REPORTS via PSC

Reports is a feature within the Empower Plan Service Center (PSC) website that allows you to run the Participant Deposit Detail Report or the Plan Contribution Summary by Money Source Report.

1. **After you log in to PSC**, select *Reports* from the left navigation menu.

2. **Select Standard reports**

3. **Select the *Contributions* tab**

4. **Select either the Participant Deposit Detail or Plan Contribution by Money Source report**
To run: **Participant Deposit Detail report**

- **Select the Plan**
- **Ignore divisions** Leave as No
- **Division:** Select your Payroll Center
- **Date Indicator** select either:
  
  *Payroll date* – this may be best if you know you made payroll contributions based on date of payroll and not day of.

  *Effective date:* would be by the date the actual remittance hit the employee’s accounts.

- **Money Source:** You may choose “select all” if you’d like as many of the options do not apply to our plans, and would not populate.
  
  MNDCP: Only options are **BEF1-MNDGP Pre-tax, RTH1-MNDGP Roth After-Tax**
  
  HCSP- **BEF1-HCSP Active Contrib, BEF3-Sev/Eligible for Reimbursement**

- **Deposit type:** *Payroll Contributions*
- **Report type:**
  
  *Detail* will provide every deposit for each individual in the selected time frame
  
  *Summary* will give you overall totals for that individual in the selected time frame

- **Subtotals:**
  
  *Exclude* will give the total
  
  *Include* will give total by money source, and combined total

- **Participant Identifier:** Select whatever is useful, *full SSN, partial SSN, or MSRS employee ID*
- **Sort Order:** Usually select *Participant Name* (the Participant ID is the MSRS account ID)
- **Age Range:** Usually select *All Ages*
- **Deposits in excess of:** may leave at 0.00, can determine whatever threshold you are reviewing
- **Report Format:** leave at *CRYSTAL REPORT*, you may download in another format later
- **Frequency:** select *Now*, you may set up ongoing reports by selecting *Monthly, Quarterly, Weekly*
- **Begin Date:** Input the first date you’d like to search
- **End Date:** Select the end date of your search
- **Email Notification:** You may want to receive an email notification if this is a large search, it may take a lot of time and this will notify you your report is complete and is ready to review in PSC
- **Email Address:** enter the email address you’d like to receive the notification
- **Select Submit**

Example, See Screenshot below
**Participant Deposit Detail**

Deposits to participant accounts for a specified date range.

<table>
<thead>
<tr>
<th>Field</th>
<th>Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan</td>
<td>98945-01 - Minnesota Deferred Compensation Plan</td>
</tr>
<tr>
<td>Ignore divisions *</td>
<td>No</td>
</tr>
<tr>
<td>Division *</td>
<td>PAYROLL CENTER ALL (933 selected)</td>
</tr>
<tr>
<td>Date indicator *</td>
<td>Payroll Date</td>
</tr>
<tr>
<td>Money source *</td>
<td>All Money Types (26 selected)</td>
</tr>
<tr>
<td>Deposit type *</td>
<td>Payroll Contributions (1 selected)</td>
</tr>
<tr>
<td>Report type *</td>
<td>Summary</td>
</tr>
<tr>
<td>Subtotals *</td>
<td>Include</td>
</tr>
<tr>
<td>Participant identifier *</td>
<td>FULL SSN 123-45-6789</td>
</tr>
<tr>
<td>Sort order *</td>
<td>Participant Name</td>
</tr>
<tr>
<td>Age range *</td>
<td>All Ages</td>
</tr>
<tr>
<td>Deposits in excess of *</td>
<td>0.00</td>
</tr>
<tr>
<td>Report format</td>
<td>CRYSTAL REPORT</td>
</tr>
</tbody>
</table>

**Frequency**
- NOW

**Begin date**
- 01/01/2019

**End date**
- 12/31/2019

**Email notification * 3**
- No
- Yes

**Email address ***
- patrikia.katz@mars.us

* Mandatory fields

Using a future date parameter will impact certain data and other information will only be as of the previous business day.
To run: Plan Contribution Summary by Money Source report

- Select the Plan
- Ignore divisions: Leave as No
- Division: Select your Payroll Center
- Date Indicator select either:
  - Payroll date – this may be best if you know you made payroll contributions based on date of payroll and not day of.
  - Effective date: would be by the date the actual remittance hit the employee’s accounts.
- Money Source: You may choose “select all” if you’d like as many of the options do not apply to our plans, and would not populate.
  - MNDCP: Only options are BEF1-MNDCP Pre-tax, RTH1-MNDCP Roth After-Tax
  - HCSP- BEF1-HCSP Active Contrib, BEF3-Sev/Eligible for Reimbursement
- Participant Identifier: Select whatever is useful, full SSN, partial SSN, or MSRS employee ID
- Report Format: leave at CRYSTAL REPORT, you may download in another format later
- Frequency: Select Now, you may set up ongoing reports by selecting Monthly, Quarterly, Weekly
- Begin Date: Fill in the first date you’d like to search
- End Date: Select the end date of your search
- Email Notification: You may want to receive an email notification if this is a large search, it may take a lot of time and this will notify you your report is complete and is ready to review in PSC
- Email Address: enter the email address you’d like to receive the notification
- Select Submit

Example, See Screenshot below
Plan Contribution Summary by Money Source

Contributions to the plan by money source for a specified date range.

**Plan**

- 98945-01 - Minnesota Deferred Compensation Plan

**Ignore divisions**

- No
- Yes

**Division**

- PAYROLL CENTER
  - 1 Minnesota State of 1 (1 selected)

**Date type indicator**

- Payroll Date

**Money source**

- All Money Types (27 selected)

**Participant identifier**

- PROTECTED SSN XXX-XX-1234

**Report format**

- CRYSTAL REPORT

**Frequency**

- NOW

**Begin date**

- 06/01/2018

**End date**

- 06/30/2019

**Email notification**

- No
- Yes

**Email address**

- patricia.katz@mars.us

* Mandatory fields

Using a future date parameter will impact certain data and other information will only be as of the previous business day.

[Submit]
Report will load, and bring you to the *My Reports* page, the report will run and remain for 30 days if it is not deleted first.

While the report is running, it will be in pending status

When the report is done running, and you receive a notification email, you will select **View** to open the report

To look at payroll detail, select **View Detail**

To download or print the report select the options in the upper left hand corner of page

1. Click 📨 in the toolbar to print or click ⌨️ to export.

If you choose to print, you will need to open each pay period you’d like to print, otherwise it will only print the part of the report that is currently open on the page you are selecting to print
To Export, select what you would like to download the report in.