EMPLOYER PLAN ACCESS

ACCESS AND HIGHLIGHTS

1. Go to **alerusrb.com**, click **Login**, select **Employer Access**, then click **Go**.
2. Enter your plan sponsor Username and temporary Password. Click **Sign In**.
3. Next, you will be presented with an electronic consent form and terms and conditions. Review and click **Accept**.
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 code you receive via email and click **Submit**.
6. On the next screen, select a phone number/email to have a code sent to verify your identity. Click **Submit**.
7. Enter the six-digit code you receive and click **Submit**.
8. Select **Plan Access** and click the **Plan ID** to access plan and participant information.

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 UPLOAD

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 hire).

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.

ALERUS

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