

Plan Gateway: Sponsor Website



Easy, secure access to your retirement plan information is important! Log in to our sponsor website by following these easy steps:

1. Go to alerusrb.com.
2. Click **Login** in the upper right corner of the screen.
3. Enter your **User ID** at the User ID prompt. Continue to the next page and enter your **Password**. For your initial log in, use your **Temporary Password**.
4. Select and answer the **Security Questions**, then click **Continue**.
5. 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, and web usage.

PLAN FEATURES

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

BALANCES

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

INVESTMENT PERFORMANCE

- Historical fund performance, investment prices, and current market and prospectus information.

MANAGE LOANS

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

REVIEW CONTRIBUTIONS

- Browse contributions by source, trade, or payroll date.
- Download to CSV file.

CHECK DISBURSEMENTS

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

MANAGE MY PARTICIPANTS

SELECT PARTICIPANT

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

PENDING ACTIVITY

- View current and scheduled transactions.

MANAGE MY SITE

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.

UTILITIES

- View transactions and web activity.

REQUEST REPORTS

- Request participant reports in CS.

For more information contact The Open Plan Group:

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