

For Credit Unions with IRAs and/or HSAs:

1. Go to the Document Retrieval Manager (DRM).
2. Set the Search filters to the following settings, also graphically represented below.
 - **Document Description:** Jobs Report Log
 - **From** 04/01/2014
 - **To** Current Date
 - **Contains Text** 5498

The screenshot shows a search interface with the following fields and values:

- Document Name: DUEJOBLOG
- Document Description: JOBS REPORT LOG
- Teller ID: AB
- Account Base: [empty]
- Account Sub: [empty]
- Contains Text: 5498
- Case Sensitive: [checked]
- From: 04/01/2014
- To: 04/15/2014
- Rows: 1 - 1000
- Viewable Rows: 1000
- Display Only Documents With Pending Signatures: [unchecked]
- Display Only Documents With Notes: [unchecked]

Navigation buttons: Accept, Default, Previous, Next, Last Receipt, Multi-Print

3. **IMPORTANT: If you do not find any reports based on these settings, please contact your Support Center.**
4. **If the report date is prior to 04/15/2014, you MUST manually add any IRA and/or HSA cont made prior to 04/15/2014 to the driver file for the appropriate IRS form.**
5. **If you require assistance, please contact your Support Center.**