

This guide will walk you through the process of completing the annual questionnaire and submitting census data. If you have any questions, please do not hesitate in reaching out to your Analyst.

## Log into Plan Sponsor Link

Browse to: <https://dbzinc.plansponsorlink.com/>

Enter your Username (your email address) and password

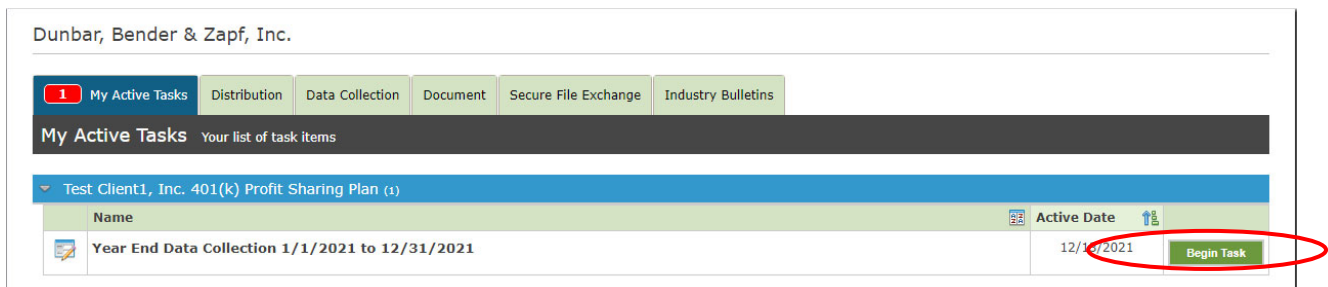
Click the 'Sign In' button

If you have forgotten your password, click on the 'Forgot password?' link and input your email address. You will receive a system generated email with a temporary password.

If this is your first time logging in, click on the 'First time user?' link to register. You will receive a system generated email with a temporary password.

## Begin the Year End Data Collection Task

Upon logging in, you will be on the 'My Active Tasks' page. Any items that require your attention will be displayed here. Click on the 'Begin Task' button to the right of the Year End Data Collection task for the appropriate plan year.



## Helpful hints while working on the Year End Data Collection task:

- Once you have reviewed and updated everything on each step, click the 'Save' button. If you want to proceed on with the Year End Data Collection task but the step is not completed yet, do not click the 'Save' button; instead click the grey arrow at the top of the page to move to the next step. This will mark the step as uncompleted and you can come back to finish your updates at any time. Completed steps will have a green checkmark instead of a grey arrow.
- Required fields are noted with an asterisk (\*).
- You can add a note to any step with additional information, if necessary, by clicking the 'Note' button in the upper right-hand corner.
- All steps must be completed with a green check mark in order to complete the final approval step which sends all data to your Analyst for review.

### **Step 1: Company Contact Information**

This page requires that you confirm company information for the Plan Sponsor.

You can click the 'Add' button to add a new type of record or the 'Edit' button to change the existing record. If anything needs to be removed, click the 'Notes' button in the upper right-hand corner and add a note explaining what needs to be removed. Once you have added your note, you can close the note screen.

Click the 'Save' button once all updates are complete.

### **Step 2: Employer Company Data**

This page requires that you confirm additional company information for the Plan Sponsor.

Click the 'Save' button once all updates are complete.

### **Step 3: Principals**

This page should detail all owners of the Plan Sponsor and their ownership. It should also list all officers of the company.

You can click the 'Add' button to add a new owner or officer or the 'Edit' button to change the existing record. To remove an owner or officer, click the 'Delete' button.

Click the 'Save' button once all updates are complete.

### **Step 4: Family**

This page should detail all employees that are related to an owner of the Plan Sponsor (or any related employers) and how they are related. Important relationships are:

- Spouses
- Parent
- Child
- Grandparent

You can click the 'Add' button to add a new related employee or the 'Edit' button to change the existing record. To remove a related employee, click the 'Delete' button.

Click the 'Save' button once all updates are complete.

### **Step 5: Other Businesses Owned**

This page needs to detail other businesses that are owned by the owners of the Plan Sponsor.

To add a new company, click the 'Add' button and complete all items. Please be sure to include ownership details for the additional company.

Click the 'Save' button once all updates are complete.

### Step 6: Contact

This page details all contacts currently associated with the plan and their access to information on Plan Sponsor Link.

To notify us of a change that need to be made, click the Add button in the upper right corner of the grid for the contact requiring a change and note your change request.  
Click the 'Save' button once all updates are complete.

### Step 7: Annual Employer Questionnaire

Please answer all questions. Your responses here will assist us with the annual administration of your plan.

Click the 'Save' button once all questions have been answered.

### Step 8: 5500 Questionnaire

Please answer all questions. Your responses here will assist us with preparing the Form 5500 (if applicable).

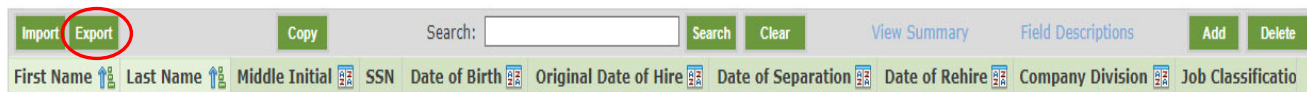
Click the 'Save' button once all questions have been answered.

### Step 9: Employee Census

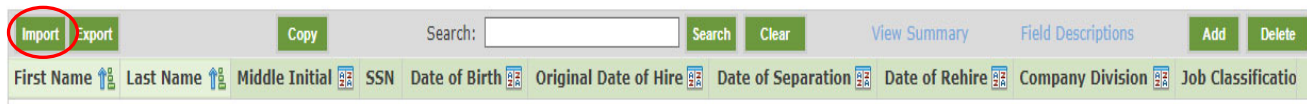
This page is for you to detail census data for all employees employed in the plan year regardless of if they are participating in the plan or not. There are 2 different ways to load census data on this page:

#### Option 1 – Export Template, Add Data, Import Completed Template:

- Click on the green 'Export' button on the left side of the census chart

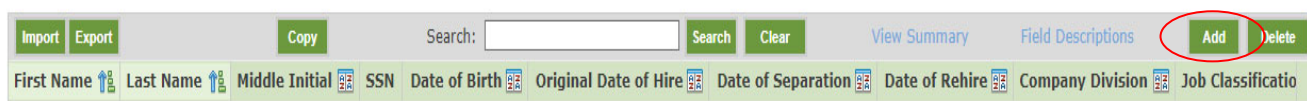


- Save Excel file to your computer
- Add census data from your payroll provider
- Import the updated file by clicking on the green 'Import' button on the left side of the census chart



#### Option 2 – Manually Add/Update Records:

- Click the 'Add' button on the right side of the census chart

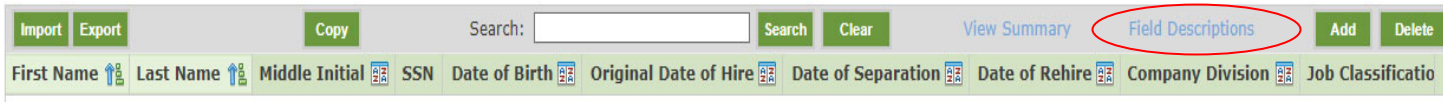


- Complete all fields
- Click the 'Save' button
- Repeat for each employee employed in the plan year

Once you have all census data loaded, click on the ‘View Summary’ link, and make sure totals tie to your payroll records.



If you need additional clarification on any of the census items requested, click on the ‘Field Descriptions’ link for a listing of all fields and information on the data requested.



Note that if any income is reported on a Schedule C or Schedule K-1, you will need to provide these Schedules to us. If they are not yet available, we ask that you complete the annual questionnaire and all other census data and submit these Schedules to us as soon as they are available via Secure File Exchange or by fax.

Please be sure to also provide us with Forms W-2 and W-3 (transmittal page for the Forms W-2) AND/OR a payroll summary report generated by your payroll provider or your in-house payroll system. You can upload these documents securely, along with any additional supporting documents, reports or spreadsheets on the Approval Step of the Data Collection Project (instructions provided below)

### Step 10: Approval

This page provides you with the opportunity to submit any additional notes, supporting documents, payroll reports or spreadsheets to your Analyst for them to perform the annual administration on your Plan.

Click the ‘Add’ button to search for the document item on your computer you wish to upload



Once all additional documents have been uploaded and all data collection steps have been completed, click the green ‘Sign and Submit’ button at the bottom of the Approval Step, and provide/verify your contact information before submitting.

Upon submission, your Year End Data Collection Project will now display under the the Data Collection Tab on the PlanSponsorLink home page with a completion date reflected. You can click the ‘Report’ button to the right of the task to view a summary of the information you provided to DBZ.

Your Analyst will receive notification that you have completed and returned the annual data collection project. They will perform an initial review of the data received and will reach out to you shortly afterwards to collect any additional information needed.

As a reminder, please do not email anything that contains sensitive information (ie. social security numbers). Sensitive information should be sent via Secure File Exchange, an option available in Plan Sponsor Link once you have logged in. For more information on how to use secure file exchange, or navigate our secure portal, please view our instructional youtube video: <https://www.youtube.com/watch?v=ypDIUvV-Yyg&feature=youtu.be>