Wrangle Dashboard Cheat Sheet

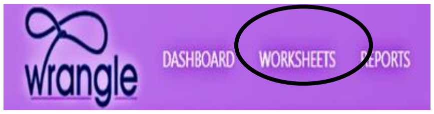
Log-In Information: Go to www.wrangle5500.com and click on the Dashboard button

Username: Your Email Address

Password: Dashboard will send you an email to prompt you to set a password.

Notes: Password is to be at least 12 alpha/numeric characters; there is a password reset function if needed
!!Reminder: Don't send log-in details to client. They would then in turn see all clients' materials.

To Review Current Client or Add a New eWorksheet



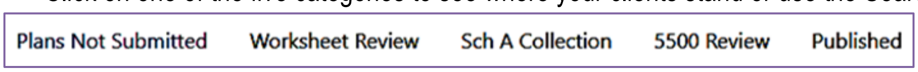
Click on "Worksheets". This will then pivot you to a new screen giving you the option to add a new worksheet or Reviewing one established.

Reminder: Dashboard Auto-Saves!!

- ***New eWorksheet***: Dashboard will auto-populate data from the DOL's EFAST site if applicable after you insert: the Company name, EIN and Plan Year. You can then edit and update. If there are no past 5500s, you will add the details in Dashboard.
- ***Established eWorksheets***: use the following icons to set the tasks to be completed:
  Pencil = Edit; Trash Can= Delete; Counter Circle/Arrow: Retract (only if not finalized by Wrangle), Eye: Review only
- For Editing you can change details under Plan Sponsor Key Info, Benefit Plan Info., Policy Details and Other Details (notes).

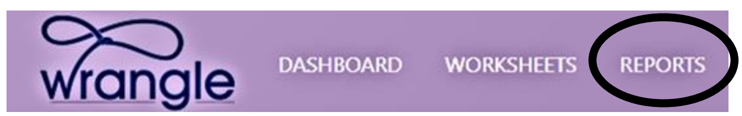
Generating Quick Status on Dashboard

- Click on one of the five categories to see where your clients stand or use the Search box to look for a specific client.



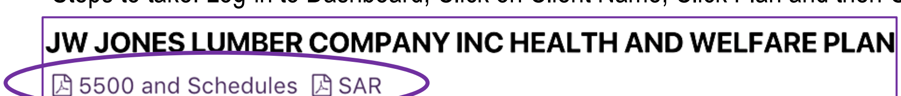
Generating Status Reports

1. On Dashboard, click "Reports"
2. Use drop-down menus to select criteria
3. Click *Download Report*



Downloading Form 5500 and SAR

- Wrangle will send an email to notify you that the 5500 is ready to be downloaded
- Steps to take: Log-in to Dashboard, Click on Client Name, Click Plan and then Click the purple "PDF" symbols to download



eFiling

1. Click the checkboxes for the plans you'd like to e-file
2. Choose an e-filing Option 1 or 2
3. If Wrangle is to eFile Client/Plan Administrator will receive a DocuSign document, sign and then Wrangle will be notified to e-File
4. The client may choose to eFile on their own from the Dashboard

Who to Contact:

Questions on eWorksheet	Submitting Schedule As	Questions on 5500 or Process	Changes to 5500 and E-filing
Data Collections – Broker Facing	Data Collections – Carrier Facing	5500 Consultant	5500 Specialist