

Tasks

Tasks are designed to make action items easier to find and complete. New items are easy to spot from the home page and from the Tasks area.

When you open a task, you'll review the details and then take the action available to you—such as reviewing a request, approving it, or rejecting it. Examples may include distributions, loans, rollovers, participant changes, or plan-access codes.

Once an approver acts, the task is completed for everyone who shared it.

TASKS

OVERVIEW



Pending

→

2

items requiring attention



Completed

→

0

in last 30 days

MOST RECENT

2

Loan Request

→