

**Employer Reports**

These reports are relevant **for every** payroll.

You can receive an e-mail from Transamerica notifying you if there has been a change to contributions or loans that requires you to run these reports.

**1)** **Changes to Contribution Rate Report –** Create a list of participants with contribution rate changes, includes new enrollments and/or changes in deferral:

From the [www.ta-retirement.com w](http://www.ta-retirement.com/)ebsite, log in with applicable Sponsor credentials. Go to ***Plan Reports > Contribution > Changes to Contribution Rate***

 Select the applicable date range

 Select New enrollments and deferral changes

 Check the “Check the box to limit the effective date . . . “

 Click Submit

**2)** **Loans Issued Report –** Create a list of participants with loans issued during a specific date range:

From the [www.ta-retirement.com w](http://www.ta-retirement.com/)ebsite, log in with applicable Sponsor credentials. Go to ***Plan Reports > Loans > Loans Issued***

Select the applicable date range

Indicate the sort order

Click Submit

The reports below should be run at least quarterly.

**3) Loan Register Report –** Generate a list of all participant loans outstanding with loan details and to-date payment information:

From the [www.ta-retirement.com w](http://www.ta-retirement.com/)ebsite, log in with applicable Sponsor credentials. Go to ***Plan Reports > Loans > Loans Register***

**4)** **Loans in Danger of Default** (posted quarterly)

**5)** **Loans Approaching Maturity Date** (posted quarterly)

From the [www.ta-retirement.com w](http://www.ta-retirement.com/)ebsite, log in with applicable Sponsor credentials. Go to ***Plan Information > Document Center > Reporting & Testing > Late Loan Reporting***

Select the applicable quarter and view applicable report

Send questions or concerns with any of these reports to Theresa.Mackey@transamerica.com

1