

Viewing Plan and Participant Transactions

To view a specific participant transaction, please follow these steps:

1. Log in to the employer portal from sentinelgroup.com and select "Retirement" from the home page of the portal .
2. From the Plan Sponsor Dashboard, select **Transactions** then sub-selection **Research All Transactions**.
3. You may begin to refine your Plan transaction search (the defaults are set to "All") by selecting the "Investment," "Source," "Transactions to Display," and "Transaction status" box options. You may also initiate a transaction search by individual Participant by entering the Participant's social security number. It is important also to specify the "Start date" and "End date" of your entries above.
4. Once your transaction search criteria above is completed, click on **SUBMIT**

Research All Transactions

Investment: All

Transactions to display: All

Social security number: [input field]

Division: All Divisions

Start date: 09/12/2018

End date: [input field]

Only display records with redemption fees

SUBMIT

No records available at this time.

5. Search results will then appear at the bottom of the web page.

For Plan Sponsors with employee viewing/editing rights, searching for individual participant transactions may also be accomplished as follows:

1. From the Plan Sponsor Dashboard, select the **Employee Management** tab and then sub-selection **Find Employee**.

Sentinel Benefits & FINANCIAL GROUP

Good Morning, Sentinel Plan Sponsor
Last Login: September 13, 2018 11:56 AM EST

Plan Sponsor Dashboard

Find Employee

Add/Update EE

Loan Summary

Plan year: 01/01/2018 - 12/31/2018

Plan contact: Client Services <clientcare@sentinelgroup.com>

2. Enter an employee search criteria, such as "Last name" or "SS#," and then click on **SUBMIT**

Navigation: View Account | Transactions | Statements, Forms & Reports | **Employee Management** | Contribution Center | Web Client | Resources | Distribution Approval | Plan Selection

Find Employee

Open employee

Employee SS# **SELECT**

Please enter search criteria and press submit.

SS# EE# SS# range to

First name Last name Balance

Plan Division Plan status Employment status

SUBMIT

3. Select the Participant dashboard tab **Manage My Account** and the sub-selection **View Transactions**.
4. Follow the same search refinement instruction in item 3. of the above