# The PRS Report

# SHAREFILE: THE BASICS

To secure and simplify the transmittal of confidential data (e.g., employee census, participant loan and distribution packages), as well as to have a reference source for certain plan materials (e.g., plan documents), Pension Review Services (PRS) has created online ShareFile folders for its clients' plans. Chances are our clients and their advisors have already received their "welcome" email inviting them to "log in" to the portal via ShareFile. The purpose of this newsletter is to provide the basic steps to utilize the portal.

### The Initial Email and Account Set-Up:

Once a folder has been created, a "welcome" email is sent with the subject line: "Pension Review Services has added you to ShareFile." To get started, the ShareFile account must be opened by clicking the link in the email: "Click here to …". The link sends you directly to ShareFile on the internet. The account is then activated by verifying certain data and asking you to create a unique password (must be at least 8 characters with one letter and one number) and clicking "Save". The link to ShareFile in the "welcome" email is active for **30** days only. If the account is not opened within the 30 days, a new link must be sent.

After clicking "Save" you are sent to the Folder for the Plan. Each client has its own folder, and access to it is limited to those granted permission.

If you are unsuccessful in setting up your account the first time, and you click on the link to activate your account 2 or more times, you will need to enter a verification code which ShareFile will send you via email. The subject will be "Finish activating your ShareFile account." The verification code is 6 characters long and

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will need to be entered within 1 hour. Always use the last verification code you receive.

**Signing in After Initial Visit:**

To sign in after that initial visit, there are several options:

- Go directly to the website: https://pensionreviewservices.sharefile.com/ (we suggest setting this as a bookmark for future use)
- Go to our website: www.pensionreviewservices.com. Along the ribbon, across the top, in the right most position is SHAREFILE. Click on it and it will bring you to a log-in or Quick Upload (Quick Upload will be explained later.)
- If you have received an email informing you that a file has been uploaded, you can click on the hyperlink ("Company Name") in that email and sign in to your folder. This approach will take you to all files in the folder, not just the current uploaded file(s).
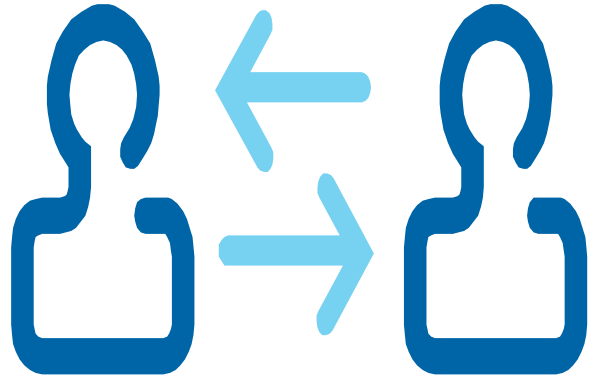
**Retrieving Information Sent to You Via the Portal:**

If items (files) are added (uploaded) to your folder, you will receive an email telling you the name of the person who has uploaded the files to your folder and the name(s) of the file(s). Within the email will be a link to the items that were added to your folder "Click here to download these items". If all you want to see are the items that were added, click on that link. You may be asked for your email address associated with the account and password. You will then see the list of the items added. You can either view the file or download it for use later. From this link you will only be able to view and download those particular items (individually or as a zip file). If you want to see the contents of your entire folder then you will have to sign in to ShareFile as explained above (Signing in After Initial Visit).

**Sending/Uploading Information to the Portal:**

Once you have the file on your computer, it is easy to upload the information to ShareFile: You can use either the ShareFile website or the "Quick Upload" feature listed on the PRS website as follows:

*From ShareFile:*

1. Log-in to the ShareFile system by one of the methods listed above.
2. Click on the folder to which you want the information placed.
3. Once there, on the right side, click "Upload files."
4. Choose the method to locate the files to be uploaded: drag and drop, or choose files. To identify the files, the name of the files will be the name which will appear in the folder.

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5. In order to inform others that information has been placed on the portal, check the box on the lower right to "Send email notifications when finished."
6. When all desired files have been added to the "box", click on "Upload Files."
7. After the files have been uploaded, indicate who to send the email notifications to: either check the "Specify users to notify" and enter the individual email addresses, or check "Notify all users in this folder." Notifying all users in this folder will send an email to all persons who have been given access to the account.
8. Click "Send Notifications."
9. The screen returns to the folder and the newly uploaded files will be listed for viewing and/or downloading.

*From Quick Upload:*

1. Once at the PRS website, hover over the ShareFile button and then click on "Quick Upload".
2. Fill in the information (email address, first name, last name and subject) so that PRS will know who uploaded the file. Sign in and passwords are not needed.
3. Choose the files to upload.
4. Click "Upload Files".
5. When the upload has completed, you will see a message: "Thank you. Your files have been successfully uploaded".

Note that when using Quick Upload, the files are not automatically associated with your folder and when saved to your folder (by PRS) may be renamed. In addition, email notifications cannot be specified and only PRS knows information was uploaded.

**SHAREFILE EXPEDITES THE EXCHANGE OF
INFORMATION IN A SECURE EFFICIENT ENVIRONMENT**



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