## Changes to On-Demand Reporting

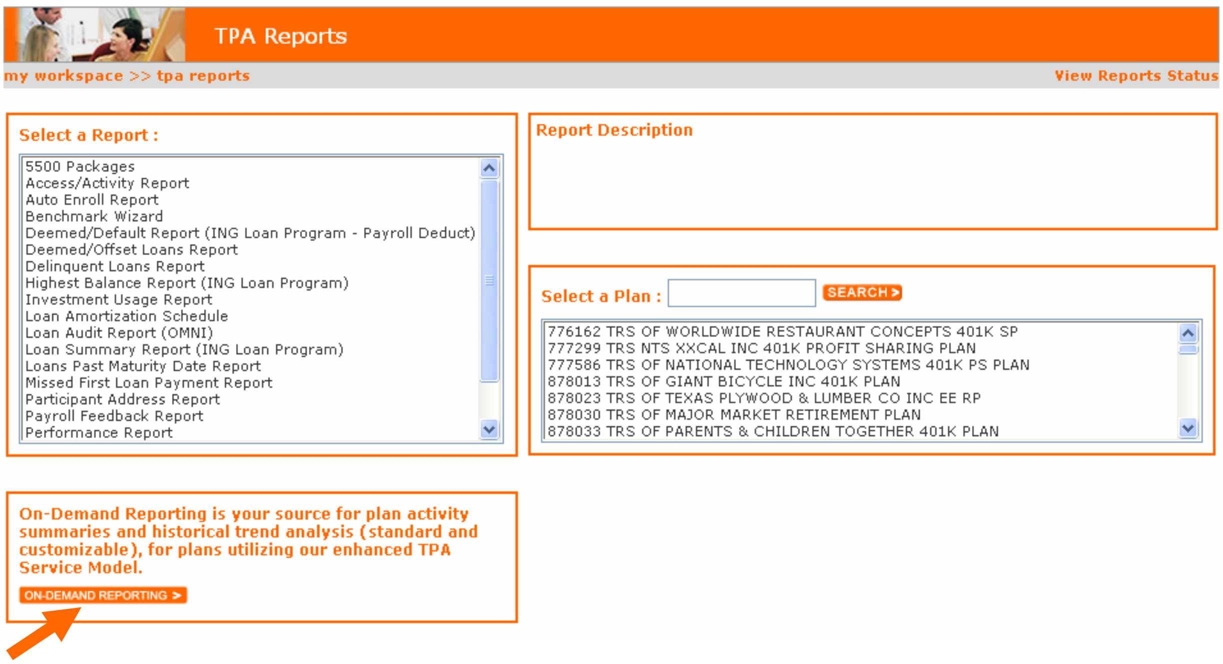
The On-Demand Reporting tool is being enhanced to include the ability for TPAs to report across their book of business - for plans on our EASE platform. Additionally we've added plan numbers to the plan name folders (where custom reports might be stored and shared among members of your firm)

If you're not familiar with our On-Demand Reporting tool, it provides you with a number of Standard Reports as well as the ability to produce ad-hoc reports from a number of data elements.

You can view a demo of this tool by visiting our Reference Library section of the TPA Website and selecting the Automated Demos link.

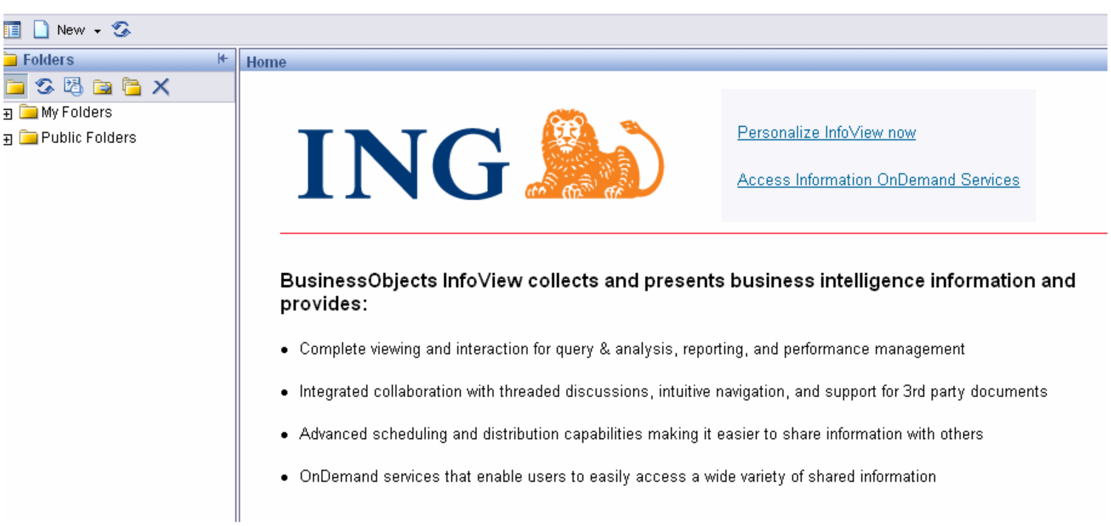
### Changes you can expect to see to On-Demand Reporting

Navigate to the TPA Reports section of the website from the My Workspace page.




From there, select the new button for On-Demand Reporting. You will no longer make a plan selection on this page.

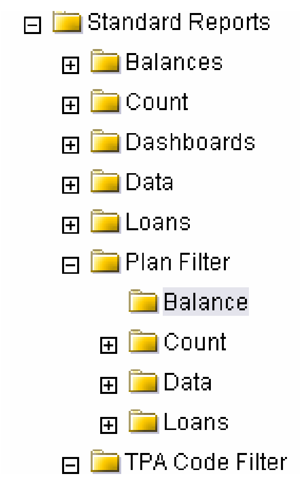
When you enter the tool, you'll see a similar screen as the one pictured below:



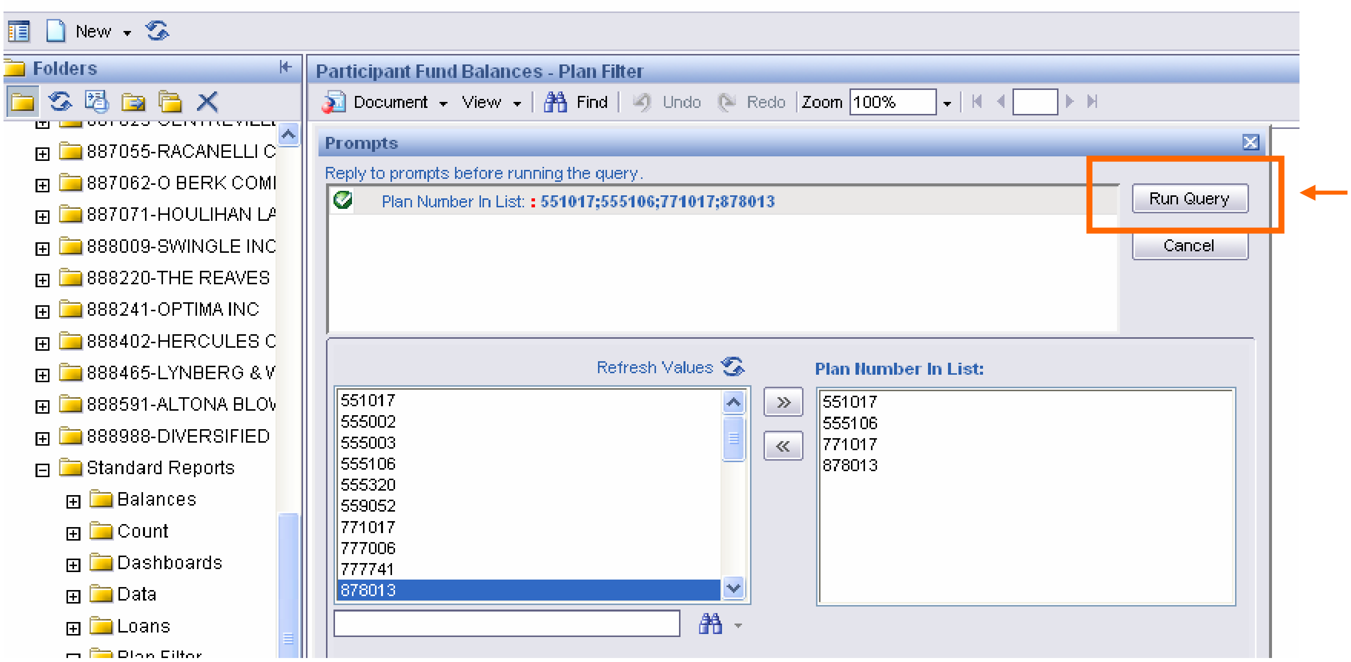
Click on the + next to Public Folders to expand the view. This will display all of the sub folders including the Standard Reports folder.

Click on the + next to Standard Reports. This will expand the view and show you the sub-folders of: Balances / Count / Dashboards / Data / Loans. If you run a report from one of these folders, it will contain data for <u>all of your EASE plans</u>.

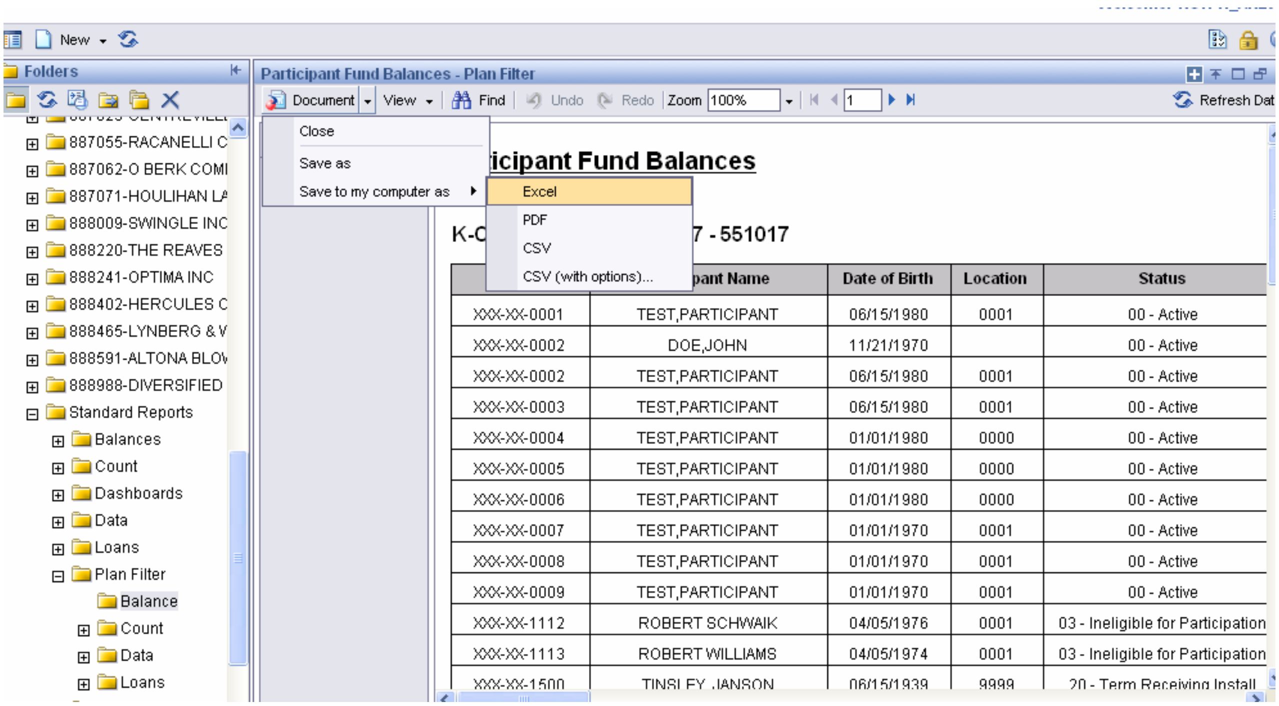
- If you wish to <u>filter your report results by Plan</u>, expand the folder marked Plan Filter and select a sub folder and report. It will prompt you to select the plan(s) you would like to report on.
- If you have access to multiple TPA codes and wish to <u>filter your report results by TPA code</u>, select the sub folder marked TPA Code Filter and it will prompt you to select the code(s) you would like to report on.




The following is an example of a report by Plan Number. Under Plan Filter, the Participant Fund Balance report was selected and then a pop up displays allowing you to select the plan(s) from a list. After you've identified the plan(s) you wish to report against, click on the Run Query button.



From there you can print/save your report by clicking on Document / Save to My Computer as and then select (Excel, PDF or CSV).




You will then be prompted with the choice of either saving to a location of your choice or opening it. Depending on if it is a PDF or Excel file will determine if either Adobe Acrobat or Microsoft Excel.