progress: **66% Complete**

Confirm & Submit

If your enrollment information is correct, click below to submit your enrollment request.

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Personal Information [Edit](#)

<b>Username:</b> testpart1	<b>Marital status:</b>
<b>First name:</b> Demo	
<b>Last name:</b> Employee	
<b>Street address 1:</b> 123 Main Street	<b>Home phone:</b> () -
<b>Street address 2:</b>	
<b>City:</b> Anytown	<b>Other phone:</b> () -
<b>State:</b> WI	<b>Home email address:</b> abc123@test.com
<b>Zip code:</b> 53813	
<b>Country:</b>	
<b>Date of birth:</b> 01/01/1976	<b>Send email confirmation to:</b> Home

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Security Question

<b>Security Question 1</b>	<b>Answer 1</b>
What is your mother's maiden name?	TEST

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Salary Deferral Elections [Edit](#)

<b>Pre-tax contributions</b>	Deduct 0.00 each pay period.
<b>After-tax contributions</b>	Deduct 0.00 each pay period.
<b>Roth 401(k) contributions</b>	Deduct 0.00 each pay period.
<b>Automatic contribution acceleration</b>	
<b>I do not want to use pre-tax acceleration</b>	
<b>I do not want to use Roth acceleration</b>	

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**Beneficiary** Designations [Edit](#)

Primary Beneficiary

<b>Name</b>	<b>City</b>
<b>Beneficiary percentage</b> 0.00%	<b>State</b>
<b>Relationship</b>	<b>Zip code</b>
<b>Birth date</b>	<b>Country</b>
<b>Home Address</b>	<b>Social security number (optional)</b> XXX-XX-
<b>Street address 1</b>	
<b>Street address 2</b>	

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Investment Elections [Edit](#)

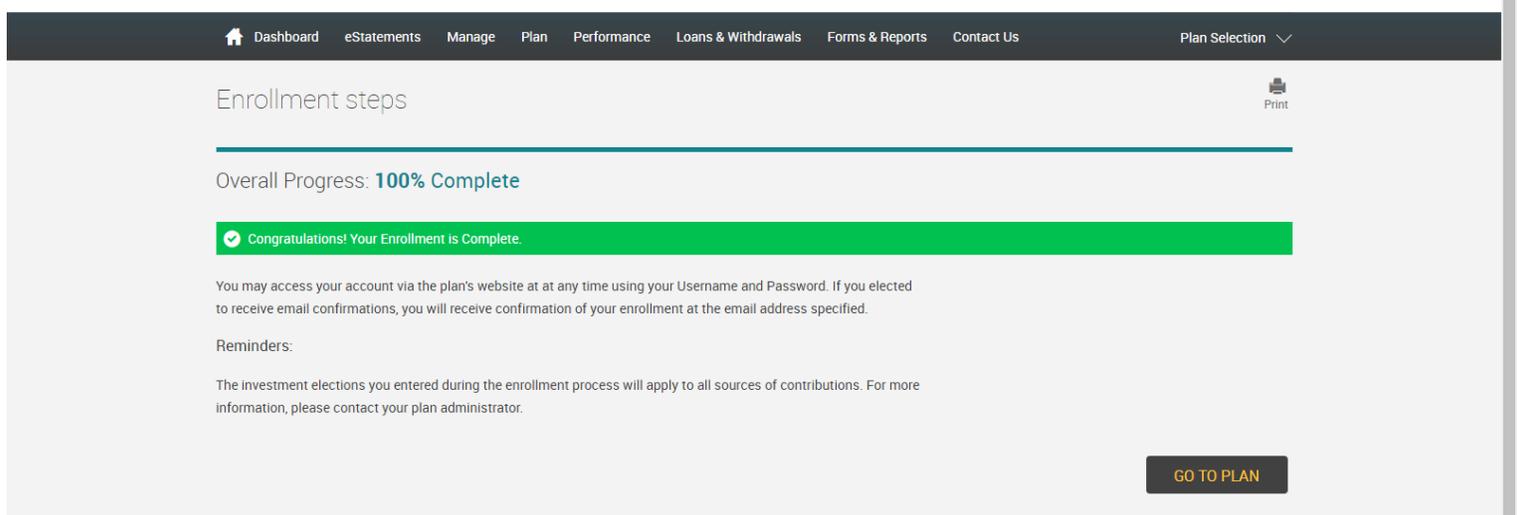
All future contributions to the plan will be invested as follows:

**Moderate** : 100.00%

If your enrollment information is correct, click below to submit your enrollment request.

**SUBMIT**

Upon completion of the enrollment process, a final screen will confirm your enrollment and allow you to click “Go To Plan” to access the plan website.



If there are any important messages about your plan, it will be signified by this symbol in the upper right hand corner of your screen  - Click on this symbol to review. These notices should be reviewed and cleared after reviewing

To update either your personal information, beneficiary info or user id/password, click on this symbol in the upper right hand corner of your screen 

To log off the website, click on this symbol in the upper right hand corner of your screen 

# Dashboard Tab – will provide an overview of your account

Dashboard eStatements Manage Plan Performance Loans & Withdrawals Forms & Reports Contact Us Plan Selection

### My Dashboard

Print

#### Account Balance

\$0.00

\$0  
Vested Balance

MANAGE INVESTMENTS

#### Contribution Rate

Pre-tax 0%

Roth \$0

CHANGE CONTRIBUTION RATE

### My Portfolio

View: Overview Performance model: 1-year

Investment Name	Fund ID	Performance	From My Paycheck	Balance
> Moderate		-1.92% <span style="color: red;">+</span>	100%	\$0.00

# Manage Tab – Manage Investments – to select one of these actions, click the box of the applicable topic

When making ANY change, ensure you receive a Confirmation banner with a Confirmation number to ensure the change has been accepted.

Dashboard Close Participant eStatements **Manage** Plan Performance Loans & Withdrawals Forms & Reports Message Board

Plan Selection ▾

## Manage Investments Print

Your Balance  
**\$0.00**

Vested Balance \$0.00

### Change Elections



The funds you put the money from your paycheck into.

### Move Money



Transfer the money in your account between the funds in your plan.

### Rebalance



Make the balance match your existing target or set a new one.

### Change Contributions



Change how much money you put in your account from your paycheck.

### My Portfolio

View

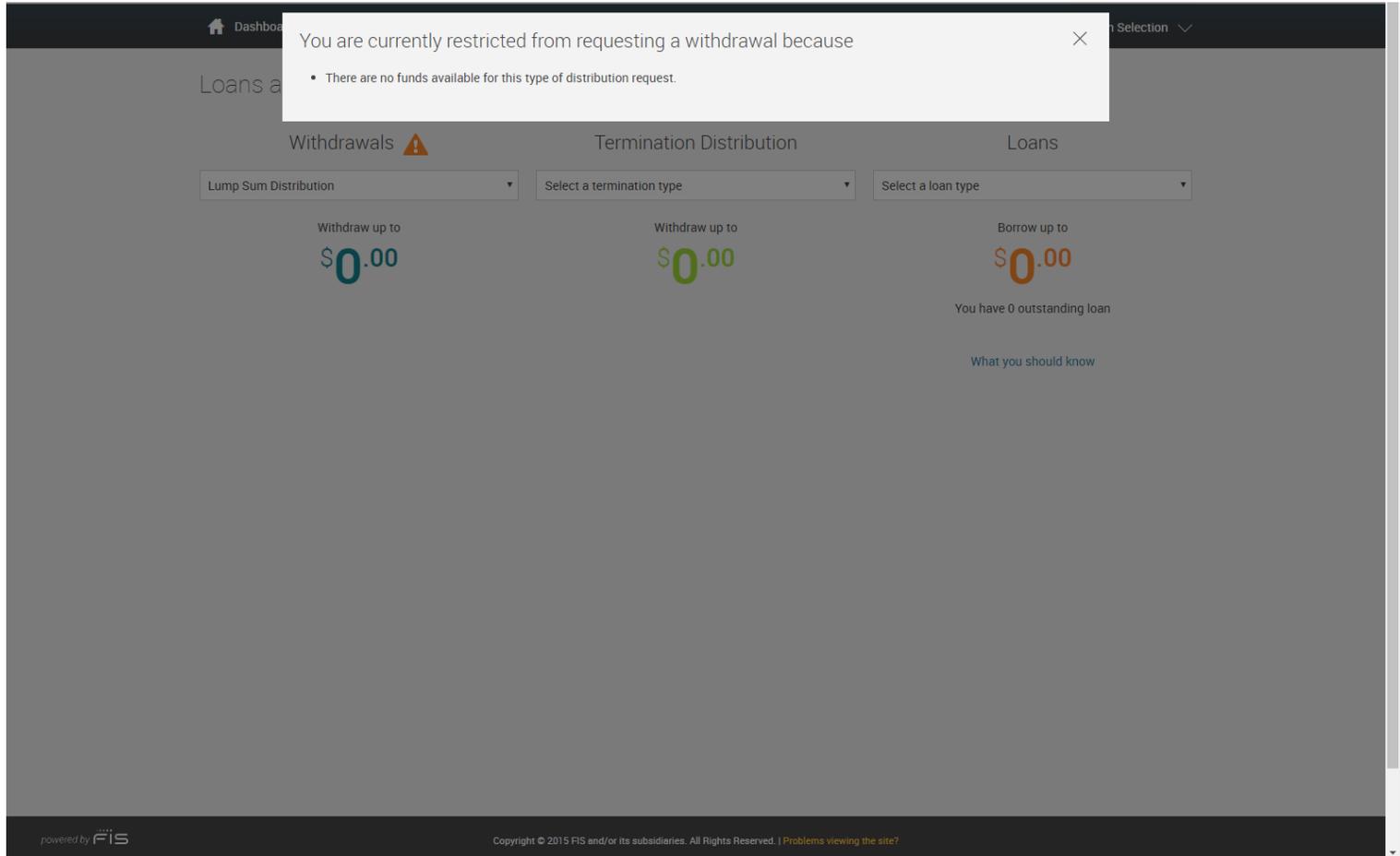
Overview ▾

Investment Name	Fund ID	Price	Expense	Asset Class	From My Paycheck	Balance
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**Loans & Withdrawals Tab** – this tab will allow you to initiate an Inservice Withdrawal, Termination Distribution or a Loan – if any of these are allowed on your plan (or allowed to be initiated via the web).

When requesting ANY type of transaction, ensure you receive a Confirmation banner with a Confirmation number to ensure the change has been accepted.

If a transaction is allowed by the plan but you aren't currently eligible, click on the  for a description of why you aren't eligible for that transaction type.



The screenshot shows a web dashboard interface for a financial plan. At the top, there is a navigation bar with a home icon and the word 'Dashboard'. Below this, the main content area is titled 'Loans and Withdrawals'. A modal message box is open, displaying the text: 'You are currently restricted from requesting a withdrawal because' followed by a list item: 'There are no funds available for this type of distribution request.' Below the modal, there are three main sections: 'Withdrawals' (with a warning icon), 'Termination Distribution', and 'Loans'. Each section has a dropdown menu for selection and a 'Withdraw up to' or 'Borrow up to' amount of '\$0.00'. The 'Loans' section also includes the text 'You have 0 outstanding loan' and a link 'What you should know'. At the bottom of the page, there is a footer with the text 'powered by FIS' and 'Copyright © 2015 FIS and/or its subsidiaries. All Rights Reserved. | Problems viewing the site?'.

## Quick Reference Guide

### **Web Tabs**

eStatements Tab – this tab will open a screen that will list up to your 4 most recent quarterly statements – click on each link separately to access the applicable statement

Plan Tab – this tab has the Retirement Calculator

Performance Tab – Rate of Return – will show your personal rate of return on a specific investment

Performance Tab – Investment Returns – shows the historical performance of the investments within the plan

Forms & Reports Tab – Reports – this is where you can elect to only receive electronic statements or both electronic and hardcopy via mail.

Forms & Reports Tab – Forms – this tab is where all of the participant forms and required notices are located (ie: Distribution at Termination form, Rollover In Form, Annual Notices, etc)