

DCG PORTAL – STEP-BY-STEP PROCEDURES

OVERVIEW

This procedure describes how to open or download your plan’s documents from the DCG Portal.

PROCEDURE

1. From the Dana Consulting Group website, [www.danaconsulting.com](http://www.danaconsulting.com), click the **DCG Portal** menu option on the left.
2. Enter your Login and Password.
  - a. Your Login is your e-mail address.
  - b. Your Password was issued to you when you were given access to the Portal.
3. Select your plan from the **Set Active Plan To:** drop down menu.



4. Items in the **In Box** are of special importance and require immediate attention. We will periodically request that you access your In Box for important items.
5. Click on the **Plan Files** menu to see the drop down list.
6. Select the document category you wish to view or download by clicking once on the option. A new window will appear with a list of available documents. The categories and their contents are listed below. (The items may not apply to all plans.)

**Summary Plan Description**

- Forms
- Instructions
- Plan Highlights
- Summary of Material Modifications
- Summary Plan Description

**Adoption Agreement**

- Adoption Agreement
- Form 8905
- IRS Determination Letter
- Plan Document
- Trust Agreement

**Amendments**

- Amendments
- Consents

**Service Agreement**

- Engagement Letters with Dana Consulting Group Ltd. or Jennings Law Firm Ltd.

**Safe Harbor Notice**

- Annual Safe Harbor Notices

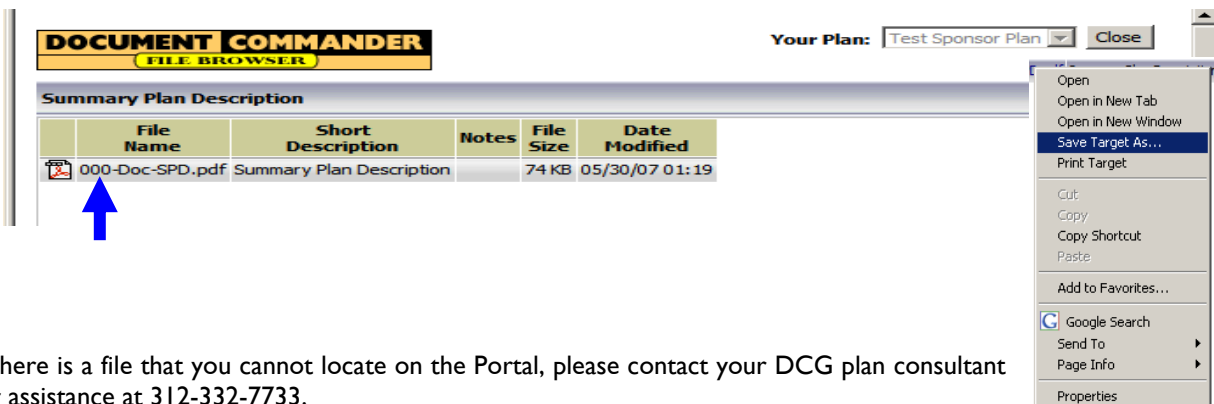
**Reports**

- ADP/ACP Testing
- Year End Report
- Contribution Testing
- Year End Valuation

**Government Filings**

- Form 5500 with Schedules
- Other Government Filings

6. To open a file directly from the portal, position your cursor over the file name and click the left mouse button. You can print or save the file to your computer. To save the file to your computer without opening it first, position your cursor over the file name, right mouse click and choose **Save Target As...** and save it to the target location.



If there is a file that you cannot locate on the Portal, please contact your DCG plan consultant for assistance at 312-332-7733.