

Archdiocese of Los Angeles

How to Access Employees' Online Lay Pension Statements

- Audience:** Archdiocese of Los Angeles (“ADLA”) Location Administrators
- Purpose:** Describes how to log on to the Pension Web Portal to access lay employees' pension statements and other plan information.
- Plan Years:** Applies to the 2009 Plan Year. You will be contacted, as additional plan years' statements become available (e.g., 2010, 2011, etc.).
- Separations:** If a lay employee is no longer employed by a location within the ADLA (i.e., separated), that separated employee will not be permitted to log on to the Pension Web Portal. If that separated employee has met the plan-vesting requirement (5 years of service), he/she may be eligible for a benefit under the plan. Please have the separated employee contact Pension Services at 1-866-907-5472 to request an application form. After receipt of the application form, Pension Services will determine the benefits, if any, to which he/she is entitled under the plan.
- Entities:** There are three entities supporting the Lay Pension program:
- 1). Archdiocese of Los Angeles (“ADLA”) -- (Employer)
 - 2). Nicolay Consulting Group (“NCG”) -- (Pension Services)
 - 3). Benefit Allocation Systems, Inc. (“BAS”) – (Web Portal Developer)
- Support:** Pension Services (NCG) 1.866.907.5472
- Questions about pension benefits & calculations
 - Questions about pension statements
 - Questions about name/address/salary & other personal data
 - Questions about incorrect statements
 - Questions about completing a “Data Verification Form”
 - Questions about eligibility
- Web Portal (BAS) 1.800.945-5513
- Note:* BAS also provides the web portal and support for ADLA's health insurance portal. The pension and health web portals are now consolidated into one single access point from <http://www.la-archdiocese.org/org/benefits>:
- Questions about logging on to the web portal
 - Questions about navigating the web portal, once logged on
 - Questions about accessing a statement, once logged on
- Administrators:** Location administrators are responsible for notifying their Lay-Pension employees that their statements are available online. Administrators will be able to access the statements for employees who presently, and in the past, have worked at their location. However, this access is only for statements representing the period such former employees worked at the location.

How to Logon & Access Your Statements begins on the next page...

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Step #1 <http://www.la-archdiocese.org/org/benefits>

By entering the above link into your web browser address bar, you should receive the “**ADLA Employee Benefits Information**” page that is illustrated below (note, actual page content may vary from this illustration):

The screenshot shows the website interface for ADLA Employee Benefits Information. At the top, there is a navigation menu with links for Archdiocese, Archbishop, Parishes, Schools, Vocations, Ministries, Protecting Children, Publications, and Giving. The main content area is titled "ADLA Employee Benefits Information" and includes a section for "Lay Employee Pension Plan Information". A "MyEnroll Portal Login" box is visible on the right side, with fields for "User Name:" and "Password:", and a "Log On" button. Red arrows point to the "Log On" button and a link titled "Request User ID and Password".

Step #2 On the right hand side of the page, there is a beige boxed area titled “MyEnroll Portal Login.” Enter your Administrator’s User ID & Password and click the Log On button. Note: Your Administrator’s User ID and Password is the same as your ADLA Group Health Plan (Reta Trust) Administrator’s User ID and Password.

Help - Don’t Know or Remember Your User ID and/or Password?

That’s OK; it is very easy to retrieve your User ID and/or Password online. Simply click the orange link titled “[Request User ID and Password](#).” This link will take you through the quick & easy process of retrieving your User ID and Password.

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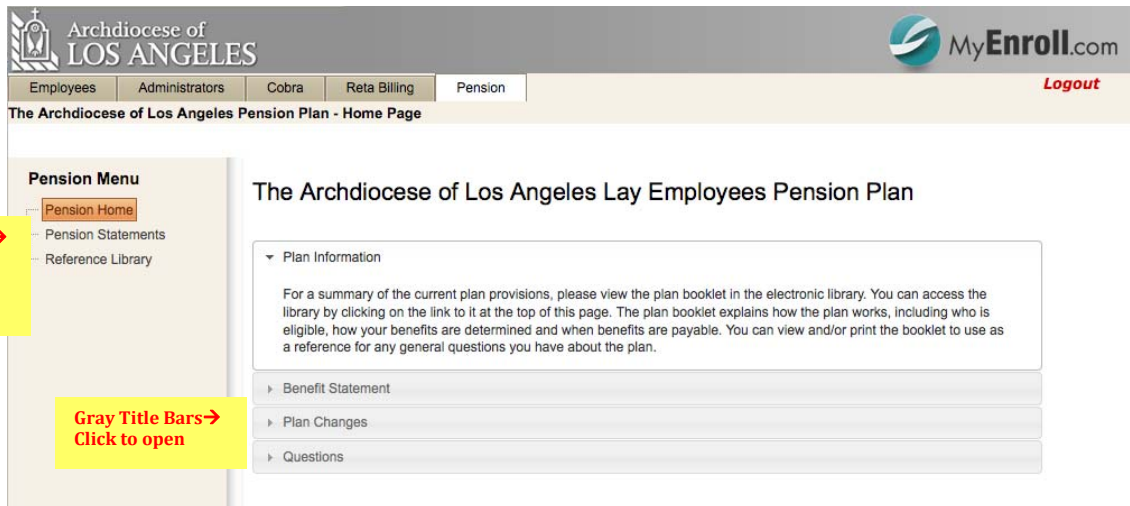
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Step #3 Upon logging in to MyEnroll.com, you will arrive on the **Administrator's page**. To access your Pension information, click on the "Pension" tab located directly below the top-of-page header graphic.



Step #4 From the Pension Home Page, click on the gray title bars to reveal the corresponding plan information.

Click the Left Menu title item "Pension Statements" to access any employee's statement and other pension documents.



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The next step requires your computer to have a PDF reader software installed (e.g., Adobe Acrobat, Mac Preview, etc.). If you do not have PDF reader software installed on your computer, you can obtain the Free Adobe Reader from: <http://get.adobe.com/reader/>

Step #5 On the Pension Statements page, please read the instructions.

Below the instructions you will see a Search button titled "Search for an Employee." Click this button to reveal the search screen

Archdiocese of LOS ANGELES

MyEnroll.com

Employees Administrators Cobra Reta Billing Pension Logout

Pension Statements

Pension Menu

- Pension Home
- Pension Statements**
- Reference Library

Pension Statements

Your Estimated Personal Benefit Statement

Please access your benefit statement as of December 31, 2009 using the link below. Your benefit statement is intended to keep you apprised of your progress under the plan. It is also our opportunity to let you review the data records we have on file and for you to notify us of any errors or omissions. This estimated retirement benefit is in addition to other sources of retirement income you may have. We encourage you to speak to a financial advisor for retirement planning purposes.

Data Verification Form

Also accessible below is your personal "Data Verification Form". Please review your information shown on the form. If there are any incorrect items, please print the form, follow the instructions and enter corrections in the space as indicated. Fax or mail the form to Pension Services at the address shown on the form. Please note that data corrections made in Part B or Part C of the form need to be verified and approved by your work site administrator. To ensure that your corrections will be reflected in the next benefit statement that is issued, return your data corrections by September 30, 2011.

Search for an employee: Search

Employee Number	Eligible	Statement Year	Statement	Validation Form	Status
No records to display.					

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Step #6 In the Search edit box, enter the name of the employee you want to find. Enter the name in the format – Last, First – you do not need to type the entire name. However, the more complete you type the name the more accurate will be the search results.

Once your results appear, click the name of the employee you wish to select. Upon clicking your choice, the page will refresh (go to Step #7).

The screenshot shows the MyEnroll.com interface for the Archdiocese of Los Angeles. At the top, there is a navigation bar with tabs for Employees, Administrators, Cobra, Reta Billing, and Pension. The Pension tab is selected. Below the navigation bar, there is a search section titled "Search for an Employee". The search instructions state: "You may search for an employee by typing his/her first name or last name or BAS employee number. To get a better result, please do not leave a blank on the search box." The search input field contains "FSa" and a "Search" button is next to it. Below the search section, there is a table with the following data:

Name	MyEnroll #	Employer Account	SSN	DOB	Home Address	Employment Status	Pension Status
Savoy, Cathy	12345	0007208-0001-000 Immaculate Heart Church	***-**-1234	1/12/54	Los Angeles, CA 90008	Active	Has Statement/DV
Santana, Jim	23455	0007208-0001-000 Immaculate Heart Church	***-**-4321	3/27/62	Palo Alto, CA 90078	Terminated	Statement Withheld

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Step #7 In the Search edit box, enter the name of the employee you want to find. Enter the name in the format – Last, First – you do not need to type the entire name.

Below the Search box & button is a data table. At this time, there will be only one row containing your selected employee's 2009 Pension statement, data verification form, bad data letter (if any) and a comment about his/her status/eligibility.

Simply, click the "View" link in any column to open the corresponding document. Once you open the document, you can print or save it to your computer using the PDF reader's functionality, so will you have access to it without having to be logged into MyEnroll.com.

Over time, employees' completed Pension statement history will accumulate in this data table.

Archdiocese of LOS ANGELES MyEnroll.com

Employees Administrators Cobra Reta Billing Pension Logout

Pension Statements

Pension Menu

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Search for an employee:

Cathy Savoy
3100 Main Street
Los Angeles, CA 90008

Employee Number	Eligible	Statement Year	Statement	Validation Form	Status
336694	Yes	2009	View	View	The statement and verification form are available.

Click the View link in any column to open the corresponding PDF.

The Status column is helpful for understanding the employee's Pension Status and why there may not be any documents to view or why the viewable documents do not include a Statement.

End of Help Document.