

www.ppsfilecabinet.com

PPS File Cabinet is a secure, document management service hosted by Radix that is accessible through a web browser. All content is indexed and retrievable through an easy to use interface.

PPS uploads documents to the site, plan sponsors and advisors sign on with a secure user ID and password to view, retrieve, complete, edit, return, print, or email the documents as necessary.

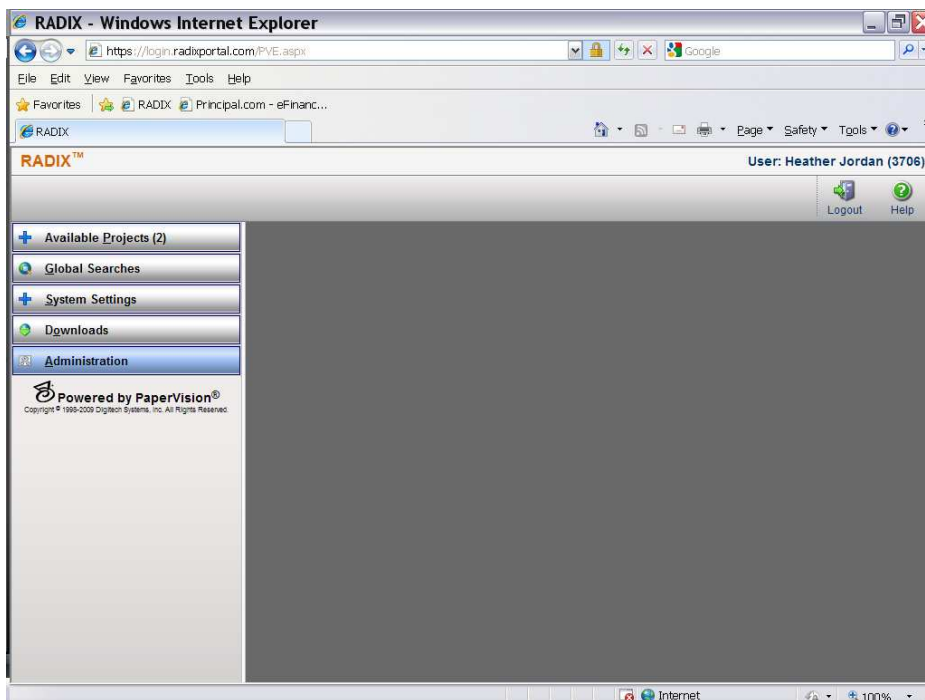
Security includes 128 bit encryption, two firewalls, six points of presence, hourly back up to offsite facility, and a secure physical facility monitored by VESPA fire and smoke detection.

Documents are retained on the secure site until a specified expiration date. No more worries of keeping confidential plan documents, retirement plan valuations, or payroll records locked up in a cabinet.

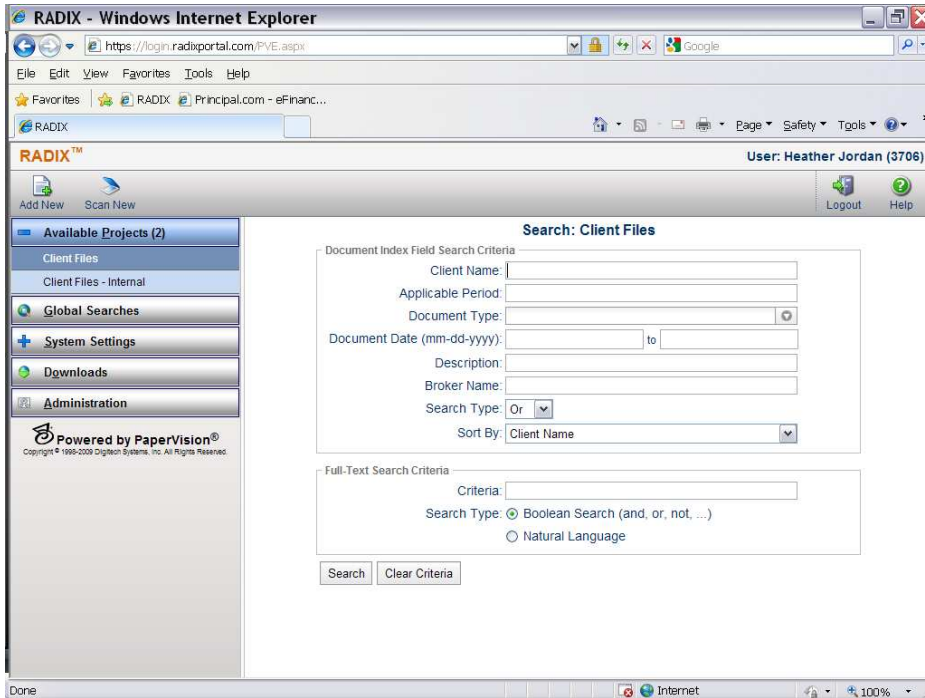
INSTRUCTIONS

Enter www.ppsfilecabinet.com in your browser's address bar. A log-in screen will appear. Log in with the entity ID: 3706, your assigned username and your password. *(You will need to change your password upon your initial log in. The password must contain at least 1 uppercase letter and at least 1 number. It must be a minimum of 8 characters.)* If you need your sign on information, please contact our office.

After you reset your password, you will be brought to this screen:

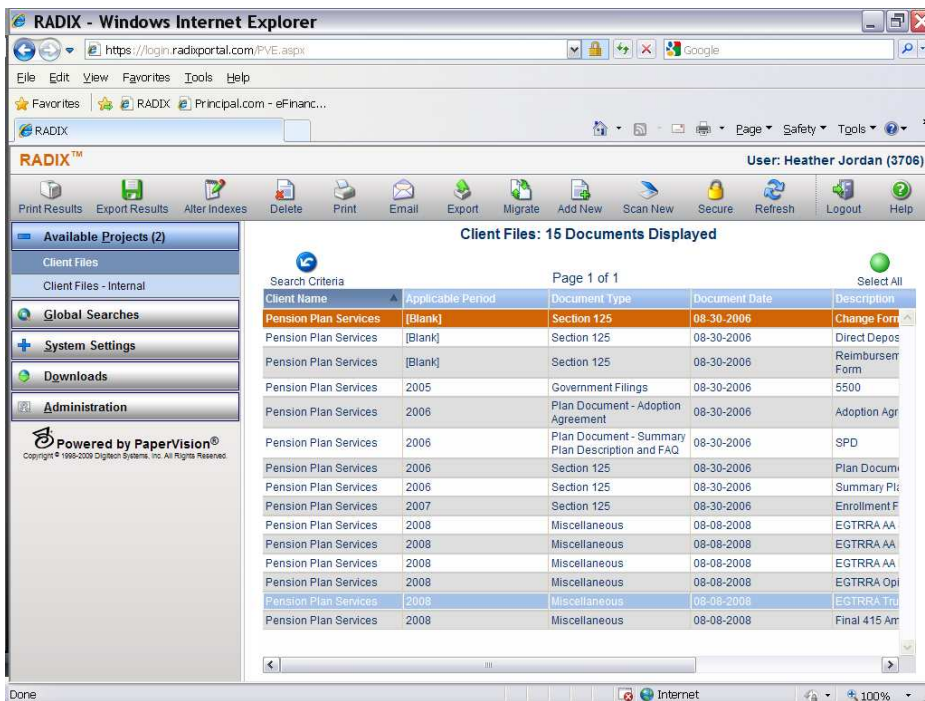


By clicking on “Available Projects” and then “Client Files”, you will be brought to an advanced search page:

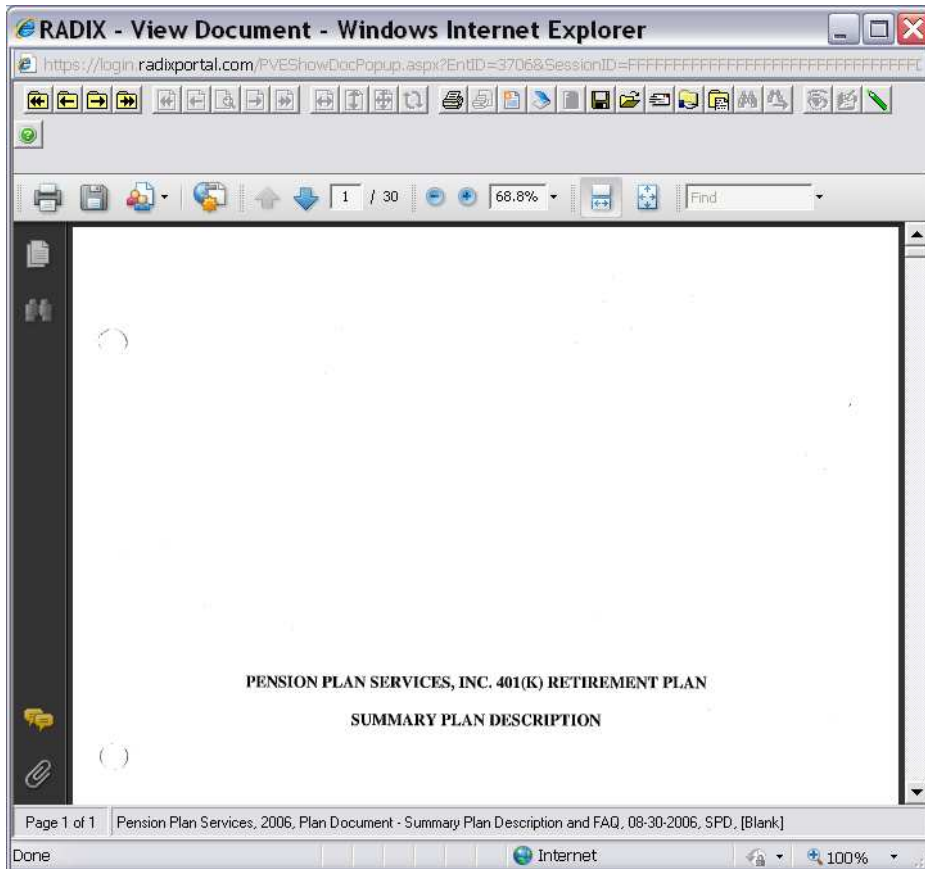


If you know what you are looking for, you may want to fill in one or more of the fields. If you are unsure of the actual name of the document, you can use an asterisk (*) as a wild card.

Click “Search”, you will get a list of results:



By double clicking any part of the document name that you are interested in, it will bring up the document in a separate window:



At this point, you can use the toolbar buttons to print, e-mail, fax, save to hard drive, etc.

Making changes to the document:

1. Right click on the document, click "Check Document Out".
2. Save the document to a folder where you can find it (desktop seems to be the easiest).
3. Make your changes. Hit save.
4. Go back to the document in Radix, right click on it again and click "Check Document In".
5. Click the ... after the file path name. Click on your file and hit open. You may check the box for Delete Source File After Checked In to delete the file from your computer.
6. Hit Save.

Please contact Heather Carpenter at hcarpenter@pensionplanservices.com with any questions, or to set up your login information.

We look forward to providing you with a secure and user-friendly document interface through the www.ppsfilecabinet.com website.