

Online In-Service Withdrawal

SPONSOR APPROVAL GUIDE

The online withdrawal request feature allows for a simplified sponsor approval process. You will receive an email notification that a distribution has been submitted for approval. Follow the below steps to log in and review the distribution. While the system will not allow an in-service request for a participant that does not meet the plan's criteria, you should verify the age on file is correct and the participant is active in the plan (in case termination information is not received).



- On your account homepage, under **Manage** in the menu bar select **Transaction Request Approval**.
- On the Transaction Request Approval screen, pending requests are displayed first. Use the options on the right to navigate this screen.
- Click **Submit** to finalize your approval.

You're finished! The participant will receive a confirmation that the distribution is approved. The Service Provider will take it from here.

Current status	Participant name	Request date	Transaction type	Transaction summary	Payment details	Approve/Cancel request
Pending	Bonnie Harris	10/02/2021	Withdrawal Default	View	View	Select One

- **Search:** If needed, you may use this section to search for a specific distribution.
- **Current Status:** You may search pending, approved, completed distributions or specific request dates.
- **Transaction Type:** Displays the type of distribution requested
- **Transaction Summary:** Click "View" to review distribution details.
- **Approve/Reject Request:** Select "Approve" or "Reject" from the dropdown.

