## How To ...

## Produce a Statement

- > Once you have logged into the Employee website -
  - ✓ Select <u>Statements</u> from the menu in the upper left section of the Homepage

OR

✓ From the Menu Tabs across the top select <u>Account Information</u> and then <u>Statements</u>

ount Information 🔻 🛛 Investment Information 🔻		Account Information 👻 Inve	Investment Information 🗢		
Account Information	Account Ov	Account Overview Current Balance Personal Rate of Return	Account Ov		
<ul> <li>Account Overview</li> <li>Current Balance</li> </ul>	- Portfolio Su	Statements Loan Balances	- Portfolio Su		
<ul> <li>♦ Personal Rate of Return</li> </ul>		♦ Personal Rate of Return			
Statements		Statements     Loan Balances			

Select the Start Date by either clicking in the date field and typing in the date OR by clicking on the drop down arrow and selecting from the calendar.

Statemer	its						
Start Date:	1/1/2	010		~			
End Date:	4		Jai	nuar	y		>
	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	27	28	29	30	31	1	2
	3	4	5	6	7	8h	)9
	10	11	12	13	14	15	16
	17	18	19	20	21	22	23
	24	25	26	27	28	29	30
	31	1	2	Э	4	5	6

Select the End Date by either clicking in the date field and typing in the date OR clicking on the drop down arrow and selecting from the calendar.

Start Date:	1/1/2	010		*			
End Date:	2/28/	2010		*	L		
	4		Feb	oruar	1¢		•
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Click the *Get Statement* button.



> Website will show a *"request is being processed"* message and will update status once job is complete.

Your last sta	ntement request	t is being proc	essed. Please	wait
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Your statement was successfully generated. Please see the list of statements below and click on the report icon to view it.

The statement you just requested will be listed in the Available Statements section at the bottom of the screen. Click on the science to view the selected statement.

View	Run Date	Start Date	End Date	Status	Generated By	Delete
<b></b>	3/16/2010	1/1/2010	2/28/2010	Completed	Me	
e	2/25/2010	10/1/2009	12/31/2009	Completed	Ме	
						Delete

- The statement will open up in a separate window and will look like the statement you receive from your employer on a quarterly or annual basis.
- If after viewing your statements you would like to delete any of the listed statements, just Check the Delete box next to those statements.
- Click the *Delete* button.

View	Run Date	Start Date	End Date	Status	Generated By	Delete
	3/16/2010	1/1/2010	2/28/2010	Completed	Me	
	2/25/2010	10/1/2009	12/31/2009	Completed	Me	

A Message Box will come up verifying that "you want to delete the selected statement(s)", Click the OK button.

Message	e from webpage 🛛 🔀
2	Are you sure you want to delete the selected statement(s)?
	OK Cancel