Benefits Advisor: Running Reports after the Open Enrollment Configuration

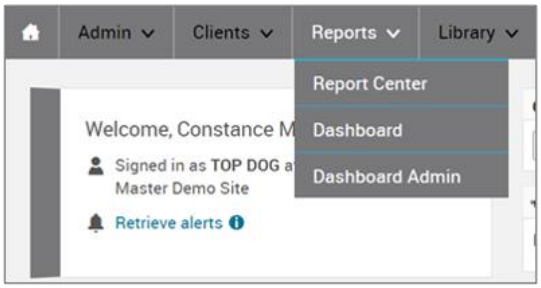
After your open enrollment configuration, you can run reports that help you track enrollment progress and more.

In this guide:

- Navigating the Report Center
- Setting up Key Open Enrollment Report Categories
- Setting up Report Specifications
- Benefit Election Changes Report
- Customer Reporting Scenarios

Navigating the Report Center

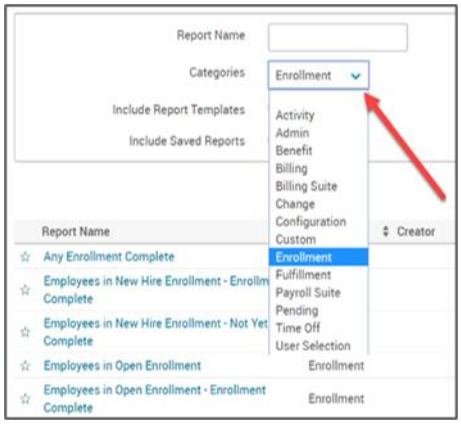
1. From the Home screen, go to **Reports** > **Report Center**.



2. Choose **one** of these methods to search for reports:

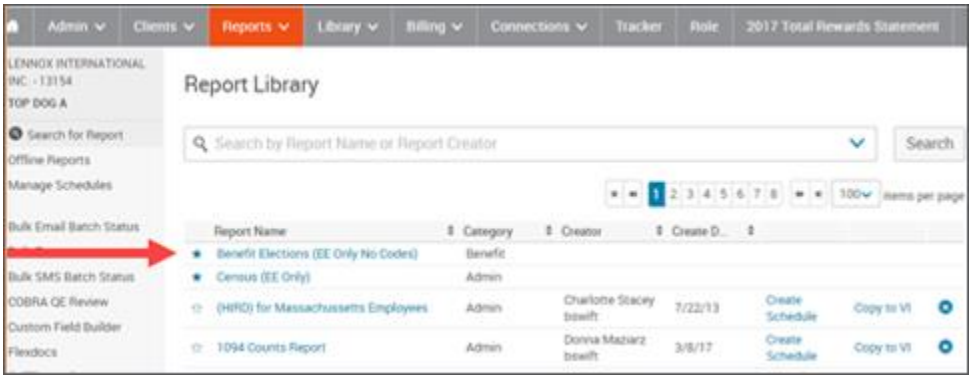
   - **Search by report name:** In the **Report Name** field, enter the **name** of the report.

Screenshot is available on the next page.



- **Search by report categories:**
  - At the right end of the **Search** field, click the **blue down arrow** icon.
  - Then click the **Categories** field and select the appropriate report from the menu.

3. To mark a report as a **favorite**, click the **star icon** on the left side.



4. Reports that have been configured can be saved for future use. This is helpful if you need to regularly run customized reports.

Setting up Key Open Enrollment Report Categories

These are the most commonly used Open Enrollment reports by category:

Admin:

- Census
- Messages Sent
- **Information contained:** Data stored within Employee profiles, including census reports and demographic data.

Benefit:

- Benefit Elections
- Benefit Credits
- **Information contained:** Information about EE and Dependent benefit coverage, such as plan selection and cost information.

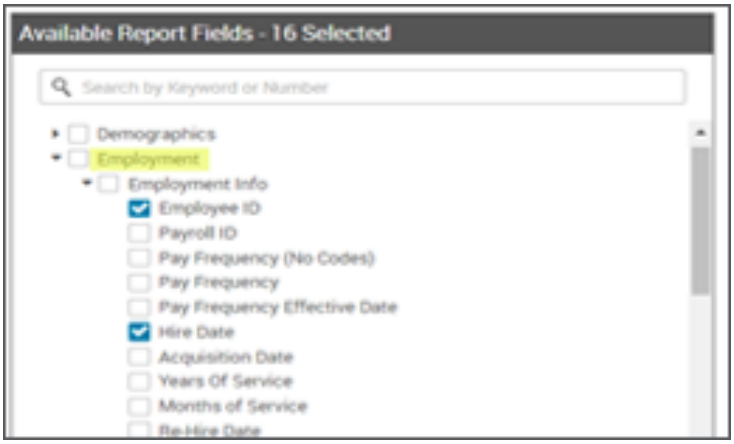
Enrollment:

- Employees in Open Enrollment - Not Yet Complete
- Employees in Open Enrollment - Enrollment Complete
- Pending Enrollments Awaiting Approval
- **Information contained:** Information regarding completion status of enrollments

Setting Up Report Specifications

Report Fields:

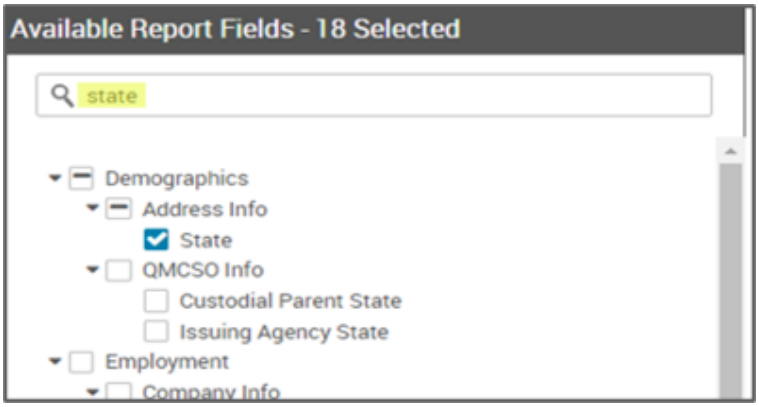
1. First, you need to select the fields you want to include in the report.



2. To change the order of the fields, click a field and then move the up and down arrows.

3. To remove a field, click the **blue X** next to the field name.

4. In the **Search** field, enter a **keyword** to quickly locate a specific category or subsection (instead of scanning for screen yourself).



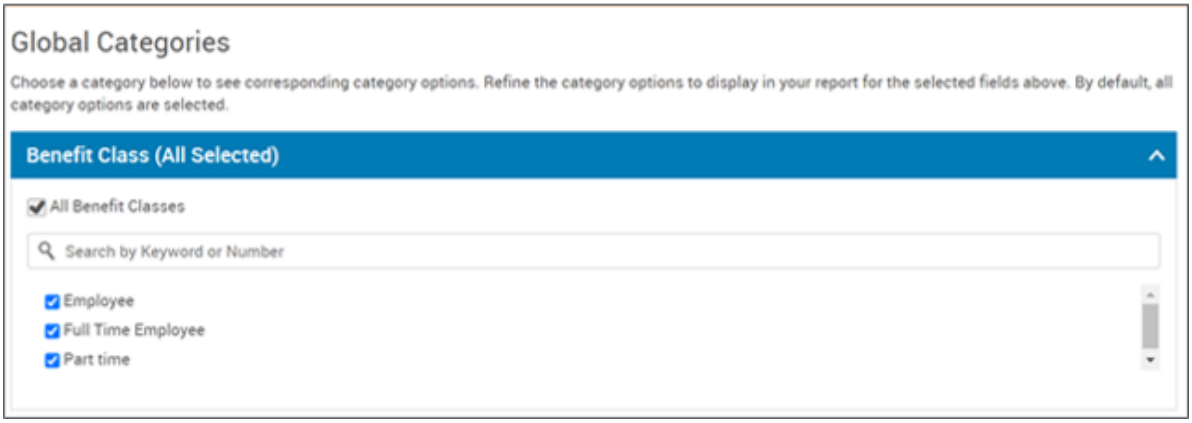
Global Categories

These filters allow you to refine the options you can display in your report:

- Benefit Class
- Department
- Division
- Location
- Region
- Business Unit

To make selections in a category, click the carrot on the right and select from the choices in the box.

Screenshot is available on the next page.

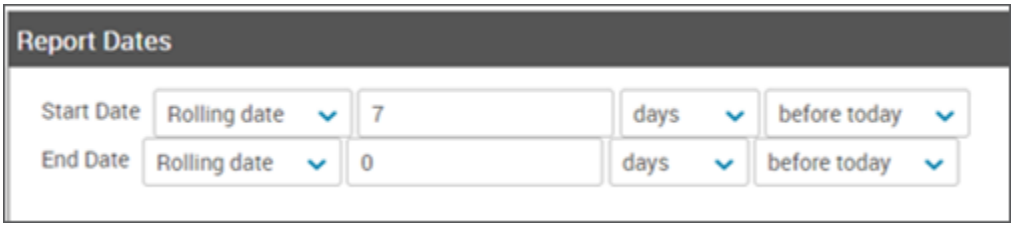


Global Categories allow you to select specific groups of people who should be included in the report. Categories include **Employment Status**, **Relationship Type** and **User Type**.

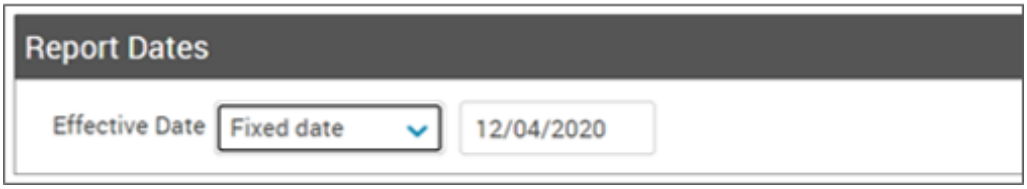
Report Effective Dates:

The **Rolling Dates** option can be used for snapshot reports which have only one effective date. These reports default to the setting ***before today***, meaning the report will pull data **as of the current date.**

For reports with a start date and an end date, both dates are set to Rolling Dates by default. The start date is set to 7 days before the current date and the end date is the current date. You can adjust these parameters to meet your report needs.



Using the **Fixed Date** option provides data as of the date you select. Click the box and you can either select a date from the calendar or type in the date in the format mm/dd/yyyy.



Report Filters:

This feature allows you to further customize the data in your report by adding more customized filters.

- To add a custom filter, click **Add Condition.**
- To remove a filter, click the **blue X**.

Before running the report, select output format from the **Select Output Type** field. Output options include:

Web:

- Report will open in a new browser tab.
- Web reports can also be subsequently exported as Excel or CSV files, and you can add further custom filters after the web report has been generated.

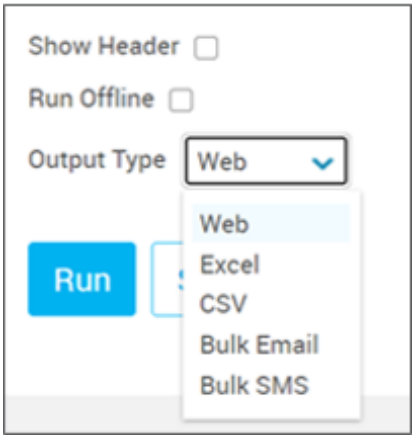
Excel: Report can be opened and saved as an Excel (.xls) file.

CSV: Report can be opened and saved as a comma separated values (.csv) file.

Bulk Email:

- Report can be sent by email to the selected employees or administrators.
- This option is only available for select reports.

Screenshot is available on the next page.



To display information about the report's configuration on the report itself:

- Mark the checkbox next to **Include Report Header**:
    - For web reports, this will automatically expand the header panel at the top.
    - For Excel and CSV reports, report header info will appear at the top of the spreadsheet above the column headers.

To run the report offline:

- Mark the checkbox next to **Run Offline**:
    - This generates the report for later retrieval from the Offline Reports page under **Reports > Report Center > Offline Reports**.
    - Reports are stored on this page for up to 90 days.
    - This works well if you are running a large report or will need to reference the report multiple times.

Benefit Election Changes Report

- The Benefit Election Changes Report helps customers quickly pinpoint election changes that occurred during an Open Enrollment so they can communicate those to their insurance carriers.

Screenshot is available on the next page.

- **Running the Benefit Election Changes Report after an Open Enrollment Event:**
    - In the **Effective Date** field, select **Fixed date** and enter the **last day** of the **old** plan year.
    - In the **End Date** field, select **Fixed date** and enter the **first day** of the **new** plan year.

- **Accessing the Benefit Election Changes Report:**

    1. In **Benefits Advisor** and **Benefits Advisor Pro**, go to **Reports > Report Center**.

    2. Search for **Benefit Election Changes** report and click the report name to open it.

- **Report example for a 1/1/2022 renewal:**

Client Name	Benefit Plan Type	Employee ID	First Name	Last Name	Reason for Change	Change Indicator Y/N	Change From Election (Plan Name)	Change From Election (Coverage details (Tier or Amount))	Change To (Plan Name)	Change To (Coverage Details (Tier or Amount))	Change To Effective date	Change To Termination date	Dependent changes (Y or N)
ABC Company	Medical	554	Sebastien	Jones	Open Enrollment	Y	Medical PPO	Employee Only	Medical PPO	Family	1/1/2021	12/31/9999	Y
ABC Company	Medical	555	Jennifer	Patterson	Open Enrollment	N	Medical PPO	Employee Only	Medical PPO	Employee Only	1/1/2021	12/31/9999	N
ABC Company	Dental	557	Sebastien	Jones	Open Enrollment	Y	No Coverage	No Coverage	Dental Plan 1	Family	1/1/2021	12/31/9999	N
ABC Company	Dental	558	Jennifer	Patterson	Open Enrollment	Y	Dental Plan 2	Employee Only	No Coverage	No Coverage	1/1/2021	12/31/9999	N

Customer Reporting Scenarios Examples

Customer scenario 1:

I am going to send an e-mail regarding upcoming changes for Annual Enrollment. I will need a report for all active, Union employees who are currently enrolled in Medical.

What report should be used and what fields should be pulled in?

- **Which Report?** Use the **Benefit Elections (EE Only No Codes)** report
- Pull in **Demographic e-mail fields:**
    - Home E-mail
    - Work E-mail
    - Alternate E-mail
- Filter on **Benefit Plan Types > Medical**
- Filter on **Benefit Class** > **Union**
- Make sure you select **only** the **Active** users
- **Output type:** Excel

Customer scenario 2:

I would like to see what enrollments each EE has elected.

What report should be used and what fields should be pulled in?

- **Which Report?** Use the **Benefit Elections (EE Only)** report
- Pull in **Demographic and Employment fields:**
    - Employeeid
    - Last Name
    - First Name
    - Middle Initial
    - SSN
    - Benefit Plan Import Code
    - Coverage Tier
    - Coverage effective date
    - Coverage Termination date
- Filter on **Relationship Type > Employee** (this is the default)
- Make sure you select **only** the **Active** users
- **Output type:** Excel

Customer scenario 3:

I want to see my Pending enrollments.

What report should be used and what fields should be pulled in?

- **Which Report?** Use the **Pending Enrollments Awaiting Approval** report
- Pull in **Employee fields:**
    - Employee id
    - Employee SSN
    - Last Name
    - First Name
    - Benefit Class Name
    - Location
    - Division
    - Department
    - Benefit Plan Type
    - Benefit Plan name
    - Reason for Pending
    - Prior amount/tier
    - Current Amount/tier
    - Work email
- Filter on **Relationship Type > Employee**
- Make sure you select **only** the **Active** users