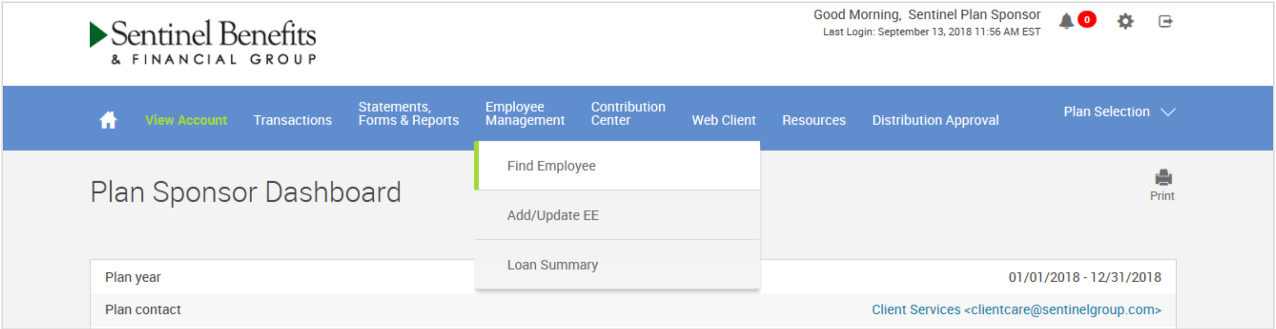
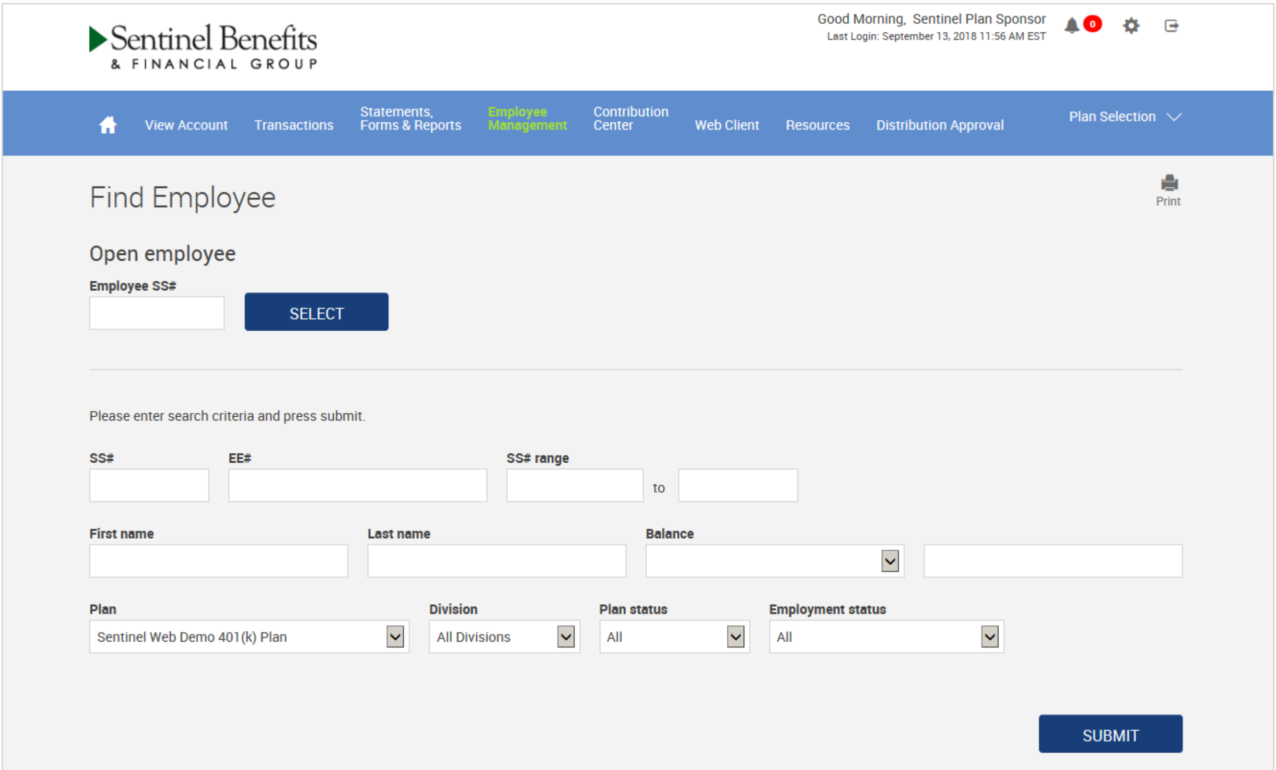
Searching for/Updating Employee Account Information

If you are looking to research participant information/transactions or assist a plan participant make changes to their account, such as contribution election changes, investment changes, request a loan or withdrawal or to just update some personal information, you do this through the Sponsor site by doing the following:

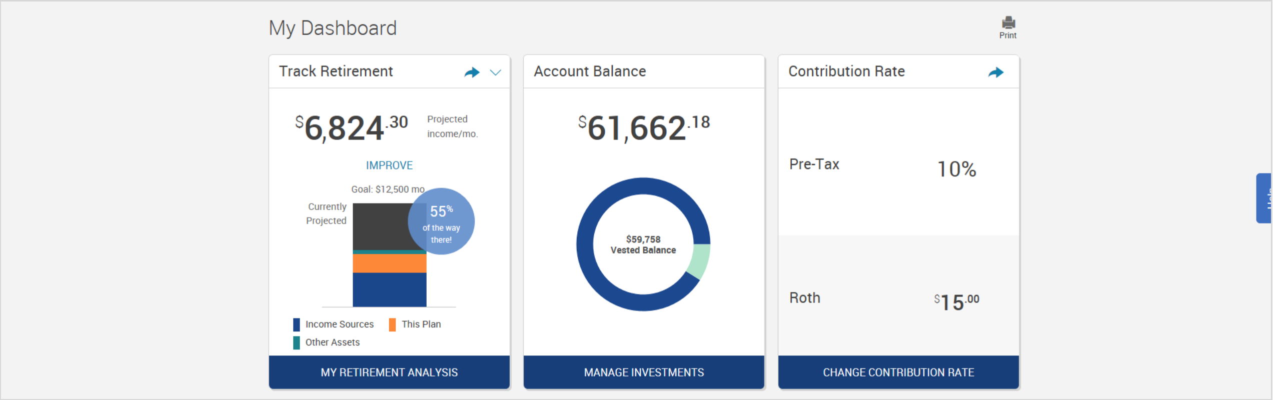
1. The navigation strip across the top of your sponsor dashboard has the following option: **Employee Management**. Hover over this option and select **Find Employee**.



2. Search by **Last Name** by typing into the Last Name field and select " **Submit**". Once you see your employee, click on their social security number.



3. You should now be on the employees dashboard where you can select any of the menu options – as if you were the participant themselves.



4. If you are looking to make personal information changes, in the upper right of your screen you should see an icon that looks like a person's silhouette.

5. Select this gear icon and select **Personal Info**. Update any applicable information and select "**Submit**".

6. Any saved changes should trigger a notification to the participant of the changes made (provided an email address is part of their personal information).