

THE FREEDOM TO FOCUS ON WHAT REALLY MATTERS



NORTHERN TRUST
Help Guide

FOR

Benefit Payment Participant Web Passport®

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My Passport Home

Benefit Payment Passport provides 24/7 online access to your benefit payment information. With BPP you can easily view your benefit payment information as well as update and maintain your personal information.

The **My Passport Home page** is the first page you view upon logging in. This page displays summary information on your upcoming payments, Year-To-Date, and payment history.

Please Note

If you participate in more than one benefit plan, you will not go directly to My Passport home after logging in. You will first need to select the plan you wish to view by clicking on the View button next to the plan.

The History Summary section displays a historical list of payments by date, with the most recent payment first. A filter function is available to limit the list to a desired date range.

To apply a filter:

1. In the **From Date** field, enter a date or click  to select a date.
2. In the **To Date** field, enter a date or click  to select a date.
3. Click **Apply Filter**.

To return the list to an unfiltered state, click **Clear Filter**.

To view details on a payment, click on an activity link in the **Payment Activity** column.


Benefit Payment Participant Web Passport
Sign Off | Contact Us | Help

MY PASSPORT MY INFORMATION

[Home](#)

MY COMPANY/PLAN

Participant:	Client:
Reference Number:	Plan Name:

NEXT SCHEDULED PAYMENT

Payment Date: 12/01/2021
Gross Amount: \$555.00

YEAR-TO-DATE PAYMENT SUMMARY

Year-to-Date Gross: \$6,105.00
Year-to-Date Deductions: \$22.00
Year-to-Date Net: \$6,083.00

HISTORY SUMMARY

From Date:  **To Date:**  [Apply Filter](#) | [Clear Filter](#)

Payable Date	Payment Activity	Payment Reference	Gross Distribution	Net Amount	Payment Status	Paid Date
11/01/2021	REISSUE	10157496	\$555.00	\$553.00	OUTSTANDING	
10/01/2021	CHECK	 9869063	\$555.00	\$553.00	PAID	10/04/2021
09/01/2021	CHECK	 9646957	\$555.00	\$553.00	PAID	08/31/2021
08/02/2021	CHECK	 9415166	\$555.00	\$553.00	PAID	08/02/2021
07/01/2021	CHECK	 9191819	\$555.00	\$553.00	PAID	07/02/2021
06/01/2021	CHECK	 8960994	\$555.00	\$553.00	PAID	06/01/2021
05/03/2021	CHECK	 8728645	\$555.00	\$553.00	PAID	05/03/2021

Reissue Selected Payment Print

Contact Information

The Contact Information screen allows you to update and maintain your mailing address, phone numbers, and Email address.

To update your contact information:

1. Input any changes or additions, then click **Save**.

MY PASSPORT		MY INFORMATION	
Contact Information Direct Deposit Tax Elections Tax Form Summary			
MY COMPANY/PLAN			
Participant:		Client:	
Reference Number:		Plan Name:	
CONTACT INFORMATION			
Country:*	UNITED STATES		
Address 1:*	312 N MAIN ST		
Address 2:			
Address 3:			
Address 4:			
City:**	CHICAGO		
State/Province:**	ILLINOIS		
Postal Code:**	60603		
Home Phone:		Home Phone Country Code:	
Alternate Phone:		Alternate Phone Country Code:	
		Ext:	
Email:			
Re-Enter Email:			
**US/CA Only			
			<input type="button" value="Save"/> <input type="button" value="Print"/>

To print data contained on this screen click the **Print** button at the bottom of the screen.

Please Note:

All foreign address changes must be approved by Northern Trust. Foreign address changes will remain in an awaiting approval status until Northern Trust approves the transaction, pending receipt of applicable Non-Resident Alien documentation.

Direct Deposit

The Direct Deposit screen allows you to input and maintain your direct deposit information. And update Statement Mailing to "Suppressed."

To update your Electronic Transfer Information:

1. For domestic accounts, respond to the statement regarding the transfer of your payment to a non-US bank by selecting either **Yes** or **No** from the drop-down menu.
2. Input new information, then click **Save**.

To remove your Electronic Transfer Information and to receive a paper check:

1. Select the checkbox below Account # and click **Save**.

To Suppress your Monthly Earning Statement:

1. Select the checkbox at the bottom of the screen called Suppress Advice and click **Save**.

MY PASSPORT MY INFORMATION

Contact Information | **Direct Deposit** | Tax Elections | Tax Form Summary

MY COMPANY/PLAN

Participant:		Client:	
Reference Number:		Plan Name:	

ELECTRONIC TRANSFER INFORMATION

100% of this deposit will be transferred to a non-US bank from the US Bank account shown below:

Electronic Payment Type:	<input type="text" value="ACH/Checking"/>	<input type="button" value="Show Bank Name"/>	
Routing #:	<input type="text" value="071000152"/>	Bank:	THE NORTHERN TRUST CO
Account #:	<input type="text" value="*****9876"/>	Further Credit To Account #:	<input type="text"/>

Enter Check Mark into Check Box and Click Save to Delete Electronic Payment Information

If Net Payment is completed, a flat amount may be deposited to other institutions using Additional Electronic Transfer Information

Suppress Advice

To print all data contained on this screen click the **Print** button at the bottom of the screen.

Tax Elections

The Tax Elections screen allows you to input and maintain your Federal and State tax withholding information.

Please Note

Any withholding election changes will be applied to future payments, and the election will continue until another change is submitted.

For Federal or State withholding questions, click on the applicable withholding link.

MY PASSPORT | **MY INFORMATION**

[Contact Information](#) | [Direct Deposit](#) | **[Tax Elections](#)** | [Tax Form Summary](#)

MY COMPANY/PLAN

Participant: _____ **Client:** _____
Reference Number: _____ **Plan Name:** _____

NOTE: Tax withholding will apply to all taxable payments.

FEDERAL [IRS Tax Withholding Tables](#)

Calculate
 Prior Format Current Format

Step 1 – Marital Status _____
Step 2 – Income From a Job or Multiple Pensions/Annuities
Step 3 – Claim Dependent and Other Credits
Step 4 – Other Adjustments

(a) Other Income
(b) Deductions
(c) Extra Withholding

Withhold This Exact Amount

Percentage Only

Do Not Withhold

STATE [State Withholding Rules](#)

Code

Marital Status **Exemptions** **Additional Flat Amount**

Withhold This Exact Amount

Percentage Only **Arizona Only Additional Amount**

Do Not Withhold

To print all data contained on this screen click the **Print** button at the bottom of the screen.

Tax Form Summary

The Tax Form Summary screen displays all tax forms that were issued to you (i.e.W2, 1099, 1042, etc.) with the most recent year displaying first.

To View or Print a tax form, click on the form name link.

MY PASSPORT
MY INFORMATION

Contact Information
Direct Deposit
Tax Elections
Tax Form Summary

MY COMPANY/PLAN

Participant:	Client:
Reference Number:	Plan Name:

TAX FORM SUMMARY INFORMATION

">	Participant Id Tax Year Gross History	Client Plan User Id Tax Form	Dist Type Dist Code Pay Type	Event Date Event Status Date Status	State Locality Dist % NRA %	NRA Country NRA Exempt NRA Inc Code Reason
<input type="checkbox"/>	0033681 2020 \$6,660.00 71307625	SYSTEM 1099R	7 7 Periodic	01/12/2021 Initial Mailing 01/12/2021 Mailed		
<input type="checkbox"/>	0033681 2019 \$6,660.00 68202274	SYSTEM 1099R	7 7 Periodic	01/14/2020 Initial Mailing 01/14/2020 Mailed		
<input type="checkbox"/>	0033681 2018 \$6,660.00 65269303	SYSTEM 1099R	7 7 Periodic	01/14/2019 Initial Mailing 01/14/2019 Mailed		
<input type="checkbox"/>	0033681 2017 \$6,660.00 62429229	SYSTEM 1099R	7 7 Periodic	01/16/2018 Initial Mailing 01/16/2018 Mailed		
<input type="checkbox"/>	0033681 2016 \$6,660.00 57286433	SYSTEM 1099R	7 7 Periodic	01/17/2017 Initial Mailing 01/17/2017 Mailed		
<input type="checkbox"/>	0033681 2015 \$6,660.00 54722109	SYSTEM 1099R	7 7 Periodic	01/19/2016 Initial Mailing 01/19/2016 Mailed		
<input type="checkbox"/>	0033681 2014 \$6,660.00	SYSTEM	7 7 Periodic	01/20/2015 Initial Mailing 01/20/2015		

To print all data contained on this screen click the **Print** button at the bottom of the screen .

My Preferences

The My Preferences screen allows you to manage your BPP password and User ID. To update your password or User ID, follow the instructions on the screen and click **Save**.

Please Note:

Passwords are case sensitive and must be at least 6 characters long and include at least 1 lower case alpha and 1 numeric character.

MY PASSPORT	MY INFORMATION
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Contact Information | Direct Deposit | Tax Elections | Tax Form Summary | **My Preferences**

My Company/Plan

Participant:		Client:	
Reference Number:		Plan Name:	

Change User ID

Enter your current Password if you wish to change your User ID.

Current Password:

Current ID:

New ID: Enter 6 to 8-characters. No special characters, e.g., &,*,\$,etc., or blanks permitted.

Confirm ID:

Change Password

View or Change Enrollment Security Information

To print all data contained on this screen click the **Print** button at the bottom of the screen.

Glossary

ACH - Automated Clearing House; electronic fund transfers flow through the Automated Clearing House prior to reaching its final destination (a financial institution).

Client Number – A four-digit code assigned by Northern Trust to identify a client relationship.

Deduction Source Code/Description - A Northern Trust assigned number along with a client directed description make up the deduction source code and description.

Distribution Code – A distribution code is an IRS code that is used to identify certain payment types. The distribution code is mapped to the distribution code box on the 1099-R tax form.

Distribution Type – A distribution type is a code used to identify the payment category.

Employee Contributions – Employee contributions are contributions made by an employee to his/her retirement plan.

Funding Source Code/Description – A Northern Trust assigned number along with a client directed description make up the funding source code and description.

Retroactive Payment (Retro) – A retro payment is comprised of past funds that were due a participant.

Routing Number – Routing number is synonymous with ABA number. This number identifies the financial institution when electronically transmitting funds.

Payable date - The date of the payment.

Processing date - The date that the payment is created.