JOHNSON FINANCIAL GROUP® | BANKING WEALTH INSURANCE

Retirement Plan Access Reporting Instructions

With the enhancements made to Retirement Plan Access, you're now able to generate your own participant reports to help you manage the day-to-day responsibilities as a plan sponsor. We have outlined the following instructions on three specific reports that will be important for you to review periodically.

Accessing Participant Reports
With your plan sponsor access, navigate to: Retirement Plan Sponsor Access - Secure Login

- In the top navigation bar, hover on **Forms & Reports** > click **Reports**
- **Reports** > **Generate Reports**
- Select **report group** > **Enrollment**
- **Report Selection** > **Contribution Rate Change** OR **Enrollment Report**
- **Options** > **Divisions: All Divisions** > Select **Employee: All Employees** > Select file export type: **PDF** > **Available plan years: 2021** > Select **From/To Period** > **Submit**

REPORT 1: Contribution Rate Change Report
Provides a history of contribution rate changes.
Recommendation: pull report and review periodically in conjunction with auto-generated notifications.

REPORT 2: Enrollment Summary
Provides a list of eligible employee's enrollment status and deferral election.
Recommendation: pull report and review periodically in conjunction with employer enrollment patterns.

For the final report, you will access by:

- In the top navigation bar, hover on Forms & Reports > click **Reports**
- **Reports** > **Generate Reports**
- Select **report group** > **Participant Level Reports**
- **Report Selection** > **Eligibility Determination Report**

REPORT 3: Eligibility Determination Report
Provides projected eligibility to assist the plan sponsor in identifying employees who will become eligible in the near future.
Recommendation: this report is generated/emailed on the plan's behalf and the recommendation is to follow up with eligible employees for enrollment.