

How to Run the Peg Balance Report



This helpful report provides the funding amounts necessary to reimburse participant claims and replenish the Peg Balance.

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 **Funding & Fees** section, choose **“Peg Balance Funding Requirements.”**

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.

Enter the desired dates in the **Funding Period From** and **Funding Period To** fields, then click **“Submit.”**

7.

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

8.

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.