Your Island Pension (YIP) – How do I run reports from my employer account?

The pension built for you. Easy, simple, affordable.

This Service Guide will help you to run and export the following reports:

Employer Snapshot	Lists Members and values and status as well as total members by status and value.
Scheme Activity Report	Shows the activity over the given period. Including: joiners, leavers, Member changes, switches and redirections, money in and out between selected date range.
Contribution Statement	Lists the contribution types and amounts by selected date range.
Employer Valuation	By Fund name, units, unit price and total value.
Transaction Statement	Lists the cash transactions by given date range.
Membership Report	Lists Member information and value by selected date range.
Leaver Report	Lists leaver information by selected date range.

The good news is that this is an easy process. All you need to do is:

Select Report and date range

1. The first step is to log into your Employer Self-Service account and select the 'REPORTS' option on the left-hand-side menu.
2. This will take you to a list of reports to choose from.
3. Select the report that you want.
4. Depending upon which report you choose, the portal will either ask you to select a specific date or a date range.
5. Simply use the calendar box at the end of the date box and select accordingly.
6. Click Submit and the system will create the report and confirm it has been successfully run by a green bar appearing on the Reports page stating 'Your request has been submitted successfully'.

Access Report

You now need to move to a different screen area of the portal.

1. Click on the 'DOCUMENTS' tab listed on the left-hand-side menu.
2. Select 'Employer documents'.
3. Your most recent report(s) submitted will be listed on this page.
4. Select 'View' and the report will automatically open in Excel so that you can save and sort the data.
5. If you wish to save this as a PDF, select File and 'Save As' and select PDF and Save.

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How do I search for reports I've created previously from my employer account?

1. The first step is to log into your Employer Self-Service account and select the 'DOCUMENTS' option on the left-hand-side menu.
2. Using the Search criteria you can search for any report by using a date range. Simply use the calendar box on the right-hand-side of the 'Date added from' and 'Date added to' boxes and click SEARCH.
3. If you know what type of report you are looking for, update the Search criteria as listed above with the relevant date range and select the Report type via the 'Documents' drop-down box.
4. Select View and it will automatically open in Excel so that you can save and sort the data.
5. If you wish to save this as a PDF, select File and 'Save As' and select PDF and Save.