Dear [Salutation]:

It is now time to start preparing the year-end data collection process for your plan year ending [Project Period End] for the [Plan Name].

We are pleased to announce that we have a new web portal to help streamline the data collection process for you and your staff. The link for this new website is (<https://yourURL.plansponsorlink.com>). PlanSponsorLink will provide you an easy step-by step process to approve, modify or add your company data, update your employee census and easily send us the information we need to perform your year-end calculations through a simple question and answer process.

Please login to the website (<https://yourURL.plansponsorlink.com>). Your login will be your email address. You can obtain a password by selecting the New User Setup link under the Sign In button. A new password will be emailed to you and you can then use it to sign on to the system.

Once logged in, the data collection will display on your Active Tasks list.  Please press the “Begin Task” button to the right of the data collection to begin the process.  Please go through each step and add or update the data as needed.  For the census data, step 8, you have the option to manually add or modify the census, or you can export the data to a file, modify in Excel, and import it back in through the Website.

If you have any questions or need any assistance entering the data, please feel free to contact me.

Regards,

[Sender First Name] [Sender Last Name]  
[Sender Company]  
[Sender Email]