Partner Access Report Generator Procedure

Summary

The *Report Generator* procedure describes how to execute a report in Partner Access.

Procedure

1. From the Tool Bar, click the **Reports & Documents** icon, and select **Report Generator**.

OR

Find the widget **My Documents and Reports** and click **Reports**.

2. Reports may be filtered using the funnel icon next to the **Report Name** or **Description of the Report**. ***The Reports that will mostly be used are the "Monthly Deduction Summary by Vendor" report and the "Newly Suspended or deceased pensioners" report.*** For more information on how to generate the reports noted above, please review the slides in the overview PPT on the Learning Center at www.IMRF.org.
   <u>**Reports:**</u>
   Account Summary - Outstanding payments - outstanding payments and historical payments.
   Employer Reserves Statement PP – Employer Reserves Statement
   Employer Security – This report allows to check the Employer Security.
   Finance Report 1 – **Invoices and Payments –** This report allows to check the list of invoices, returns, and payments for employers and their plan participants.
   IMRF Member Data – This report allows you to extract all IMRF data related to the specified member.
   Monthly Deduction Summary by Vendor
   Newly suspended or deceased pensioners report
   Purchase of Service Statement

3. Once the report is run a scroll bar is available for review. All reports may be exported to **Excel**.
4. Click on **Return to Reports Listing**, takes you back to the main report screen.

This procedure is complete.