HARTFORDFUNDS

Hartford Funds – Plan Administration Online
Frequently Asked Questions & Tips

Logon Page

How do I register for Plan Administration Online?

The Plan Administrator can complete a Request Access Form on www.mfplanadmin.com or complete the Plan Administration Online Access Request Form (MF-10074). The completed form can be faxed or mailed to Hartford Funds. Fax form to 888-802-0039. Hartford Funds, or its delegate, will review the form, contact the Administrator and provide an Operator ID and password, generally in 3 to 5 business days.

What information will I need to register for Plan Administration Online?

The information required on the Access request form is the group name,
Plan Administrator information including: name, phone number, email address
Bank information including: bank name, account type, bank address, routing number, account name and number. A voided check must be attached to the authorization form if checking account is the account type selected. The Plan Administrator must also complete, sign and date the authorization section.

How do I Logon?

Enter your Operator ID and password that you received from Hartford Funds on the Logon page.

What is my Operator ID?

The unique Operator ID is assigned by Hartford Funds and provided to you after registration. If you administer multiple plans, a unique Operator ID and password will be assigned for each plan.

How can I change my password?

The Operator has the option of choosing "Change Password" on the Logon page. The change password page will instruct the Operator to enter the old password and to select and confirm a new password. The new password must be at least 8 characters long and contain at least 1 letter, 1 number, and special character. Once confirmed, the Operator will be prompted back to the original Logon page to re-enter the Operator ID and (new) password for verification.

Will my Operator ID expire?

Operator IDs are disabled after 60 days of inactivity and removed from the system after 180 days of inactivity. If the Operator ID is removed from the system, then the Plan Administrator must complete a new Request Access Form on www.mfplanadmin.com or Plan Administration Online Access Request Form (MF-10074). The completed form can be faxed or mailed to Hartford Funds.

Does my password expire?

Passwords expire every 30 days and you will be prompted to change your password. After 30 days or multiple incorrect attempts, the Plan Administrator will be locked out and have to have the password reset.

How does Hartford Funds protect my information?

At Hartford Funds, the security of your account information is important to us. That's why we take precautions to help safeguard your personal information and assets. For example, Hartford Funds Plan Administration Online will automatically log you off from your session after 20 minutes of inactivity. This helps reduce the risk of someone else accessing private information from your unattended computer. A warning message will display 60 seconds prior to the session ending. To learn more, see **Protecting the Security of Your Information** in the Help section.

Plan Selection Page

What do I do if I have more than one plan that I administer?

If you administer multiple plans, a unique Operator ID and password will be assigned for each plan. You will choose the Plan you wish to work with by entering the Operator ID and password associated with that plan.

Plan Details Page

What information is available on this page?

This page includes information about the group, the Plan Administrator, company and banking information. A list of active plan participants is also displayed at the bottom of the page.

What can I update online about the plan?

You can update or add a primary or secondary email address for email notifications that are sent indicating plan activity occurred.

How can I make changes to the bank information?

To make changes to the bank information, the Plan Administrator must complete a new Request Access Form on www.mfplanadmin.com or Plan Administration Online Access Request Form (MF-10074) with the new information, including a copy of a voided check. The completed form can be faxed or mailed to Hartford Funds. This update is generally made in 3 business days.

Payment Selection Page

What do the different statuses mean?
Work-In-Progress: A roster/payment has been created but has not been submitted to be processed. A Work-In-Progress is created each time you click on "Make a Payment". Existing Work-In-Progress items can be edited in order to submit a current roster. If there are 4 Work-In-Progress items open, the system will not allow the Plan Administrator to create a new payment. The existing Work-In-Progress items will need to either be submitted or deleted.

Released: A roster/payment was submitted and confirmed. If the payment was not future dated and was submitted prior to market close, it will process overnight.

Processed: A previously submitted roster/payment has been applied to each participant.

Rejected: A roster was released but later rejected by Hartford Funds at the Plan Administrator's request. If a payment has been released in error and needs to be rejected, please call 888-843-7824 option 0 to speak with a service specialist.

How do I initiate a payment?
Click "Make a Payment" on the right-hand side of the page. Once this is clicked, a payment has begun and you will be taken to the Payment Details page where you can complete the payment. You can then select a release date and enter in amounts for each participant.

How do I know if my roster has been submitted?
On the Payment Selection page, the submitted roster will reflect a "Released" status.

Payment Details Page

How do I submit a payment?
Once the proper amounts are entered in for the participants, click on the "Submit Payment" button on the bottom of the page. This will take you to the Submit Payment Verification page. Select "Confirm" if all the information is correct. Once the payment is confirmed, return to the Payment Selection Page to print the confirmation. Click on the View Payment Details hyperlink and print a copy of the confirmation that will show each participant and the allocation of funds to each. The system does not hold transaction confirmations indefinitely, therefore, you should print or save the confirmation as your record of the transaction.

How can I print the breakdown of the payment?
Once payment has been made, return to the Payment Selection page. Click on "View Payment Details". This will display the payment details. Under "File" choose "Print".

Why is it important to print the breakdown of the payment?
Processed rosters are not held indefinitely on the system and Hartford Funds does not receive copies of the confirmations. Printing is the only way for the Plan Administrator to ensure that this information is being tracked and saved.

How can I add a new fund to the participant's account?
Plan Administrators are not able to add funds through Plan Administration Online. The participant or financial representative listed on the participant's account may call Hartford Funds at 888-843-7824, option 0, to speak to a service specialist who will assist in having the fund added. The fund will be added and seen immediately thereafter on Plan Administration Online.

How can I add a new participant to the plan?
A new employee/participant must complete a new SIMPLE IRA Adoption Agreement (MF-10001) or SEP IRA Adoption Agreement (MF-10026) and submit it to Hartford Funds. Once received and processed, the new participant will appear on the Plan Details screen, generally in 2 business days. The Plan Administrator is unable to add new participants via Plan Administration Online.

Can I change the contribution type?
Yes, the option to choose between the available contribution types is on the payment details page.

- Employer Reduction (ER) – Tax-deductible contribution on behalf of eligible employees.
- Salary Reduction (SR) – Contribution excluded from employee's gross income.

Can I future date a request?
Yes, there is a fillable field option on the payment details page to select a date in the future to have the roster released. The system will allow you to select any date as long as it is not a weekend or a holiday. The future dated payment will show as released.

How can I change a participant's future contribution fund allocations?
Plan Administrators can change the percent allocated to each fund for the participant's future contributions only within the funds the participant has already chosen. Select the participant by clicking on the name link and the Participant Allocation page will display. By selecting the appropriate link or scrolling down, you can specify the allocations within each reduction type (ER, SR). Alternately, the participant or financial representative may call Hartford Funds to have the future allocations updated or notify us in writing. However, if the participant would like future contributions to go to a new fund, the participant or financial representative listed on the account, must call or notify Hartford Funds in writing. The Plan Administrator cannot add the new fund. Once Hartford Funds is notified, the new fund will be available for selection by the Plan Administrator immediately. Please note that allocation changes will not be reflected on any existing Work-In-Progress payments. A new payment will need to be created for the changes to be reflected. In addition, if this is a one-time allocation change, the Plan Administrator will have to change the allocation back to the original. This does not happen automatically.

How can existing money in the plan be re-allocated?
This can be done by the participant or financial representative listed on the participant's account by contacting Hartford Funds at 888-843-7824. During this call, future contribution allocation percentages can also be updated. Money already invested in the plan cannot be re-allocated by the Plan Administrator.

Can I make a payment to a participant's account that is closed?
If the participant has taken a full redemption from their account, the participant's account will be closed. If a payment attempt is made to a closed account, you will receive an error message indicating that the "Account is Closed" under the participant's name. In order to complete your submission, you will need to call Hartford Funds at 888-843-7824 and ask to have the participant's account status changed to open. While on the line, the service specialist will change the account status to open so that you can submit the payment and confirm back to the service specialist it was submitted successfully.

How can a participant be removed from the plan?
If a participant has separated from service and needs to be removed from the group, a letter of instruction on company letterhead signed by the Plan Administrator must be sent in order to be processed. This cannot be done online. If the current Plan Administrator is unable to sign, a letter of instruction signed by an authorized individual along with a copy of the Corporate Resolution showing authorized signers will be accepted. Once processed, the participant will no longer show up as a participant on www.mfplanadmin.com. This typically takes approximately 5 business days.

Please note: The Plan Administrator may remove a participant online from a specific payment only; not the plan itself.

Hartford Funds Contact Information

Contact a service specialist at 888-843-7824 option 0
Fax to 888-802-0039

Mail to:

Standard mail delivery:
Hartford Funds
PO Box 219060
Kansas City, MO 64121-9060

Private express mail (overnight) delivery:
Hartford Funds
801 Pennsylvania Ave
Suite 219060
Kansas City, MO 64105-1307