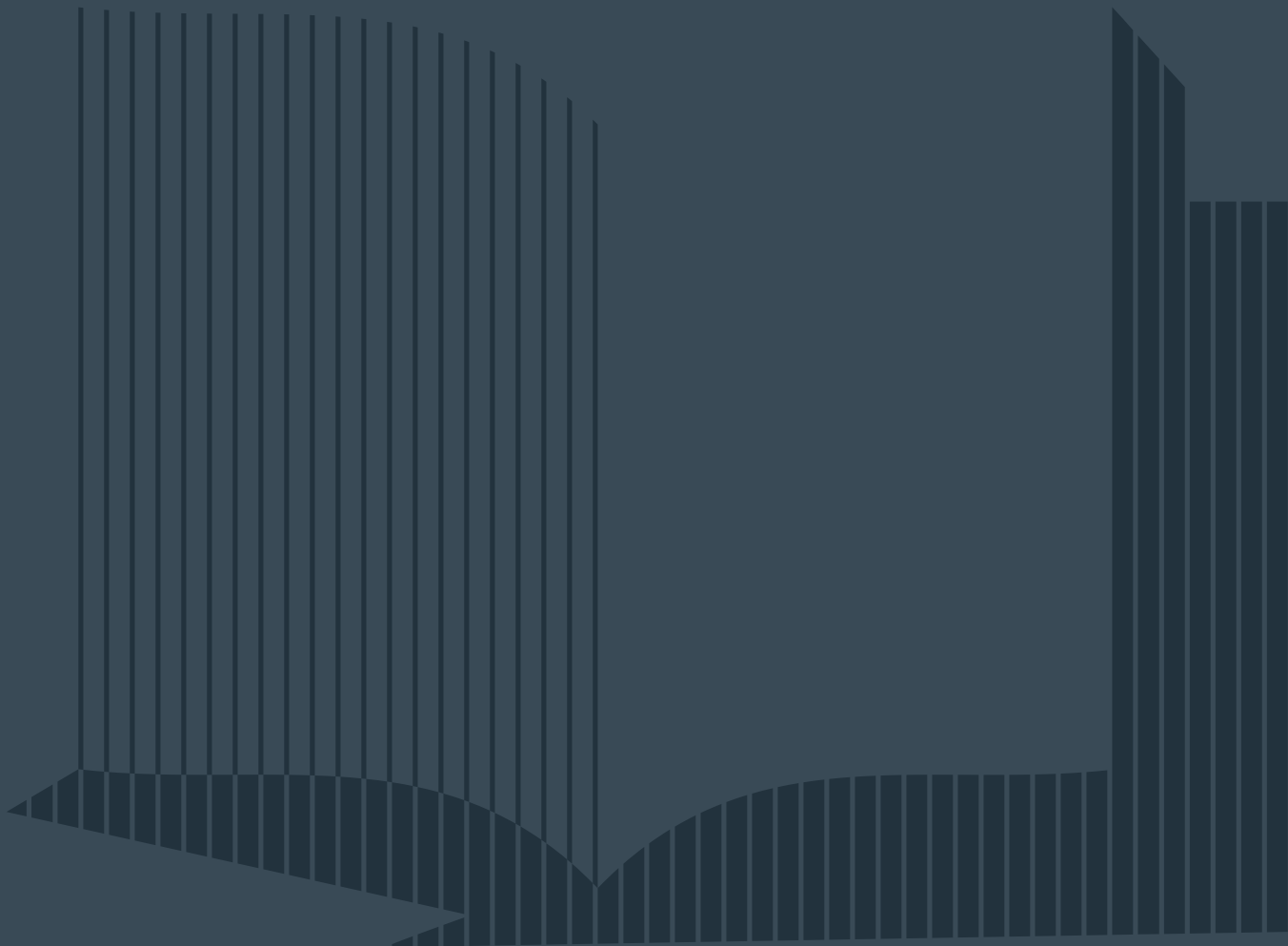


# **SchoolsFirst FCU Plan Administration:**

Plan Vue<sup>®</sup> Guide  
for Participants





## **SchoolsFirst Federal Credit Union (FCU) Plan Administration: Plan Vue Guide for Participants**

Welcome to the SchoolsFirst FCU Plan Vue® Guide for Participants. The following guide was assembled to introduce you to the Plan Vue system. We have included an orientation to the key functions of the system as well as answers to some of the most Frequently Asked Questions we receive.

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## Contact Us

Our goal as your district's 403(b)/457(b) Plan Administrator is to provide you with the very best personal service. For assistance with the Plan Vue system, please contact a SchoolsFirst FCU Third Party Plan Administrator:

**Phone:** 800.462.8328, ext. 4727

**Email:** [retirement@schoolsfirstfcu.org](mailto:retirement@schoolsfirstfcu.org)

**Hours:**

Monday through Friday: 7 a.m. to 7 p.m.

Saturday: 9 a.m. to 3 p.m.

## Accessing Plan Vue

### New Users:

To access the Plan Vue website as a Participant, please complete the following steps:

1. **Visit** <https://pa.schoolsfirstfcu.org>

#### **Note: System Requirements**

Plan Vue requires your computer to have the most updated version of web browser and/or Java available. It is compatible with Mozilla Firefox, Google Chrome, Apple Safari, and Microsoft Internet Explorer 9.0+. If you are experiencing issues accessing the site or uploading files, an out of date browser or Java version is most likely the cause. To determine the specific issue, use the link at the bottom of the site titled "Problems viewing the site?". Once the Browser Compatibility results appear on the screen, contact your district's IT department for assistance with upgrading your computer.

If you are experiencing formatting issues, the issue may be different. It is recommended that Plan Vue be accessed in Internet Explorer or Google Chrome as Mozilla Firefox will transfer any customization made to the browser over to Plan Vue which could result in screen distortion.

If neither of these solutions resolves your issues, contact a Plan Administrator at 800.462.8328, extension 8793 and we will be happy to assist you.

2. **User ID:** Enter your 9-digit social security number *(without dashes or spaces)*

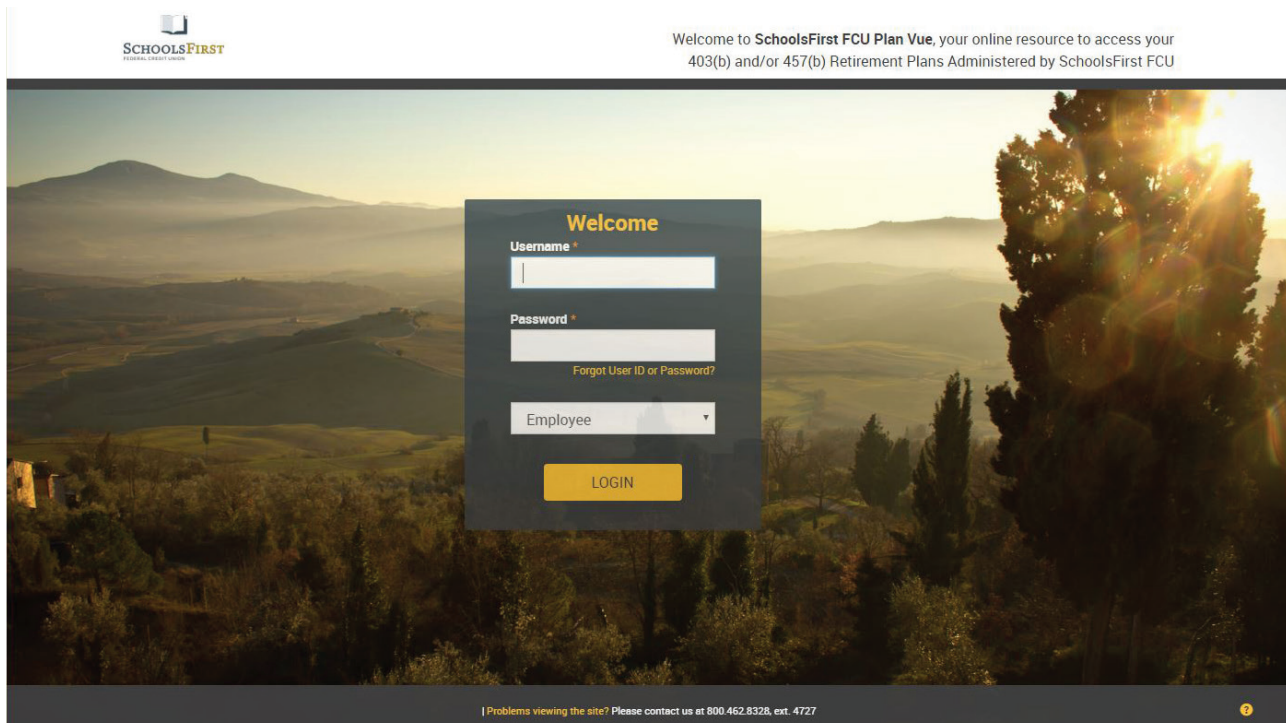
*Note: This information is encrypted and is not shared with any third party*

3. **Password:** Enter the last 4-digits of your social security number

*Note: This information is encrypted and is not shared with any third party*

4. **Select Role:** Select **Employee** in the drop-down menu

5. Click Login



**SCHOOLSFIRST** FEDERAL CREDIT UNION

Welcome to **SchoolsFirst FCU Plan Vue**, your online resource to access your 403(b) and/or 457(b) Retirement Plans Administered by SchoolsFirst FCU

**Welcome**

Username \*

Password \*

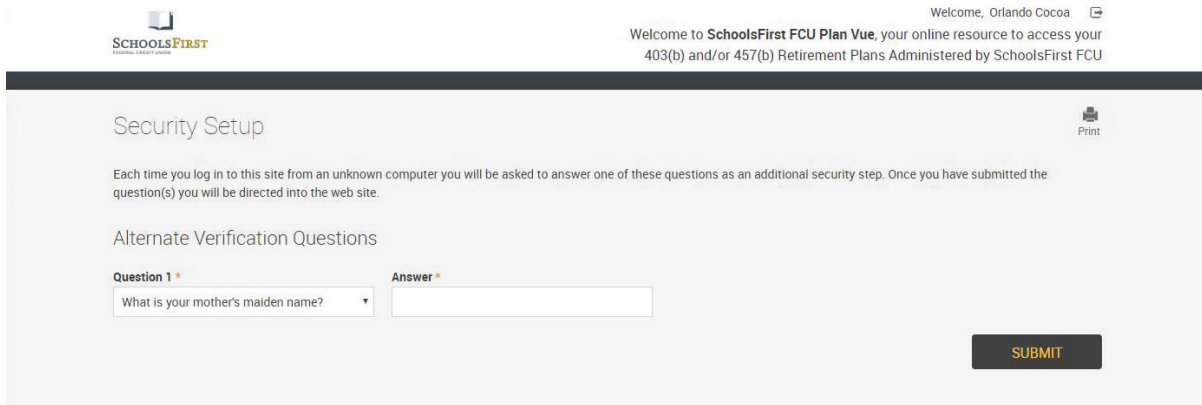
Forgot User ID or Password?

Employee ▼

**LOGIN**

Problems viewing the site? Please contact us at 800.462.8328, ext. 4727

6. Select an **Alternate Verification Question** that will be asked when you log in on a new computer; Enter the answer to the question you choose in the answer box and click **Submit**



Welcome, Orlando Cocoa

Welcome to **SchoolsFirst FCU Plan Vue**, your online resource to access your 403(b) and/or 457(b) Retirement Plans Administered by SchoolsFirst FCU

### Security Setup

Each time you log in to this site from an unknown computer you will be asked to answer one of these questions as an additional security step. Once you have submitted the question(s) you will be directed into the web site.

#### Alternate Verification Questions

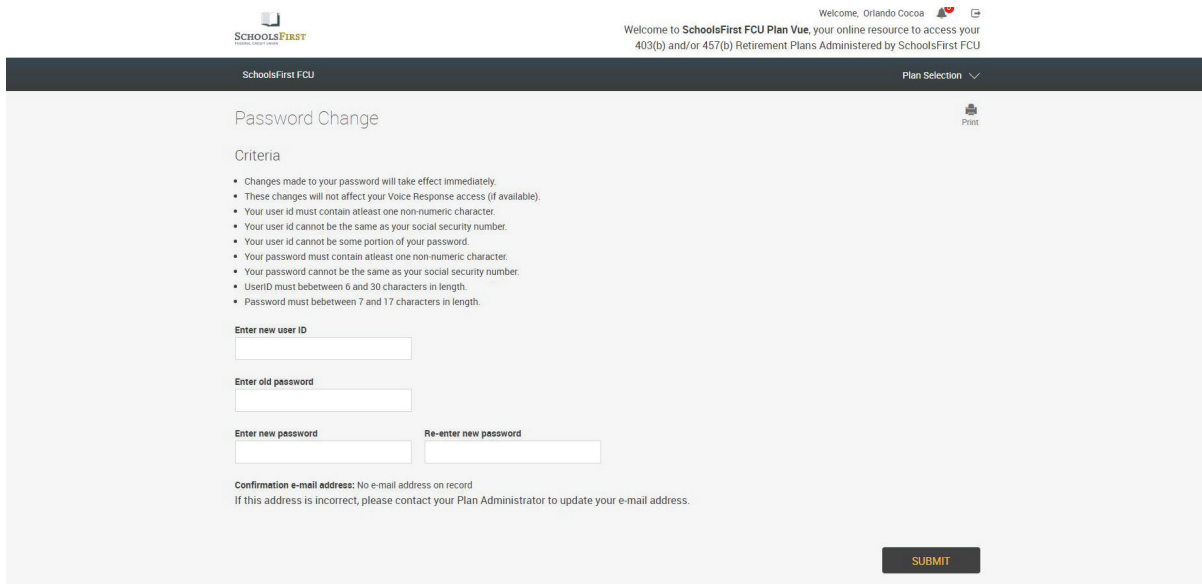
Question 1 \*      Answer \*

What is your mother's maiden name?     

**SUBMIT**

7. Create a new **User ID** and **Password** (*your selections must meet the listed requirements*); Your **Previous Password** is the last 4-digits of your social security number

**Note:** You will only need to complete the password change process once as the Plan Vue password never expires.



Welcome, Orlando Cocoa

Welcome to **SchoolsFirst FCU Plan Vue**, your online resource to access your 403(b) and/or 457(b) Retirement Plans Administered by SchoolsFirst FCU

### Password Change

Criteria

- Changes made to your password will take effect immediately.
- These changes will not affect your Voice Response access (if available).
- Your user id must contain atleast one non-numeric character.
- Your user id cannot be the same as your social security number.
- Your user id cannot be some portion of your password.
- Your password must contain atleast one non-numeric character.
- Your password cannot be the same as your social security number.
- UserID must bebetween 6 and 30 characters in length.
- Password must bebetween 7 and 17 characters in length.

Enter new user ID     

Enter old password     

Enter new password      Re-enter new password

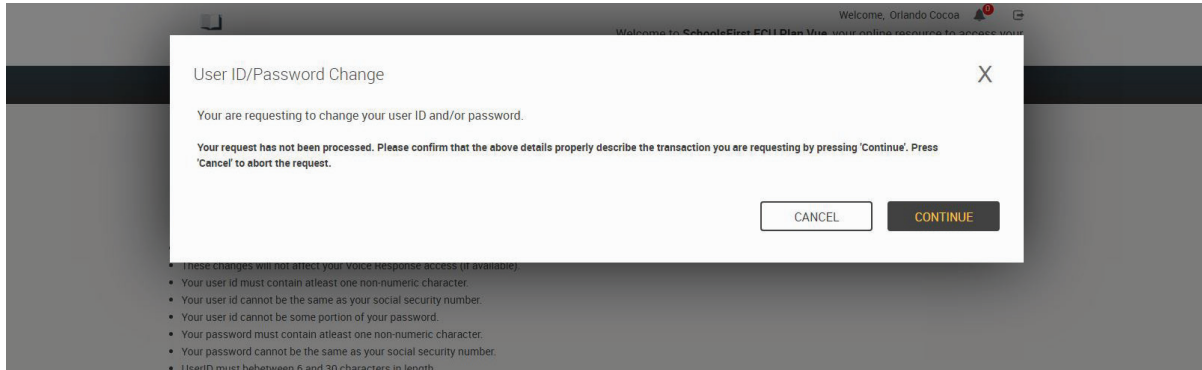
Confirmation e-mail address: No e-mail address on record.  
If this address is incorrect, please contact your Plan Administrator to update your e-mail address.

**SUBMIT**

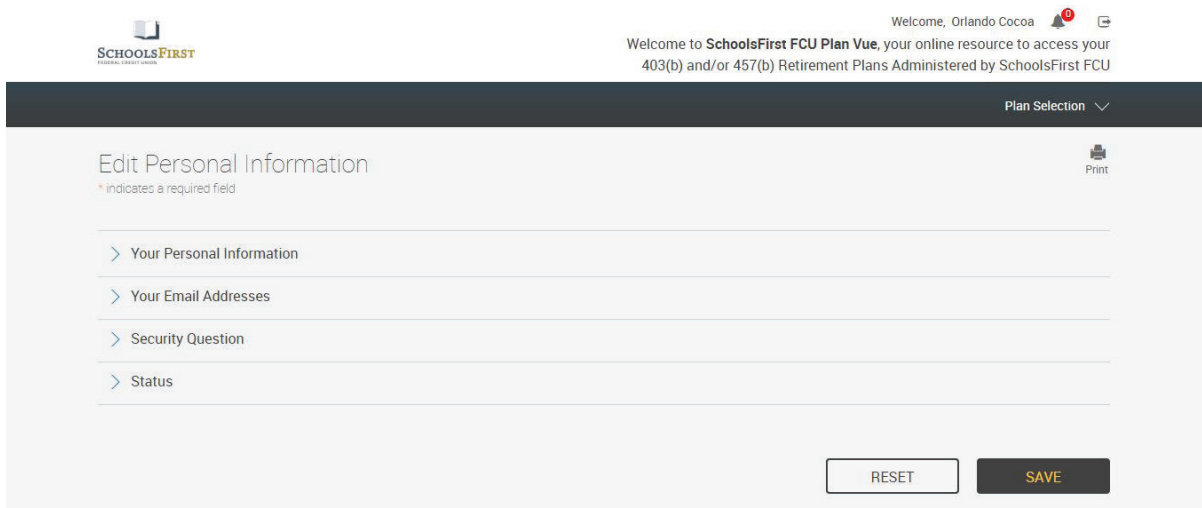
### Password Requirements:

- Minimum of 7 characters
- Maximum of 17 characters
- Must contain at least 1 letter
- Cannot match your User ID
- Case-sensitive
- Cannot match your User ID
- Case-sensitive

8. Click **Submit** to confirm your User ID and Password change, and then click **Continue** on the pop-up screen



9. You will be taken to the **Personal Info** tab to enter an email address and update your preferences. Your email address will be used to send you confirmations of your salary reduction changes.

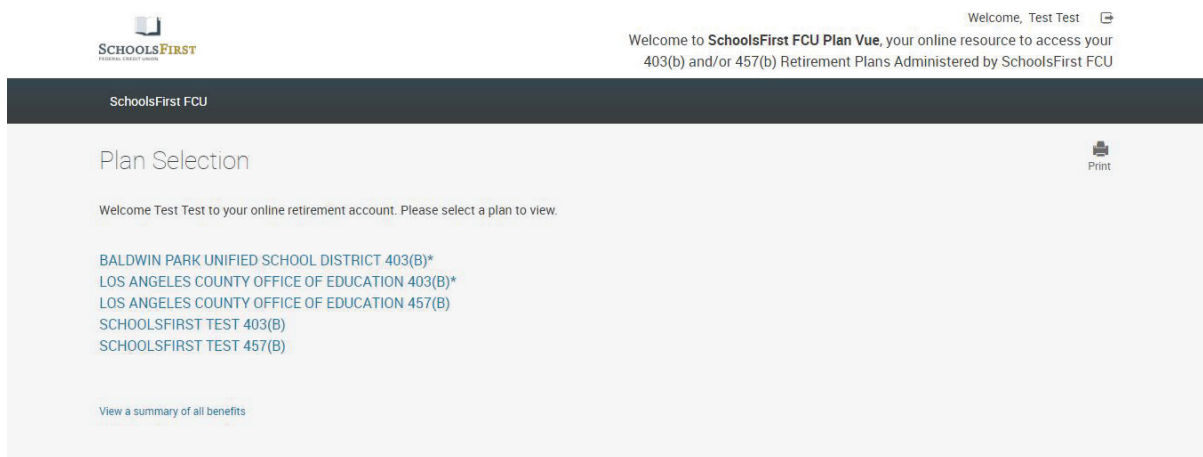


## Plan Selection

Once you have successfully logged into Plan Vue, **select the plan** you would like to enter by clicking on the name of the plan type.

An asterisk (\*) next to the plan name denotes that your district has elected to offer the Roth 403(b) option as a part of the 403(b) plan. The Roth post-tax deferral and 403(b) deferral information will be communicated together as they are the same base plan type.

**Note:** Plan Vue keeps the 403(b) and 457(b) plans separate and will only communicate information regarding that plan in the designated profile.

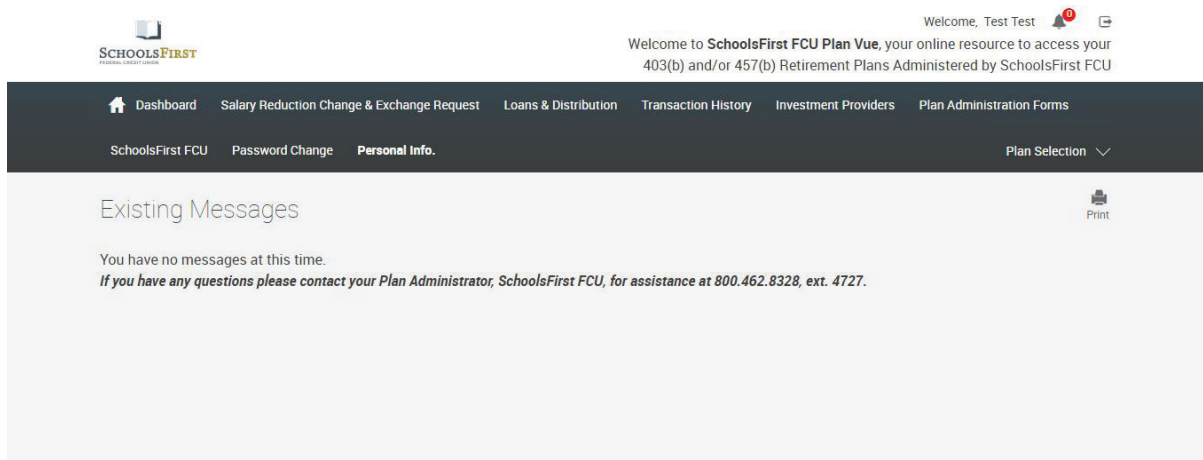




## View Your Messages

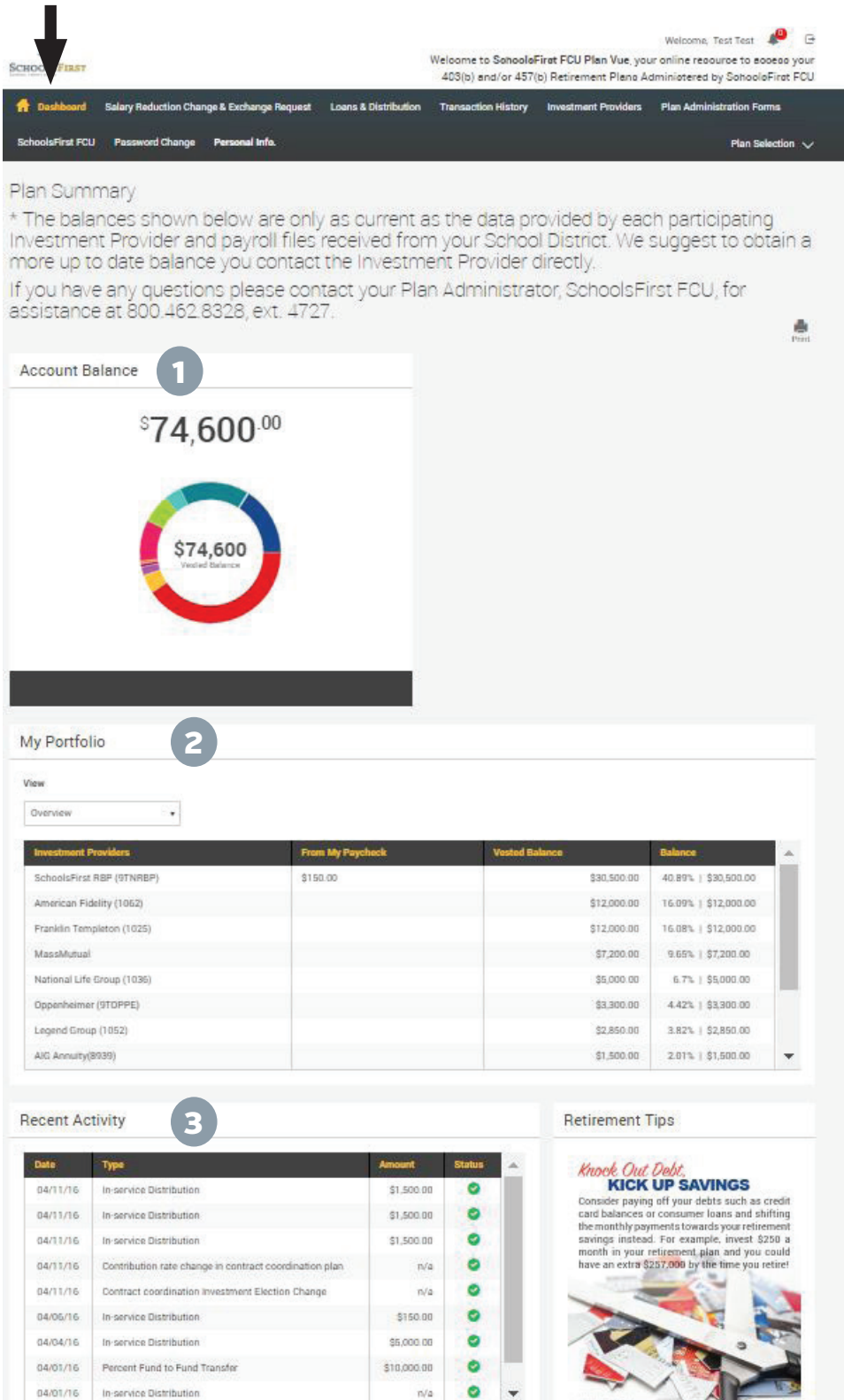
On your **Existing Messages** page, you will find important messages sent by your Plan Administrator communicating regulatory changes and important reminders.

Click on the message title to open and read details of the message. Once you have read the message, you may delete it from your message inbox by selecting the box below **Delete Message(s)** and clicking **Submit**.



## Plan Summary (Dashboard)

To view a summary of your plan participation, click the **Dashboard** tab located at the top of the page. In the image below, the number in the circle corresponds to the descriptions of each section.



Welcome, Test Test

Welcome to SchoolsFirst FCU Plan Vue, your online resource to access your 403(b) and/or 457(b) Retirement Plans Administered by SchoolsFirst FCU

**Dashboard** Salary Reduction Change & Exchange Request Loans & Distribution Transaction History Investment Providers Plan Administration Forms

SchoolsFirst FCU Password Change Personal Info Plan Selection

### Plan Summary

\* The balances shown below are only as current as the data provided by each participating Investment Provider and payroll files received from your School District. We suggest to obtain a more up to date balance you contact the Investment Provider directly.

If you have any questions please contact your Plan Administrator, SchoolsFirst FCU, for assistance at 800.462.8328, ext. 4727.

#### Account Balance 1

**\$74,600.00**

**\$74,600**  
Vested Balance

#### My Portfolio 2

View: Overview

Investment Providers	From My Paycheck	Vested Balance	Balance
SchoolsFirst RBP (RTNRBP)	\$150.00	\$30,500.00	40.89%   \$30,500.00
American Fidelity (1062)		\$12,000.00	16.09%   \$12,000.00
Franklin Templeton (1025)		\$12,000.00	16.08%   \$12,000.00
MassMutual		\$7,200.00	9.65%   \$7,200.00
National Life Group (1036)		\$5,000.00	6.7%   \$5,000.00
Oppenheimer (STOPPE)		\$3,300.00	4.42%   \$3,300.00
Legend Group (1052)		\$2,850.00	3.82%   \$2,850.00
AIG Annuity(8039)		\$1,500.00	2.01%   \$1,500.00

#### Recent Activity 3

Date	Type	Amount	Status
04/11/16	In-service Distribution	\$1,500.00	✓
04/11/16	In-service Distribution	\$1,500.00	✓
04/11/16	In-service Distribution	\$1,500.00	✓
04/11/16	Contribution rate change in contract coordination plan	n/a	✓
04/11/16	Contract coordination investment Election Change	n/a	✓
04/05/16	In-service Distribution	\$150.00	✓
04/04/16	In-service Distribution	\$5,000.00	✓
04/01/16	Percent Fund to Fund Transfer	\$10,000.00	✓
04/01/16	In-service Distribution	n/a	✓

#### Retirement Tips

**Kick Out Debt. KICK UP SAVINGS**

Consider paying off your debts such as credit card balances or consumer loans and shifting the monthly payments towards your retirement savings instead. For example, invest \$250 a month in your retirement plan and you could have an extra \$257,000 by the time you retire!

*\*Assumes 7% rate*

### 1 Account Balance

A summary of the amount you have deferred from the time you entered the SchoolsFirst FCU Plan and YTD, broken down by Plan Type.

### 2 My Portfolio

A summary of the amount you have deferred and are currently deferring to each vendor.

### 3 Recent Activity

Shows amount deferred for the most recent payroll cycles and the date the deferrals were processed and sent to your investment provider.

## Setting Up Notifications

Once you set up your Plan Vue profile, go to the **Personal Info** tab located at the top of the page and click on **Your Email Address**. Select the button next to the **Salary Reduction Agreement (SRA)** label to turn it on. If this is not selected, email notifications cannot be sent. You may also elect to have your confirmations sent to your home, office or other email address in this location. Click **Save** at the bottom of the page to save your changes.

**Note:** Currently we send notifications for any SRA that is submitted through Plan Vue or via fax. Additional notification options will be available once the system is used for processing those transactions.

You can also manage the email address you would like notifications to be sent to.

Welcome, Test Test

Welcome to SchoolsFirst FCU Plan Vue, your online resource to access your 403(b) and/or 457(b) Retirement Plans Administered by SchoolsFirst FCU

Dashboard Salary Reduction Change & Exchange Request Loans & Distribution Transaction History Investment Providers Plan Administration Forms

SchoolsFirst FCU Password Change **Personal Info.** Plan Selection

### Edit Personal Information

\* indicated a required field

☒ No changes were made to this Participant's personal information.

> Your Personal Information

✓ Your Email Addresses

Home: beach0371@yahoo.com Confirm home email address: beach0371@yahoo.com

Your office Email address: Confirm office email address:

Other Email address: Confirm other email address:

Send email notification to one of the following: \*

☒ Home ☐ Office ☐ Other ☐ None ☐ I do not have an email address

Send me an email notification message any time one of the following items occurs within my plan(s).

Salary Reduction Agreement (SRA) Off ☒ On

Distribution(s) / Rollover(s) Off ☒ On

Loan(s) Off ☒ On

Transfers Off ☒ On

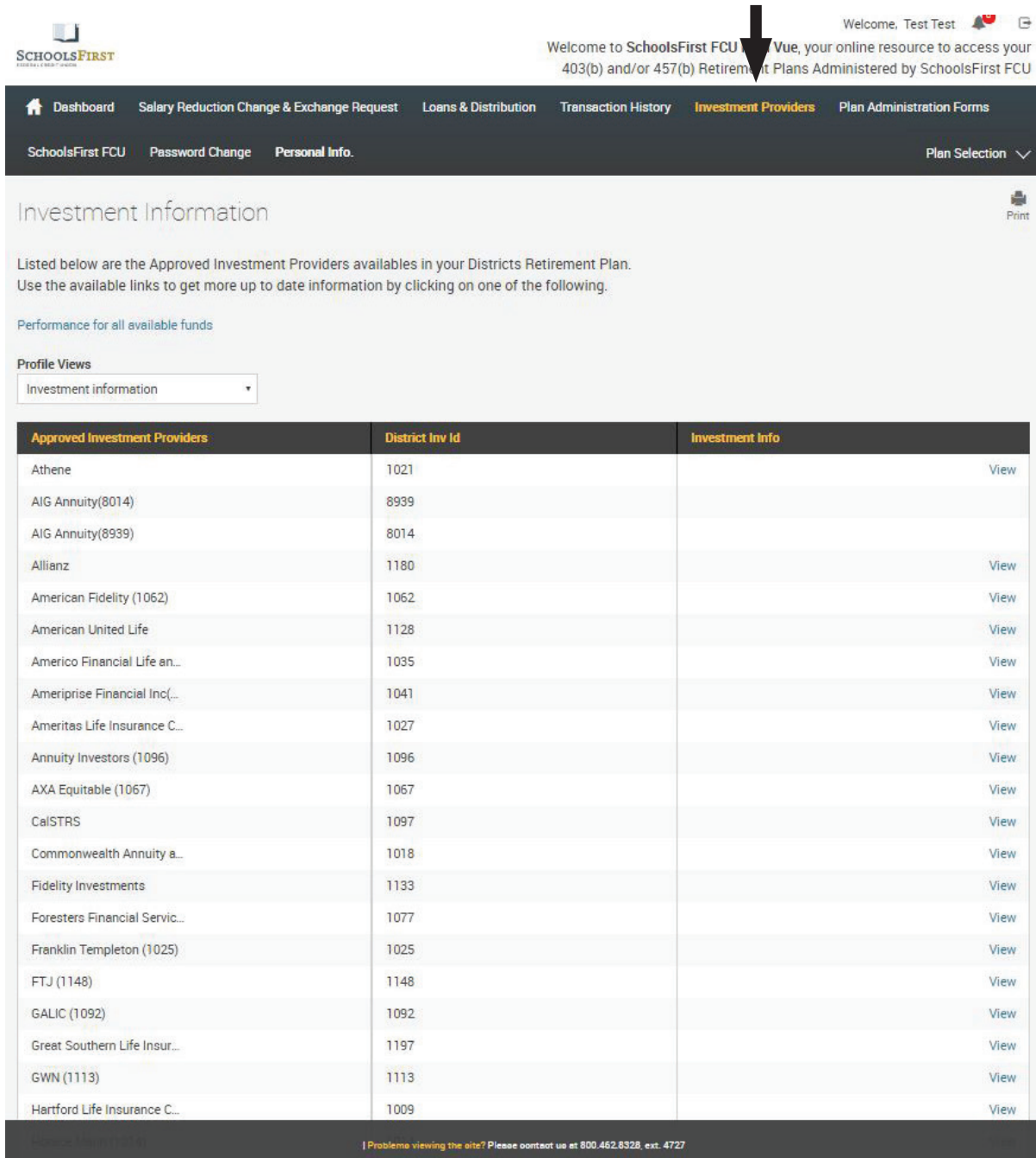
> Security Question

> Status

RESET SAVE

## Investment Providers

Your district has a unique list of 403(b) and/or 457(b) Investment Providers available to you. If you are looking to invest in a 403(b)/457(b) or would like to switch to a new Investment Provider, the Investment Provider page offers links to each of the investment providers available under your district's plan.



Welcome, Test Test

Welcome to SchoolsFirst FCU. View, your online resource to access your 403(b) and/or 457(b) Retirement Plans Administered by SchoolsFirst FCU

Dashboard Salary Reduction Change & Exchange Request Loans & Distribution Transaction History **Investment Providers** Plan Administration Forms

SchoolsFirst FCU Password Change Personal Info. Plan Selection

### Investment Information

Listed below are the Approved Investment Providers available in your District's Retirement Plan. Use the available links to get more up to date information by clicking on one of the following.

[Performance for all available funds](#)

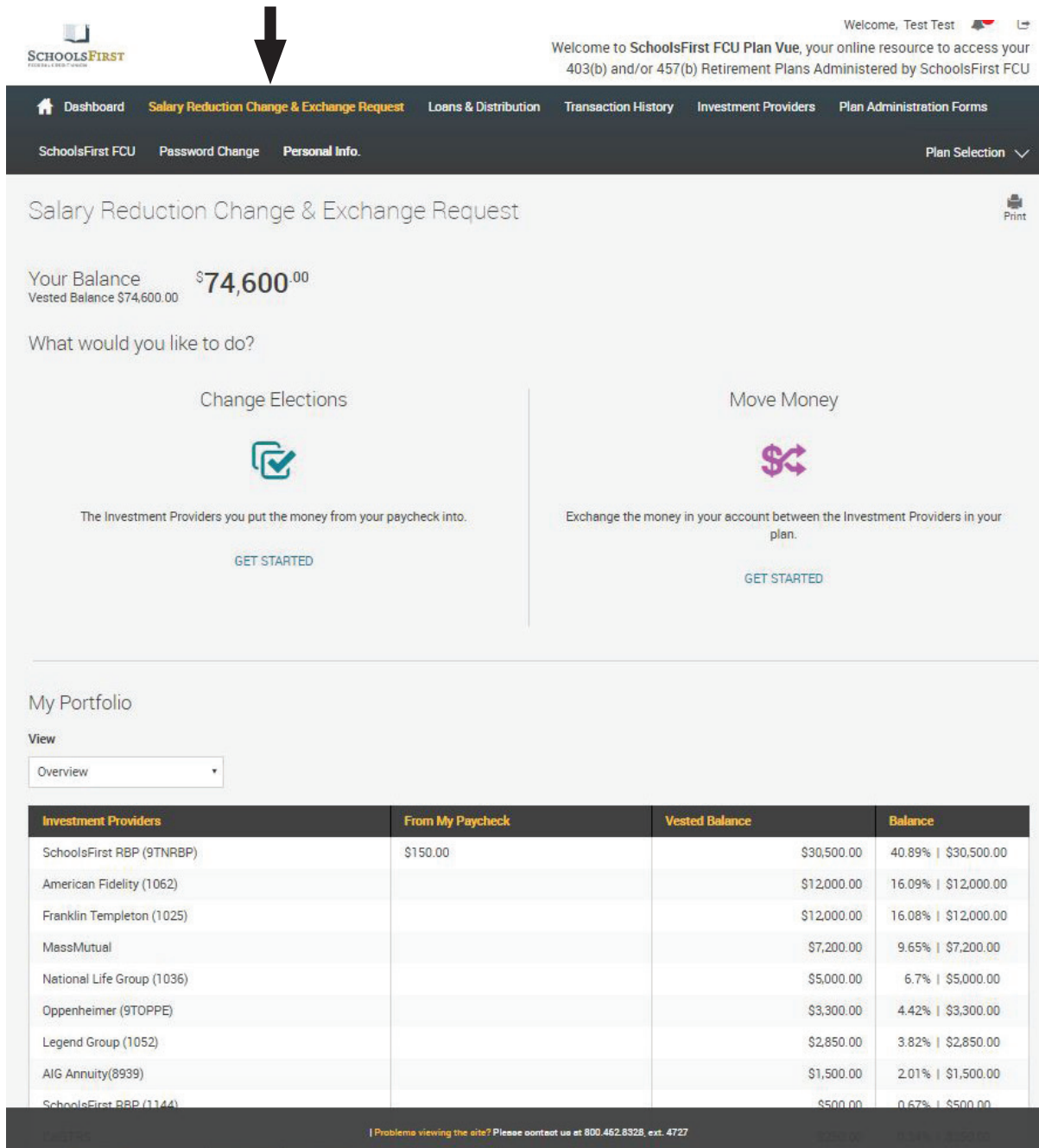
Profile Views  
Investment information

Approved Investment Providers	District Inv Id	Investment Info
Athene	1021	<a href="#">View</a>
AIG Annuity(8014)	8939	
AIG Annuity(8939)	8014	
Allianz	1180	<a href="#">View</a>
American Fidelity (1062)	1062	<a href="#">View</a>
American United Life	1128	<a href="#">View</a>
Americo Financial Life an...	1035	<a href="#">View</a>
Ameriprise Financial Inc(...	1041	<a href="#">View</a>
Ameritas Life Insurance C...	1027	<a href="#">View</a>
Annuity Investors (1096)	1096	<a href="#">View</a>
AXA Equitable (1067)	1067	<a href="#">View</a>
CalSTRS	1097	<a href="#">View</a>
Commonwealth Annuity a...	1018	<a href="#">View</a>
Fidelity Investments	1133	<a href="#">View</a>
Foresters Financial Servic...	1077	<a href="#">View</a>
Franklin Templeton (1025)	1025	<a href="#">View</a>
FTJ (1148)	1148	<a href="#">View</a>
GALIC (1092)	1092	<a href="#">View</a>
Great Southern Life Insur...	1197	<a href="#">View</a>
GWN (1113)	1113	<a href="#">View</a>
Hartford Life Insurance C...	1009	<a href="#">View</a>

[Problems viewing the site? Please contact us at 800.452.8328, ext. 4727](#)

## Salary Reduction Change

On the **Salary Reduction Change** tab located at the top of the page, you can start deferrals, change your deferral amount/vendor, or terminate future deferrals.



Welcome, Test Test

Welcome to SchoolsFirst FCU Plan Vue, your online resource to access your 403(b) and/or 457(b) Retirement Plans Administered by SchoolsFirst FCU

Dashboard **Salary Reduction Change & Exchange Request** Loans & Distribution Transaction History Investment Providers Plan Administration Forms


SchoolsFirst FCU Password Change Personal Info. Plan Selection

### Salary Reduction Change & Exchange Request

Your Balance **\$74,600.00**  
Vested Balance \$74,600.00

What would you like to do?


Change Elections



The Investment Providers you put the money from your paycheck into.

GET STARTED

Move Money



Exchange the money in your account between the Investment Providers in your plan.

GET STARTED

### My Portfolio

View


Overview



Investment Providers	From My Paycheck	Vested Balance	Balance
SchoolsFirst RBP (9TNRBP)	\$150.00	\$30,500.00	40.89%   \$30,500.00
American Fidelity (1062)		\$12,000.00	16.09%   \$12,000.00
Franklin Templeton (1025)		\$12,000.00	16.08%   \$12,000.00
MassMutual		\$7,200.00	9.65%   \$7,200.00
National Life Group (1036)		\$5,000.00	6.7%   \$5,000.00
Oppenheimer (9TOPPE)		\$3,300.00	4.42%   \$3,300.00
Legend Group (1052)		\$2,850.00	3.82%   \$2,850.00
AIG Annuity(8939)		\$1,500.00	2.01%   \$1,500.00
SchoolsFirst RBP (1144)		\$500.00	0.67%   \$500.00

Problems viewing the site? Please contact us at 800.462.8328, ext. 4727



1. **Salary Deferral Change Request:** Click on the arrow to the left of the deferral type you would like to make changes to; this will expand the list of eligible Investment Providers available through your district's plan. You will need to check the box that says "Include" in order to submit a change for the deferral type you selected. Changes for more than one deferral type may be submitted at the same time, but the "Include" box must be checked or they will be skipped.





Welcome, Test Test



Welcome to SchoolsFirst FCU Plan Vue, your online resource to access your 403(b) and/or 457(b) Retirement Plans Administered by SchoolsFirst FCU

Dashboard
Salary Reduction Change & Exchange Request
Loans & Distribution
Transaction History
Investment Providers
Plan Administration Forms

SchoolsFirst FCU
Password Change
Personal Info.
Plan Selection

 Salary Deferral Change Request:


**2016 IRS Contribution limit is \$ 18,000.00.**

If you are over 50 or will be the age of 50 by December 31st of this year you can contribute an additional \$6,000.00 for a total of \$24,000.00 dollars. If you have any questions about the limits, please contact your Financial Advisor or your Plan Administrator, SchoolsFirst FCU, at 800.462.8328 x4727

---

Overall Progress: **0% Complete**

To change your Deferral amount and /or Investment provider, please select the [ > ] sign below to open the Investment options for the plan type you wish to make changes for. Please make your selection and check the Include box. If you wish to continue deferrals to a specific vendor or plan type, please reenter that amount and check the Include box. Once you have entered an amount and check the Include box for each Investment provider you are deferring to, check the box next to "I authorize this investment election change", then click Next.

This Salary Deferral Change request must be submitted 30 days before the effective date for your districts payroll cycle. Please contact your Plan Administrator, SchoolsFirst FCU, at 800.462.8328 x4727 or School District if you have any questions.

> 403(b) Deferral	<input checked="" type="checkbox"/> Include
> 403(b) Employer Contribution	<input type="checkbox"/> Include
> Roth 403(b) Deferral	<input type="checkbox"/> Include

☐ I authorize this investment election change

CANCEL
NEXT

2. **Current Deferral Amount:** If your district allows you to choose a dollar deferral or a percentage deferral, you will have the option of making the change via the drop down at the top of the list of Investment Providers. Your current deferral amount will show in the **Current Deferral Amount** Column. If you do not have an existing deferral this column will not have any values entered.

403(b) Deferral

Include

Contribution method  
Dollar

Investment Provider	Current Deferral Amount	New Deferral Amount
American Fidelity (1062)	\$0.00	\$ <input type="text" value="0"/>
Americo Financial Life and Annuity	\$0.00	\$ <input type="text" value="0"/>
Ameriprise Financial Inc(1041)	\$0.00	\$ <input type="text" value="0"/>
Ameritas Life Insurance Corp	\$0.00	\$ <input type="text" value="0"/>
Annuity Investors (1096)	\$0.00	\$ <input type="text" value="0"/>
American United Life	\$0.00	\$ <input type="text" value="0"/>
Athene	\$0.00	\$ <input type="text" value="0"/>
AXA Equitable (1067)	\$0.00	\$ <input type="text" value="0"/>
CalSTRS	\$0.00	\$ <input type="text" value="0"/>
Commonwealth Annuity and Life Insurance	\$0.00	\$ <input type="text" value="0"/>
Fidelity Investments	\$0.00	\$ <input type="text" value="0"/>
Foresters Financial Services	\$0.00	\$ <input type="text" value="0"/>
Franklin Templeton (1025)	\$0.00	\$ <input type="text" value="0"/>
FTJ (1148)	\$0.00	\$ <input type="text" value="0"/>
GALIC (1092)	\$0.00	\$ <input type="text" value="0"/>
Great Southern Life Insurance Company	\$0.00	\$ <input type="text" value="0"/>
GWN (1113)	\$0.00	\$ <input type="text" value="0"/>
Hartford Life Insurance Company	\$0.00	\$ <input type="text" value="0"/>
Horace Mann (1014)	\$0.00	\$ <input type="text" value="0"/>
Industrial-Alliance (1135)	\$0.00	\$ <input type="text" value="0"/>
Voya (1060)	\$0.00	\$ <input type="text" value="0"/>
Voya (1059)	\$0.00	\$ <input type="text" value="0"/>
Legend Group (1052)	\$0.00	\$ <input type="text" value="0"/>
Lincoln Investment Planning Inc	\$0.00	\$ <input type="text" value="0"/>

Problems viewing the site? Please contact us at 800.462.8326 ext. 4727

3. **New Deferral Amount:** Enter your deferral amount(s) in the **New Deferral Amount** column. Find the box that corresponds with your Investment Provider and enter the amount there. If you wish to continue an existing deferral to a vendor, and are adding or changing another vendor, you will need to enter amount you are retaining in the box that corresponds with that vendor. If you do not, the deferral to that vendor will be cancelled.

4. **Total Allocation:** Ensure that your total deferral amount in the New Deferral Amount column matches the full amount you are electing to defer inclusive of all Investment Providers for that plan type.
5. **Authorization:** Click the 'I authorize this investment election change' box in order to authorize your elections and proceed to the confirmation page.

Investment Provider	Current Deferral Amount	New Deferral Amount
Waddell and Hedra (1042)	\$0.00	\$0.00
Western National Life Insurance Company	\$0.00	\$0.00
Allianz	\$0.00	\$0.00
RSG Securities (1174)	\$0.00	\$0.00
AIG Annuity(8939)	\$0.00	\$0.00
AIG Annuity(8014)	\$0.00	\$0.00
Western National Life (8014)	\$0.00	\$0.00
Veritrust (8012)	\$0.00	\$0.00
Oppenheimer (9TOPPE)	\$0.00	\$0.00
SchoolsFirst RBP (9TNRBP)	\$150.00	\$200.00
<b>TOTAL ALLOCATION</b>	<b>\$150.00</b>	<b>\$250.00</b>

☐ 403(b) Employer Contribution ☐ Include  
☐ Roth 403(b) Deferral ☐ Include  
☒ I authorize this investment election change

6. **Submit:** Review your **Current and New Deferral Amount(s)** for accuracy. If they are correct, click **Submit**.

Dashboard Salary Reduction Change & Exchange Request Loans & Distribution Transaction History Investment Providers Plan Administration Forms

SchoolsFirst FCU Password Change Personal Info. Plan Selection

Salary Deferral Change Request:

**2016 IRS Contribution limit is \$ 18,000.00.**

If you are over 50 or will be the age of 50 by December 31st of this year you can contribute an additional \$6,000.00 for a total of \$24,000.00 dollars. If you have any questions about the limits, please contact your Financial Advisor or your Plan Administrator, SchoolsFirst FCU, at 800.462.8328 x4727

Overall Progress: **50% Complete**

Review Elections

403(b) Deferral

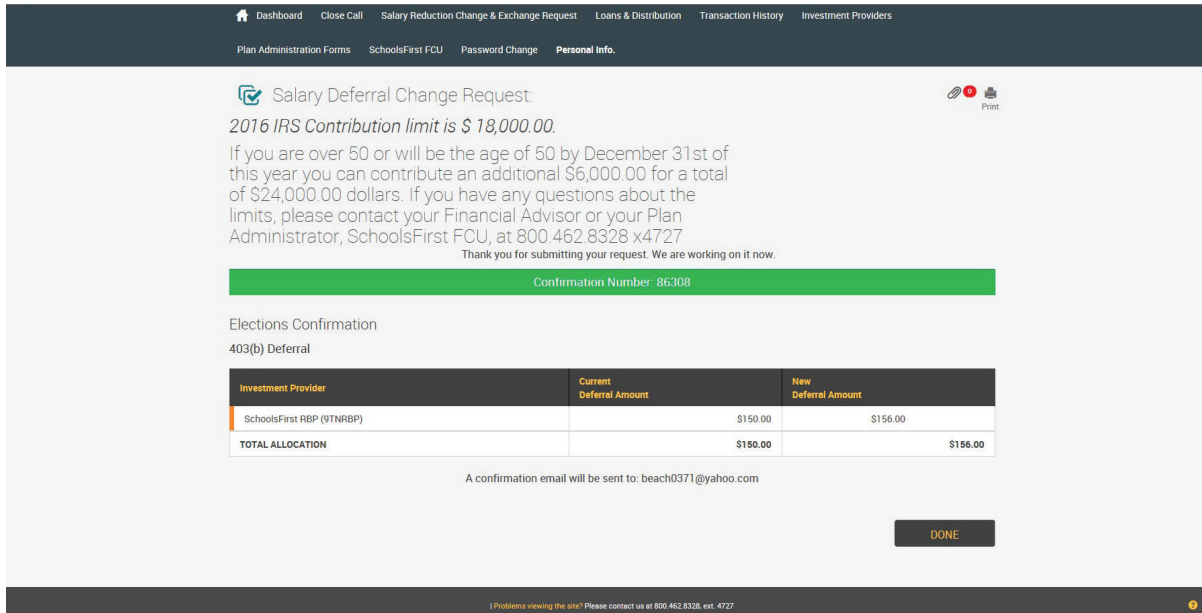
Investment Provider	Current Deferral Amount	New Deferral Amount
Security Benefit (1022)	\$0.00	\$50.00
SchoolsFirst RBP (9TNRBP)	\$150.00	\$200.00
<b>TOTAL ALLOCATION</b>	<b>\$150.00</b>	<b>\$250.00</b>

☒ I authorize this investment election change

A confirmation email will be sent to: beach0371@yahoo.com [edit email address](#)



7. **The Salary Reduction Agreement:** A confirmation number will appear when the system has finalized your request. A copy will be stored for you and can be accessed via the **Plan Summary** page under **Transaction Confirmations**, should you need it in the future.



**Salary Deferral Change Request**

2016 IRS Contribution limit is \$ 18,000.00.

If you are over 50 or will be the age of 50 by December 31st of this year you can contribute an additional \$6,000.00 for a total of \$24,000.00 dollars. If you have any questions about the limits, please contact your Financial Advisor or your Plan Administrator, SchoolsFirst FCU, at 800.462.8328 x4727

Thank you for submitting your request. We are working on it now.

Confirmation Number: 86308

Elections Confirmation

403(b) Deferral

Investment Provider	Current Deferral Amount	New Deferral Amount
SchoolsFirst RBP (9TNRBP)	\$150.00	\$156.00
<b>TOTAL ALLOCATION</b>	<b>\$150.00</b>	<b>\$156.00</b>

A confirmation email will be sent to: beach0371@yahoo.com

**DONE**

( Problems viewing the site? Please contact us at 800.462.8328, ext. 4727 )

### Important information to note about your deferral elections:

- Salary deferral requests must be submitted **30 days** before the effective date for your districts payroll cycle
- If your request is not submitted in time to make the change requested for the current pay cycle, it will be effective for the following pay cycle
- Online salary deferral changes are submitted to your district the following business day; Your changes will be applicable for the next available date
- The change submitted online will supersede any instructions that you currently have on file
- If multiple changes for the plan are submitted on the same day, the last entry will be considered the requested change
- If you wish to continue an existing deferral to a vendor, and are adding or changing another vendor, you will need to enter the vendor and amount you are retaining; If you do not, the deferral to that vendor will be cancelled
- If you want to have different amounts for future payroll deferrals, you will need to submit a change during each deferral period; The Plan Vue system does not allow future dated requests
- An account must be established with the Investment Provider **prior** to submitting a SRA
- Deferrals sent to an Investment Provider without an active account will result in a returned contribution

## Forms


PDF copies of our most commonly used forms have been provided on the **Plan Administration Forms** tab located at the top of the page.


welcome to **SchoolsFirst FCU Plan view**, your online resource to access your 403(b) and/or 457(b) Retirement Plans Administered by SchoolsFirst FCU

**SCHOOLSFIRST** FEDERAL CREDIT UNION

Dashboard Salary Reduction Change & Exchange Request Loans & Distribution Transaction History Investment Providers **Plan Administration Forms**

SchoolsFirst FCU Password Change Personal Info. Plan Selection ▾

Forms 



Name	Size	File Type	From Date	To Date	<input type="checkbox"/> Delete
Form Group: None					
3 - Nationwide-RBP Outgoing Exchange...	44kb	Adobe Acrobat			
2 - Nationwide-RBP Loan Application	286kb	Adobe Acrobat			
3 - Nationwide-RBP Incoming Exchange...	63kb	Adobe Acrobat			
2 - Nationwide-RBP Hardship Applicatio...	86kb	Adobe Acrobat			
2 - Nationwide-RBP Distribution Applica...	158kb	Adobe Acrobat			
1 - 403(b) Loan Authorization	80kb	Adobe Acrobat			
1 - 403(b) Hardship Authorization	150kb	Adobe Acrobat			
1 - 403(b) Exchange Authorization	92kb	Adobe Acrobat			
1 - 403(b) Distribution Authorization	85kb	Adobe Acrobat			

| Problems viewing the site? Please contact us at 800.462.8328, ext. 4727

## Frequently Asked Questions

The following is a list of Frequently Asked Questions we commonly receive from our Participants.

**Q. Where do I go to change my deductions?**

- A.** Once you have logged in to the Plan Vue system, you can make changes to your deductions under the 'Salary Reduction Change' tab located at the top of the screen.

**Q. How do I access my other 403(b)/457(b) plan?**

- A.** In the upper right hand corner of each screen there is a drop down named **Plan Selection**. When you click on the drop down arrow, there will be a list of your available plans and you may choose the plan you would like to enter.

**Q. Why don't my balances match my Investment Provider statement?**

- A.** The balance information has to come from your Investment Provider. We might not receive a regular electronic data feed or any data feed at all from your Investment Provider. In which case, the balance you see in Plan Vue will be the cumulative value of your deferrals that have been uploaded into our system, not the actual account value.

**Q. I see my deferral balance on Plan Vue, why doesn't that amount match the amount I have deferred this year?**

- A.** We rely on our school districts to provide us with payroll data so we can present it to you in Plan Vue. If we are not the common remitter for your school district, we may not receive payroll files on a consistent basis. Thus, we are only able to present you with the information we have received.

**Q. What happens if I enter multiple changes for the same dollar amount?**

- A.** If you enter multiple changes on the same day or for the same dollar amount, the system should only recognize the last change you requested and that is what will be sent to your district. It is always a good idea to check back the next day to verify that your deferral request reflects as you would like it to so we can make corrections if necessary.

**Q. Who do I contact if I don't see the new school district I started working for when I log in?**

- A.** Please contact a Plan Administrator at 800.462.8328, ext: 4727. We can assist you in building your profile so you can make your deferral changes online.

**Q. Do I use my User ID and Password from my SchoolsFirst FCU account?**

- A.** No, the SchoolsFirst FCU Plan Vue® system is used to provide our Plan Administration services only at this time. Since Membership is not a requirement to be a Participant in a 403(b) or 457(b) plan with our TPA districts, the service is not integrated into Online Banking. Use your social security number to log in as a new user and you will be prompted to select a unique user ID and password.

**Q. Why can't I make changes to my SchoolsFirst FCU/Nationwide RBP through this site?**

- A.** Though SchoolsFirst FCU is the custodian of your RBP plan, it is offered through Nationwide Life. In order to make changes to how your funds are invested, you must go directly to the company that holds the funds.

**Q. I want to start a 403(b), can I just log in to Plan Vue and choose an Investment Provider?**

- A.** You will first want to contact the Investment Provider you are interested in to establish your 403(b). If you do not have an account established with the investment provider, your deferrals will be returned to us.

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