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How to Run the Benefit Summary Report

This helpful report illustrates current participant account balances.

1. Once you have logged into your account, select **"Administer Benefits."**

2. Click **"Access Now"** next to any of the benefits listed and a new window will open. Then click the **"Reports"** tab in the top navigation bar.

3. Under the **Participants** section, choose **"Benefit Summary."**

4. Choose your preferred **Report Output Format,** either as a **PDF** file or an Excel compatible **CSV** file.

5. The **Account Type** defaults to include all benefits. If you want the report for a specific benefit, select the appropriate **Account Type** from the drop-down menu provided.

6. In the **Plan Year Ending** field, enter the appropriate end date for the plan year you would like to view. If this field is left blank, the report will include information for all plan years.

7. In the **Coverage Type** field, the default is **All Participants** (both active and terminated). There is an option to view only **Active** or **Terminated** participants by selecting the drop-down menu provided.

8. Once you have completed all of the applicable information, click **"Submit."**

9. You will receive a message indicating that your report has been submitted successfully. Click on the **"Return to Reports Page"** button.

10. Once report has generated, it will appear in your **Recent Report** display box. Depending on size, your report may take a few minutes to display. You can click on the **Reports** tab on top of the page to refresh. Click **"Download"** to open and view your report.