PLAN GATEWAY
PLAN SPONSOR WEBSITE

Log in to our sponsor website by following these easy steps:

1. Go to **alerusrb.com** and click **Login** in the upper right corner of the screen.
2. Enter your plan sponsor Username and temporary Password. Click **Sign In**.
3. Next, you will be presented with documents describing electronic consent and terms of use. Review and click the **Accept** button to continue.
4. On the next screen, reset your temporary Password by entering your Username and clicking **Send Code**. An email will be sent to you with a verification code.
5. Enter the six-digit verification code you receive via email, confirm your new Password and click **Submit**.
6. On the next screen, select a phone number and method (text or call) to have a code sent to verify your identity. Click **Submit**.
7. Enter the six-digit code you receive via text or call and click **Submit**.
8. Select **Plan Gateway** and click **the Plan ID** to access Plan and Participant information.

PLAN GATEWAY HIGHLIGHTS

MANAGE MY PLAN

SUMMARY
- Monitor alerts for timely updates and notices.
- At-a-glance summary of plan assets, last contribution, plan participation, web usage, and participant balances by age..

PLAN FEATURES
- Highlights features in the plan and the next scheduled realignment dates.

BALANCES
- View by investment, source, or asset class.
- Query and download activity, see **Investment Changes**.

INVESTMENT PERFORMANCE
- Historical fund performance, investment prices, fund fact sheets, and current market and prospectus information.

MANAGE LOANS
- Query loans by status (current, new, past due, or paid).
- View payment history and amortization schedules.

CHECK DISBURSEMENTS
- Search disbursements by SSN, date, or type.
- Expand to see payee name and address.

MANAGE MY CONTRIBUTIONS

CONTRIBUTION GATEWAY
- Upload and review contribution files.

CONTRIBUTION DEPOSITS
- Browse contributions by source, trade, or payroll date.
- View **Deposit Received**.

RESERVE ACCOUNTS
- View **Reserve Balances**, **Account Summary**, and **History**.

MANAGE MY PARTICIPANTS

SELECT PARTICIPANT
- Search by full or partial name or by SSN.
- Edit participant information (address, date of birth, date of hire, date of term, or date of rehire).

PENDING ACTIVITY
- View current and scheduled transactions.

VIEW STATEMENTS
- View participant statements.

MANAGE MY FILES

RETRIEVE FILES
- Use the **Plan Forms/Documents** drop-down menu to download forms (enrollment, distribution, beneficiary, and more).
- Use the **Payroll Reports** drop-down to retrieve weekly files, including new loans, rate changes, and new enrollees.

SUBMIT FILES
- Upload confidential information here. Choose a **Report Type** using the drop-down menu. Enter description of the file and attach your document.

VIEW LOGS
- View transactions and web activity.

REQUEST REPORTS
- Request participant reports.

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