HOW TO RUN THE **ENROLLEE ACCOUNT BALANCE REPORT**

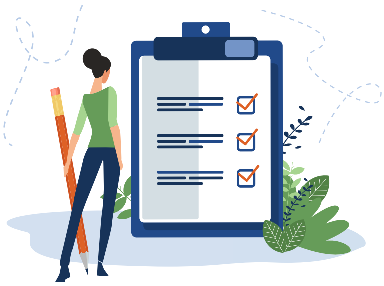
Follow these simple steps to generate and view the Enrollee Account Balance Report:

Step 1: Log In
- Go to ClarityBenefitSolutions.com and log in.
- Click the Manage Your Company Benefits tile.

Step 2: Access Reports
- In the new window, click the three-line menu in the top left corner.
- Select Reports, then Request.
- Choose Enrollees, and select Enrollee Account Balance Report.

Step 3: Customize and Generate the Report
- Your company name will already be filled in.
- Adjust the filters if needed (e.g., plan type, date range, or report format like PDF, Excel, or CSV).
- Click Generate.

Step 4: View and Download the Report
- Click the three-line menu again, go to Reports, then Results.
- Select View Reports. If it's still processing, refresh your screen.
- Download the report to your computer.



Understanding the Report

- **Employee ID:** Identifies employees (mask or unmask if needed).
- **Status:** Indicates if an employee is active, new, or terminated.
- **Annual Election:** Shows their plan amount for the year.
- **Contributions:** Employee and employer contributions.
- **Rollover:** Any rolled-over funds.
- **Total Disbursed:** What they've spent so far.
- **Forfeiture Balance:** What they would lose if they left without claiming more funds

That's it! Now you have all the details you need to manage your company's benefit plans efficiently. For additional help, remember that Clarity is here to make everything Simply Smarter!

Learn more about us at **claritybenefitsolutions.com**

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