



How Do I View a Document?

12/04/2024 10:28 am CST

1. If the document you are looking for is one you have not viewed yet, it will show up in your 'New Documents' list on the right side of your home or plan page.


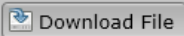
New Documents	
Document	Date
 Plan Document XYZ Company XYZ 401(k)	04/16/2012

2. If the document has not been viewed yet and your plan administrator has added it to your ToDo list, you may also access the document by clicking on it in your ToDo list.

ToDo List	
ToDo	Days 
Plan Document XYZ Company XYZ 401(k) Plan - Document Print and Review	0

3. You can also access all the uploaded documents for a plan by selecting a plan from the dropdown at the top of the page and clicking the 'Documents' button on the left side of the page.
4. To view a document in a plan's documents list, click on the document in the list on the top half of the page.

Documents		
Document	Classification	Date
 5500 Documents	...	
 Plan Document Document.rtf	Retirement Plan Document	04/16/2012

Document Information	
Uploaded By: Your Administrator	Upload Date: 4/16/2012
Classification: Retirement Plan Document	
Description: Plan Document	
File Name:  Document.rtf (Download)	
View your attached plan document	
	

5. After selecting a document, you will see its contents in the lower half of the page. Here you can also download that document's files by clicking on the filename in the attachment list or by clicking the 'Download File' button at the bottom.

