



Use of the Annual Statement Data

Getting Started

1. Select all columns A through CZ
2. Double click on line between two columns so that all columns widen to show full column name
3. Turn on Filtering (in Data Menu Item pick Filter and then select Autofilter)
4. Hide columns with data that is not relevant by (Select columns and in Format Menu Item pick Column and then select Hide). To “unhide” these columns pick the Unhide menu item in the same menu.

Queries on Future Retirements

Useful Columns:

Column	Label
N	Normal Retirement Date
O	Earliest Retirement Date
P	Earliest Unreduced Retirement Date
R	Total Credited Service

Example 1:

To see who will be eligible to retire without reduction in next year:

1. click on filter for column P (Earliest Unreduced Retirement Date)
2. choose Custom and select “is less than or equal to” from dropdown and enter date e.g. “30-Jun-2010”

Example 2:

To see who will be 65 by the end of next year:

1. click on filter for column N (Normal Retirement Date)
2. choose Custom and select “is less than or equal to” from dropdown and enter date e.g. “31-Dec-2010”

Example 3:

To see who will be 65 by the end of next year and has at least 20 years of service as of Dec 31, 2008:

1. click on filter for column N (Normal Retirement Date)
2. choose Custom and select “is less than or equal to” from dropdown and enter date e.g. “31-Dec-2010”
3. click on filter for column R (Total Credited Service)
4. choose Custom and select “is greater than or equal to” from dropdown and enter 20

Note: When finished with filtering for each query, remember to clear filtering by choosing “All” on the filter.