

## New PlanSponsorLink Look – Quick Guide

1. *My Active Tasks* is now *Overview*. All tabs have been moved to the left-side menu.
2. Data collection and other time-sensitive tasks are found in the *Overview* here.
3. Newly-added files are now listed separately.
4. The *Overview* page also shows the progress of any distributions and other projects in process.
5. New toggle for Light/Dark mode.

The screenshot shows the 'Overview' page of the PlanSponsorLink application. The left sidebar contains a menu with items: Overview (highlighted with a red badge and callout 1), Distribution, Projects, Data Collection, Documents, Secure File Exchange, Bulletins, and Contacts. The main content area is titled 'Overview Everything at a glance' (callout 5). It features three main sections: 'Needs Your Attention' (callout 2) with a 'Standard Distribution w/ Web Collection' card and a 'Ready to Download' section with 'Compliance Report' and 'Adoption Agreement' cards (callout 3); 'Active Distributions' (callout 4) with cards for 'Olivia Garcia' and 'Sarah Thompson'; and 'Active Projects' with a 'Document Restatement' card. Each card includes a progress bar, status, and action buttons like 'Begin Task' or 'Download'.

The screenshot shows the 'Documents' page, titled 'List of Forms, Compliance Reports and Legal Plan ...'. It features a green 'Upload Fiduciary Document' button. Below the header, there are 'View Options' (callout 7) with buttons for 'Group by Plan, Grouping', 'Sort by Plan', and 'Reverse Order' (callout 9). The main content area displays two document cards. The first card, '2026 Adoption Agreement' (callout 6), shows a 'Download' button. The second card, 'Annual Compliance Report' (callout 8), shows a detailed summary and a 'Download' button. Callout 9 points to the expand/collapse arrow on the top right of the cards.

6. Some items (like files and contacts) are listed as cards.
7. Cards can be grouped and sorted using the options at the top.
8. Use the arrow on a card to see more details.
9. Use the arrow at the top to expand or collapse all cards.

Data collection, secure file exchange, and all other features will work the same as before.