



Transaction Request Approval

Transactions Payroll & Employee Info

Transaction Request Approval

Transaction History

DISTRIBUTIONS:

Web Requests

Loan Summary

View Forfeiture Account Balance

Choose **Transactions** and select **Transaction Request Approval** from the dropdown.

Scroll to the bottom of the page and:

1. Review the **Transaction summary** and **Payment details** by clicking **View** in each column
2. Approve or Deny the request by clicking on the dropdown menu
3. If approved, enter the **Final Contribution** date
4. Click **Submit**

Current status	Participant name	Request date	Transaction type	Transaction summary	Payment details	Approve/Cancel request	Final Contribution
Pending	Test5 AutoEnroll	12/18/2025	Termination distribution T...	View	View	Select One	

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SUBMIT

Reject the request if the answer to any of the questions below is 'Yes' and email admin@retirementplanconsultants.net the details.

Termination Distribution requests

- The participant was rehired

Loan requests

- The participant is no longer employed

Any Withdrawal Request

- The participant passed away or became disabled
- The participant is in the process of a divorce