



## How to Use the Online Participant Portal

### Welcome to Definiti

During an online session in the Participant Portal, you can:

- View a summary of your account
- Elect how you would like to receive your statements
- Get help accessing your account or navigating the website

### How to Login to Your Account

- Visit <https://www.yourbenefitaccount.net/login/>
- Enter your User ID and Password and Select *Participant* from the dropdown box, then click on **Login**. **For first time users**, your **Username** is your Social Security number (no dashes), and your **Password** is the last 4 digits of your Social Security number
- You will be prompted for a one-time PIN confirmation

*Always use the Logout button to end your online session.*

### HELPFUL TIPS

- ☐ When you request a change, you will receive a confirmation number which you can use to reference the transaction in the future.
- ☐ Requests, while processed into the database, may not take effect immediately.
- ☐ If you have problems logging in immediately after changing your ID/Password, please revert to your previous ID/Password and try again. Call (888) 744-4015 if you need further assistance.

### How can I get a quick view of my retirement account?

- Access your retirement account online
- On **My Dashboard** screen, view **Summary**

*The top portion of the screen will give you a visual view of your total account balance by fund. The bottom portion of the screen will provide you investment, Fund ID, Performance, balance, and any recent activity. The Dashboard also allows you to pull up performance models by 1-year, year-to-date, etc.*

# My Dashboard



My Dashboard is a quick view of your balances, investment performance, and recent activity.  
Choose **Manage Your Investments** below or **Manage/Manage Your Investments** from the top menu to make changes.

Account Balance

\$136,458.<sup>13</sup>

\$136,458

Vested Balance

MANAGE YOUR INVESTMENTS

Retirement Tips

A Dollar A Day

Contribute as little as \$30 extra dollars a month to your retirement plan and you could have an extra \$31,000 by the time you retire!

\*Assumes 7% rate of return, a 2.5% inflation rate and 25 years to retirement.

## How do I view my transaction history on the website?

- Access your retirement account online
- Click **Manage**
- Click **Transaction History**

The top portion of the screen allows the user to select from drop down boxes to define their search criteria, by selecting *Investment*, *Source*, *Transaction to display*, *Transaction status*, *Start Date* and *End Date*. The bottom half of the screen displays the transactions which meet the selected criteria. If no transactions meet the criteria, no transactions will be displayed.

Dashboard

Manage

Plan

Performance

Withdrawal Request

Forms & Reports

Contact Us

SmartPlan

Plan Selection

Transaction History

Investment

Source

Transactions to display

Transaction status

Start date

End date

☐ Only display records with redemption fees

SUBMIT

No records available at this time.

## How do I request to receive my Quarterly Statement via paper, electronically or both?

- Access your retirement account online
- From the top menu bar, select **Forms & Reports**, then select **Reports** from the drop-down menu



- Select how you would like to receive your statements by completing one of the options listed

A screenshot of the 'Reports' form. At the top, there is a header 'Reports' and a logo for Adobe Acrobat Reader. Below the logo, there are two radio button options: 'I elect to only receive electronic statements that I can view online' and 'I elect to receive statements both electronically and through the mail'. The second option is selected, indicated by a green dot. At the bottom of the form, there is a large green button labeled 'SUBMIT'.

## How do I access my Quarterly Statement electronically?

- Access your retirement account online
- From the top menu bar, select **Forms & Reports**, then select **Reports** from the drop-down menu
- Under Create Reports, click on **Report Group: Participant Statements** and the available statements will be listed
- Click on the statement you wish to view

## Create Reports

Select report group

None ▼

Select report

None ▼


Select export file type

Adobe Acrobat (PDF) ▼


Available plan years

01/01/2025 - 12/31/2025 ▼

From

n/a 

To date

n/a 

GET RESULTS

Name	Size	File Type	From Date	To Date	<input type="checkbox"/> Delete
✓ Report Group: Participant Statements					
Participant Statement	109kb	Adobe Acrobat	01/01/2025	03/31/2025	<input type="checkbox"/> Delete
Participant Statement	109kb	Adobe Acrobat	10/01/2024	12/31/2024	<input type="checkbox"/> Delete

### What if I have questions relating to the website?

- Access your retirement account online
- Call the Definiti Participant Service Center at (888) 744-4015