Instructions for Accessing PlanSponsorLink (PSL)

Below is the information on how to access and use the PlanSponsorLink (PSL). The PSL can be accessed at: *https://plansponsorlink.com/thetpaexperts.com*

First Time Users

If you have not used the PlanSponsorLink (PSL) website before, you will need to set up your account by selecting the "First Time User?" link at the web address noted above. You will be asked to enter your email address. The system will send a secure password to the email address you provided. Once you receive the password, you will be prompted to create a personalized password.

Please note that your USER NAME is your EMAIL ADDRESS you provided.

Even though the PlanSponsorLink (PSL) is rather intuitive, we suggest you review an important video regarding website navigation that is located in the upper right-hand corner's drop down menu under your name.

Please Note the following tabs:

My Active Tasks:

Any Active task for your plan can be found here. For example, you will find the Year-End data collection task under this tab.

Data Collection:

Historical data and files collected for your plan that you may need to access can be found here.

Documents:

Contains different documents related to your Plan.

- **Administrative Forms**
  Find the Hardship Self-Certification and/or other forms provided by The TPA Experts here.
- **Legal Plan Documents**
  Contains Plan specific documents such as your Adoption Agreement, SPD, etc.
- **Fiduciary Documents**
  Contains documents such as copies of your Summary Annual Report (SAR) or Form 8955-SSA if applicable.

Secure File Exchange:

Any file that has Personal Identifying Information (PII), such as Dates of Birth, SSNs, must be sent from or to us through the Secure File Exchange located under this tab.

If You Forget Your Password:

Go to the PSL Login screen at
www.plansponsorlink.com/thetpaexperts
and select "Forgot password?"

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