


Your Quick Guide to Navigating Fidelity Plan Sponsor WebStation®

FidelityPSW®

User Maintenance | Training & Support | Settings | Logout

Home | View Participants | Administer Plans | Manage Data | Work With Fidelity | Reporting | News & Insights |  Your Notifications

Home

- Your Notifications**
- View Participants**
- Benefits Dashboard**
 - Defined Contribution Plan Balances
- PSW Messages**
- Additional Resources**
 - SSAE 16 Reports

Administer Plans

- Defined Contribution**
 - Set Plan Options
 - Plan History & Balances
 - Plan Investments
 - Approve Loans & Withdrawals
 - View & Submit Loan Interest Rates
 - Company Contribution Calculator
- Compliance**
 - Form 5500 Activities
 - Non-Discrimination Testing (NDT)

Work With Fidelity

- Service Requests**
 - View All Service Requests
 - Open a New Service Request
- Team Workspace**
 - Your Team Workspace Projects
 - Tasks
 - Tasks You Assigned
 - Tasks Assigned to You

News & Insights

- News & Fidelity Insights**
 - View All News & Fidelity Insights
 - Fidelity Workplace Services
 - Fidelity Forum®
- Compliance Resources**
 - SSAE 16 Reports

View Participants

- View Participants**
 - Search by SSN/Name/EmpID
 - Defined Contribution Filters
- Recently Viewed Participants**
 - Names of the 5 most recently viewed participants
 - More Recently Viewed Participants

Manage Data

- File Management**
 - View All Files
 - Create or Send a File
 - Apply Funding
 - Receive Files
 - View & Modify File Layouts
- Participant Data Management**
 - Add a New Participant
 - Enroll a New Participant
 - View & Modify Participant Data
 - View Employees Requiring Employment Event Maintenance

Reporting

- Defined Contribution**
 - Explore & Chart Your Data
 - View an Existing Report
 - Order a Standard Report
 - Order a Custom Report
 - Schedule a Report

Fidelity Plan Sponsor WebStation® makes plan administration simpler than ever. Here's a look at PSW's intuitive navigation. **Get to the information you need with a single click.**



Turn here®



Clickstreams for popular Plan Sponsor WebStation® tasks



Be a PSW power user.

Here are the direct routes to 11 of the functions our PSW users perform most often.

TO FIND:

SIMPLY CLICK:

Add a New Participant	Manage Data	>	Add a New Participant
Compliance Form 5500	Administer Plans	>	Form 5500 Activities
Compliance Non-Discrimination Testing (NDT)	Administer Plans	>	Non-Discrimination Testing (NDT)
Manage Contributions	Manage Data	>	Create or Send a File > Select File Type
Notification Settings	Settings		
Plan Balances	Administer Plans	>	Plan History & Balances
Plan Investments	Administer Plans	>	Plan Investments
SAS 70	News & Insights	>	SSAE 16 Reports (SAS 70 was phased out and replaced with SSAE 16)
Set Error Notification Options	Administer Plans	>	Set Plan Options > Set Error Options
Set Funding Options	Administer Plans	>	Set Plan Options > Set Funding Options
Upload Batches	Manage Data	>	Create or Send a File



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