

Available Reports in Benefits Access for Plan Sponsors (BAP)

Conference-Specific Reports

Report Name	Description	Request Options	Location	Timing	Format
Census Reports					
Active Participants	Comprehensive membership, service, compensation, and plan enrollment data for conference's: – Active clergy – Clergy appointed to a leave of absence – Clergy appointed under <i>Book of Discipline (BOD)</i> ¶ 346.1	Option to include addresses and e-mail addresses	Conference home page under <i>Reports</i>	Immediate	Excel
Retired Participants	Membership and service data for conference's retired clergy	Option to include addresses and e-mail addresses	Conference home page under <i>Reports</i>	Immediate	Excel
Death Notifications	Notification of death for conference's – Deceased participants – Deceased family members of participants	Date range based on date death was reported or actual date of death	Conference home page under <i>Reports</i>	Immediate	Excel
Future Dated Events	Active Future Dated Events – Membership – Service – Compensation – Plan Enrollment	Not applicable	Conference home page under <i>Reports</i>	Immediate	Excel
Clergy Retirement Manager Summary	Summarized retirement eligibility and intends to retire status for clergy who are eligible to retire	Not applicable	Conference home page under <i>Clergy Retirement Manager</i>	Immediate	Excel
Clergy Retirement Manager Detail	Retirement eligibility, intends to retire status, addresses, and e-mail addresses for clergy who are eligible to retire	Not applicable	Conference home page under <i>Clergy Retirement Manager</i>	Immediate	Excel

Conference-Specific Reports (continued)

Report Name	Description	Request Options	Location	Timing	Format
Contribution Reports					
Contribution Activity	UMPIP contributions for a user-defined payroll period, including contributions for which posting was delayed	Option to request data by the day contributions were posted to the account (Posted Date) or billing period (Origination Date) Date range—earliest from date is the 1st of the calendar year 3 years prior to current year	Conference home page under <i>Reports</i>	Overnight	Excel
Contribution Activity – Total by Year	Annual UMPIP contributions for a user-selected calendar year	Option to request data by calendar year for 5 years prior to current year	Conference home page under <i>Reports</i>	Overnight	Excel
Moving Expense Payments	Participants who had a moving expense payment provided	Not applicable	Conference home page under <i>Reports</i>	Immediate	Excel
Contribution Remittance (export)	Detailed billing for conference-sponsored and conference-remitted plans	Not applicable	Conference home page under <i>Contribution Remittance</i>	Immediate	Excel
Matching Contribution Detail	Data used to calculate participants' CRSP DC and/or UMPIP match for the current month	Not applicable	Conference home page under <i>Contribution Remittance</i>	Immediate	Excel
Matching Contribution True-up	Data used to calculate participant true-up contributions, includes current and prior year	Not applicable	Conference home page under <i>Contribution Remittance</i>	Immediate	Excel
Participant Contribution Change	Current contribution elections for participants who had a contribution election change	Not applicable	Conference home page under <i>Contribution Remittance</i>	Immediate	Excel
Moving Expense Payment Contribution Detail	Current month CRSP DC and/or CPP Premium contributions for participants with moving expense payments	Not applicable	Conference home page under <i>Contribution Remittance</i>	Immediate	Excel

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Conference-Specific Reports (continued)

Report Name	Description	Request Options	Location	Timing	Format
Conference Reports					
UMPIP Adoption Agreement Elections	UMPIP adoption agreement elections for conference controlled/conference responsible employers	Not applicable	Conference home page under <i>Reports</i>	Overnight	Excel
Organization List	Profile, office address, and billing address details for organizations affiliated with the conference	Not applicable	Conference home page under <i>Reports</i>	Immediate	Excel
DAC/CAC	Denominational Average Compensation and Conference Average Compensations for a selected year	Year	Conference home page under <i>Reports</i>	Immediate	PDF
CRSP Eligibility Change	Participants who have had an eligibility change in CRSP (eligible to ineligible or vice versa)	Not applicable	Conference home page under <i>Contribution Remittance</i>	Immediate	Excel
Automatic Features Reports					
Participant Contributions	Contribution elections as of "report information date"	Not Applicable	Conference home page under <i>Reports</i>	Immediate	Excel
Pre-Escalation	Contribution elections 1 month before escalation date	Not Applicable	Conference home page under <i>Reports</i>	Immediate	Excel

Available Reports in Benefits Access for Plan Sponsors (BAP)

Organization-Specific Reports *(continued)*

Report Name	Description	Request Options	Location	Timing	Format
Census Reports					
Active Participants	Comprehensive membership, service, compensation, and plan enrollment data for organization's: – Active participants – Participants on a leave of absence	Option to include addresses and e-mail addresses	Organization home page under <i>Reports</i>	Immediate	Excel
Death Notifications	Notification of death for organization's: – Deceased participants – Deceased family members of participants	Date range based on date death was reported or actual date of death	Organization home page under <i>Reports</i>	Immediate	Excel
Future Dated Events	Active Future Dated Events - Membership - Service - Compensation - Plan Enrollment	Not applicable	Conference home page under <i>Reports</i>	Immediate	Excel
Contribution Reports					
Contribution Activity	UMPIP and/or Horizon 401(k) contributions for a user-defined payroll period, including contributions for which posting was delayed	Option to request data by the day contributions were posted to the account (Posted Date) or billing period (Origination Date) Date range—earliest from date is the 1st of the calendar year 3 years prior to current year	Organization home page under <i>Reports</i>	Overnight	Excel
Contribution Activity – Total by Year	Annual UMPIP contributions for a user-selected calendar year	Option to request data by calendar year for 5 years prior to current year	Conference home page under <i>Reports</i>	Overnight	Excel
Moving Expense Payments	Participants who had a moving expense payment provided	Not applicable	Organization home page under <i>Reports</i>	Immediate	Excel

Available Reports in Benefits Access for Plan Sponsors (BAP)

Organization-Specific Reports (continued)

Report Name	Description	Request Options	Location	Timing	Format
Organization Reports					
Plan Sponsor Plan Asset Summary	Total plan sponsor assets in UMPIP and/or Horizon 401(k)	Market close date	Organization home page under <i>Reports</i>	Immediate	PDF
Plan Sponsor Plan Asset Detail	Total plan sponsor assets in UMPIP and/or Horizon 401(k)—by participant	Market close date	Organization home page under <i>Reports</i>	Overnight	Excel
Automatic Features Reports					
Participant Contributions	Contribution elections as of "report information date"	Not Applicable	Organization home page under <i>Reports</i>	Immediate	Excel
Pre-Escalation	Contribution elections 1 month before escalation date	Not Applicable	Organization home page under <i>Reports</i>	Immediate	Excel

Available Reports in Benefits Access for Plan Sponsors (BAP)

Participant-Specific Reports

Report Name	Description	Request Options	Location	Timing	Format
Clergy Service Record	Clergy service history	Not applicable	Participant page under <i>Reports</i>	Immediate	PDF
Employment Service Record	Lay service history	Not applicable	Participant page under <i>Reports</i>	Immediate	PDF
Collins Years of Service	Credited months of service in the Collins Pension Plan for Missionaries	Projection date	Participant page under <i>Reports</i>	Immediate	PDF
Total Years of Service	Calculation of total years of service toward clergy retirement eligibility under <i>BOD</i> ¶357.2, including credited years of service in Pre-82 and/or CRSP	Projection date	Participant page under <i>Reports</i>	Immediate	PDF
Data Change History	Contact data change history	Not applicable	Participant page under <i>Reports</i>	Immediate	Excel