

Employees' Pension and Investment Plan of Diocese of Lexington and Other Adopting Employers

Web Portal User Guide



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Have questions? Ask...

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Website Login

1. Begin by going to <http://www.nyhart.com> and click the “Login” button in the lower right portion of the screen.

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ACTUARY & EMPLOYEE BENEFITS

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Have an Employee Benefits or Actuarial Question?

ASK NYHART

Corporations and governments turn to Nyhart for advice when they need reliable, independent advice for employee retirement and health care benefit and actuarial questions. Submit your question now.

How can I more effectively manage the costs of my defined benefit pension plan?

One of the financial advantages of being the sponsor of a defined benefit pension plan is that the contributions to the plan are deductible for tax purposes, up to a [...]

Tayt Odom *Actuary and Principal*

AREAS OF EXPERTISE

- Cash Balance Plan
- Defined Benefit & Pension
- Defined Contribution, 401(k) & 403(b)
- Employee Stock Ownership Plan (ESOP)
- Flex Accounts - FSA, HRA & HSA
- Healthcare Actuarial & GASB 43/45

1,000+ CLIENTS. 48 STATES.

Nyhart is one of the nation's largest independent actuarial and employee benefit firms, consulting to retirement clients with \$14+ billion in plan assets.

Our team of advisers deliver personalized analysis and recommendations, translating complex calculations and issues into common language that enables corporations, associations, churches and governments to effectively manage their retirement and health care benefits.

CLIENT & PARTICIPANT LOGIN

Access your benefits account, check your flex account balances, and download forms here.

LOGIN

2. On the following screen, select “Login for any of the below services”.

Login for any of the below services

- Flex/HSAMEBA Services
- COBRA Services
- Retirement Services
- ESOP Services
- ClientConnect
- Online Enrollments

- ▷ **5500 Submission**
- ▷ **401(k) Plan Participant**
- ▷ **401(k) Plan Sponsor**
- ▷ **401(k) Financial Advisor**

Website Login

3. Enter your User Name and Password on the right side of the screen. The login information is the same as used to view your annual statement. If it hasn't been changed previously, your login information will be as shown below.

- Initial Username: SSN (without dashes)
- Initial Password: Date of Birth (MMDDYYYY)

ONLINE ACCESS

User Name:

Password:

4. Select "Benefit Calculator" on the left side of the screen.

User Login:	Diocese.Part
Participant Name:	Diocese Participant
Last Login:	1/2/2013 7:50:29 AM
Login Failures:	1

5. You will now see the Welcome page of your calculator.

Client ID: 0262-02
Client Name: Roman Catholic Diocese of Lexington, Kentucky

[Logout](#) [Change Password](#)

[Run Benefit Estimate](#)

Welcome to the Defined Benefit Web Portal.
This website will allow you to run pension estimates and access a variety of forms and links. Please select an option from the navigation panel on the left side of the page.


Run Benefit Estimate

1. From the Welcome page, select “Run Benefit Estimate” on the left side of the screen.
2. The screen below will appear. Click “Next”.

Create Benefit Estimate

Click **Next** to begin a new estimate or select a prior estimate to view.

Estimate History
No documents to display.

 **Next**

3. The following page will allow you to view your personal demographic information. You will only be allowed to make changes to the marital status and beneficiary’s date of birth. Any other changes made will not be saved. After reviewing the data, select “Next”.

Below are the data items available for modification.

Beneficiary changes are for estimate purposes only. Please complete and submit a Beneficiary Designation Form to change your beneficiary of record. The form can be found under the Download Forms section.

Participant Information

First Name MI Last Name

Participant Date(s)

Date of Birth

Miscellaneous Data

Married Yes No

Gender 

Beneficiary Information

First Name MI Last Name

Ben Type 

Gender 

Date of Birth

Run Benefit Estimate

- You will now see a page of your employment history. No fields on this page can be edited. Please review the data and contact Noreen Brown with any concerns. Select "Next".

Employment History

Effective Date	Status Code
4/21/2005	Hire Date <input type="text"/>

- After the personal information and history pages, you will see the Calculation Information page shown below. Input the appropriate dates and amounts.

Calculation Information for: Test Person

Date of Termination

Date Payments Commence

Click this button if you wish to change the commencement date to the first day of the month following the participant's 65th birthday.

Note: The Payment Commencement Date is used to determine age and the factors used to determine benefits payable at such date. This date must be the first of the month. If the first of the month is not used the calculator will change it to the first day of the month after your termination date.

Optional Fields:

Annual Salary Increase (0%)

If the Annual Salary Increase box is left blank, compensation will project at the most recent reported amount.

- After clicking "Next", you will see the final calculation page. To create the estimate, select the "Calculate Benefit" button.

Calculations for: Test Person

After clicking the calculate button please be patient as it may take 1-2 minutes to process your request. A "View Results" link will appear on the screen when your estimate is ready for viewing.

Run Benefit Estimate

7. You should see the website loading on your screen while the benefit is being calculated (may take a few minutes), and if there were no errors in processing the benefit you will see the “View Results” button displayed. Click “View Results” to view the PDF of the benefit.



8. The benefit can also be retrieved from the “Estimate History” table displayed when you return to the initial “Run Benefit Estimate” page.

Create Benefit Estimate

Click **Next** to begin a new estimate or select a prior estimate to view.

Estimate History

	RequestTime
1/2/2013 8:16:56 AM	View PDF



Beneficiary Designation

- Be sure to have a current Beneficiary Designation Form for this plan on file with Nyhart.
- Beneficiary Designation Forms can be found under the “Download Forms” section of the website as well as the end of this document.
- Please return completed forms to Noreen Brown at Nyhart and retain a copy for your records.



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Benefit Eligibility

You are immediately eligible for benefits under this plan upon any of the following:

- Cease participation or termination of employment (voluntary or in-voluntary) with less than 10 years of service
- Retirement, termination of employment (voluntary or in-voluntary), and meeting one of the following:
 - Age 65 with 5 years of plan participation
 - Age 55 with 10 years of service
- In-Service Distribution, no longer making contributions, currently employed with the Diocese, and attaining one of the following:
 - Age 65 with 5 years of plan participation
 - Age 65 with 10 years of service
 - Age 60 with 30 years of service and 5 years of participation
- Death

Contact Noreen Brown at Nyhart with any questions regarding your retirement benefit from this plan or to apply for your benefit.



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