

Secured Divisional Reporting

Plan Process Summary

Now you can limit access to employee information, providing an enhanced level of security for participants and more convenience for you.

Enhanced security

Retirement plan recordkeeping and trust systems can contain sensitive information about employees. Protecting this information from being disclosed may mean adopting “need-to-know” policies for anyone who accesses employee payroll and benefits information.

Schwab offers secured divisional reporting, which allows you to restrict information access to specific locations or divisions, and use the system more consistently with your business needs.

Customizing information access

You can grant access to all reports for all departments, limit access to all reports for a specific department only, or limit access to a set of specific reports for one or more departments.

You can also limit or vary the information that users can view, including:

- Contribution rate changes
- Distributions
- Loans, including originations and payoffs
- Quarterly administration
- Reinstatements and suspensions
- Upcoming loan payoffs
- Year-to-date administration

How we implement your access requirements

For divisional access and reporting, your regularly scheduled communications to us must contain up-to-date information on each user’s location or division.

For secured divisional reporting, we ask that you provide:

- All people who need web report access
- Which division(s) each person can view

Once we receive this information, we will:

- Verify that a user’s level division code is consistently entered on each payroll file’s division field
- Verify the complete setup and implementation of your plan

Secured divisional reporting is typically available 10 to 14 business days after we receive this information.

Learn more today

To learn more about how you can enhance security by restricting user or plan information access to specific locations or divisions, please contact your Schwab Representative or call us at **1-877-456-0777**.

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