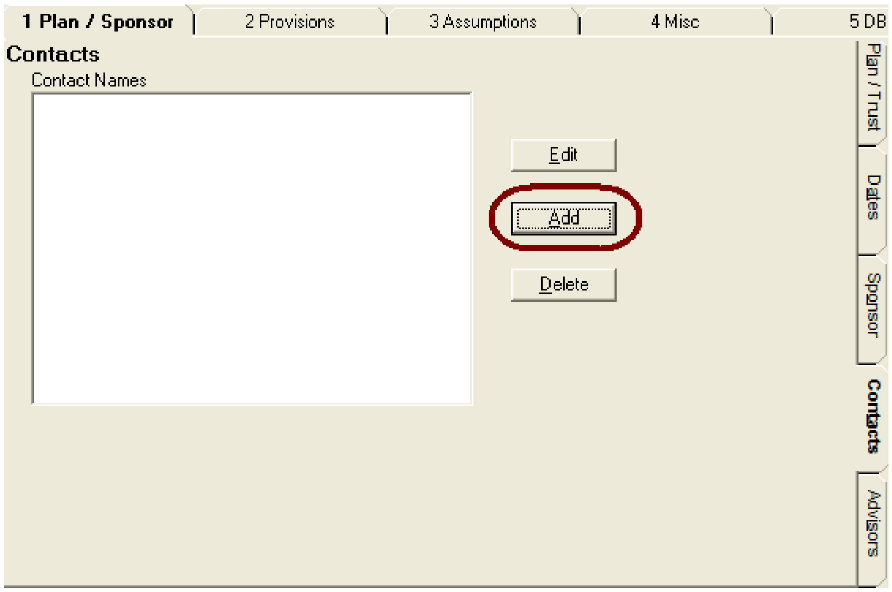
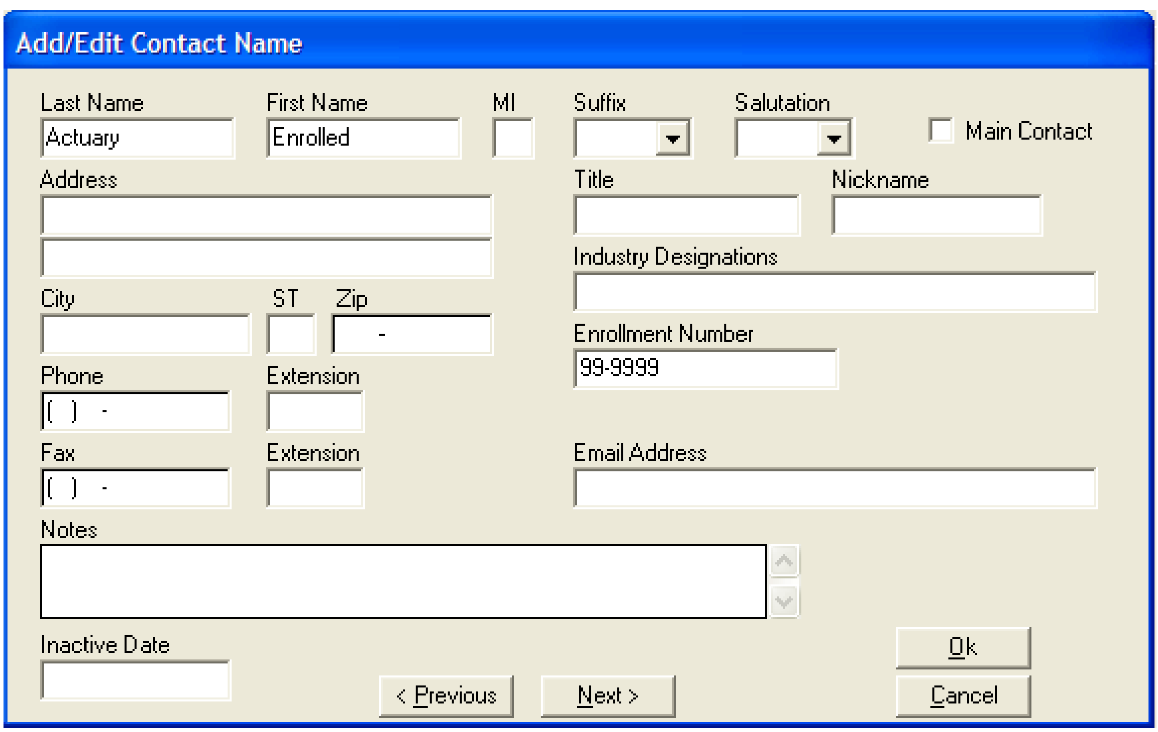
Assigning an Enrolled Actuary to Plan for reports that require certifications

1) Open the Sample DB plan*

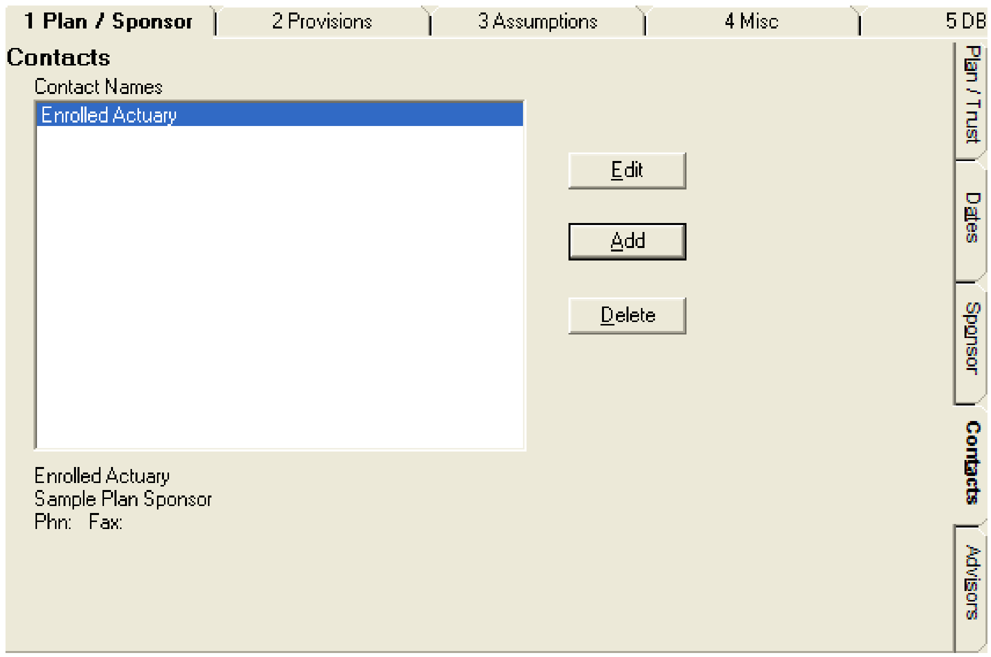
2) Go to the Plans|Plan/Sponsor|Contacts screen and "Add" a contact



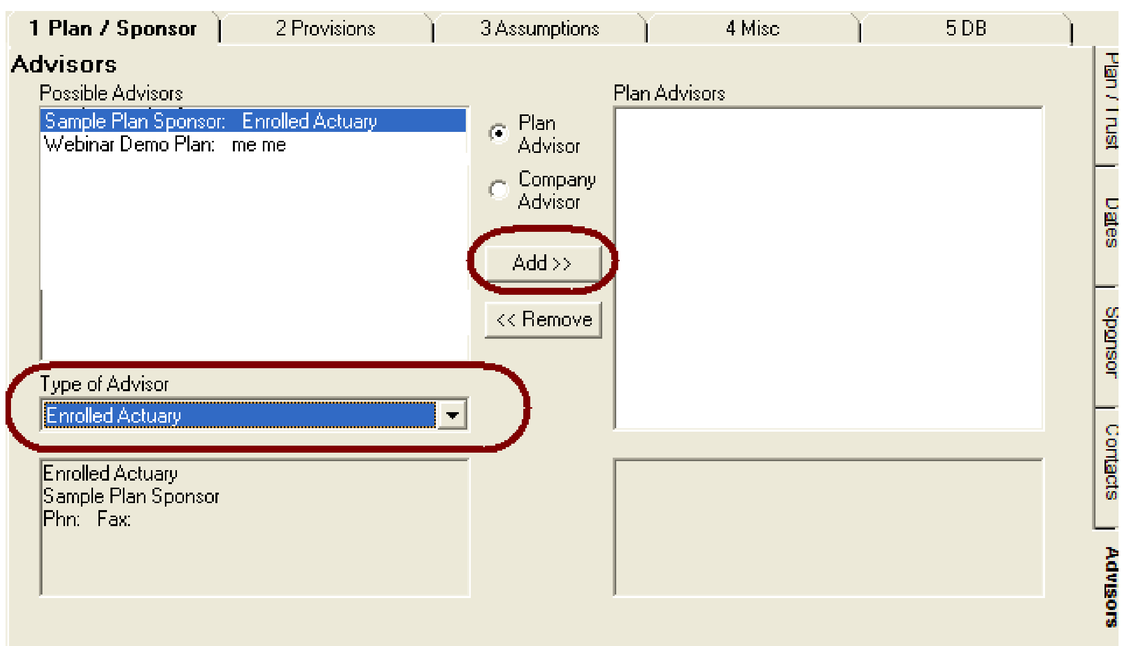
3) Complete the contact information including Enrollment Number and click okay



4) The actuary will now be listed under the Contacts for the plan that you are currently in* as well as available under the Advisory tab for any plan.



5) Highlight the actuary, select Type of Advisory as Enrolled Actuary and click on "Add"



Once you have the actuary setup and assigned as an advisor to the plan, the name and enrollment number will automatically print on reports requiring certifications.

*You may choose any plan to add a contact. However, any future changes such as updating the enrollment numbers or address changes will need to be changed in the plan that the contact was first entered. It is best to select a plan that can be kept track of. As a help, the plan that the contact was entered in, will precede the name of the contact.