



# How To Guide: Accessing the DWC Portal for New Users

**D|W|C**

**ERISA CONSULTANTS**

Strategic Precise Proactive

# Accessing the DWC Portal



- Visit our website at [www.DWCconsultants.com](http://www.DWCconsultants.com)
  - Select 'Year-End Data Submission' from the Client Access dropdown list.

The screenshot displays the website header for DWC ERISA CONSULTANTS, featuring the tagline "Strategic Precise Proactive". A navigation bar includes links for SERVICES, KNOWLEDGE CENTER, CLIENT ACCESS, FINANCIAL ADVISORS, ABOUT US, and CONTACT US. The CLIENT ACCESS dropdown menu is open, showing options: Plan Document/Report Access, Year-End Data Submission (highlighted with a red box), Secure File Upload, and Form 5500 E-Filing. An "Upcoming Events" box lists the ASPPA Regional Conference (November 17) and the Bank of Idaho Qualified Plans Symposium (September 25). The main content area features the slogan "Focused On You. And Your Business." and a promotional banner for plan design and administration services.

# Logging In



Username

Password

Remember My Username

[Forgot password?](#)

[First time user?](#)



- Click 'First time user?' at the bottom of the screen

# Logging In



- Enter your e-mail address in the box that appears and click the “Submit” button.

The screenshot shows a dialog box titled "First Time User Registration" with a close button (X) in the top right corner. The text inside the dialog box reads: "Please enter the email address that you use to access PlanSponsorLink.com below. Then, click on the Submit button to request a new password. If the email address you entered is located, an email containing your new password will be sent to that address." Below the text is a text input field labeled "Email Address". At the bottom of the dialog box are two buttons: "Submit" and "Cancel".

# Logging In



- If the address entered matches the address DWC has on file...
  - You will receive an automated e-mail from [Admin@PensionProSoftware.com](mailto:Admin@PensionProSoftware.com), providing you with a temporary password and a link to login to the system.
  - Check your SPAM or junk e-mail folder if you do not receive this e-mail within a few minutes of clicking the “Submit” button.
- If the address entered does not match our records, please contact your consultant for assistance.



# Logging In



- Return to the main login screen, enter your username/e-mail address and your temporary password
- Click the Sign In button



Username

Password

Remember My Username

[Sign In](#)

[Forgot password?](#)

[First time user?](#)

# Logging In



- Once logged in, please click the user menu at the top right of the screen
  - Select “Change Password” to create your unique password for future use.

DWC ERISA Consultants, LLC

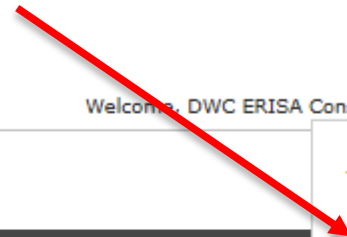
Welcome, DWC ERISA Consultants, LLC

1 My Active Tasks | Data Collection | Documents | Secure File Transfers | Industry Bulletins

**My Active Task** Your list of task items

ABC Company, Inc. 401(k) Plan (1)

- Help
- Training Videos
- Contact Us
- Change Password
- Logout





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