The Expertise you need.
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The Creativity you want.

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NAVIGATOR FREQUENTLY ASKED QUESTIONS

The following are common questions regarding access, saving, and viewing the plan information.

I cannot get into the Plan Sponsor Link (PSL) Portal?

➢ The user login is your email address that PPS has on record.

➢ Temporary passwords are sometimes sent to the junk email folder. However, if you are still not finding the temporary password in your email, please let your Plan Consultant know.

All I see is a blank screen when I click on the PSL Portal link.

➢ This is generally due to a security setting. Some people may find they have high security settings on their computer. If you have unusual security settings (like a custom or high security level), you will need to update your system to recognize our site as a safe site.

I want to have someone copied on the Navigator emails or have access to the PSL Portal?

➢ Anyone that should be copied will need to have viewing access to the PSL Portal. To add the contact please provide the person's full name and an email address to either your Relationship Manager or the Plan Consultant.

Where can I find the Navigator, it is no longer on My Active Takes tab?

➢ Click Here to view Find Navigator.

Do I need to do anything now that I have gotten The Navigator?

➢ Please read the Letter of Instruction and complete any actions on the Actions to Take page.

I cannot view or print my attachments (forms, allocation/scenarios, adjustment letter, etc.)?

➢ To view the attachments please *SAVE the document to your computer and open with Adobe Acrobat*. See page the Internet Browser pages below for instructions on how to save the document. If the Click to View button still does not work, please let your Plan Consultant know. The attachments (forms, allocations/scenarios, etc.) are saved inside of The Navigator and can be located in the attachments. On the left side of your screen there is an image of a paperclip; this will show you all of the attachments. You can right click on the attachment and click open. If you don't see the paperclip, click View at the top of the document then *show/hide > Navigation Panes > Attachments*.

I don't have Adobe Acrobat Reader DC on my Computer?

Please click this link to download Adobe Acrobat Reader DC. (***Please uncheck the optional offers***) before clicking the download Acrobat Reader button.

When I click an attachment it opens in the same window as my Navigator and I cannot get back without closing all PDFs?

This is due to user preferences and that can be changed to have each PDF open in a new window.

➢ At the top of an open PDF click Edit then click Preferences at the bottom of the list.

➢ In the window that opens, please select Documents (second item from the top)

➢ Uncheck the box for Open Cross-Document Links in Same Window and click OK.

How will my Auditor receive the Audit Packet?

The audit information will be uploaded to the Portal with The Comprehensive Reconciliation & Report Profile. If you do not want the Auditor to have access to the Portal a secured email can be sent. Flash Player is necessary to display the Audit Packet. If you open a PDF that requires Flash and your system does not already have it installed, a dialog box should prompt you to download and install the latest Flash player. Please note that for Windows, both the Active X and Plugin need to be downloaded and installed. The following link will take you to the installers

https://helpx.adobe.com/acrobat/using/flash-player-needed-acrobat-reader.html
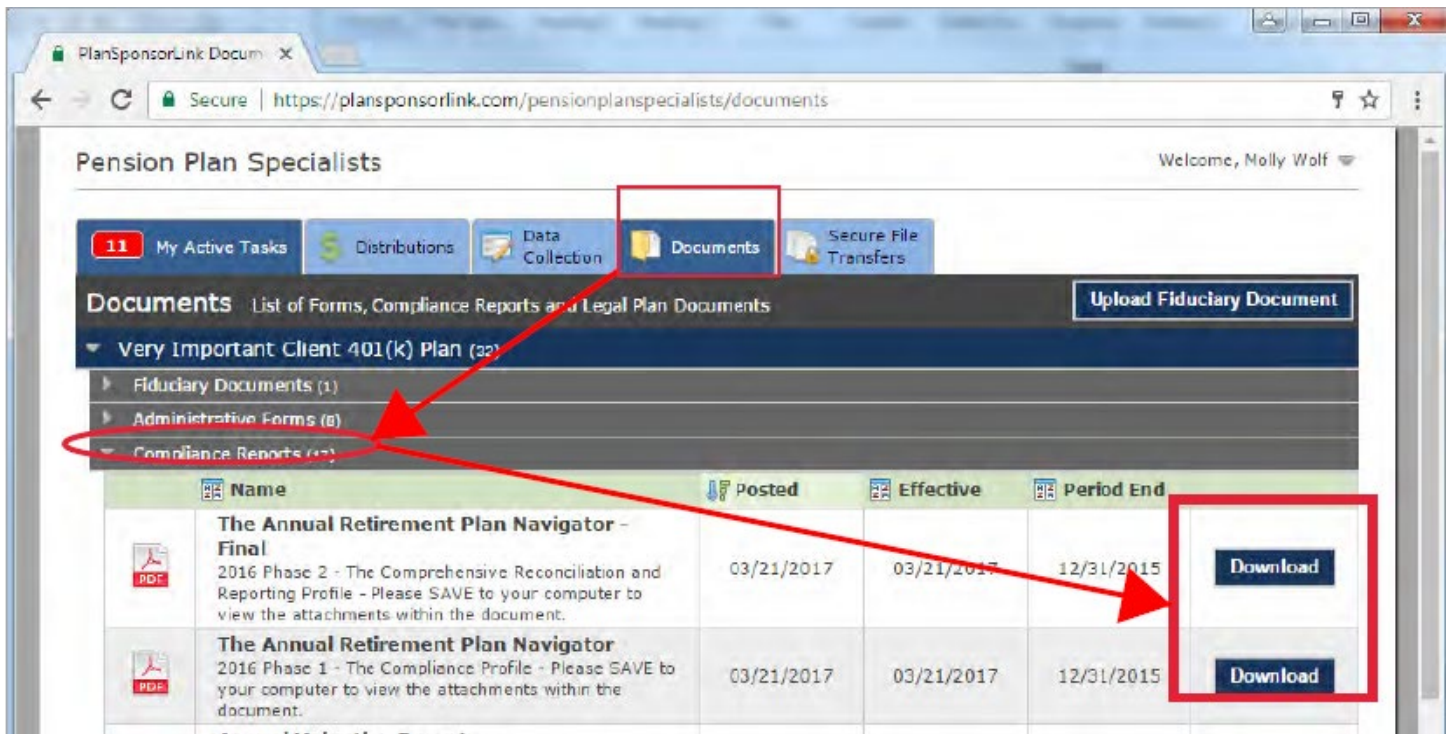
➢ Visit the Adobe Flash Player Download page - for Windows | for Mac.

➢ Click Install Now. The Flash Player installer is downloaded to your computer.

➢ Open or double-click the downloaded file to begin the installation.

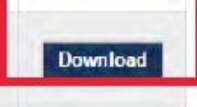➢ Follow onscreen instructions to complete the installation.

Location of The Annual Retirement Plan Navigator

Once on the PlanSponsorLink (PSL) Portal:

➢ Click the Documents tab

➢ Click the Compliance Reports

➢ Click the download button for The Annual Retirement Plan Navigator

➢ Once the Navigator is opened save it to your computer

➢ From your computer open it with Adobe Acrobat, this will allow you to view the attachments.

Mozilla Firefox 🦊

➢ Click Open With Different Viewer or download button.

➢ Select Open with Adobe Acrobat and click OK. The Navigator will automatically open into Adobe Acrobat. Please make sure to save a copy to your computer.

➢ When the Toggle Sidebar is clicked a paperclip (Show Attachment) can be seen and all attached PDF documents inside of The Navigator can be viewed. Click on the attachment name and select open with Adobe Acrobat.
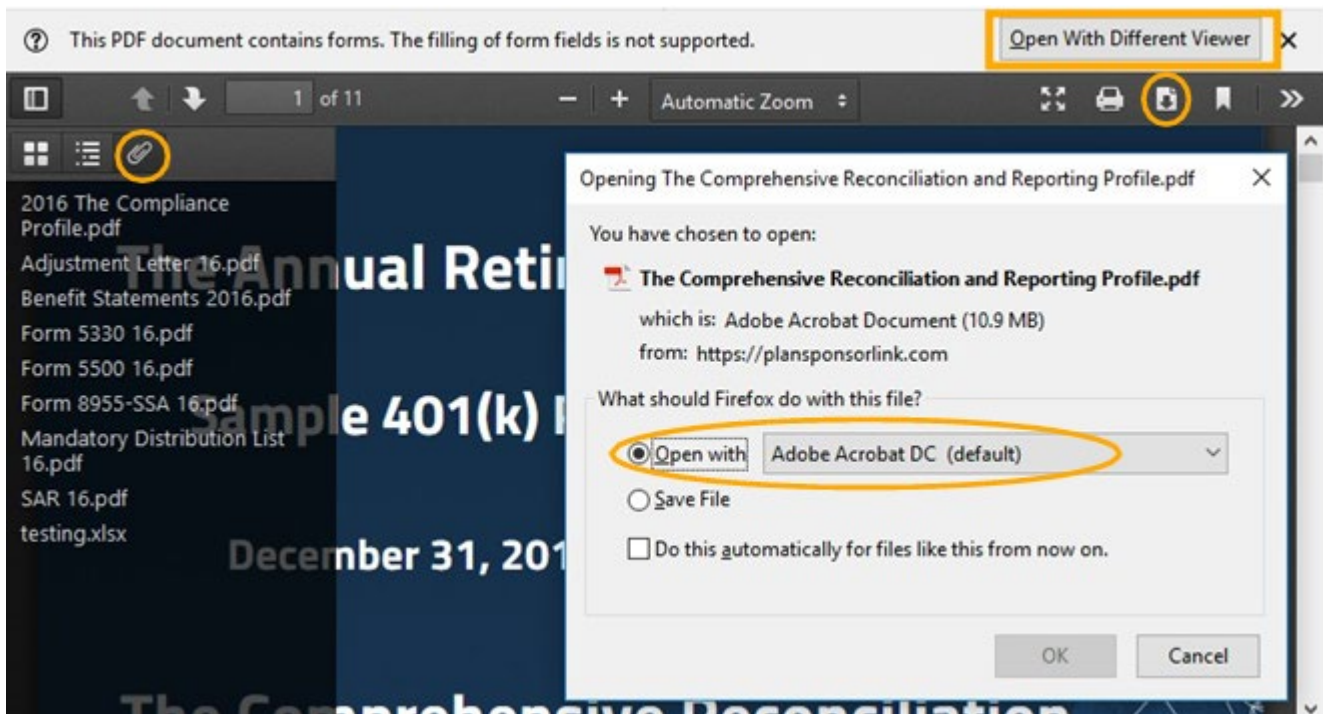
Microsoft Edge

➢ Click the floppy disk icon to save as or right click save as. (There is no pop-up that shows the Save As has been completed)

➢ Go to your downloads folder and open the Navigator with Adobe Acrobat. To open with Adobe, right click and select open with Adobe Acrobat. If this is not an option most likely Adobe Acrobat is not installed on your computer. Here is the free download of Adobe Acrobat Reader https://get.adobe.com/reader/ *(Please uncheck the optional offers before clicking the download Acrobat Reader button*) once downloaded please install the program.

➢ Navigator does not open, and the following message appears "Couldn't open PDF – Something's keeping this PDF from opening"? This is common message for Microsoft Edge. Normally, the document has already saved to your computer and can been opened from the download folder.
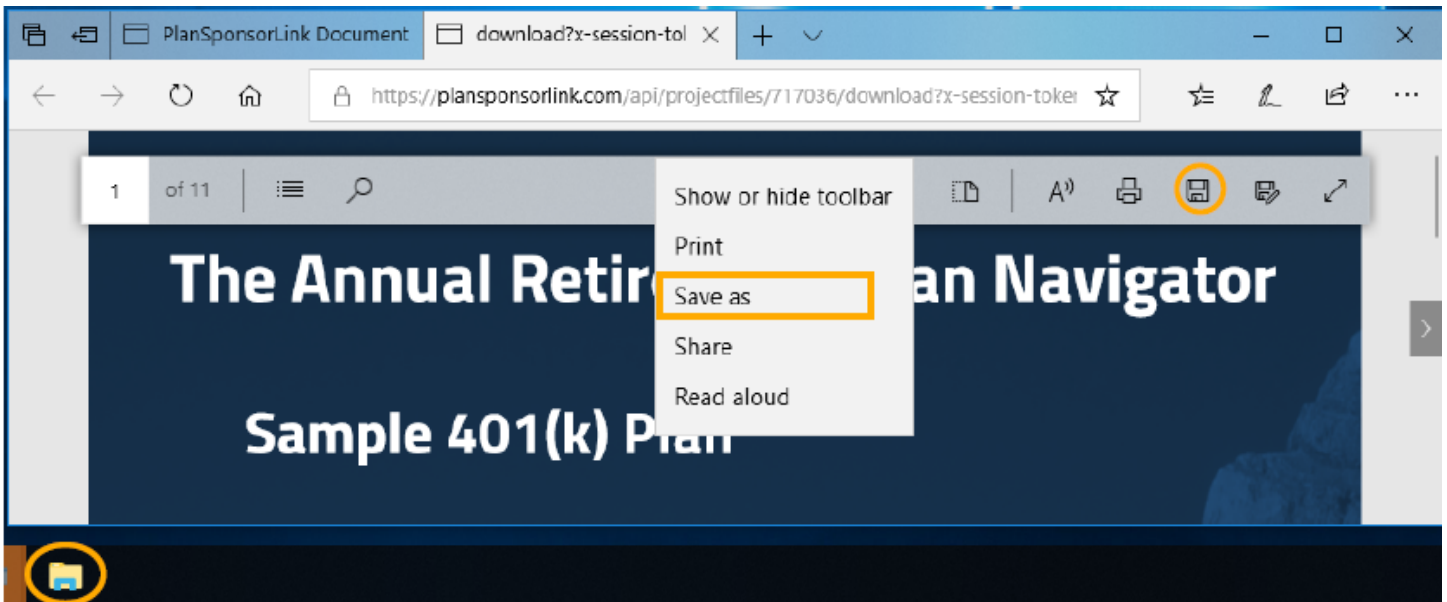
Safari for Mac 🧭

Safari for Windows - Apple no longer offers Safari updates for Windows. Safari 5.1.7 for Windows was the last version made for Windows, and it is now outdated. Published Date: September 24, 2018

- ➢ Safari for Mac - Safari is included with your Mac operating system.

- ➢ At the top of the browser screen click File then Save As... Or Export as PDF... Or hover at the bottom of the page/screen for the toolbar to appear. Then click on the download icon.
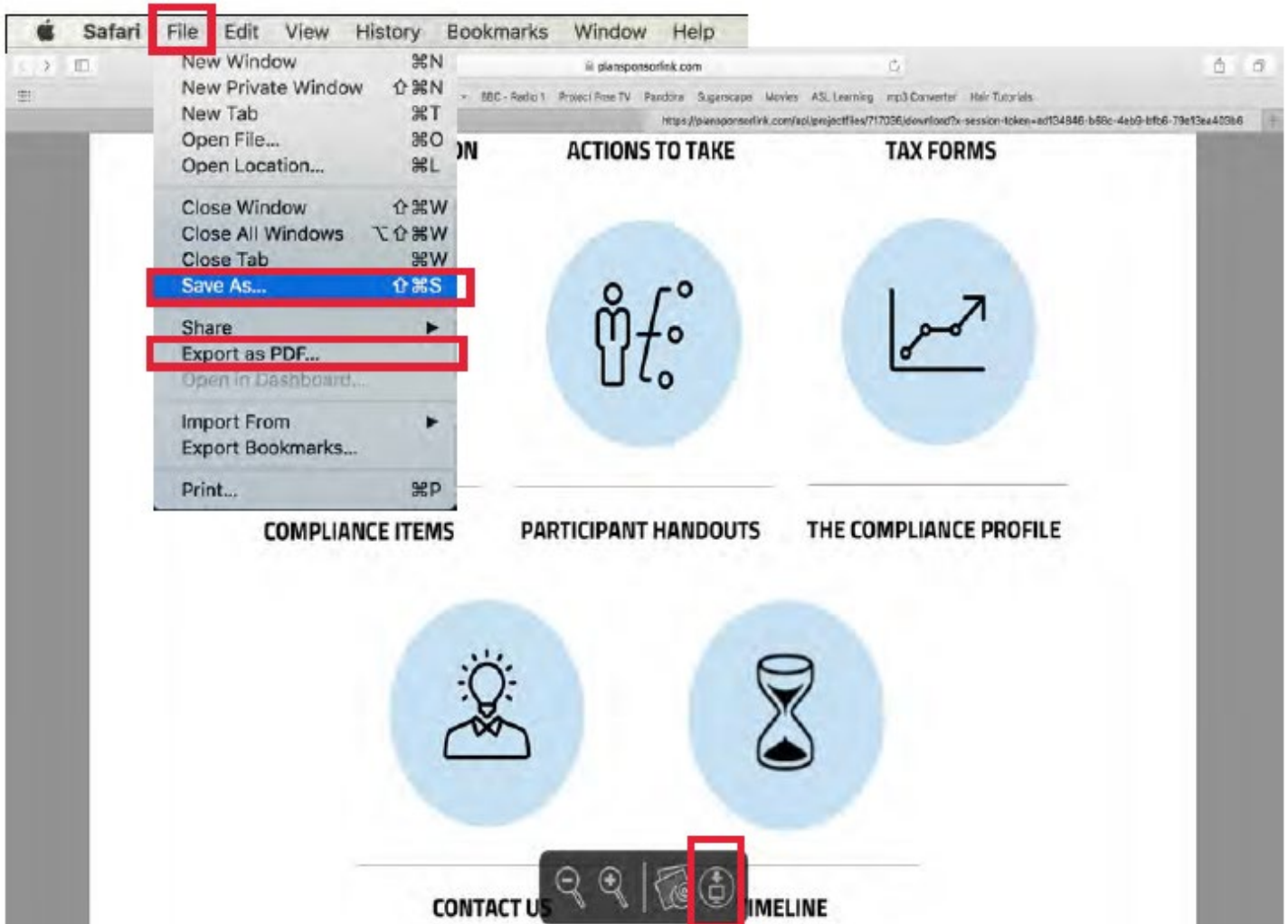
Safari for Mac continued…

Go to Finder

to open your downloads folder and open with Adobe Acrobat.

Here is a link to the free download and install Adobe Acrobat Reader: https://get.adobe.com/reader/ (***Please uncheck the optional offers before clicking the download Acrobat Reader button***)

Apple's Preview is the default application for opening PDFs. Preview will NOT allow the user to open and view the attachments inside of the Navigator. To set Adobe Acrobat Reader as the default application for opening PDF files complete the following steps:

> ➢ Click a PDF file while holding the control key
> ➢ Then select Get Info from the menu list
> ➢ Click the Open with drop down and select Acrobat Reader from the menu
> ➢ Click on the Change All button to keep the changes