



Summary Annual Report – Participant List Guide

This guide provides you the steps to generate the list of employees needed for the Summary Annual Report. The data in the report is based on information provided by the employer or participants.

A screenshot of a web application's navigation menu. The menu is titled "Documents" in green text on a dark grey background. Below this, there are three options: "Reports", "Forms and Documents", and "Forms and Documents". The "Reports" option is highlighted with a green border.

Select **Reports** from the **Documents** menu

To generate the report, choose **Employee Contact Information** from the Report Selection list, select **Excel** as the export file type, and click **SUBMIT**.

A screenshot of a web application's report generation interface. The interface is divided into two main sections: "Report Selection" and "Options".

Report Selection: This section contains a list of report options. The "Employee Contact Information" option is highlighted with a green border. The other options are:

- Contribution Rate Changes (Historical): Employee contribution rate changes within a specified timeframe.
- Current Contribution Rates: Current contribution rates for participants with contribution rates elected.
- Deferral Acceleration Summary: List of participants with a contribution rate acceleration schedule. Run as of current date.
- Catch-up Contribution Eligibility: All catch-up eligible participants, year eligible, and employment status.
- Allocations for Participants Over Age 59 With Balances: Breakdown of allocations by source for participants over age 59.
- Beneficiary List: List of participants and the beneficiaries designated.
- Contribution Timing Audit Report with Payroll Detail: Contribution deposit summary.

Options: This section contains several dropdown menus and a "SUBMIT" button.

- Divisions:** A dropdown menu with "All Divisions" selected.
- Select employee:** A dropdown menu with "All Employees" selected.
- Select export file type:** A dropdown menu with "Excel" selected.
- Available plan years:** A dropdown menu with "01/01/2025 - 12/31/2025" selected.
- From:** A date input field with "n/a" and a calendar icon.
- To date:** A date input field with "n/a" and a calendar icon.
- SUBMIT:** A green button with white text.