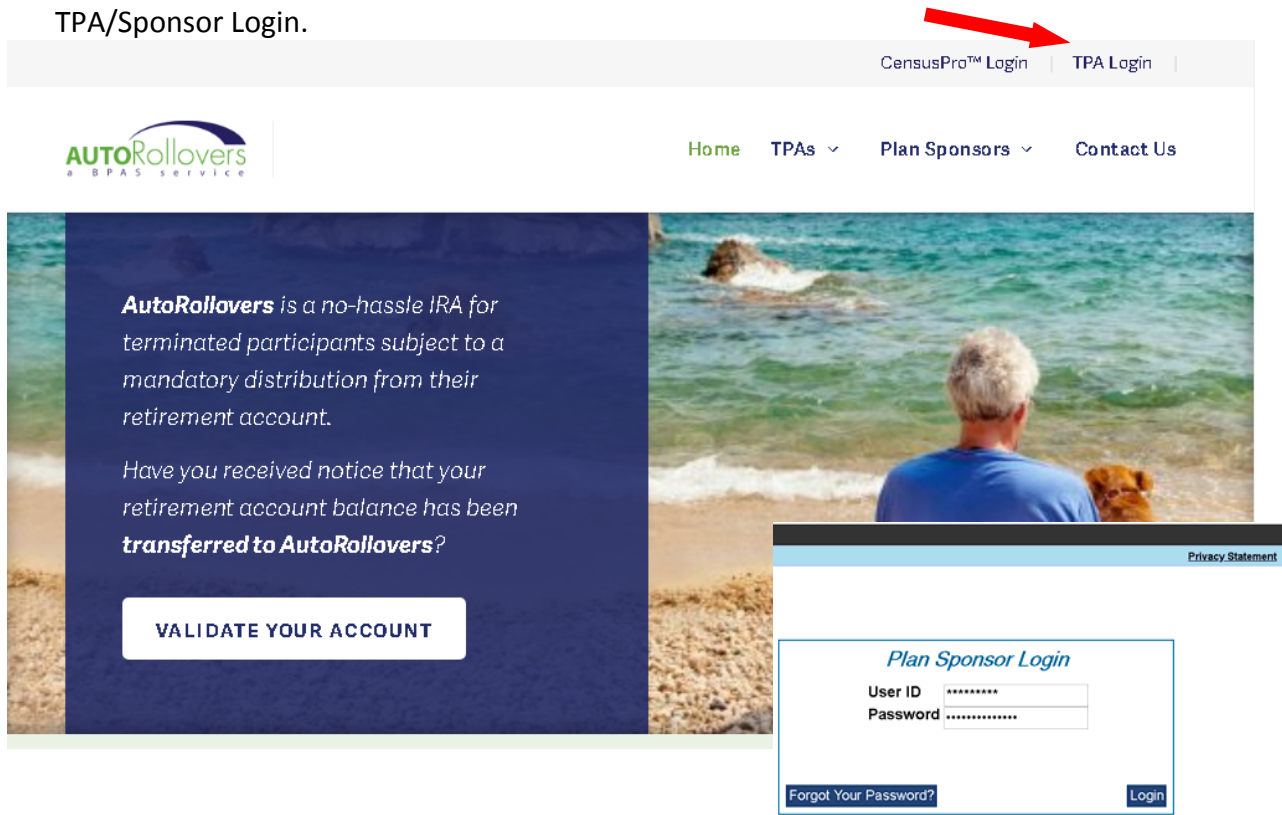


## Researching IRA Accountholders reported to AutoRollovers

**Step 1:** Log in at [www.autorollovers.com](http://www.autorollovers.com), using TPA/Sponsor Login.

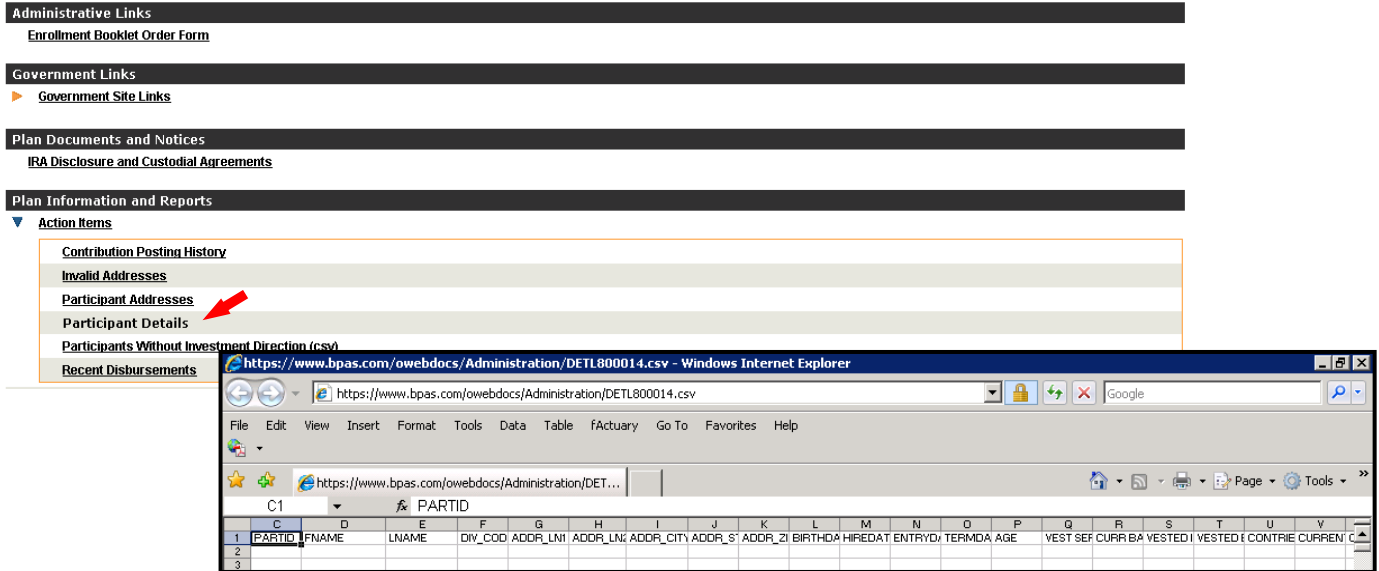


**Step 2:** Select Resource Center Tab, choose Action Items



General Plan Information	
Plan Name	AUTOROLLOVER IRAS 800014 AUTOROLLOVER IRAS 800014
BPA Plan Account ID	800014
Consultant	Carolynn Cross
Consultant E-mail	ccross@bpas.com
Telephone Number	1-866-401-5272
Plan Sponsor Contact	Carolynn Cross

**Step 3: Select Participant Details**  
(Will open as a spreadsheet)



The screenshot shows the BPAS website navigation menu with the following sections:

- Administrative Links**
  - Enrollment Booklet Order Form
- Government Links**
  - Government Site Links
- Plan Documents and Notices**
  - IRA Disclosure and Custodial Agreements
- Plan Information and Reports**
  - Action Items
    - Contribution Posting History
    - Invalid Addresses
    - Participant Addresses
    - Participant Details** (highlighted with a red arrow)
    - Participants Without Investment Direction (csv)
    - Recent Disbursements

The browser window shows a spreadsheet titled "PARTID" with the following columns:

C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	
1	PARTID	FNAME	LNAME	DIY_COD	ADDR_LN1	ADDR_LN2	ADDR_CITY	ADDR_S1	ADDR_Z1	BIRTHDA	HIREDAT	ENTRYD	TERMDA	AGE	VEST SEF	CURR BA	VESTED1	VESTED I	CONTRIE	CURREN
2																				
3																				

This spreadsheet will show you all IRA Accounts that have been established and, which ones currently have money in them. The spreadsheet is updated weekly, over the weekend.

**Please send any feedback regarding these instructions to:**  
[autorollers@bpas.com](mailto:autorollers@bpas.com).