

## Available Reports in Benefits Access for Plan Sponsors (BAP)

### Conference-Specific Reports

Report Name	Description	Request Options	Location	Timing	Format
<b>Census Reports</b>					
<b>Active Participants</b>	Comprehensive membership, service, compensation, and plan enrollment data for conference's: <ul style="list-style-type: none"> <li>– Active clergy</li> <li>– Clergy appointed to a leave of absence</li> <li>– Clergy appointed under <i>Book of Discipline (BOD)</i> ¶ 346.1</li> </ul>	Option to include addresses and e-mail addresses	Conference home page under <i>Reports</i>	Immediate	Excel
<b>Retired Participants</b>	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
<b>Death Notifications</b>	Notification of death for conference's <ul style="list-style-type: none"> <li>– Deceased participants</li> <li>– Deceased family members of participants</li> </ul>	Date range based on date death was reported or actual date of death	Conference home page under <i>Reports</i>	Immediate	Excel
<b>Future Dated Events</b>	Active Future Dated Events <ul style="list-style-type: none"> <li>– Membership</li> <li>– Service</li> <li>– Compensation</li> <li>– Plan Enrollment</li> </ul>	Not applicable	Conference home page under <i>Reports</i>	Immediate	Excel
<b>Clergy Retirement Manager Summary</b>	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
<b>Clergy Retirement Manager Detail</b>	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
<b>Contribution Reports</b>					
<b>Contribution Activity</b>	Compass and 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
<b>Contribution Activity – Total by Year</b>	Annual Compass and 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
<b>Moving Expense Payments</b>	Historical: Participants who had a moving expense payment provided	Not applicable	Conference home page under <i>Reports</i>	Immediate	Excel
<b>Contribution Remittance (export)</b>	Detailed billing for conference-sponsored and conference-remitted plans	Not applicable	Conference home page under <i>Contribution Remittance</i>	Immediate	Excel
<b>Matching Contribution Detail</b>	Data used to calculate match contributions for the current month	Not applicable	Conference home page under <i>Contribution Remittance</i>	Immediate	Excel
<b>Matching Contribution True-up</b>	Data used to calculate true-up match contributions for a prior month or year	Not applicable	Conference home page under <i>Contribution Remittance</i>	Immediate	Excel
<b>Participant Contribution Change</b>	Updated contribution elections for participants who made a change	Not applicable	Conference home page under <i>Contribution Remittance</i>	Immediate	Excel
<b>Moving Expense Payment Contribution Detail</b>	Historical: 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
<b>Conference Reports</b>					
<b>UMPIP Adoption Agreement Elections</b>	UMPIP adoption agreement elections for conference controlled/conference responsible employers	Not applicable	Conference home page under <i>Reports</i>	Overnight	Excel
<b>Organization List</b>	Profile, office address, and billing address details for organizations affiliated with the conference	Not applicable	Conference home page under <i>Reports</i>	Immediate	Excel
<b>DAC/CAC</b>	Denominational Average Compensation and Conference Average Compensations for a selected year	Year	Conference home page under <i>Reports</i>	Immediate	PDF
<b>Clergy Eligibility Change</b>	Clergy participants who have had an eligibility change (eligible to ineligible or vice versa)	Not applicable	Conference home page under <i>Contribution Remittance</i>	Immediate	Excel
<b>Automatic Features Reports</b>					
<b>Participant Contributions</b>	Contribution elections as of "report information date"	Not Applicable	Conference home page under <i>Reports</i>	Immediate	Excel
<b>Pre-Escalation</b>	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

Report Name	Description	Request Options	Location	Timing	Format
<b>Census Reports</b>					
<b>Active Participants</b>	Comprehensive membership, service, compensation, and plan enrollment data for organization's: <ul style="list-style-type: none"> <li>– Active participants</li> <li>– Participants on a leave of absence</li> </ul>	Option to include addresses and e-mail addresses	Organization home page under <i>Reports</i>	Immediate	Excel
<b>Death Notifications</b>	Notification of death for organization's: <ul style="list-style-type: none"> <li>– Deceased participants</li> <li>– Deceased family members of participants</li> </ul>	Date range based on date death was reported or actual date of death	Organization home page under <i>Reports</i>	Immediate	Excel
<b>Future Dated Events</b>	Active Future Dated Events <ul style="list-style-type: none"> <li>– Membership</li> <li>– Service</li> <li>– Compensation</li> <li>– Plan Enrollment</li> </ul>	Not applicable	Organization home page under <i>Reports</i>	Immediate	Excel
<b>Contribution Reports</b>					
<b>Contribution Activity</b>	PIP 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
<b>Contribution Activity – Total by Year</b>	Annual PIP contributions for a user- selected calendar year	Option to request data by calendar year for 5 years prior to current year	Organization home page under <i>Reports</i>	Overnight	Excel
<b>Moving Expense Payments</b>	Historical: 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
<b>Organization Reports</b>					
<b>Plan Asset Summary</b>	Total plan sponsor assets in Compass, PIP and/or Horizon 401(k)	Market close date	Organization home page under <i>Reports</i>	Immediate	PDF
<b>Plan Asset Detail</b>	Total plan sponsor assets in Compass, PIP and/or Horizon 401(k)—by participant	Market close date	Organization home page under <i>Reports</i>	Overnight	Excel
<b>Automatic Features Reports</b>					
<b>Participant Contributions</b>	Contribution elections as of "report information date"	Not Applicable	Organization home page under <i>Reports</i>	Immediate	Excel
<b>Pre-Escalation</b>	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
<b>Clergy Service Record</b>	Clergy service history	Not applicable	Participant page under <i>Reports</i>	Immediate	PDF
<b>Employment Service Record</b>	Lay service history	Not applicable	Participant page under <i>Reports</i>	Immediate	PDF
<b>Collins Years of Service</b>	Credited months of service in the Collins Pension Plan for Missionaries	Projection date	Participant page under <i>Reports</i>	Immediate	PDF
<b>Total Years of Service</b>	Calculation of total years of service toward clergy retirement eligibility under <i>BOD</i> ¶1357.2, including credited years of service in Pre-82 and/or CRSP DB	Projection date	Participant page under <i>Reports</i>	Immediate	PDF
<b>Data Change History</b>	Contact data change history	Not applicable	Participant page under <i>Reports</i>	Immediate	Excel