

Below is the information on how to access and use our secure interactive website.

The PlanSponsorLink website can be found at:
<https://plansponsorlink.com/tpa>

First Time Users

If you have not used the PlanSponsorLink website before, you will need to set up your account by selecting the “First Time Users” link at the web address noted above. You will be asked to enter your email address. The system will send a secure password to the email address you provided. Once you receive the password, you will be prompted to create a personalized password.

Please note that your USER NAME is your EMAIL ADDRESS you provided.

Even though the PlanSponsorLink website is rather intuitive, we suggest you review an important video regarding website navigation that is located in the upper right-hand corner’s drop down menu under your name.

Please note the following tabs:

My Active Tasks:

If we are waiting for year-end data from you, this section will show the status of your active tasks.

Data Collection:

This will show the history of data we have previously collected from you.

Documents:

This tab will show the documents we have saved for you on the website, which may include copies of annual reports, Form 5500, and annual notices.

Secure File Exchange:

We may send files to you through secure file exchange, and you may also upload files to us through this secure file exchange.

If you forget your password:

You may go to the log in screen and select “Forgot password?” or contact us to have your password reset.

