ALLEGIANCE ADVANTAGE

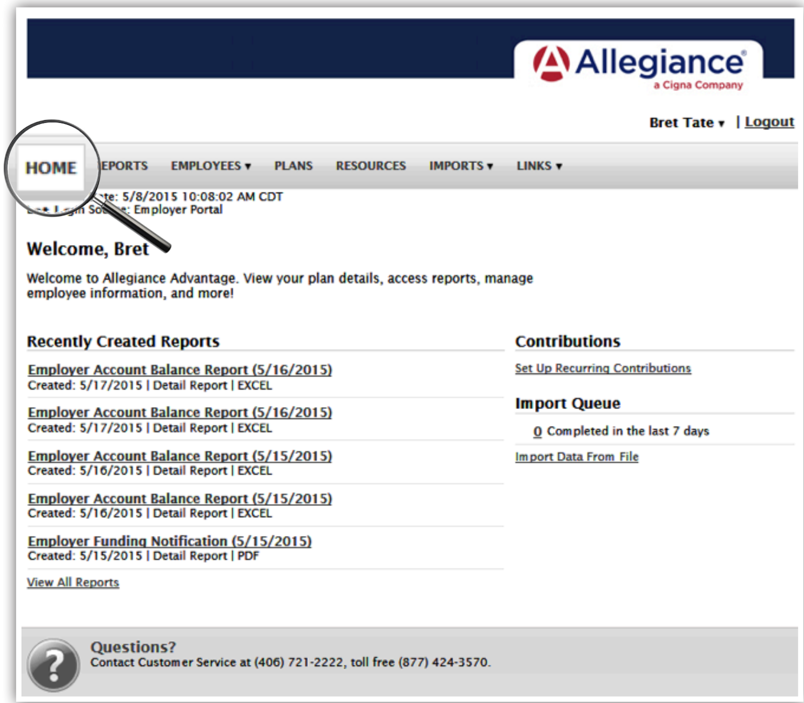
EMPLOYER QUICK START GUIDE

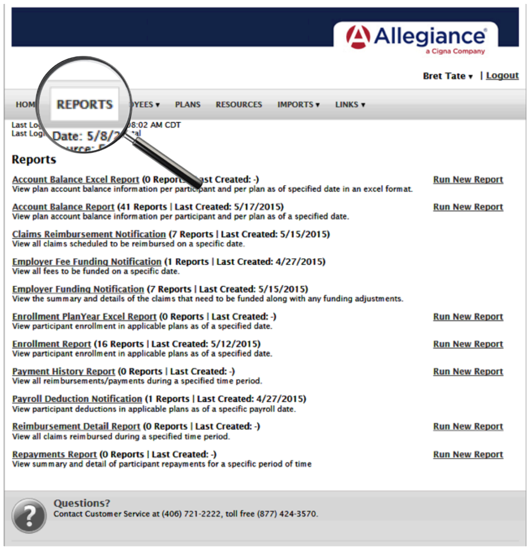
HOW DO I ACCESS THE HOME PAGE?

1. You and your assigned contacts will be sent a username and a password. You may also decide the access rights for each assigned contact.

Everything you need is found on the home page. You will see a history of the reports and notifications with quick links to the latest versions. You can:

- View employee level data
- Check status of file imports
- Read plan documents
- Download forms



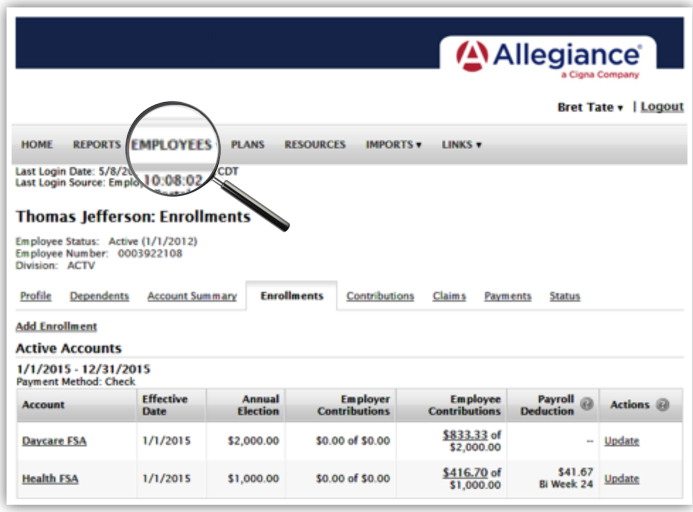


HOW DO I VIEW REPORTS AND NOTIFICATIONS?

1. Under the **Reports** tab is a list of all available reports that can be viewed.
2. Select the relevant enrollment, financial, contribution or plan information report you wish to view.
3. If there is a report you need, but do not see, please contact your Allegiance representative to request it.

HOW DO I ADD/ENROLL/ UPDATE EMPLOYEES?

1. Locate the **Employees** Tab.
2. Select **Add Employee**.
3. Enter the personal and employment information.
4. Click **Add Employee**.
5. In the confirmation section, click **Add Enrollment**.
6. Select the plan and click **Enroll**.
7. Enter the effective date and election/employer contribution.
8. Click **Add Enrollment(s)**.

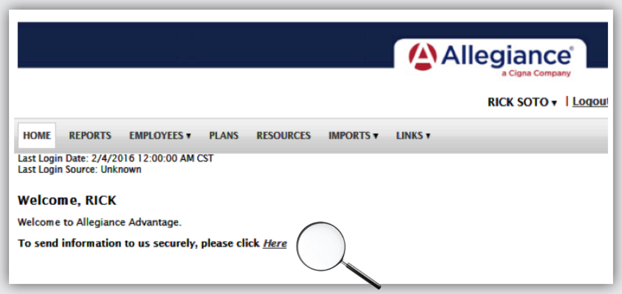


HOW DO I ACCESS MY PLAN INFORMATION?

1. Under the **Plans** tab, you will find options to view the same information as the employees for all active and inactive plans.
2. Information available includes:
   - Plan summaries
   - Plan details and rules

HOW DO I ACCESS FORMS?

1. Under the **Resources** tab, you can download and print forms and access any other documents or custom materials.



HOW DO I SEND MY PAYROLL CONTRIBUTION INFORMATION TO ALLEGIANCE?

If you are currently sending your payroll contributions by file, through the import tab, or have set up auto-posting with Allegiance, you may continue your current procedure.

For all others, please follow the steps outlined below.

1. Compare the detail page of the Payroll Deduction Notification with your actual payroll data.
2. Copy and paste the data from the detail page of the notification (with any corrections) or the data from your payroll report into the **Contribution Template**. The template may be through the **Secure Upload** area on the Employer Website Home Page.

An example of the completed **Contribution Template** is below.