



DECEMBER 2019

Plan Sponsor Dashboard Gets Sponsors Closer to Their Plan's Data

Recently, Milliman updated the overall look and feel of **MillimanBenefits.com** while also enhancing the reporting it offers to plan sponsors.

Now, Plan Sponsors can view information, and dig deeper to learn even more about their plan with a few simple clicks of the mouse. It begins with the new Dashboard.

The plan's data is broken out in several different ways to make it quicker and easier for sponsors to find the information they're looking for.

The Dashboard is customizable which allows plan sponsors to get an up-to-date look at plan statistics. The Dashboard provides full-color graphics and charts which makes the data quick and easy to read.

Favorites

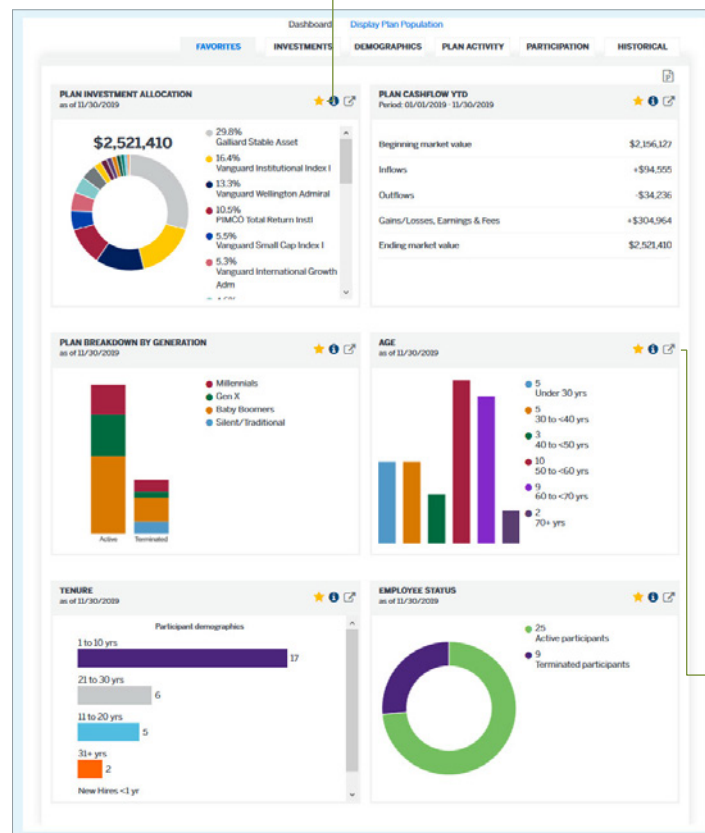
If there is a specific data point that a plan sponsor is interested in, or regularly checks, they can add that chart or table to their favorites by clicking on the star located along the data point's title.

When plan sponsors log in, their favorites will be the first thing they see. Sponsors can select multiple data points as their favorites.

Along with their favorites, sponsors can view data based on the plan's investments, demographics, plan activity and participation by selecting the tabs along the top.

More In Depth

With any data point, the sponsor can get a more in-depth view by clicking the arrow to get more information.



Deeper Dive

When plan sponsors click on the arrow in the upper right of any tile, they'll be taken to a new screen that offers an opportunity to view the data in several different ways.

The Plan Population screen offers several filters that allow sponsors to drill down into their data. This gives sponsors the ultimate control and access to their plan data.

Sponsors can even review the data on a participant level. To do so, simply, Click on Plan Population to see the names of the participants in the selected data point. That means with a few clicks of the mouse, sponsors can see who has an outstanding loan, who is/isn't taking advantage of a possible matching contribution and who is utilizing InvestMap.

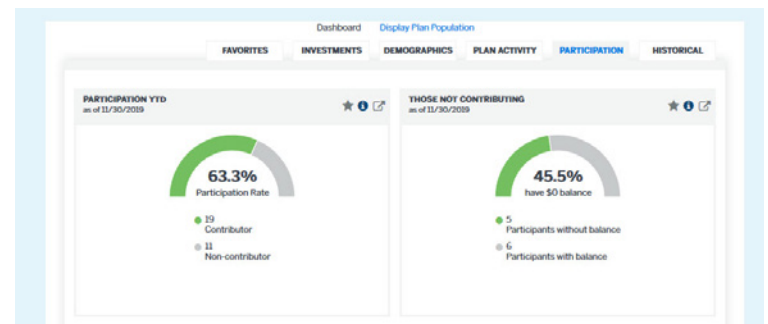
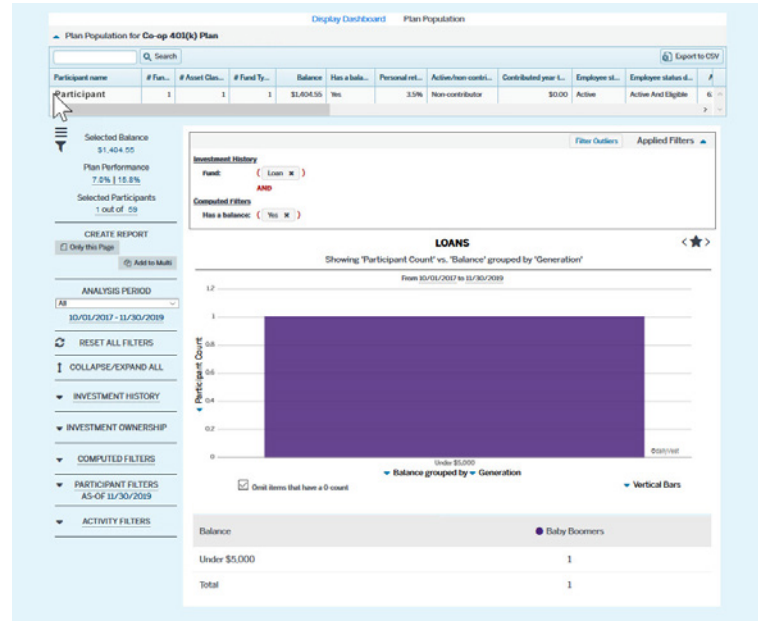
This data can also be exported to Excel for reviewing at a later time.

More Information, Better Communication

The Dashboard on **MillimanBenefits.com** gives the plan sponsor the ability to see where their plan is excelling and where it might need some help.

With the plan data information in hand, sponsors can work with their Co-op 401(k) Plan Relationship Manager to determine ways to help improve such things as participation rate, loan usage and increasing deferral rates. Together, the sponsor and relationship manager can create a targeted communication, or talking points that can be addressed during employee meetings that can highlight those key areas to help improve the overall health of the plan. This can be based on age groups, investment strategies, savings rates, outstanding loans just to name a few.

If you have any questions regarding **MillimanBenefits.com** or the Dashboard, contact your Relationship Manager or call 800.652.6675 option 2.



Merry Christmas & Happy New Year!

The Co-op 401(k) Plan Fiduciary Board and Milliman would like to wish everyone a happy holidays!

In observance of the upcoming holidays, Milliman's offices and Benefit Service Center, will be closed on Wednesday, December 25, 2019 and Wednesday, January 1, 2020.

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