

Defined Benefit: Benefit Statement System Introductory Guide for a Plan Sponsor

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The purpose of this Introductory Guide is to help new or occasional system users become familiar with the Defined Benefit: Benefit Statement System. After reviewing this guide a user should be able to view the benefit statement for all participants; assist participants to view their statements and assist participants if they forget their passwords.

This Introductory Guide includes the following sections:

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1. What is the Defined Benefit (DB): Benefit Statement System?

The DB: Benefit Statement System is a web-based system that supports a plan participant's access to the plan benefit statement on line. The participant may view, save and (if a printer is available) print the statement.

2. How is the DB: Benefit Statement System accessed by the Plan Sponsor?

To access the DB: Benefit Statement System, you must first sign in. Your Plan Administrator will provide you with your sign in information. Refer to the Sign In Procedures and Related Features document for details. After you have signed in, the BLAZE SSI Applications page will appear:

[User Info](#) [Sign Out](#)



BLAZE SSI Applications

[Sys#68 Defined Benefit: Benefit Statement](#)

[Sys#79 Sign In Maintenance](#)

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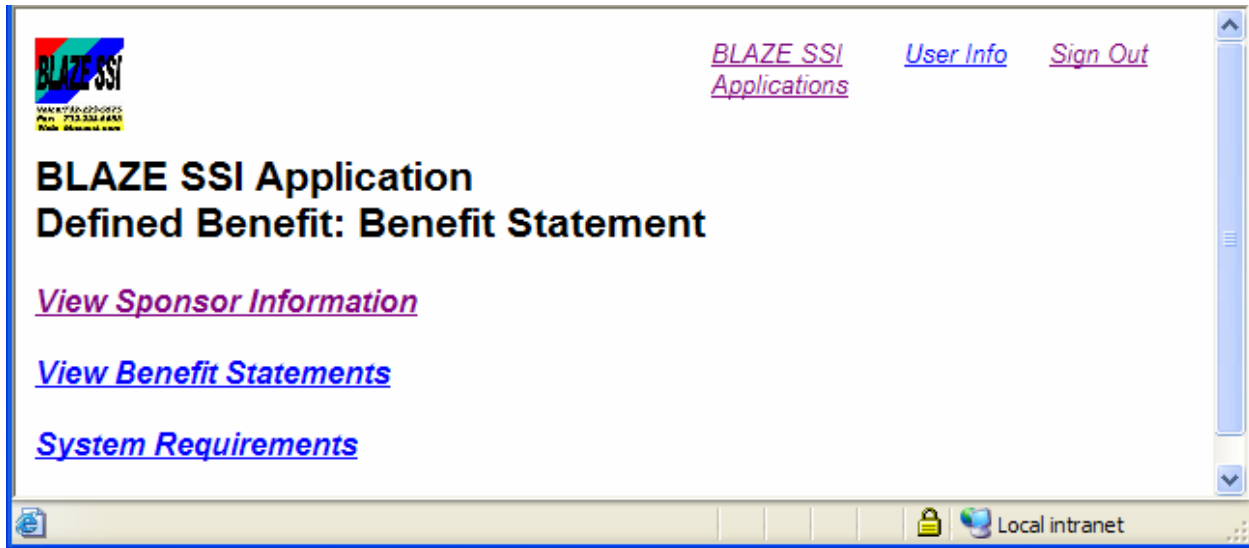
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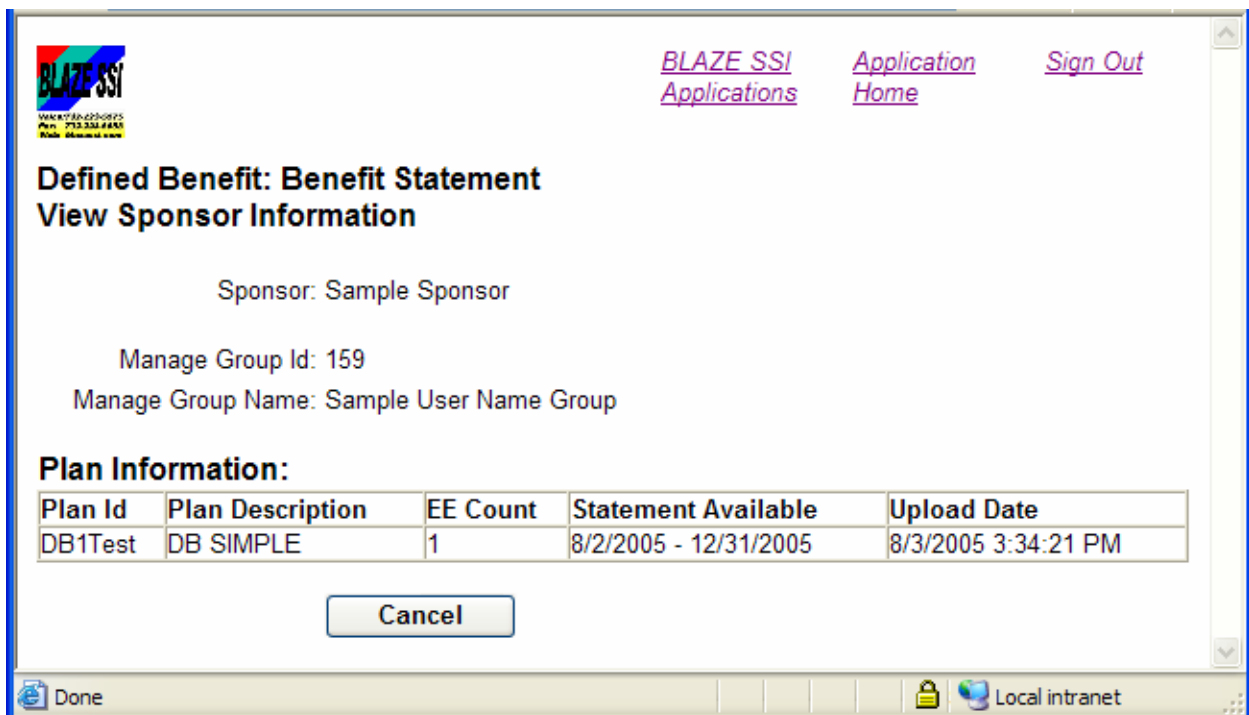
Done Local intranet

Click on the Sys#68 Defined Benefit: Benefit Statement link and the Application Home page will appear:



3. View Sponsor Information

Click on the View Sponsor Information link from the DB: Benefit Statement System Application Home page. The View Sponsor Information page allows you to view the sponsor information as well as other basic plan information.



The sponsor's 'Manage Group Id' is shown here: The sign in 'Group Id' for all participants is the 'Manage Group Id' of the sponsor.

The dates that the statements will be available for viewing is also shown here: In this example the statements may be viewed from 8/2/2005 to 12/31/2005.

Click 'Cancel' or 'Application Home' to return to the Application Home page.

4. View Benefit Statements

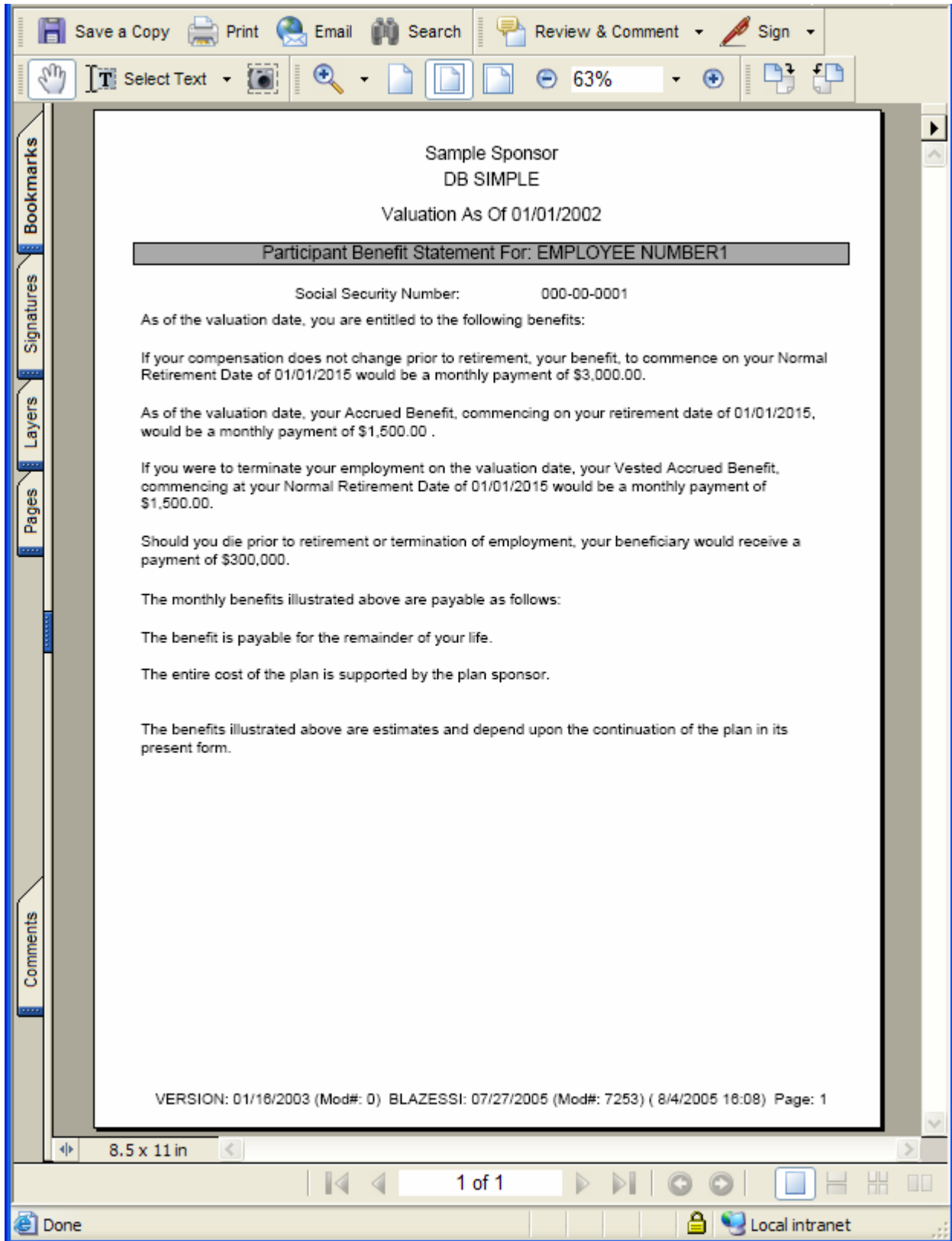
Click on the View Benefit Statements link from the Defined Benefit: Benefit Statement System Application Home page.

The screenshot shows a web browser window with the following elements:

- BLAZE SSI** logo in the top left corner.
- Navigation links in the top right: [BLAZE SSI Applications](#), [Application Home](#), and [Sign Out](#).
- Page title: **Defined Benefit: Benefit Statement View Benefit Statements**.
- Form fields:
 - Select Plan:** A dropdown menu with 'DB1Test - DB SIMPLE' selected.
 - Select Statement:** A dropdown menu with 'NUMBER1, EMPLOYEE' selected.
- Buttons: **View** and **Cancel**.
- Bottom status bar: 'Done' on the left and 'Local intranet' on the right.

The View Benefit Statement page allows you to view the benefit statement for a specific participant by selecting the plan and the plan specific participant. If the Plan Sponsor has more than one plan, use the drop down box to select the plan. If there is only one plan, that plan is pre-selected.

Select the desired participant from the Select Statement dropdown boxes and then click on 'View' to view the selected benefit statement. Click the back button to return to the prior page.



5. General links

These links appear on some or all of the system's pages:

BLAZE SSI Applications

Click this link to go to the BLAZE SSI Applications page where you can access other BLAZE SSI web-based applications.

User Info

Click this link to go to the Sign In Information page where you can view or change your sign in information such as Sign In Name and Password. Please refer to the Sign In Procedures and Related Features document for details.

Sign Out

Click this link to start the BLAZE SSI web-based applications sign out process. When this process is completed you will be sent to the Sign Out page which will confirm that you have signed out successfully.

Application Home

Click this link to go to the DB: Benefit Statement System Home page.

6. System Requirements

Click on the ***System Requirements*** link from the DB: Benefit Statement System home page to view the current DB: Benefit Statement System requirements.

7. Sign In Maintenance

Use **BLAZE SSI Applications > Sign In Maintenance > Sign In Information** to view/change participants passwords. This is helpful if a participant forgets his/her password.

Some tips on using this function:

- If there are not many participants, you may simply click the 'Search' button (without entering any data) and all the participants will be listed.
- After selecting one participant and clicking the **View** link, the system queries for 'your Sign In password'. This is not the employee's password, but the current user's password.

For added security, it is recommended that the participant change their password the first time they access the system.