

PRO TIPS:

Master the MyRPB for Employers portal

Start your session

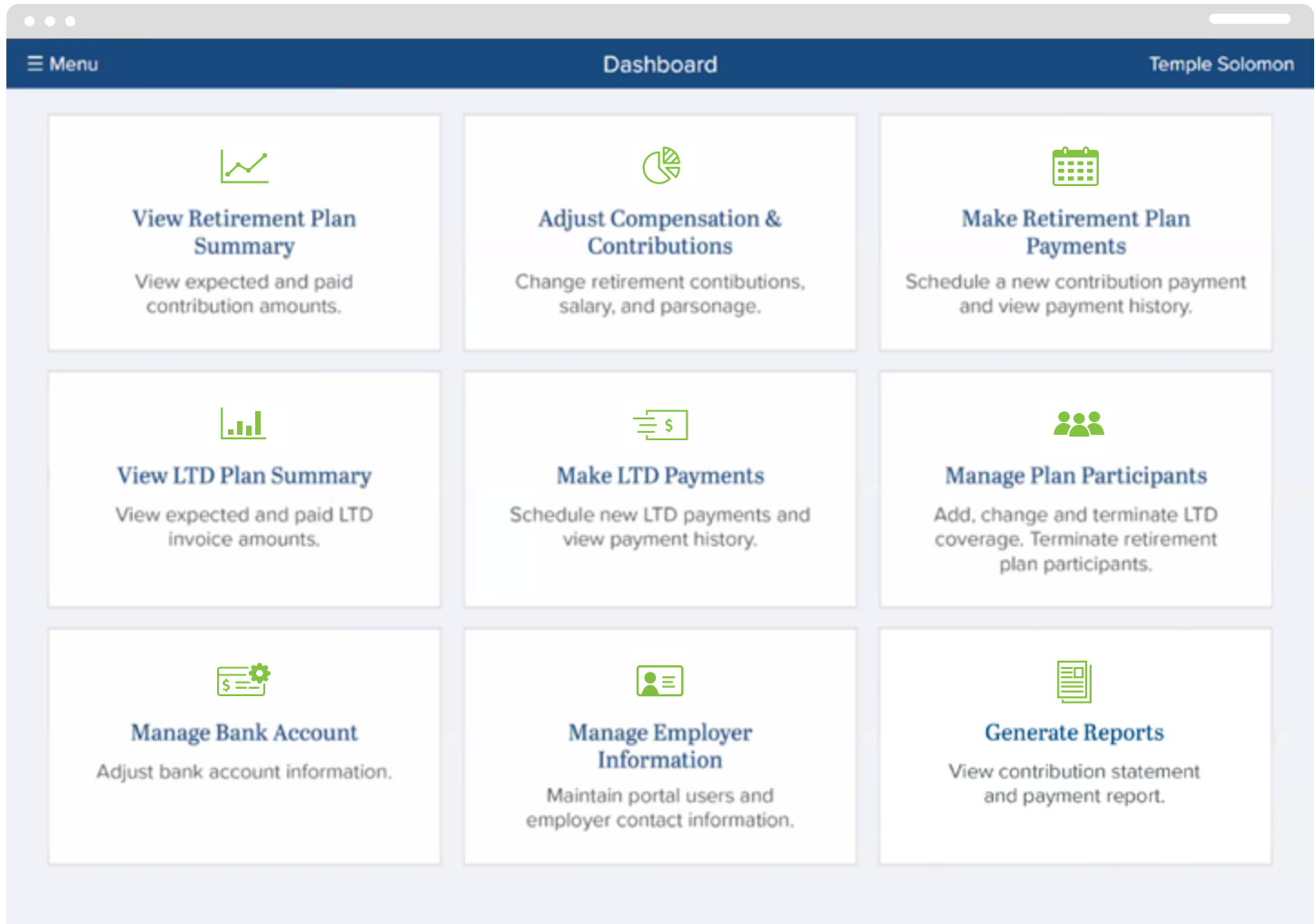
Login and go!

To access your MyRPB for Employers portal:

1. Go to www.rpb.org and click the "LOG IN" button in the top right corner of the homepage.
2. Click "LOG IN" under the "EMPLOYERS" heading.
3. Enter your username (assigned by RPB) and password. Then click the "log in" button to access the portal landing page with employer notices, resources, and the dashboard link.
4. Click "TAKE ME TO THE DASHBOARD" to manage your employees' retirement and insurance benefits.

The Dashboard

The Dashboard is your home base and where you'll start each session. It has nine tools that allow you to manage employees' retirement and LTD plans and take care of general administrative tasks. To use a tool, select the corresponding tile. Switch between tools easily by clicking "MENU." There is no back button.



Note: Manage Bank Account and Manage Employer Information tools are exclusive to Portal Administrators. Only eligible employers in the U.S. will see the full dashboard.

Tools

RETIREMENT

View Retirement Plan Summary

This is where you see participants' expected and paid contributions for a given Plan Year. Easily switch between Plan Year (July 1 through June 30) and Calendar Year to keep an eye on those contributions.

Adjust Compensation and Contributions

Before scheduling contribution payments to RPB for your employees, make sure to enter their latest compensation and contribution details on this screen. It's important to keep this information current for smooth and accurate transactions.

Expand a participant's record by clicking the chevron (>) icon. Once expanded, you can either add a record or edit a record. Here's when to use each function:

- **ADD RECORD**

- At the start of every Plan Year (or your Fiscal Year), add a new record with the appropriate effective date for each participating employee—even if the information isn't changing—so RPB knows the data is up-to-date.
- At any other time during the year, add a new record when: 1) an employee enrolls in the Plan or 2) a participant's compensation or contribution information changes. (You'll also need to add the new effective date for that change.)

- **EDIT RECORD**

- Only edit the current record when you need to correct information that is retroactive to the original effective date.
- Enter all amounts as annual values (12 months). The system will automatically calculate the prorated amounts for you, when necessary.

Make Retirement Plan Payments

After you've entered a participant's compensation and contribution data, you'll be able to make retirement plan contribution payments electronically from your organization's bank account. You can create a recurring payment schedule or make a one-time payment.

- **CREATE OR REPLACE A PAYMENT SCHEDULE**

- A payment schedule lets you set up recurring contribution payments for each employee for the entire Plan Year. The system will automatically calculate your payments based on the expected contribution amount for the full Plan Year divided by your chosen payment frequency.
- There is a range of payment frequencies to choose from. You can use a different payment frequency for employer contributions and employee contributions.

(Continued on next page)

Tools (continued)

- If you want the amount of each payment to be the same for the entire schedule (to align with your payroll, fiscal year, or for another reason), edit the system-generated payment amount *before* you create the schedule:
 - On the Payment Preview screen, click “EDIT PAYMENT AMOUNT.”
 - Next, modify the periodic payment amount and click “SAVE.”
 - Then click “CREATE PAYMENT SCHEDULE” to finish setting up automatic contributions.
- Payment schedules are only valid for the current Plan Year which ends June 30 each year. You must create a new payment schedule for each new Plan Year.
- If you make changes to employee compensation or contributions during the Plan Year:
 - The system will automatically update any remaining payments in the schedule in Make Retirement Plan Payments.
 - Updated payments will be placed on hold for your review. You must review the payments and release the hold before they can be processed.
 - Expand the participant’s payment record and click “RELEASE FROM HOLD.”
 - Use the Replace Schedule feature to quickly release multiple payments placed on hold or edit the dollar amounts of the payment schedule. The remaining payments of the old schedule will be replaced with the new schedule you created.
- **MAKE A ONE-TIME PAYMENT**
 - You can schedule a one-time payment for one or more participants.
 - One-time payments are not automatically updated when compensation or contribution information changes or you terminate employees from the retirement plan. You must edit—or cancel and reschedule—the payment.
 - Use one-time payments to pay off balances from prior Plan Years or terminated employees.

IMPORTANT:

- If you want to schedule contribution payments for the entire Plan Year, use the payment schedule feature instead of the one-time payment option.
- Be sure to select the correct Plan Year and Payroll Calendar Year when scheduling payments.
- Payroll Calendar Year is the year the employee contribution is deducted from payroll. The system defaults to the calendar year you make the payment unless you change it. Do not combine payments from different Calendar Years.
- When the STATUS field on the screen says “Ready” it means the payment is in line to be processed. You’ll also receive email notifications when payments are being processed.

Tools (continued)

LONG-TERM DISABILITY

View LTD Plan Summary

This provides an overview of your employees who are currently enrolled in RPB's LTD insurance plan as well as the premium amounts due.

Make LTD Payments

This is where you schedule LTD premium payments when they are due.

To view the premium amount for your employees, click the blue "MAKE LTD PAYMENT" button at the top right of the screen. From there, you can schedule the premium payment.

Learn more about LTD and RPB's other insurance offerings at rpb.org/insurance-explainer.

ADMINISTRATIVE

Manage Plan Participants: Add, change, and terminate benefits

This provides an overview of all your employees active in the retirement plan, LTD plan, or both. It is where you will add, change, or terminate benefits for your participating employees or add new employees. Here's how it works:

- Click "ADD NEW PARTICIPANT" at the top right corner of the screen to enroll employees who are not yet in any RPB plan and want to join the retirement plan, LTD plan, or both.
- Click "+ADD RET" in the Actions column for employees who are already enrolled in the LTD plan and want to join the retirement plan.
NOTE: Enrollment in the retirement plan requires RPB review and approval before you can enter compensation and contribution data and schedule payments.
- Click "+LTD" in the Actions column to enroll employees in the LTD plan who are either already in the retirement plan or who only want LTD coverage.
 - When adding LTD coverage, you must also enter the employee's compensation, dating back to their start date. To do this, click "\$ADJ COMP."
- For retirement and LTD plans, make sure the employee's compensation information is up-to-date. If it is not, you can update it by clicking "\$AJD COMP" and filling in their updated compensation information.
- **Terminate benefits:**
 - To terminate an employee who will be leaving or has left your organization from either plan, click "TERMINATE." Then enter the required data including the current or future termination date.
 - To end LTD coverage without terminating an employee, click "END LTD" during the December open enrollment period so that the coverage does not renew.

Looking for a step-by-step guide to enrolling employees in RPB's retirement plan? Visit rpb.org/enrollment-explainer.

Tools (continued)

Manage Bank Account

(For administrators only)

This is where you add or update your bank information for ACH payments.

To change your organization's bank account:

- Remove the current payment method by clicking the orange "REMOVE PAYMENT METHOD" button.
- Add a new payment method by clicking the blue "ADD PAYMENT METHOD" button.
- The new account will be available for use after you verify two small deposits into your account. This typically takes 1 – 3 business days.

Manage Employer Information

This is where you update the primary contact and employer portal users for your organization.

- **Primary contact:** This is the person responsible for administering the RPB plan in your organization (generally the Executive Director). The Primary Contact will receive important notices about plan administration from RPB. You can only have one primary contact.
- **Portal users:** There are two types of portal users: 1) those with administrator rights and 2) those without administrator rights. You can have multiple administrators.
 - Only portal administrators have access to the Manage Bank Account Information and Manage Employer Information tools.
 - All portal users will receive important emails from RPB about payment processing.
 - To give a portal user administrator rights, click the green "EDIT" button to the far right of their name. Then check the "ADMIN" box.
- Remember to disable any MyRPB portal users who leave your organization to ensure data security.

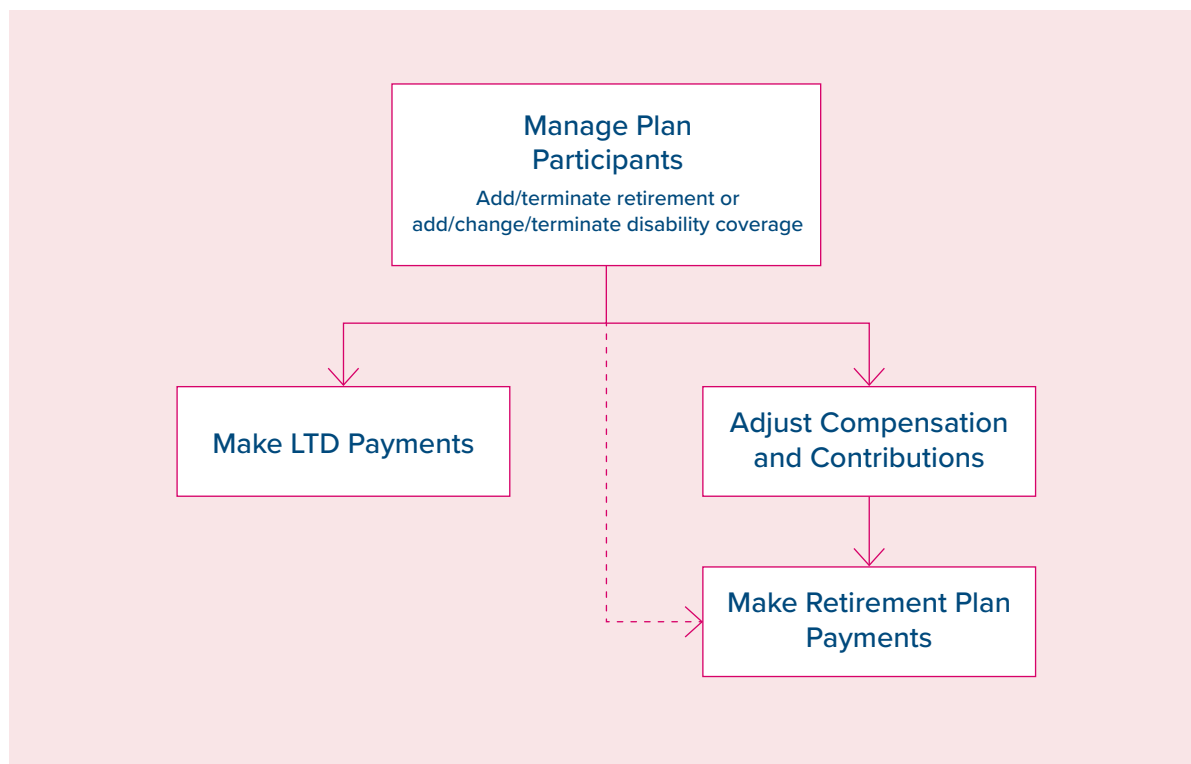
Generate Reports

Create and print a Contribution Statement or Bank Activity Report for your organization. You can also download/print transaction information from the retirement, LTD, and compensation and contribution screens.

Manage retirement and LTD plan information like a pro.

We suggest that you start with the Manage Plan Participants tool. There you can see an overview of your employees' benefits, add employees to or terminate them from the retirement or LTD plan, and change the employee's LTD benefit waiting period. Then, depending on your specific needs, you will:

- **Make adjustments to an employee's retirement plan**, by going to the Adjust Compensation and Contributions tool.
- **Create contribution payments for employees in the retirement plan**, by going to the Make Retirement Plan Payments tool, depending on your specific needs.
- **Make premium payments for an employee's LTD coverage**, by going to the Make LTD Payments tool.



Mark your calendars

January: Enroll employees in LTD.

Get your employees covered

Log in to the employer web portal during the December – January annual LTD open enrollment period to enroll employees for a full year of coverage. LTD operates on a 12 month calendar year from January 1 to December 31. You can also end LTD coverage for an employee at this time.

June: Prep for the new Plan Year.

Settle current Plan Year balances

Before the new Plan Year starts, **make sure to settle any remaining balances from the current Plan Year.** To check your balances, go to the “View Retirement Plan Summary” screen.

Set-up contributions

Beginning in June you can log into the employer portal to set up contribution payments for the new Plan Year, which starts on July 1 and ends on June 30. Remember: recurring payments don't carry over to the new Plan Year so you must set up payments every June.

July: New Plan Year, new enrollments.

Add or terminate retirement plan participants

Before the new Plan Year officially opens on July 1, make sure to add or terminate your employees' enrollment in the retirement plan.

Enroll employees in LTD

Log in to the employer web portal during the semi-annual LTD open enrollment period to enroll employees who missed annual open enrollment. Employees will be covered for the remaining half of the Plan Year (July - December) and will pay a prorated amount.

Update optional Life Insurance information

Make sure you update the compensation information as of July 1 for employees who have Optional Life Insurance through RPB.

December: Year-end contributions

Keep calendar years aligned

For December and January employee contribution payments, make sure to select the calendar year in which they were withheld from payroll. Payroll follows the IRS tax year of January 1 to December 31 and is used by RPB for annual IRS limit testing.

Year-Round

Enroll new employees in RPB's plans

New employees can enroll in the LTD plan anytime within 60 days of their hire date and in the retirement plan at any time. They do not have to wait for an open enrollment period.

Have questions? We're here to help!

Contact RPB's Employer
Services team:

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