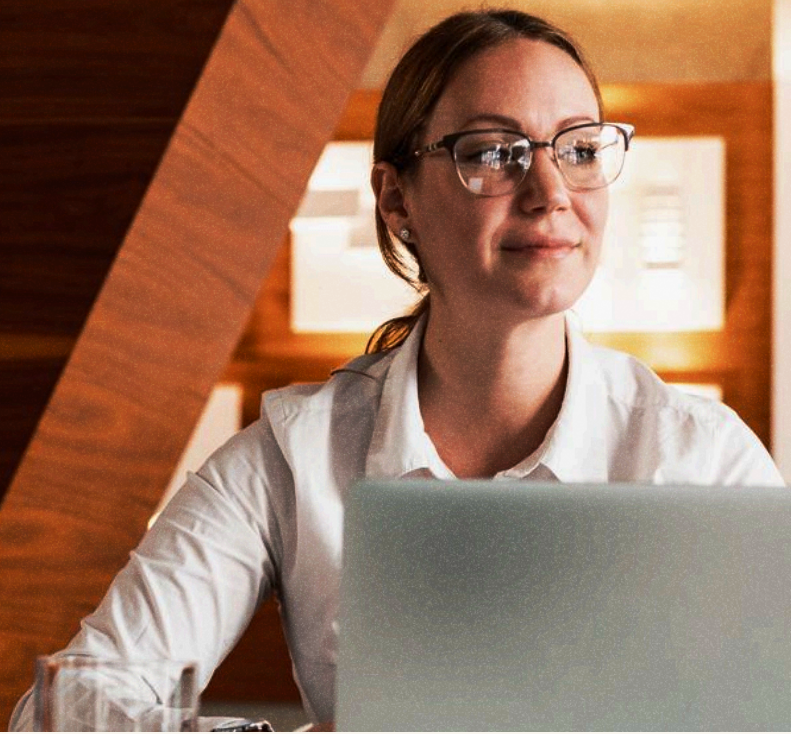
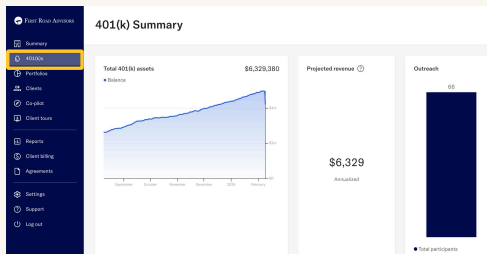


# Explore our Reporting Feature

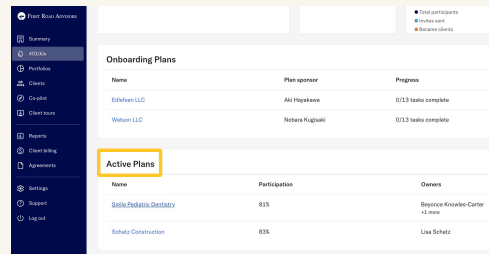


Gain instant access to participant and plan-level data, helping you track performance, identify trends, and prepare for client conversations with meaningful insights. Here's how to get started:

## 1 Navigate to your 401(k) dashboard



## 2 Click into an active plan

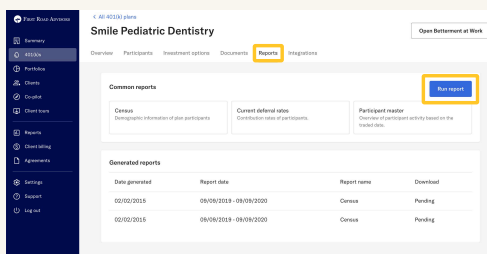


Name	Plan sponsor	Progress
Edelman LLC	Ali Hayskano	0/13 tasks complete
Watson LLC	Nobara Kugulski	0/13 tasks complete

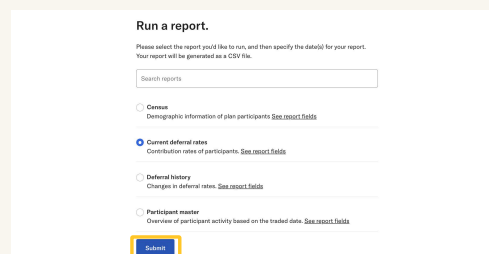
Name	Participation	Owners
Smile Pediatric Dentistry	83%	Stephanie Knowlton-Carter +1 more
Schultz Construction	83%	Uma Schultz

## 3 Navigate to the reports tab



Date generated	Report date	Report name	Download
02/02/2018	08/08/2018 - 08/08/2018	Census	Pending
02/02/2018	08/08/2018 - 08/08/2018	Census	Pending

## 4 Select a report to run



**Run a report.**

Please select the report you'd like to run, and then specify the date(s) for your report. Your report will be generated as a CSV file.

Search reports:

Census  
 Demographic information of plan participants. [See report fields](#)

Current deferral rates  
 Contribution rates of participants. [See report fields](#)

Deferral history  
 Changes in deferral rates. [See report fields](#)

Participant roster  
 Overview of participant activity based on the traded data. [See report fields](#)

# Glossary of Report Types

<b>Cash Fund</b>	Activity in and out of the cash account.
<b>Census</b>	Demographic and employment information of participants.
<b>Corrections</b>	Corrective actions initiated.
<b>Current deferral rates</b>	Contribution rates of participants.
<b>Deferral history</b>	Changes in deferral rates.
<b>Distributions</b>	Processed participant distributions.
<b>Fee detail</b>	Vesting information by participant and contribution source.
<b>Fee summary</b>	Total fees paid by participants, based on fee type.
<b>Forfeiture fund</b>	Activity in and out of the forfeiture account.
<b>Loan payments</b>	Loan payments made during payrolls, loan payoffs, or conversions.
<b>Loans</b>	Loans by participant.
<b>Participant activity</b>	Balance of participant accounts by contribution source on the start and end date specified.
<b>Participant contributions (Individual)</b>	A log of each individual contribution to participant accounts.
<b>Participant contributions (Total)</b>	Total payroll contribution amount in each participant account, by contribution source.
<b>Plan level investment activity</b>	Overview of participant activity at the ticker level based on the completed date.
<b>Participant vesting</b>	Vesting information by participant and contribution source.
<b>Plan activity</b>	Overview of plan activity by contribution source.
<b>Plan assets schedule</b>	Overview of assets by ticker.
<b>Plan contributions</b>	Contributions into the plan by effective and completed dates.
<b>Plan level investment activity</b>	Overview of total financial activity by fund ticker.
<b>Retirement match on student loan payments</b>	Participant details on 401(k) student loan match.
<b>Summary annual report recipients</b>	List of participants who need to be sent a Summary Annual Report (SAR) after your Form 5500 is submitted.
<b>Suspense fund</b>	Activity in and out of the suspense account.
<b>Unallocated funds</b>	Record of forfeiture, suspense, and cash fund totals.
<b>Unclaimed employees</b>	List of participants who have not claimed their Betterment accounts.

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