Send Attached Files

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Once your files attached, you will also have the option to send these files via email to your plan sponsors and participants. Select "Send Attached Files" from the "Do With Selected" menu. When your recipient receives your email, they will need to enter their username and password before the files may be downloaded. If your recipients do not yet have a login, the first email the user receives will contain a link with a temporary password. Once the user enters their username and temporary password, they will need to then enter the last four digits of their SSN and DOB. The software will then have the user create a new password. Once this process is done, they can download attachments. Any emails sent via the batch tool will be logged in your audit trail automatically.