

Retirement Online

Initiated and Posted Reports

If you have a report on your Reporting Dashboard in *Retirement Online* that is in “Initiated” status, the reporting process is not complete. The report must be in “Posted” status for the data to be released to the members’ accounts.

If the report contains data and needs to be completed:

Click on the report date of the Initiated report. This will bring you to the Report Summary page for this report. If you have any errors/warnings, click on the Error and Warnings tab at the top of the screen and export them into an Excel document to print or save electronically. To export the information into an Excel document, click the grid icon with the red arrow.

You can post your report with warnings, however, if there are any errors, the error transactions will be dropped off of the report at the time of posting.

Once you have addressed any errors and warnings, click on the Report Summary tab and scroll down the page. You will need to click into the box that says “I agree to the submission of this Employer Report” and then click Submit. You will get a pop-up indicating that you will receive an email once the information is posted. Click OK. You will then be brought back to your Reporting Dashboard. The report will most likely be in “Submitted” status. Please click the Refresh button until the report is in “Posted” status.

If the report was opened in error and there is no data to submit:

Scroll to the right of the page and click the Delete button.

If you need further assistance with getting your report posted, please reach out to us at 866-805-0990 and select #1 (Employer) on the main menu and then #2 on the next menu for help with uploading and/or submitting a file.