

Managing Your Plan's Eligibility and Enrollment Process is Easier than Ever.

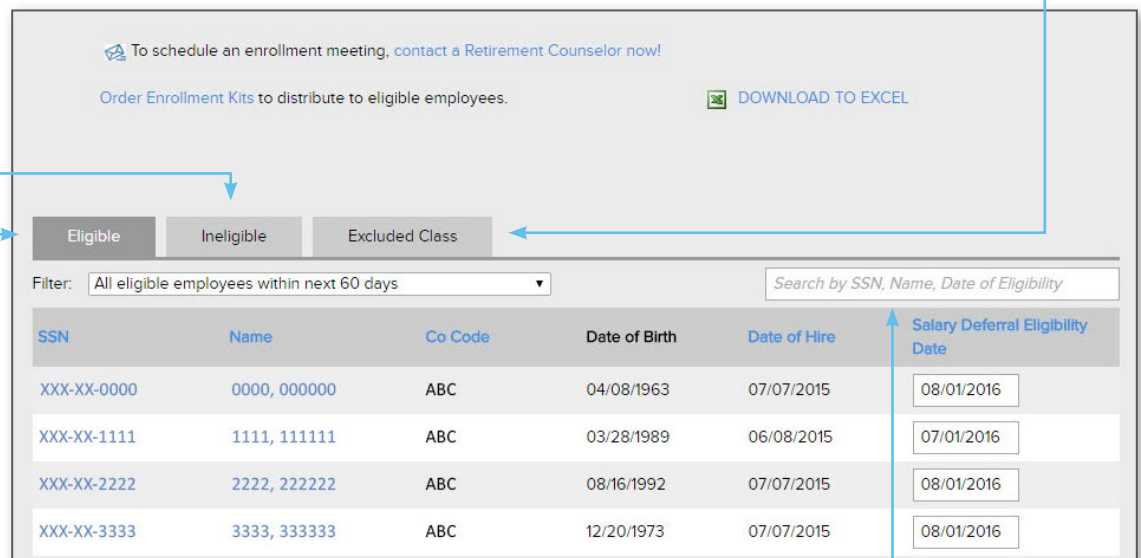
Enhanced Eligibility and Enrollment Screen

Keeping track of which employees are eligible to enroll in your company's retirement plan is no longer a time consuming task thanks to the newly enhanced Pending Enrollment Screen on your Plan Sponsor Website (www.mykplan.com/sponsor). New functionality allows you to easily view Eligible employees as well as other groups of employees within your company who may not currently meet your eligibility requirements.

If your plan has exclusions, employees you have coded in payroll as "excluded" will display on the 'Excluded Class' tab. To change or correct an employee's exclusion status, submit the update via payroll.

Review the 'Ineligible' tab regularly. If an employees is missing or has invalid dates, they will be listed here until updates are submitted.

View employees by category for an easier review.



To schedule an enrollment meeting, contact a Retirement Counselor now!

Order Enrollment Kits to distribute to eligible employees. [DOWNLOAD TO EXCEL](#)

Eligible Ineligible Excluded Class

Filter: All eligible employees within next 60 days

SSN	Name	Co Code	Date of Birth	Date of Hire	Salary Deferral Eligibility Date
XXX-XX-0000	0000, 000000	ABC	04/08/1963	07/07/2015	08/01/2016
XXX-XX-1111	1111, 111111	ABC	03/28/1989	06/08/2015	07/01/2016
XXX-XX-2222	2222, 222222	ABC	08/16/1992	07/07/2015	08/01/2016
XXX-XX-3333	3333, 333333	ABC	12/20/1973	07/07/2015	08/01/2016

Note: If required by your Plan, you must affirmatively approve the eligibility date displayed on this page by clicking on the "Approve" button. You will also need to review the 'Unapproved' tab for employees with a past 'Salary Deferral Eligibility Date' that you never approved, and take action accordingly. Remember, ADP will not send a Welcome Letter to unapproved employees.

Search by SSN, Name, or Date of Eligibility.

View/update Salary Deferral Eligibility Dates that will be used for Welcome Letters, Compliance Testing and IRS/DOL Reporting Forms.

Additional Resources

For more details on your role and responsibilities as Plan Administrator, visit the Plan Sponsor Website to access:

- Training Videos, located in the Education Center under 'Resources'
- Plan Administration Manual and Special Updates, under 'Resources', 'Plan Information', 'Plan Documents'

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ADP Retirement Services 71 Hanover Road, Florham Park, NJ 07932

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