Your Participant Website

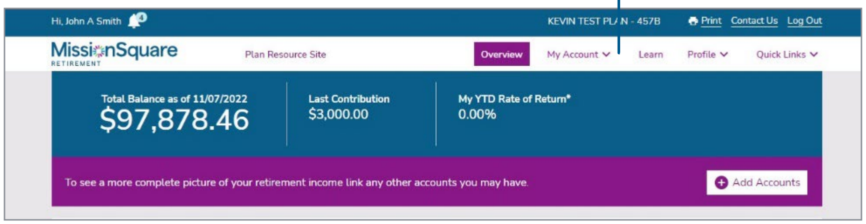
Accessing your Account Statements

Contents

Creating and Viewing On-Demand Statements – Single Account View

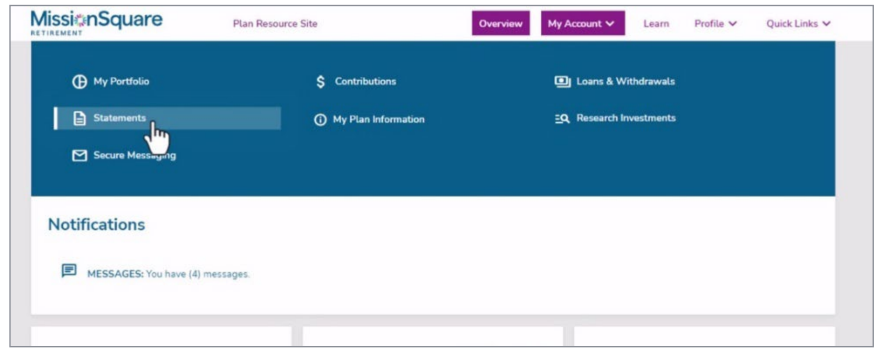
The ability to view and print your account activity is just one step away using the navigation panel at the top of the page. Statements can be accessed via two paths.

Navigation Panel

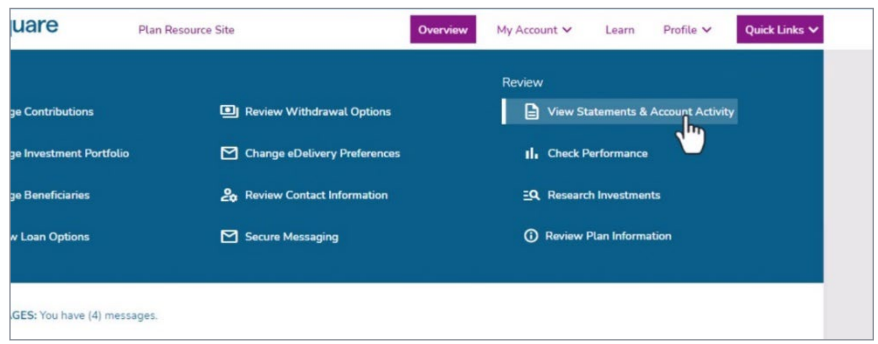


If you have just one MissionSquare account, follow these steps:

Path 1: My Account > Statements Link



Path 2: Quick Links > View Statements and Activity



Using the top navigation panel, click on **Quick Links**, then in the right side column, click on **View Statements and Account Activity**.

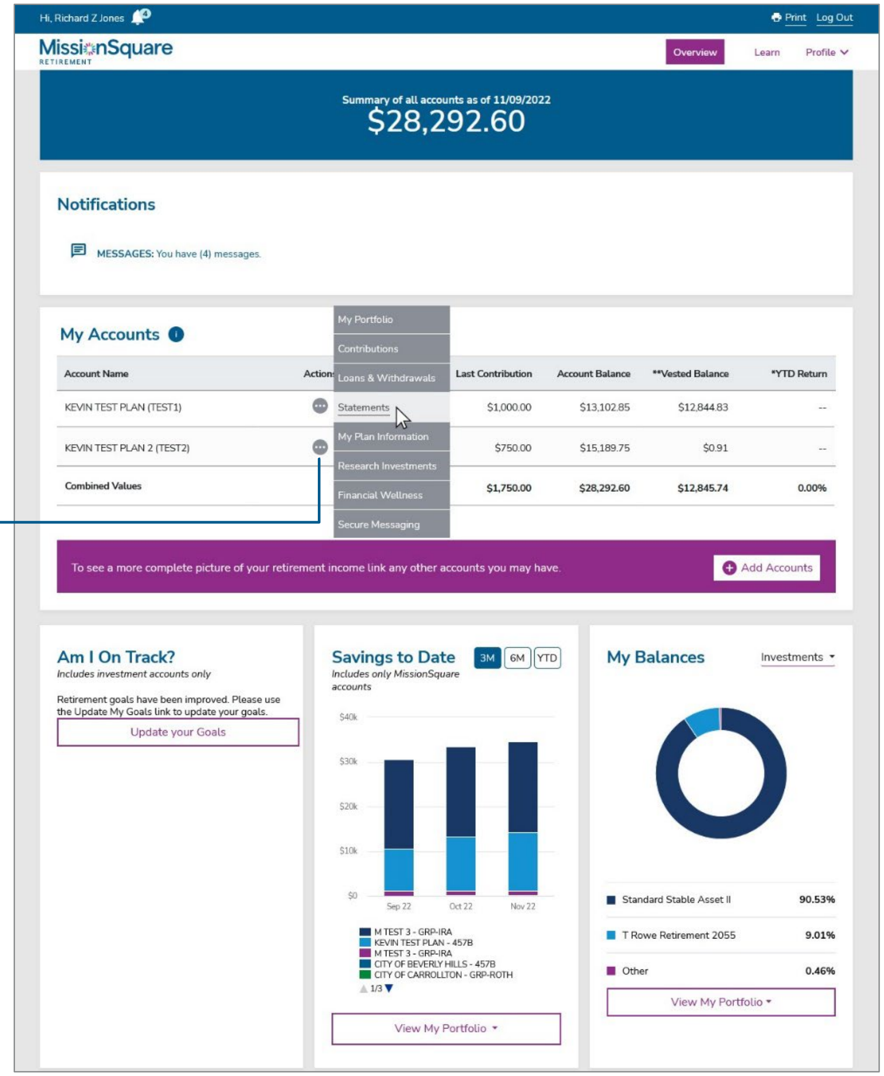
Creating and Viewing On-Demand Statements – Multiple Accounts

If you have more than one MissionSquare account, your accounts will be displayed on the overview page in the **My Accounts** tile.

Since activity statements are unique to each account, you will need to select an account before viewing activity within that account. Simply click on the actions icon ••• next to the account name. This will display a pull-down menu.

Select **Statements** from the pull-down menu. This Action will load the **Statements and Activity** screen shown on the next page.

Actions Icon



On-Demand Statement and Activity Screen – My Account Activity Tab

All paths outlined on pages 1 and 2 will load the Statements and Activity screen shown below.

Select a Date Range

The default date range for your account activity is the last 30 days. To select a different date range*, use the pull down menu under **Date Range**. Select **Custom Date Range** to enter dates of your choice. Once your desired date range is selected, click the **Change Date Range** button.

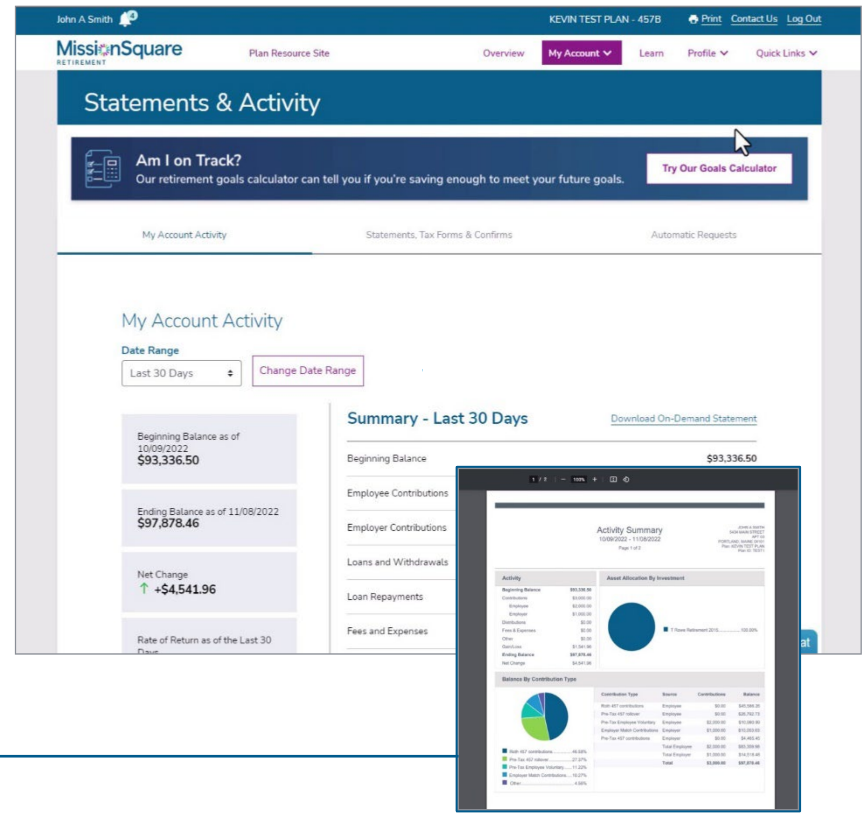
You will notice the account data changes to reflect the time period you selected.

* Please note that custom statements are available for a maximum range of 2 years.

Download your On-Demand Statement

Click the **Download On-Demand Statement** to view an online PDF of your Account Summary for the date range you selected.

Your Account Summary will load in a new browser tab where you will have the option to view, print, or save the summary to your computer or device using your web browser's tools.



Sample On-Demand Statement PDF

On-Demand Statements and Activity Screen – My Account Activity Tab

To view any earlier requests or confirmations of previous transactions, scroll to the bottom of the **My Account Activity** screen to the **Requests** area.

The Date Range displayed should match the range you selected. The example shown to the right displays requests made in the last 30 days.

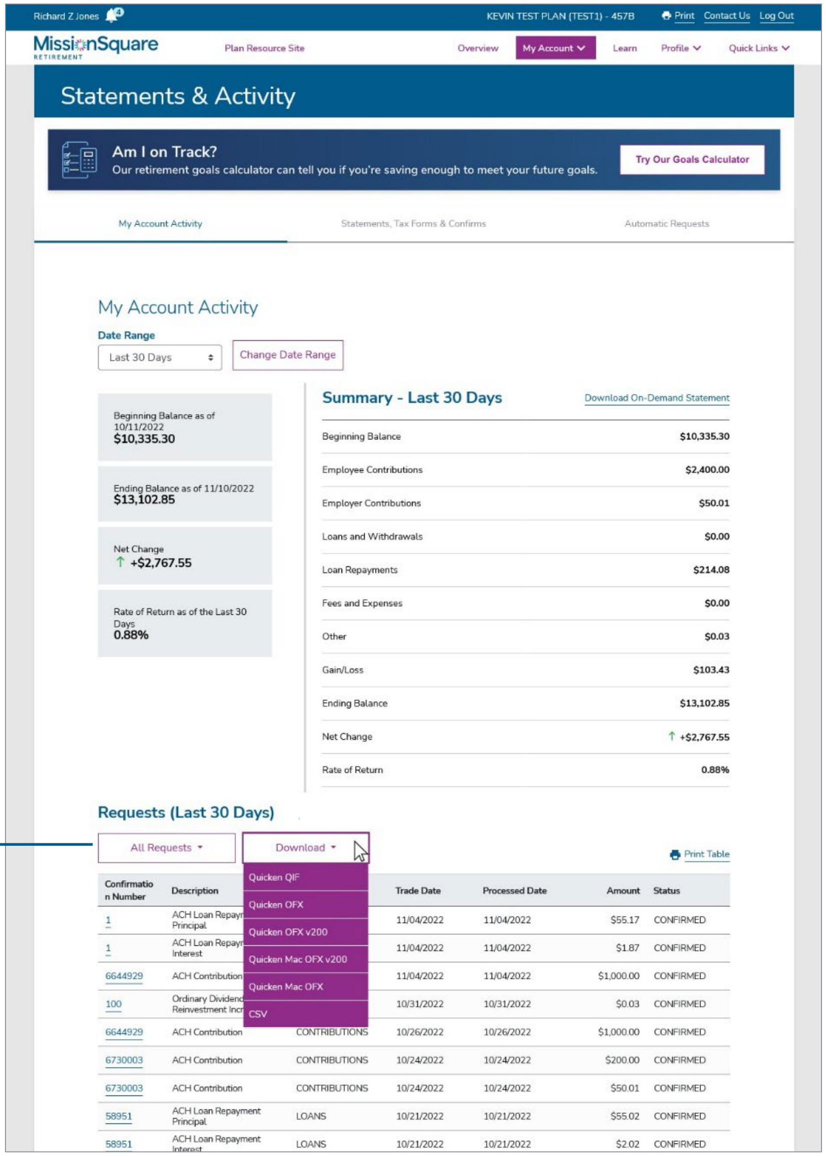
Sorting Your Account Requests

Requests can be sorted by type by clicking the **All Requests** button and selecting from the pull-down menu.

To display the table in a printable form, click the **Print Table** button.

Download Your Requests to Quicken/CSV

Once your request type has been sorted (i.e. Contributions), you can download the data by clicking on the **Download** button. This button will display various Quicken export options, in addition to CSV for viewing data in programs like Microsoft Excel.



Download and All Request buttons

Statement and Activities Screen – Quarterly Statements, Tax Forms and Confirms Tab

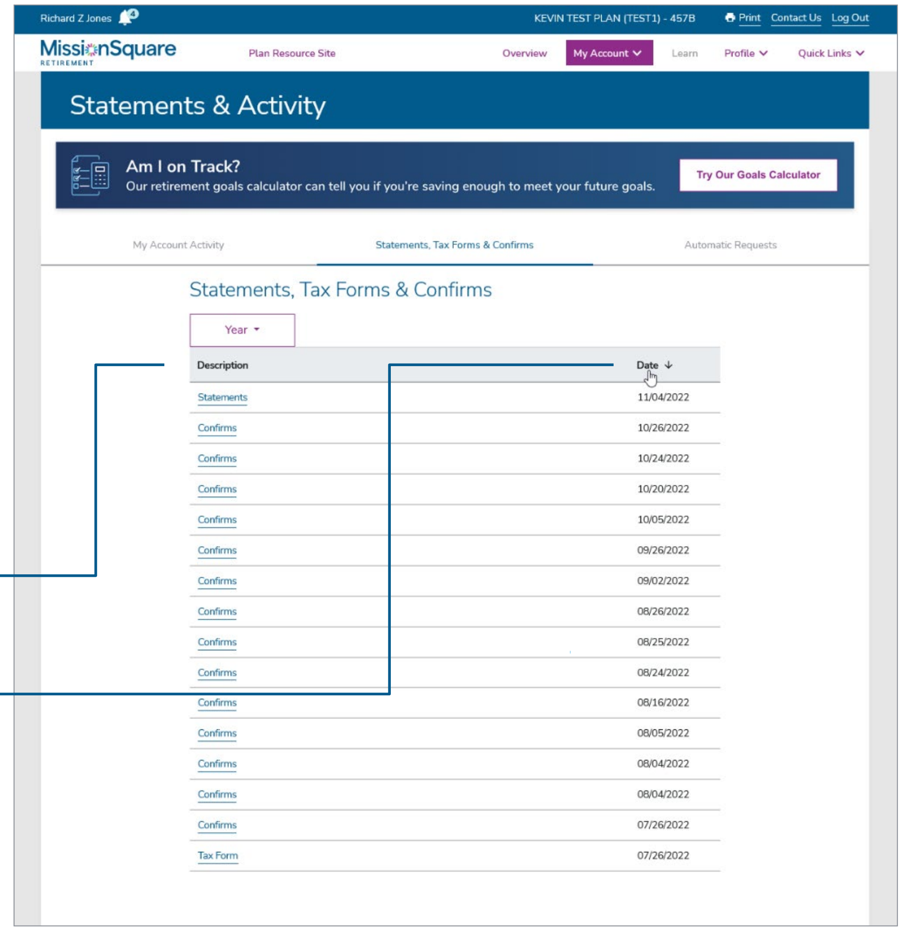
To view your Quarterly Statements, Tax Forms, and Notices of Previous Account Activity click the **Statements, Tax Forms & Confirms** tab.

This tab houses your Quarterly Statements, Tax Forms, and Notices of Previous Account Activity.

Please note these items are listed by date as the default view. Click on **Description** to sort by type or **Date** to sort the list quickly. To sort items based on calendar year, click the **Year** button.

Statements may be located towards the bottom of the list if you have a lot of activity documented on this screen.

Please note that Confirms, Statements and Tax Forms are archived for a maximum period of 7 years.



Sort by Description button

Sort by Date button