BPAS Participant Portal Guide

The BPAS Participant Portal is a great tool to help you get on the road to financial security. This guide provides an overview of the interactive website features available to help manage your account. Actual options and links available in your account may vary depending on your plan's configuration, design, and features.

Main Tab	Description
Home	• **At-a-Glance: a** dashboard displaying account balance, investment balance mix, rate of return, and other features based on account type, plus a rotating block of announcements with quick links • **Messages:** view important account messages
My Account	**Summary -** • **Balance:** view account balance total and details by investment or source • **Activity:** personalize the transaction details report within a selected date range, filtered by category, source, fund, etc.; view confirmations; and review any daily pending transactions • **Statements:** personalize a statement on demand or browse quarterly benefit statements • **History:** view a 5-year historical look at your account balance per quarter-end; run personalized rate of return for a custom date range
	Contributions - (for plans using online enrollment) • **Current:** view a dashboard of your year-to-date progress • **Change:** change your per-paycheck contribution amount
	Investments - • **Research:** review investment details, fund performance, any restrictions, fact sheets and prospectuses • **Make Changes:** realign your account—with options to rebalance, elect investments for future contributions, and transfer investments
	Rollovers - • **Incoming Rollovers:** review information to consolidate retirement accounts
	Loans - • **History:** view loan status and historical information • **Loan Options:** model and request a traditional loan or select the MyPlanLoan option, if available
	Withdrawals - • **Request Withdrawal:** review available options and request a withdrawal • **History:** view the status of a current request and view past withdrawal information
Planning	• Explore the BPAS University Financial Wellness Center (external site)
Library	• General information, holiday calendar, newsletters, transaction policy, education, plan documents and notices, survey, and more
My Profile	**Personal:** personal demographic data, update email address and mobile number
	Account Security: change password/security questions
	Go Green: change preferences to opt out of paper statements, confirmations, and notices
	Beneficiaries: for plans using Online Beneficiary Designation, designate the primary and secondary beneficiaries for your account; otherwise, complete and print the beneficiary form to submit to HR.

Questions? We're here to help.

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