



January 2009

RE: 2008 PLAN YEAR END PACKAGE INSTRUCTIONS

Dear Client:

Benefit Consultants Group is committed to providing you with the highest level of plan administration support possible. We have upgraded our website with the latest technology to improve your online experience, reduce administrative processing time and increase the convenience of taking advantage of our products and services.

YEAR END PACKAGE – ANNUAL QUESTIONNAIRE & CENSUS DATA FILE

In order to process your compliance work in a timely manner, please provide the following two items **in good order by Friday, February 13th, 2009:**

1. **Annual Questionnaire** – Please complete the Annual Questionnaire placed on your plan sponsor website at www.bcgbenefits.com & return to BCG via mail, fax or email and;
2. **Census Data File** – Your census data, which has been compiled throughout the year, has been placed on your plan sponsor website at www.bcgbenefits.com. Please review and make any necessary corrections.

Please follow the steps below for retrieving and submitting your census data file:

Step 1 - Access www.bcgbenefits.com and go to Plan Sponsor Login, click START

Step 2 - Enter username and password, click SPONSOR

Step 3 - Go to Reports, Census Data File – 2008

Step 4 - Click to open the file and review census data to determine if valid or invalid

- a. If valid and in good order, send an email to yearend@bcgbenefits.com stating "*All census data is valid*".
- b. If invalid and not in good order, make the corrections to the census data file and save to your computer (corrections to birth, hire or termination dates must be in the following format **mm/dd/yyyy**). Then upload the corrected census data file via plan sponsor web (**enclosed is step by step instructions for uploading your corrected census information via plan sponsor web**).

NOTE: Missing or incomplete information will delay the processing of all compliance testing and calculations. All compliance work will be processed in the order in which it is received, so please make it a priority to return your Year End Package information to us in good order as soon as possible, so we can meet your expectations.

If you have any questions, please contact your Plan Account Manager. Thank you again for the opportunity to serve you.

Sincerely,

Plan Account Management

UPLOADING CENSUS VIA PLAN SPONSOR WEB

Log into the Plan Sponsor web and then go to;

TOOLS

UPLOAD FILE

- File Type: Data entry routine file
- Select DER name: Census Data File Upload
- File Name: xxxxxx.csv (**must be a .csv file**)
- Pay Frequency: Any available payroll date schedule in 2008
- Pay end date: Any available payroll date in 2008
- Allocation set effective date: N/A
- Plan year end date: (**should read 12/31/08**)

The screenshot shows the 'Upload File' form in a web browser. The form fields are as follows:

| Field | Value | Required Field? |
|-------------------------------|-------------------------|-----------------|
| File type | Data entry routine file | Yes |
| Select DER name | 999000 | Yes |
| File name | 12-31-0819Home File | Yes |
| Pay Frequency | Monthly | Yes |
| Pay end date | 11/02/2007 | Yes |
| Allocation set effective date | 12/31/2009 | No |
| Plan year end date | 12/31/2007 | No |

There is an 'Upload' button at the bottom right of the form.

- Click Upload button & wait for confirmation
- Click on "Click here to send upload notification"

The screenshot shows the 'DER File Upload' confirmation screen. The form fields are as follows:

| Field | Value | Required Field? |
|-------------------------------|------------------------------|-----------------|
| File name | testfile2.csv | Yes |
| DER name | 999000 | Yes |
| File uploaded to server | Confirmation Number: 9550011 | Yes |
| Allocation set effective date | | Yes |
| Plan year end date | | Yes |
| Allocation set effective date | | No |
| Plan year end date | | No |

There is an 'Upload' button at the bottom right of the form.

- Your default email will automatically appear, enter your plan # & plan name in subject field & send.