# Core Benefits Administration

Reports Reference Guide

July 2019

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## Chapter 1: Reports Overview

The Manager Self Service system includes a reporting tool that allows users to access and run and create a variety of reports quickly and easily. Users can choose from a host of summary-level or detail-level reports that provide information on benefit elections, employee census data, carrier premium billing, transactions, etc. or create their own report through the ad-hoc functionality.  Users have the capability of adding and/or narrowing down the information contained in the reports.  In addition, the reporting tool allows the user to sort or filter the data, make changes to the formatting, and choose from various exporting options.
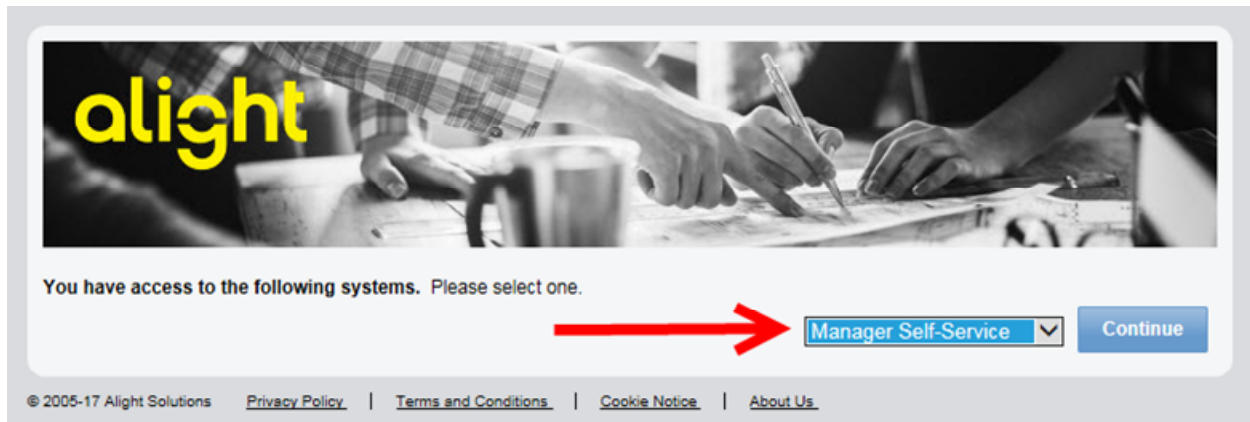
## Accessing the Reporting Tool

To access the reporting tool:

- Click on the website address or URL that is provided by the Benefits Service Team.
- Enter your Username and Password that is provided by the Benefits Service Team.



- Select Manager Self Service (MSS) from the drop down box.
- Click Continue.

- From the MSS home page click on the **Reports** link from the left navigation bar.
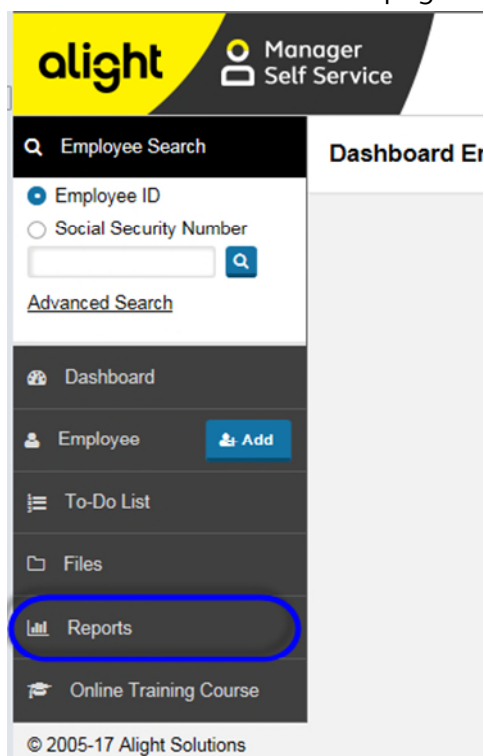


## Report Organization

Reports are grouped in folders based on the type of data included in the report. From the homepage, you can select the **Shared Reports** icon or select **Shared Reports** from the left navigation.
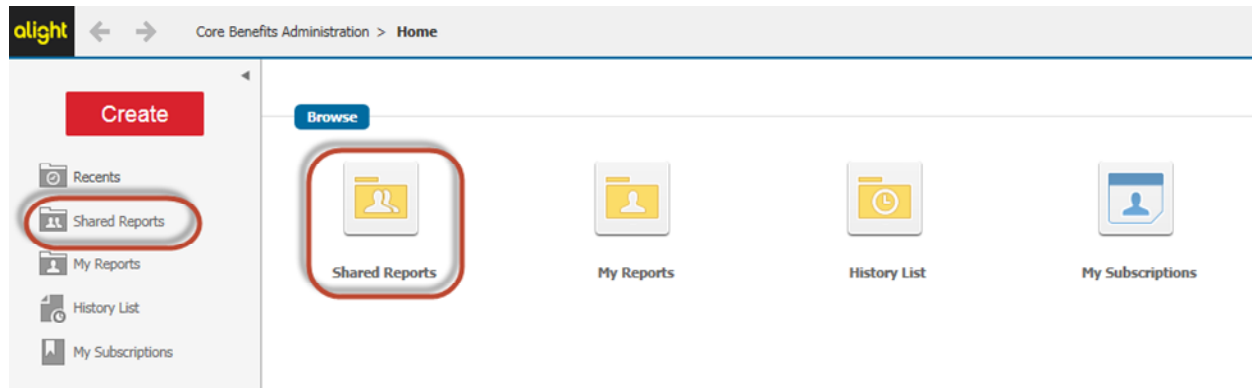
Once within the **Shared Reports** main folder, users can see all of the report folders.  Beside each folder icon users will see the name and a description of the type of reports included in that folder.

Users have two different options for viewing the home page:  **Icon** or **List**.

- Click on the **Icon View** button to view folder icons.
- Note: when the user first logs in the system will default to the Icon view.
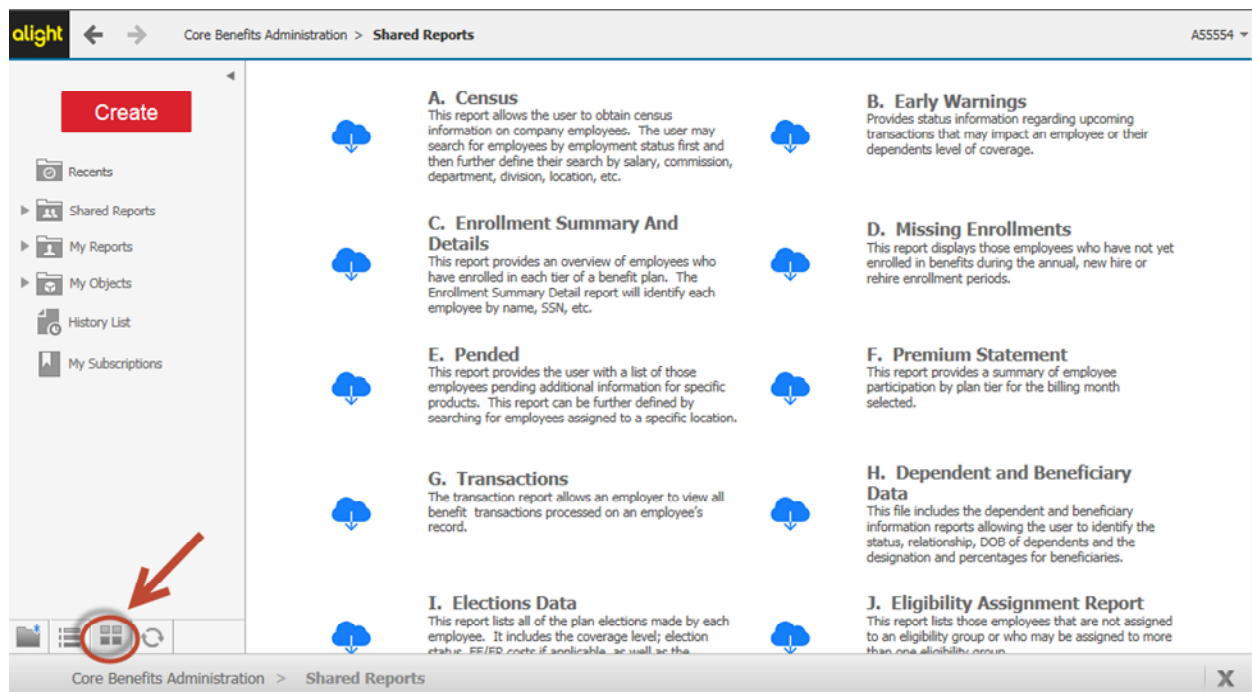


- Users can click on List View option if they prefer to view the home page in a list format.
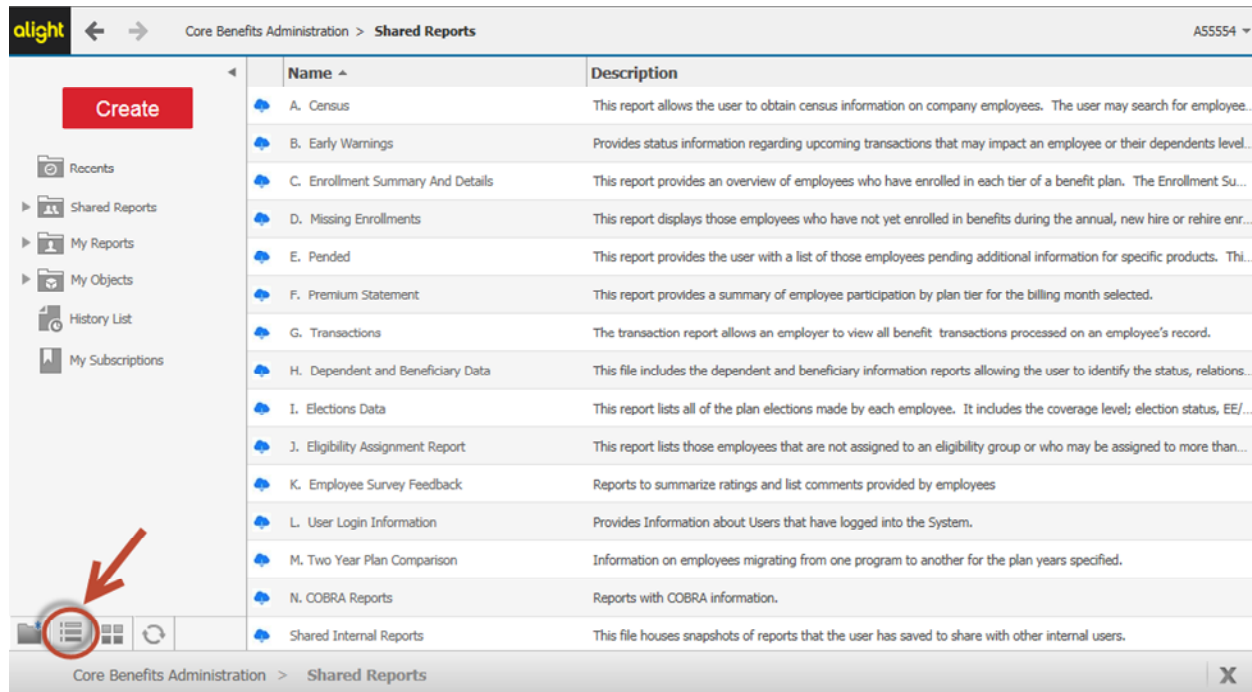
## Available Reports

Following is a list of all of the report folders including a brief description of the types of reports available in each of the folders.  **Note:**  Refer to Appendix A to view a listing of all available reports and their descriptions.

| Report Folder | Description |
|---|---|
| A.  Census | These reports contain information such as employment status, salary, commission, department, division, location, and emergency contacts. |
| B.  Early Warnings | These reports provide you with employee/dependent status information related to future transactions that may impact coverage for an employee or his/her dependent(s). |
| C.  Enrollment Summary and Details | Grouped by type of benefit (Health, Life, Disability, FSA, HSA, and Other), these reports provide summary or detail information such as plan name, coverage level or tier, and cost about employees enrolled. |
| D.  Missing Enrollments | This report identifies those employees who have not enrolled in or waived benefits during a date range you enter (normally the annual enrollment dates). |
| E.   Pended | This report provides you with a list of those employees whose coverage is pended such as life insurance pended for evidence of insurability (EOI). |

| F. Premium Statement | Grouped by type of benefit (Health, Life, Disability, FSA, and HSA), these reports provide summary or detail information on employee coverage and premium for the billing month selected. |
|---|---|
| G. Transactions | This report which allows you to view all or select transactions processed within a specified date range. |
| H. Dependent and Beneficiary Data | These reports provide dependent information such as status, relationship, and DOB as well as the designation and percentages for beneficiaries. |
| I. Elections Data | Unlike the Enrollment Summary and Details reports which are run for a specific type of benefit, this report lists all plan elections made by each employee. Information displayed on the report includes coverage level, election status, employee and employer costs, coverage effective start, and coverage end dates. |
| J. Eligibility Assignment Report | This report lists employees that are not assigned to an eligibility group or who may be assigned to more than one eligibility group. |
| K. Employee Survey Feedback | These two reports summarize the ratings and comments that employees submitted via the Feedback link in the website. |
| L. User Log In Information period. | This report provides a list of employees who have accessed the system within a specified time period. |
| M. Two Year Plan Comparison | These reports provide migration information on participants moving from one program to another for the plan years specified. |

## Chapter 2: Running Reports

All of the reports contain a standard set of data based on the type of report it is.  Users can run the standard reports or they have the option of using the prompt pages to add and/or narrow down the data/information
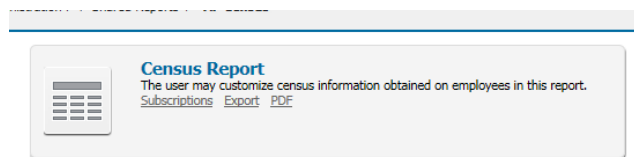
### Running a Quick Report (Standard)

To run a quick report without adding or narrowing down the data:

- From the main **Shared Reports** page click the desired report folder and subfolder (if necessary).
- Users can click on the folder icon or the name.
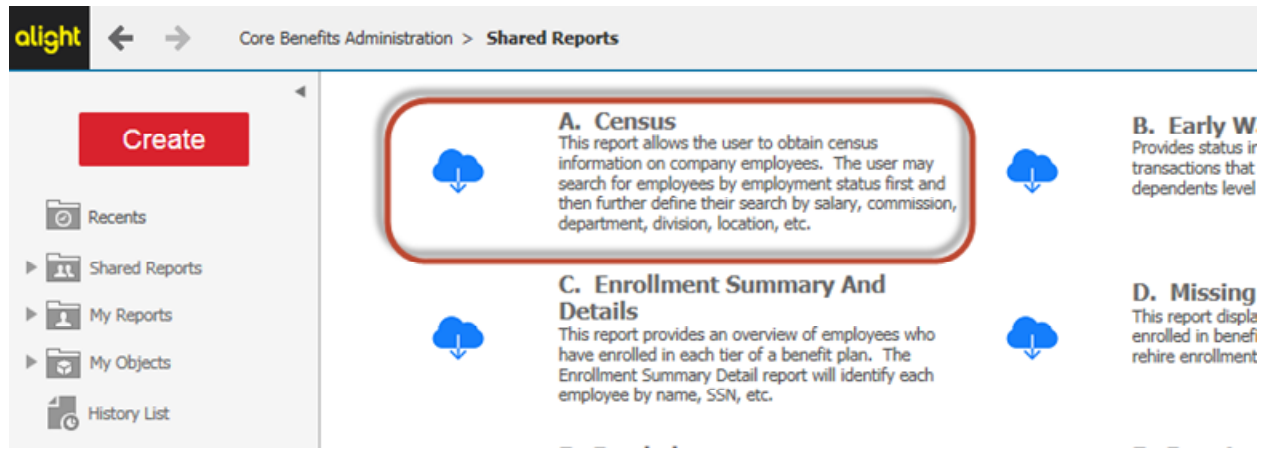
- Locate the specific report.
- Users can choose to export or PDF the report immediately by clicking the links under the report name.



- After clicking the **Export** or **PDF** link the first reports prompt page will display.
- Click the **Export** button at the bottom left of the page.
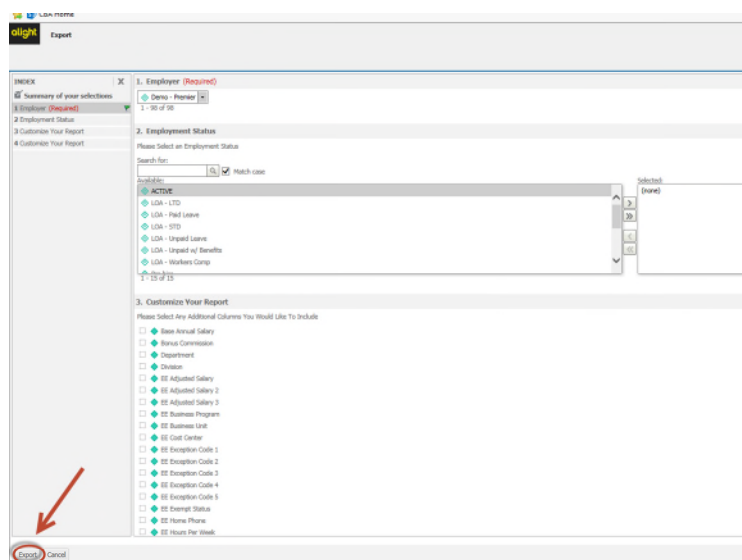


- A second prompt page will appear.

- Click the **Export** button at the bottom of left of the page.



- Options for exporting the report will appear.
- Click the **Export** button at the bottom right of the page.



- A message displays while the report is running.
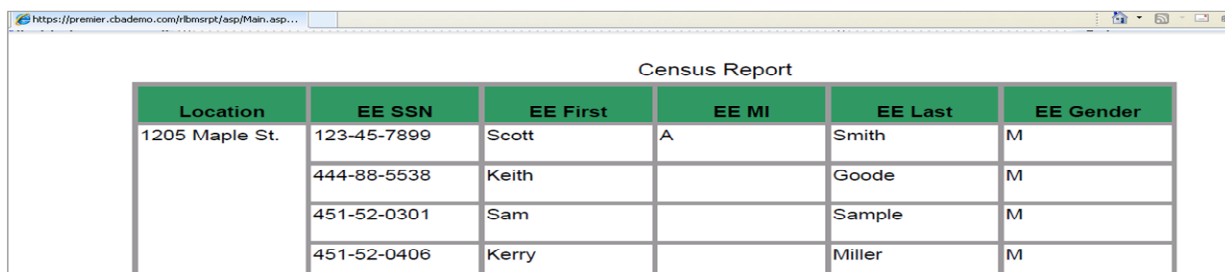
Report name: Census Report

Current status: Report ready

Report description: The user may customize census information obtained on employees in this report.

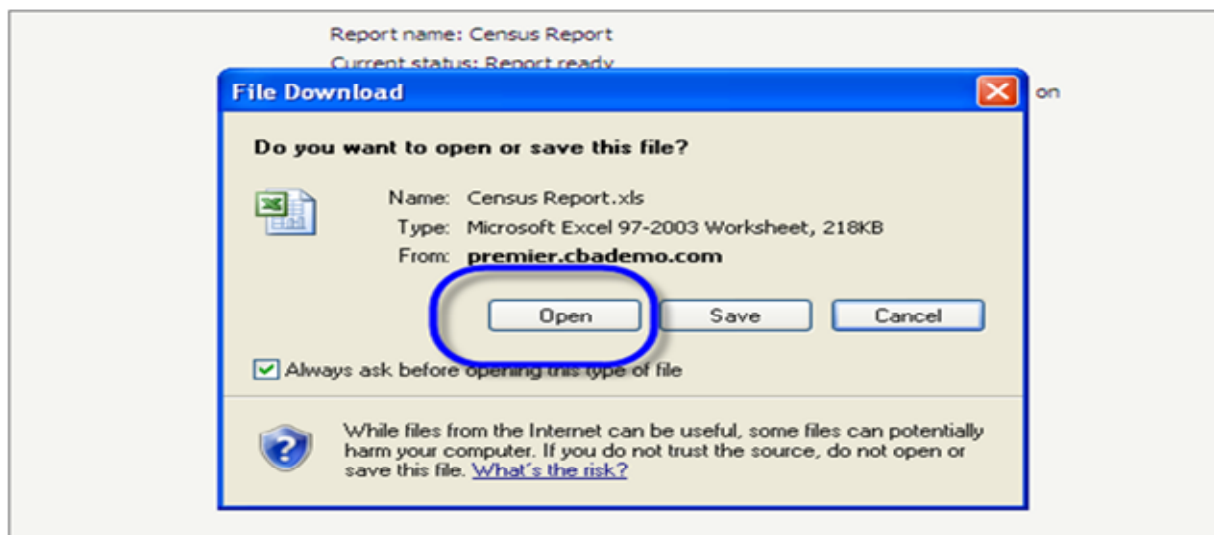You may safely close this window once your results have come back.

Close window

- If you selected PDF the report will automatically open when it is complete.

https://premier.cbademo.com/rlbmsrpt/asp/Main.asp...

Census Report

| Location | EE SSN | EE First | EE MI | EE Last | EE Gender |
|----------|--------|----------|-------|---------|-----------|
| 1205 Maple St. | 123-45-7899 | Scott | A | Smith | M |
| | 444-88-5538 | Keith | | Goode | M |
| | 451-52-0301 | Sam | | Sample | M |
| | 451-52-0406 | Kerry | | Miller | M |

- If you selected Export the report will automatically be exported to Excel. Once the report is complete a pop up box will appear prompting the user to open the report in Excel.

Report name: Census Report

Current status: Report ready

**File Download**

**Do you want to open or save this file?**

Name: Census Report.xls
Type: Microsoft Excel 97-2003 Worksheet, 218KB
From: **premier.cbademo.com**

Open     Save     Cancel

☑ Always ask before opening this type of file

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?
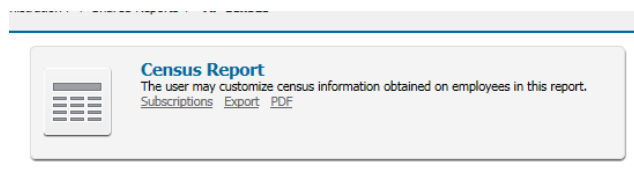
## Using Prompt Pages to Add/Narrow down Report Data

To add additional data to a report or narrow down data included in a standard report:

- From the home page click the desired report folder and subfolder (if necessary).
- Users can click on the folder icon or the name.
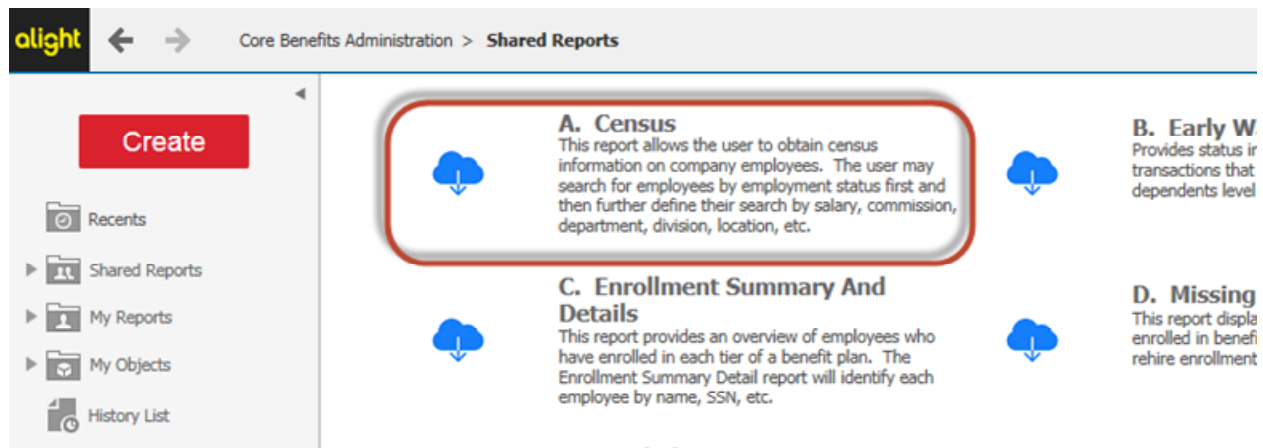


- Locate the specific report.
- Click on the report icon or the report name.



- The first prompt page will appear.

The prompts that display vary based on the type of report. There are three types of prompts users will encounter:

- Date Entry
- List Selection
- Checkbox

## Date Entry Prompts

Date Entry prompts are used to select the timeframe for the report data. There are two ways to complete a Date Entry prompt:

- Enter the date in **MM/DD/YY** format (you must include the slashes).
- Click the small **Calendar Icon** to the right of the prompt. A calendar for the current month displays. Click the left or right arrow until the correct month displays then click the desired date.

- Some reports may require a numeric value to indicate timeframe.
- For example in the Premium Statement ER Summary Health Report a numeric value is required for the billing month and billing year instead of a MM/DD/YY format.
  - In the screen shot below the billing month is February so the numeric value of 2 is entered into the field.
  - In the screen shot below the billing year is the current year so 2013 is entered into the field instead of the MM/DD/YY format.

## List Selection Prompts

List Selection Prompts are used to narrow down the information/data included in a report. For example, a user may wish to see census data for active employees only (not LOA or other employment statuses).

There are two boxes displayed for a List Selection prompt:
- **Available** – contains all of the data options that are currently included in the report.
- **Selected** – if the user decides to narrow down the data, anything added to this box will be the only data from the list included in the report.



To complete a List Selection Prompt:
- To include all data from the Available list in the report, **no action is needed**.  Simply leave the **Selected** list blank and all data will be included.
- To narrow down the data to include a single category (such as Active Employees)click to highlight the desired item from the Available list then click the **right arrow** to move it to the Selected list.

- To narrow down the data to include a few categories hold down the Ctrl key and click each desired item in the Available list. When all items are highlighted click the **right arrow** to move these items to the Selected list.
    - In the example below only the following employment statuses will be included in the report: **Active, LOA – Paid Leave, LOA – Unpaind Leave.**





- To remove an item from the Selected List (maybe it was selected in error) click to highlight the item then click the **left arrow** to move it back to the Available List.

- To remove multiple items from the Selected list hold down the Ctrl Key and click to highlight each item that needs to be removed.  When all items are highlighted click the left arrow to move these items to the Available list.

**Note:** the list of Available items may be too long to display at one time or the user may want to narrow down their options in the available list. The Search For box can be used to narrow down the list.

- Enter a word or phrase in the Search for box and then click the symbol of the magnifying glass. This will reduce the list of Available items just to those containing the word(s) entered.
    - In the screen shot below the word dental was entered into the search box to display only dental plans.



### Checkbox Prompts
Checkbox Prompts are used to add additional data to a report.
- To add additional data to a report simply click the box next to the desired item and a check mark will appear in the box.
    - In the example below the user has selected the following items to add to the census report: **User Defined Fields 1-3.**
- Leave the checkboxes blank if no additional information is desired.

**Re-prompting**

There will be times when users make their prompt selections and then generate the report only to realize they need to add or remove information from the report. There is a function called Re-prompt that allows users to make additional prompt selections while keeping their original selections intact.

To use the Re-prompt function:

- Click the drop down arrow beside the Data menu.
- Select Re-prompt



The prompt pages will reappear with the original selections still intact.

- Make the desired changes to the prompt selections.
- Click **Run Report**.

# Chapter 3: Customizing Reports

After you run a report, you may wish to change the appearance of the report results to make it easier to read or more useful to you.  The Reports tool provides you with several options to customize the appearance of your report. These options include:

- Deleting or moving columns
- Sorting
- Filtering
- Changing formatting and colors

## Deleting Columns

Each report has a standard set of data and therefore standard columns already built in. Each user may need a different set of data in each report and therefore may need to delete certain columns.

To delete a column:
- Place the cursor over the column heading that needs to be deleted.
- Click the right mouse button to display the menu.
- Click **Remove from Grid** to delete the column.
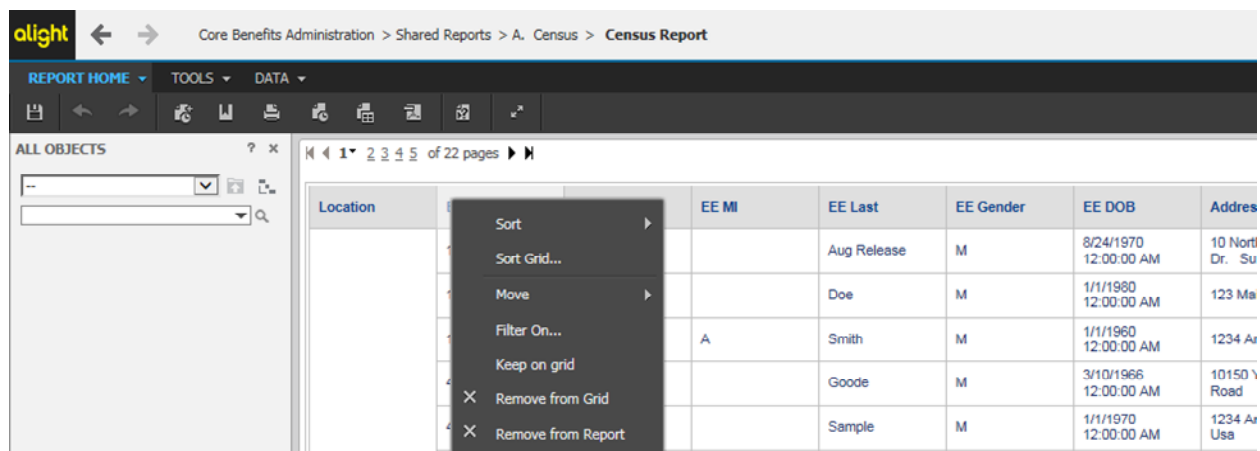


## Moving Columns

Each user may have a certain order they want the columns to follow so they may need to move some of the columns around.

Note: If additional data is selected from the prompt pages it will be added to the end of the report.  Users may wish to move those columns towards the front of the report.
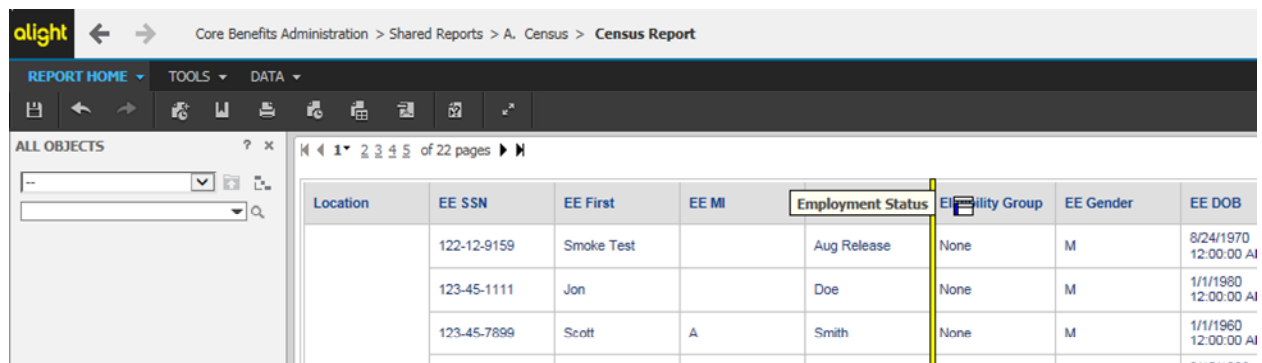
_____

There are three options for moving columns:

- Drag and drop (easiest & quickest option)
- Drop down menu
- Pivot buttons

## Drag and Drop

To move a column using the "drag and drop" option:

- Place the cursor over the column heading that needs to be moved (the cursor will change to a pointing hand).
- Click the left mouse button and hold then drag the column to the right or left releasing the mouse button once the column is in the desired place (a vertical yellow bar appears as the column is being moved to help identify the current position).
- When the vertical yellow bar is in the desired location of the column release the mouse button.



## Drop Down Menu

To move a column using the drop down menu:

- Place the cursor over the column heading that needs to be moved.
- Right click to display the drop down menu.
- Place your cursor over the **Move** option to expand a second menu.
- Select either **Left** or **Right** to move the column one spot in that direction.
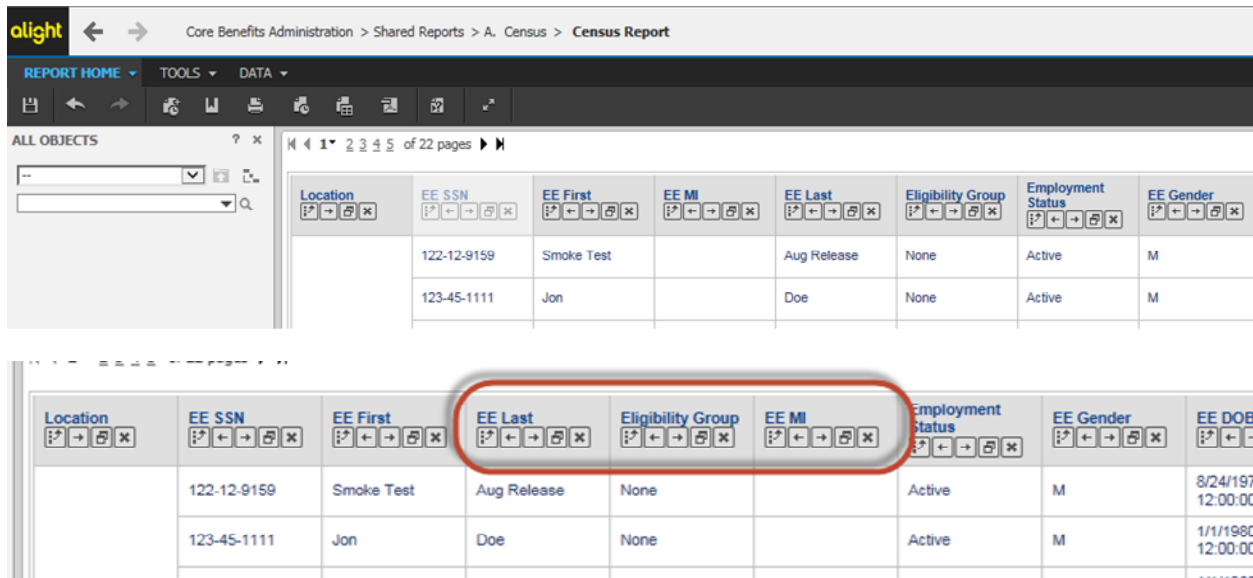  - In the screen shot below the EE DOB column was moved one spot to the right between the Address and City columns.
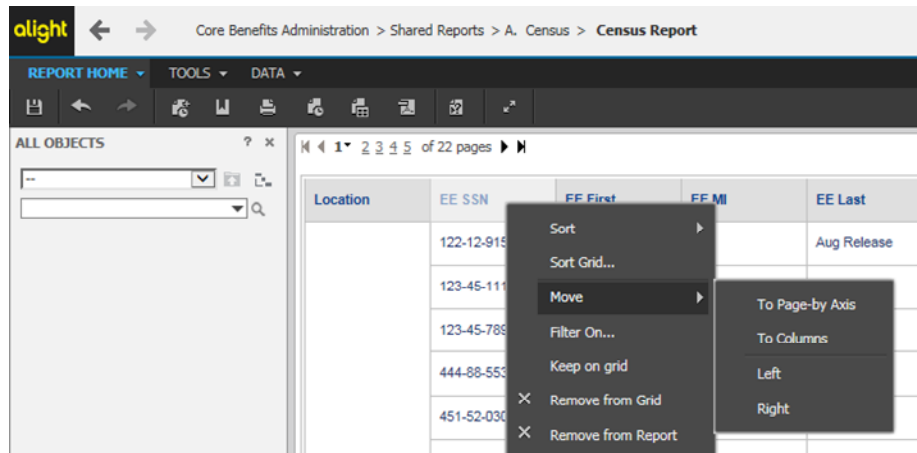
## Pivot Buttons

To move a column using the "drag and drop" option:

- Activate the Pivot Buttons by clicking on the drop down arrow beside Tools on the middle gray bar at the top of the screen.  This will expand the Tools menu.
- Click on Pivot Buttons.  The Pivot Buttons will appear at the head of each column.
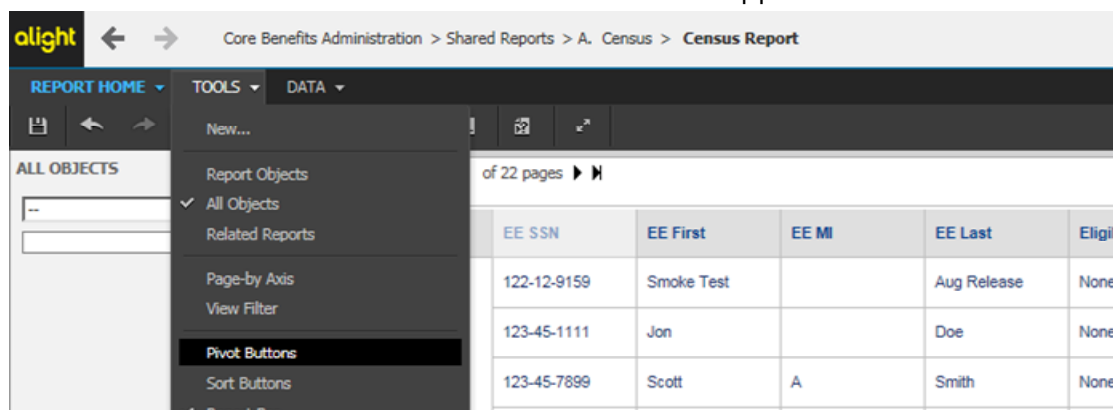


- Use the **left** and **right** arrows to move the columns one spot to the left or right.
  - o In the screen shots below the right arrow in the Pivot Buttons was used to move thee EE MI column two spots to the right between the EE Last and Elect Plan Type columns.

## Sorting Data

Users may need to sort reports in order to display report information in a certain order.
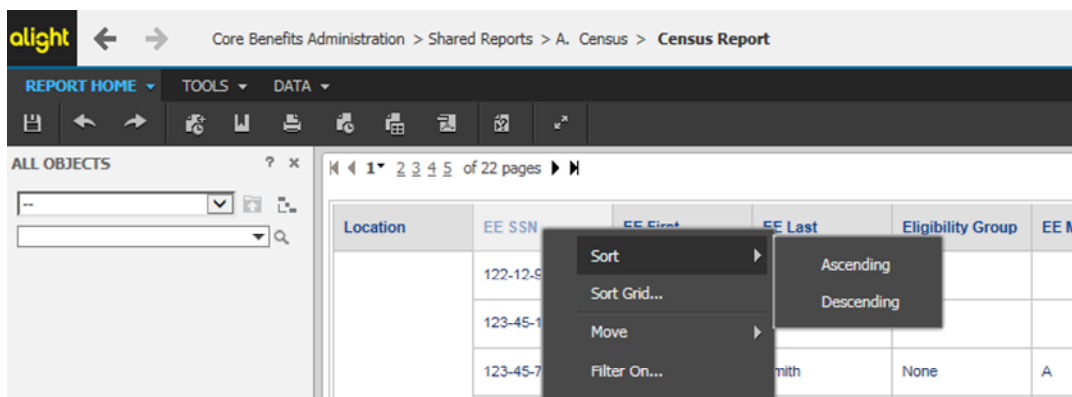
There are two different options for sorting data:
- Drop down menu
- Tool bar option

### Drop down Menu

To sort using the drop down menu:
- Place the cursor over the column heading that the report needs to be sorted by.
- Right click to display the drop down menu.
- Place your cursor over Sort to display the second menu.
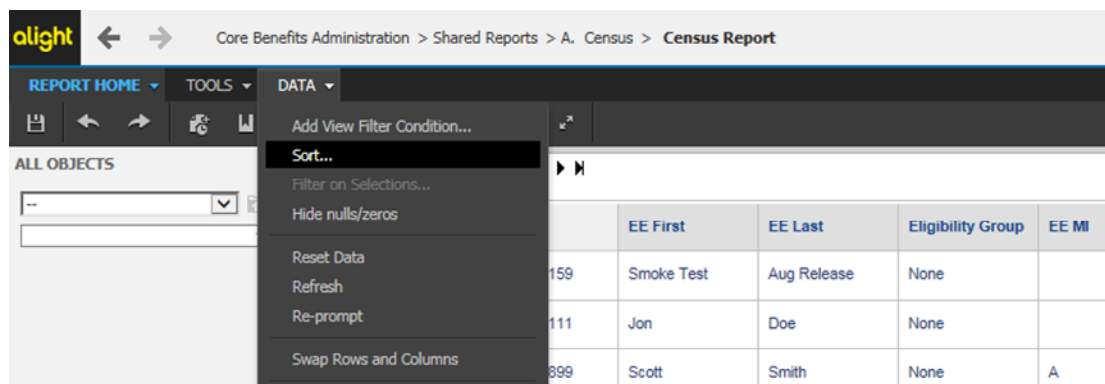- Select **Ascending** or **Descending.**
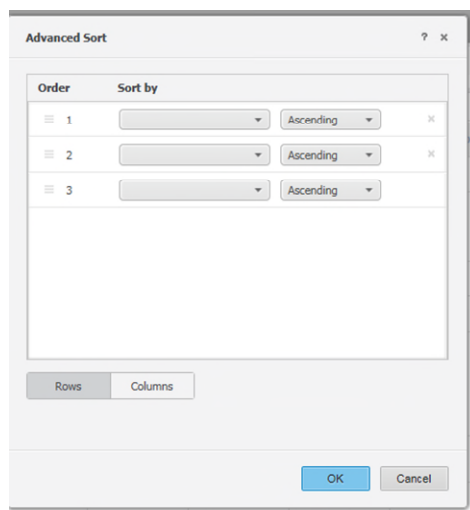
## Tool Bar Options

The tool bar option allows users to sort using up to three columns of data.

To sort using the tool bar:

- Click on the **Data** tab on the gray tool bar.
- The drop down menu will display.
- Click **Sort.**



- A pop up window appears with additional prompts.
- Users can select up to three columns to sort by.



- Click on the drop down arrow beside each of the prompts to select the desired data to sort the report by.
- Click **Apply**.

o In the example below the report is being sorted by **Location & EE First Name**.



| Location | EE SSN | EE First | EE Last | Eligibility Group | EE MI | Employment Status | EE Gender | EE DOB |
|---|---|---|---|---|---|---|---|---|
| 200 Ocean Blvd. | 999-25-5053 | Albert | Purell | None | | Pre-hire | M | 3/3/1960 12:00:00 AM |
| | 999-39-0036 | Alex | Keaton | None | P | Active | M | 8/5/1977 12:00:00 AM |
| 1205 Maple St. | 994-25-0550 | Alicia | Siro | None | | Active | F | 3/9/1960 12:00:00 AM |
| | 999-39-0038 | Alison | Keaton | None | | Active | F | 9/16/1977 12:00:00 AM |

- Users have the option to select Ascending or Descending after they have made their prompt selections.
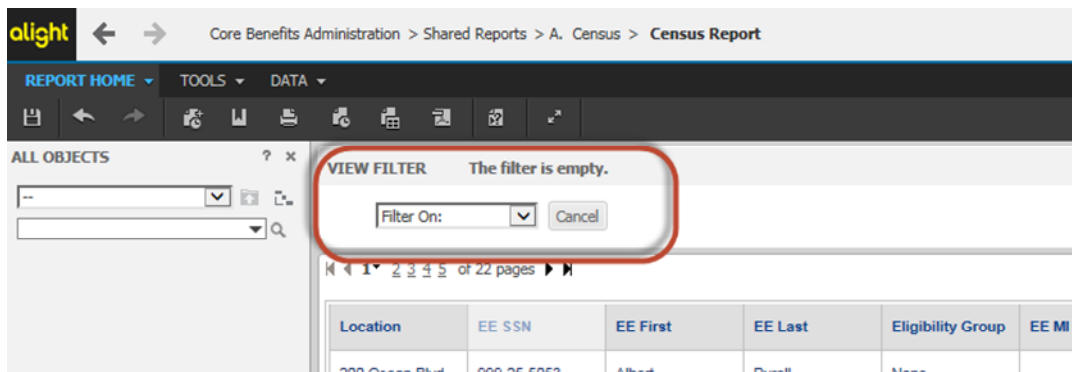
## Filtering Data

Reports often contain a large amount of data and users may want to narrow down the information by filtering out unwanted data.
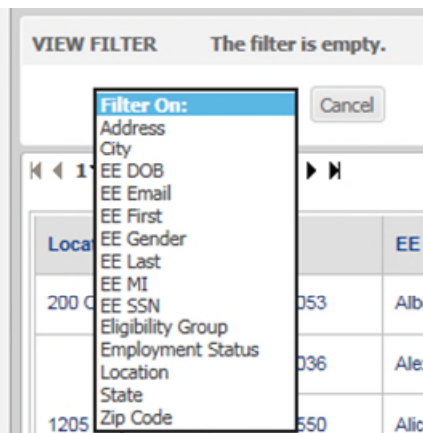
To add a filter(s) to the report:
- Click on the **Data** tab on the gray tool bar.
- The drop down menu will display.
- Click **Add View Filter Condition.**
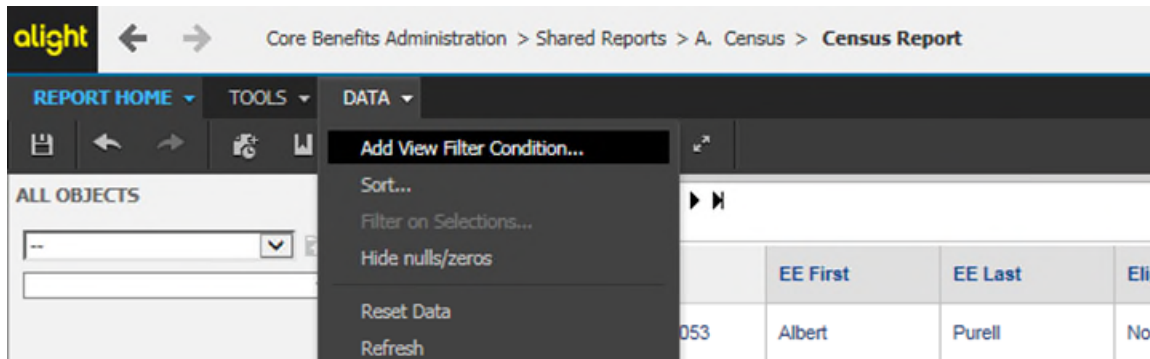
- This will turn the filter option on.



- Click the drop down arrow beside **Filter On**.
- A list of options will display.
- Select the desired option to filter the report on.

- Based on the selection additional filter items will appear in the **Available** box.
  - o In the example below, the report is being filtered by location so all of the location options appear in the **Available** box.
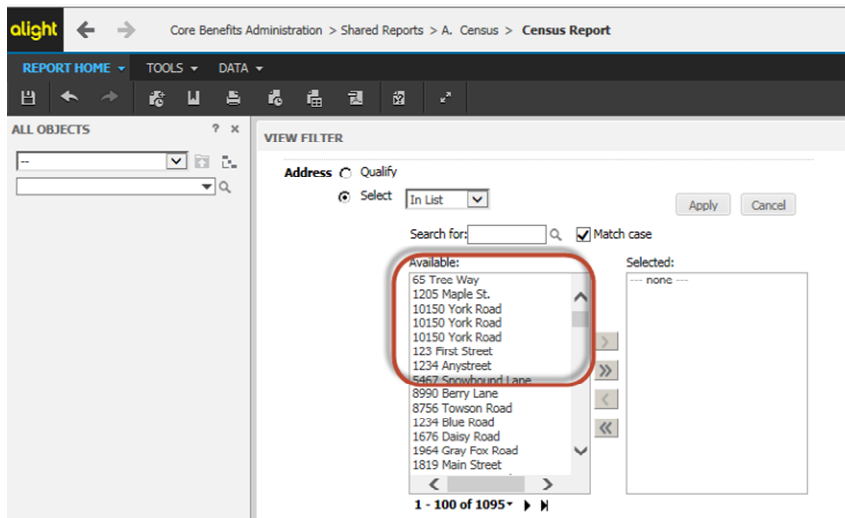


- Highlight the desired item(s) then click the right arrow to move the item(s) to the **Selected** box.
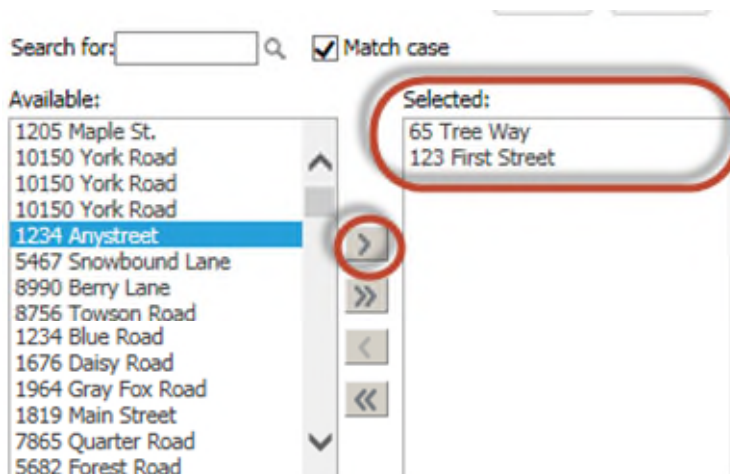


- Click the **Apply** button to apply the filter.

- The report is now filtered and the filter that has been applied displays just above the report headers.



- To remove the filter click on the **X** beside **Clear All** or the **X** beside the **Filter**.



- The user may want to add more than one filter to the report.

- To do this, click **Add Condition** (you may need to scroll to the right based on the length of your report)**.**
- Select the additional filter option and repeat the process.
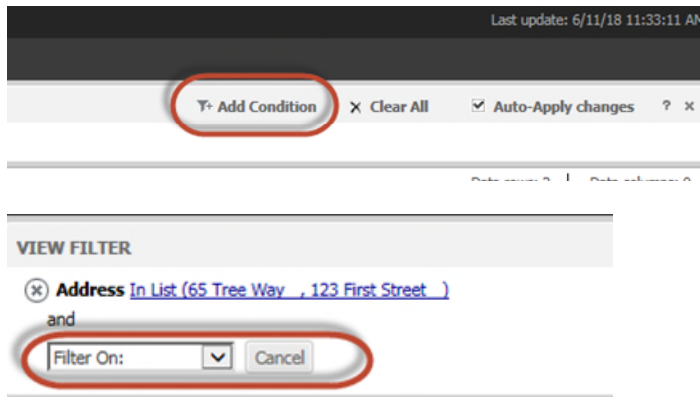


- In the example below the report is being filtered by **Location** and **Eligibility Group**.
- Notice the list of filters above the report headers.
- The user can remove one filter by clicking the **X** beside the desired filter or the user can remove all filters by clicking **Clear All**.



## Using a Qualifier (range)

There are times when users may want to filter the report data using a range.  For example, there may be times when a user needs to view employees in a certain salary range or view employees that have been hired within a certain date range.

To use a qualifier:
- Click **Add Condition**.
- Click the drop down arrow beside **Filter On**.
- A list of options will display.  Select the desired option.
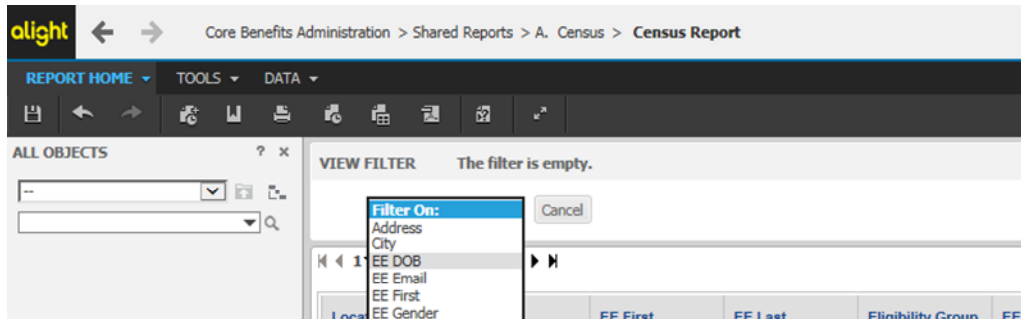
- Click on the radio button beside **Qualify** to enable the range fields.



- Click the drop down arrow beside **Equals** to select the desired criteria for your filter. Then add the amount in the numeric field.
  - In the example below the user wants Employees with DOB after 6/11/1980
- Once the fields are complete click the **Apply** button to apply the filter.

## Locking Column Headers

When users scroll down in a report the headers at the top of the page will disappear from view making it difficult to determine the data that is being seen. The solution for this is to lock the report headers.

To lock the report headers:
- Click on the **Tools** tab on the gray tool bar.
- The drop down menu will display.
- Select Report Options
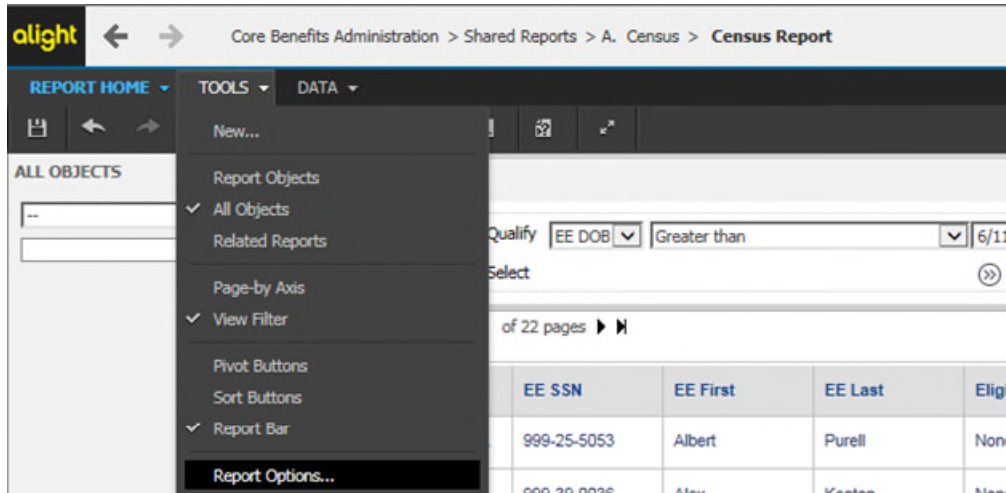
- A pop up box will appear. Under the Headers section, click the Lock checkbox under the Columns section.  Click **Apply** then click **Ok**.
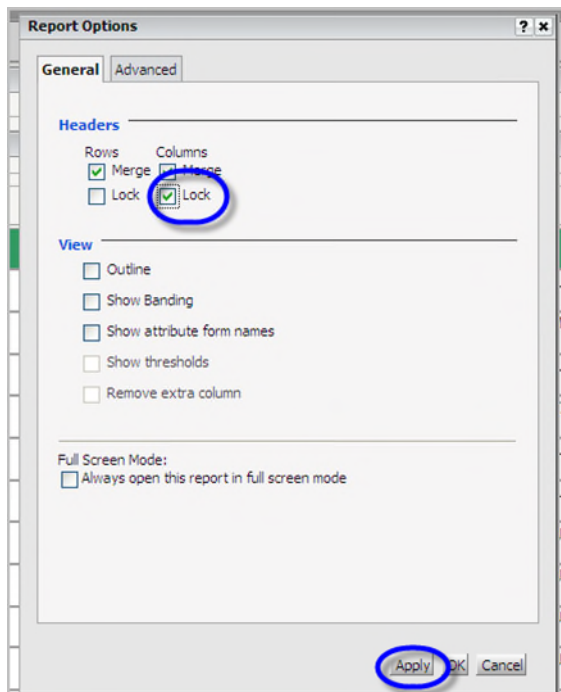
# Chapter 4: Exporting Reports

After customizing a report, it can be printed using the browser's print function and it can also be exported in a variety of formats to allow additional data manipulation or ease of sharing with others.
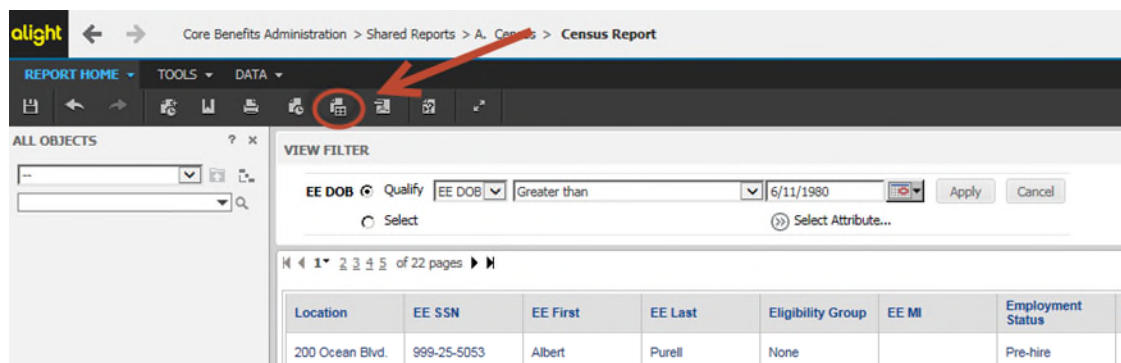
The following exporting formats are available:
- Excel with plain text
- Excel with formatting
- CSV
- HTML
- Plain text
- PDF

## Exporting to Excel with Plain Text

This option is great if users need to perform additional data manipulation in Excel.  To export reports to Excel with plain text formats:
- Click on the **Export** icon from the gray tool bar (it looks like a spreadsheet).



- A pop up box will appear.
- Select **Excel with plain text**.
  *NOTE: If you expect your report to be large, exporting to CSV*

- Users have the option to export the whole report or only the portion that is being displayed on the screen.
- The default is the whole report.
- To export only part of the report click on the drop down arrow beside Export and select **Portion displayed only.**
- Users have additional exporting options available such as Exporting the report title, Exporting filter details, Exporting metric values as text, and Exporting headers as text.
- Click to put a checkmark in the box beside any desired options.



- To add a header or footer to the exported report click on **Edit Custom Settings** beside Export Header and Footer.

- Enter the desired header or footer text in the appropriate box and click apply.



- Once all desired options have been selected click **Export**.



- A pop up box will display with options to Open, Save or Cancel the Excel report.
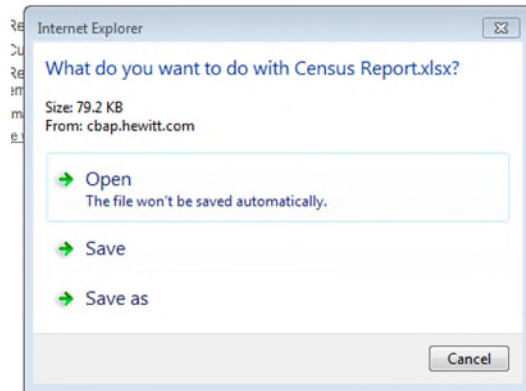
- Note: selecting the Excel with plain text option means the report will not contain any formatting.



## Exporting to Excel with Formatting

This option is great if users want to keep the report formatting in place as the report is exported. To export reports to Excel with formatting:

- Click on the **Export** icon from the gray tool bar (it looks like a spreadsheet).

- A pop up box will appear.
- Select **Excel with formatting**.



- Select any additional desired Exporting options.
- Click **Export**.



- A pop up box will display with options to Open, Save or Cancel the Excel report.
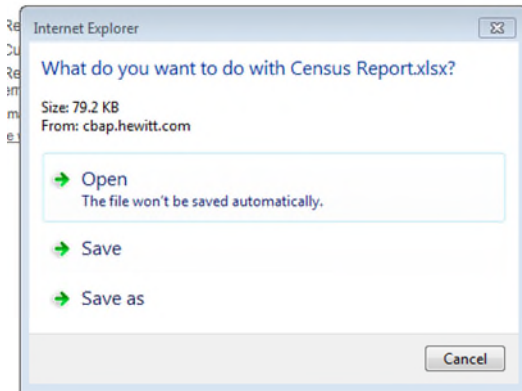
- Note: the report will be exported with all formatting in-tact.



## Exporting to a PDF Format

Sometimes users may want to export a report to a PDF format.  This is a good option if no additional manipulation is needed.

To export a report as a PDF:

- Click on the **PDF** icon from the gray tool bar.
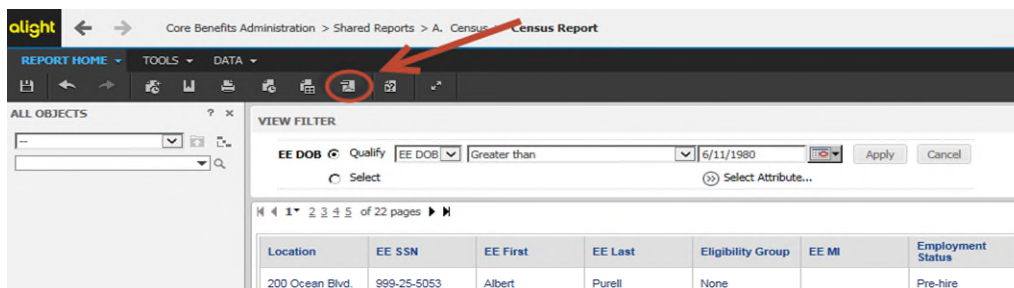
- A pop up box will appear with additional exporting options.
- Users can export the whole report or only the portion that is currently being displayed.
- There are scaling options, orientation options (portrait or landscape), header and footer options, as well as cover page options.
- Select all desired options and click **Export**.



- The PDF will display and can be printed or saved.



## Samples of Exporting Formats

As noted earlier, there are several formats available for exporting reports. To help users understand the difference between each format, samples of each format are shown below.

## Excel with Plain Text



## Excel with Formatting

## CSV File Format

## HTML



A screenshot of the Census Report displayed in Windows Internet Explorer. The report contains the following columns and data:

| Location | EE SSN | EE First | EE MI | EE Last | EE Gender | EE DOB | Address | City | State |
|---|---|---|---|---|---|---|---|---|---|
| 1205 Maple St. | 123-45-7899 | Scott | A | Smith | M | 1/1/1960 12:00:00 AM | 1234 Any Lane | Lincolnshire | IL |
| | 444-88-5538 | Keith | | Goode | M | 3/10/1966 12:00:00 AM | 10150 York Road | Hunt Valley | MD |
| | 451-52-0301 | Sam | | Sample | M | 1/1/1970 12:00:00 AM | 1234 Anyplace Usa | Chicago | IL |
| | 451-52-0406 | Kerry | | Miller | M | 1/30/1970 12:00:00 AM | 2601 Research Forest | the Woodlands | TX |
| | 555-44-1234 | John | | Knupp | M | 6/10/1960 12:00:00 AM | 123 Wacker | Chicago | IL |
| | 555-53-0118 | David | | Brown | M | 4/4/1970 12:00:00 AM | 3459 State Street | Chicago | IL |
| | 555-53-0323 | David | | Barnes | M | 4/4/1970 12:00:00 AM | 45 Alta Peak Rd. | Deer Valley | UT |
| | 555-53-0628 | Steve | | Gates | M | 4/4/1970 12:00:00 AM | 48 Solitude Way | Park City | UT |
| | 555-53-0824 | Steve | | Gates | M | 4/4/1970 12:00:00 AM | 33 Sun Valley Lane | Park City | UT |
| | 555-53-0825 | Steve | | Gates | M | 4/4/1970 | 45 Lake Tahoe | Deer Valley | UT |

## Plain Text



```
Census Report[1].txt - Notepad
File  Edit  Format  View  Help

Census Report

Location,EE SSN,EE First,EE MI,EE Last,EE Gender,EE DOB,Address,City,State,Zip Code,Employment Status,Eligibility Group,EE Email
1205 Maple St.,123-45-7899,Scott,A,Smith,M,1/1/1960 12:00:00 AM,1234 Any Lane    ,Lincolnshire,IL,60069   ,Pre-hire,None
1205 Maple St.,444-88-5538,Keith,,Goode,M,3/10/1966 12:00:00 AM,10150 York Road   ,Hunt Valley,MD,21030   ,Active,None
1205 Maple St.,451-52-0301,Sam,,Sample,M,1/1/1970 12:00:00 AM,1234 Anyplace Usa  ,Chicago,IL,12345   ,Active,None
1205 Maple St.,451-52-0406,Kerry,,Miller,M,1/30/1970 12:00:00 AM,2601 Research Forest   ,the woodlands,TX,77381   ,Active,None
1205 Maple St.,555-44-1234,John,,Knupp,M,6/10/1960 12:00:00 AM,123 wacker   ,Chicago,IL,60606   ,Active,None
1205 Maple St.,555-53-0118,David,,Brown,M,4/4/1970 12:00:00 AM,3459 State Street   ,Chicago,IL,54444   ,Active,None
1205 Maple St.,555-53-0323,David,,Barnes,M,4/4/1970 12:00:00 AM,45 Alta Peak Rd.   ,Deer Valley,UT,84111   ,Terminated,None
1205 Maple St.,555-53-0628,Steve,,Gates,M,4/4/1970 12:00:00 AM,48 Solitude Way   ,Park City,UT,84100   ,Active,None
1205 Maple St.,555-53-0824,Steve,,Gates,M,4/4/1970 12:00:00 AM,33 Sun Valley Lane   ,Park City,UT,84100   ,Active,None
1205 Maple St.,555-53-0825,Steve,,Gates,M,4/4/1970 12:00:00 AM,45 Lake Tahoe Way   ,Deer Valley,UT,84111   ,Active,None
1205 Maple St.,555-53-1122,Tom,,Smith,M,4/4/1970 12:00:00 AM,2343 Deer Creek Rd.   ,Salt Lake City,UT,84111   ,Active,None
1205 Maple St.,555-55-0427,Wayne,,Giggs,M,4/1/1970 12:00:00 AM,48 Solitude Way   ,Deer Valley,UT,84100   ,Active,None
1205 Maple St.,675-45-7686,William,,State,M,9/8/1968 12:00:00 AM,7987 Down Hill   ,City,IL,78979   ,Active,PremierCo Executives 2013, PremierCo
1205 Maple St.,709-67-6457,Spring,,Time,F,8/7/1978 12:00:00 AM,123 Main St.   ,City,MD,98673   ,Active,PremierCo Executives 2013, PremierCo Exe
1205 Maple St.,796-78-6876,Jane,,Jones,F,9/8/1981 12:00:00 AM,345 White Dr.   ,City,IL,23453   ,Active,PremierCo Executives 2013, PremierCo Exe
1205 Maple St.,852-23-5538,John,,Clancy,M,3/10/1966 12:00:00 AM,10150 York Road   ,Hunt Valley,MD,21030   ,Pre-hire,None
1205 Maple St.,876-54-3210,Demo,,Demoing,M,5/18/1978 12:00:00 AM,100 Half Day Road   ,Lincolnshire,IL,60069   ,Active,None
1205 Maple St.,954-15-8868,Kate,,Rendell,F,3/5/1978 12:00:00 AM,51896 Frankel Way   ,New Haven,CT,06520   ,Active,None
1205 Maple St.,987-65-4321,May,,TwentyTwelve,Release,F,5/13/1970 12:00:00 AM,100 Half Day Road   ,Lincolnshire,IL,60069    ,Active,None
1205 Maple St.,987-65-6544,John,,Dixon,M,1/6/1960 12:00:00 AM,123 Any Street   ,Winthrop Harbor,IL,60096   ,Active,None
1205 Maple St.,989-25-5538,John,,Walker,M,3/4/1966 12:00:00 AM,10150 York Road   ,Hunt Valley,MD,21030   ,Active,None
1205 Maple St.,993-25-5538,Jack,,Johnson,M,3/10/1966 12:00:00 AM,10150 York Road   ,Hunt Valley,MD,21030   ,Active,None
1205 Maple St.,994-25-0550,Alicia,,Giro,F,3/9/1960 12:00:00 AM,10150 York Rd   ,Hunt Valley,MD,21030   ,Active,None
1205 Maple St.,994-25-5538,Denis,,Smith,M,3/4/1966 12:00:00 AM,10150 York Road   ,Hunt Valley,MD,21030   ,Active,None
1205 Maple St.,996-25-1222,John,,Blakely,M,4/6/1960 12:00:00 AM,15 Main Street   ,Hunt Valley,MD,21030   ,Active,None
1205 Maple St.,997-12-2345,Patricia,,King,F,1/1/1970 12:00:00 AM,12 Main Street   ,Hunt Valley,MD,21030   ,Active,PremierCo Executives
1205 Maple St.,997-25-5017,Dayna,,Chavis,F,3/3/1966 12:00:00 AM,10150 York Road   ,Hunt Valley,MD,21030   ,Active,None
1205 Maple St.,997-25-5018,Michele,,Myer,F,3/2/1966 12:00:00 AM,10150 York Road   ,Hunt Valley,MD,21030   ,Active,None
1205 Maple St.,997-25-5020,James,,Oscar,M,2/2/1960 12:00:00 AM,10150 York Road   ,Hunt Valley,MD,21030   ,Active,None
1205 Maple St.,998-25-0010,Niel,,Mackey,M,10/3/1966 12:00:00 AM,10150 York Road   ,Hunt Valley,MD,21030   ,Active,None
1205 Maple St.,999-03-0912,John,,Johnson,M,1/1/1980 12:00:00 AM,17655 Waterview Parkway   ,Dalla,TX,75252   0000,Active,None
1205 Maple St.,999-15-2777,Yolanda,,Kent,F,3/3/2010 12:00:00 AM,158 Main Street   ,Towson,MD,21286   ,Active,None
1205 Maple St.,999-15-4444,Jeff,,Skylar,M,6/6/1968 12:00:00 AM,5157 Edward Street   ,New Haven,CT,06520   ,Active,None
1205 Maple St.,999-15-5481,Harry,,Johnson,M,1/3/1965 12:00:00 AM,5869 Canton Street   ,Baltimore,MD,21212   ,Active,None
1205 Maple St.,999-15-5658,Francisco,,Perez,M,11/29/1974 12:00:00 AM,84 Tire Street   ,Towson,MD,21286   ,Active,None
1205 Maple St.,999-15-6688,Jennifer,,Cobb,F,4/4/1970 12:00:00 AM,52151 Ingle Way   ,New Haven,CT,06520   ,Active,None
1205 Maple St.,999-15-6914,Fred,,Jackson,M,6/10/1980 12:00:00 AM,6565 Lincoln Road   ,New Haven,CT,06520   ,Active,None
1205 Maple St.,999-15-8496,Rhonda,,Pierce,F,8/9/1960 12:00:00 AM,5869 Kindle Street   ,New Haven,CT,06520   ,Active,None
1205 Maple St.,999-15-8887,Frank,,Hurt,M,9/29/1963 12:00:00 AM,65 Tree Way   ,Towson,MD,21286   ,Active,None
1205 Maple St.,999-25-0227,John,,Larimore,M,2/2/1966 12:00:00 AM,10150 York Road   ,Hunt Valley,MD,21030   ,Active,None
1205 Maple St.,999-25-0233,Robert,,Freedman,M,3/3/1960 12:00:00 AM,10150 York Road   ,Hunt Valley,MD,21030   ,Active,None
1205 Maple St.,999-25-0237,Nancy,,Sample,F,3/2/1970 12:00:00 AM,10150 York Road   ,Hunt Valley,MD,21030   ,Active,None
1205 Maple St.,999-25-0325,Tom,,Perry,M,3/2/1966 12:00:00 AM,10150 York Rd   ,Hunt Valley,MD,21030   ,Active,None
1205 Maple St.,999-25-0330,Frank,,Burns,M,2/2/1966 12:00:00 AM,10150 York Rd   ,Hunt Valley,MD,21030   ,Active,None
1205 Maple St.,999-25-0385,Richard,,Thaler,M,5/6/1960 12:00:00 AM,10150 York Road   ,Hunt Valley,MD,21030   ,Active,None
```

**PDF**



Census Report

| Location | EE SSN | EE First | EE MI | EE Last | EE Gender |
|----------|--------|----------|-------|---------|-----------|
| 1205 Maple St. | 123-45-7899 | Scott | A | Smith | M |
| | 444-88-5538 | Keith | | Goode | M |
| | 451-52-0301 | Sam | | Sample | M |
| | 451-52-0406 | Kerry | | Miller | M |
| | 555-44-1234 | John | | Knupp | M |
| | 555-53-0118 | David | | Brown | M |
| | 555-53-0323 | David | | Barnes | M |
| | 555-53-0628 | Steve | | Gates | M |
| | 555-53-0824 | Steve | | Gates | M |
| | 555-53-0825 | Steve | | Gates | M |

## Chapter 5: Saving Reports

If users run specific reports on a regular basis they may want to save the report(s) in their personal folder so they don't have to make all of the prompt selections and customizations each and every time they run the report(s).

### Saving Reports to a Personal Folder

To save reports to a personal folder:

- Click on the drop down arrow under **Report Home** on the middle tool bar.
- Additional menu items will appear.  Click **Save As**.
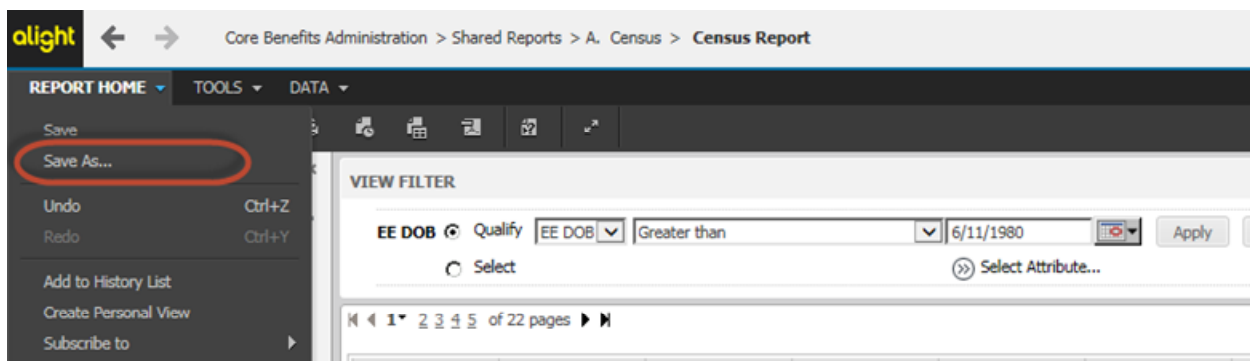


- Or click on the **Save** icon on the gray tool bar.
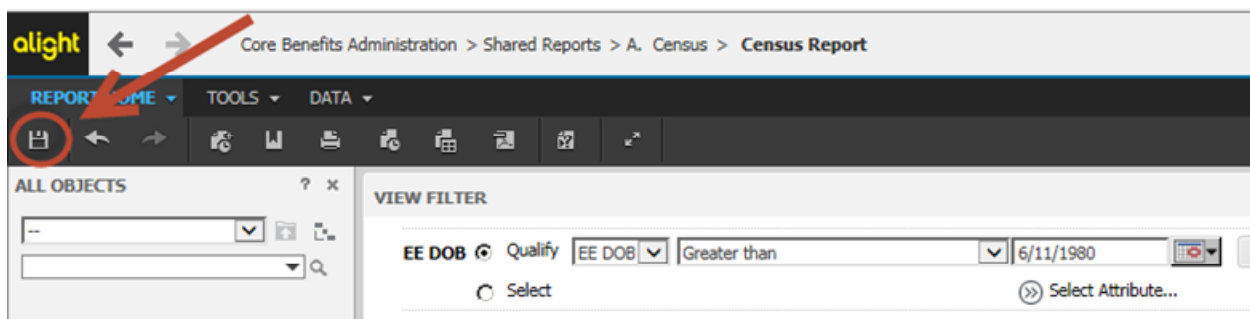


- A pop up box will appear.
- Make sure **My Reports** is showing in the **Save in** field.
- Make sure there is a checkmark in the box beside **Keep report prompted** in order to keep all of the prompts that were selected.
- Update the name of the report if desired.
- Click **Ok**.
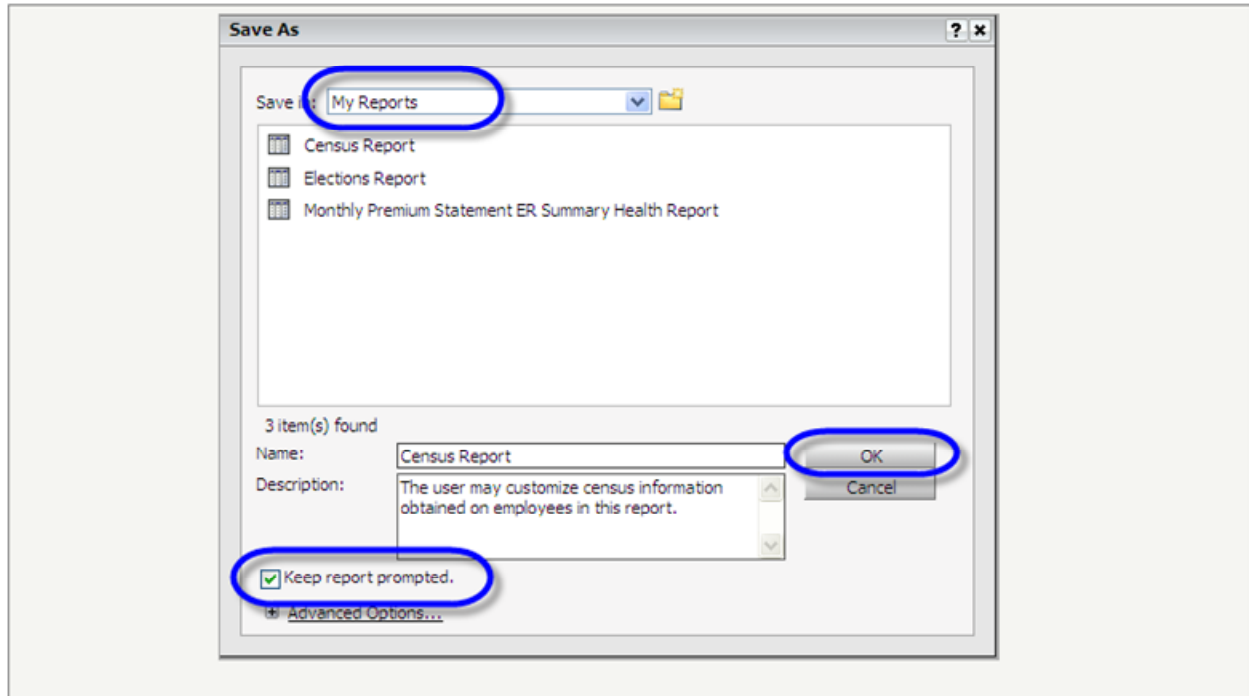
## Advanced Save Options

- Advanced options for saving prompts are available.
- Click on **Advanced Options** to view the additional items.
- Make any desired selections (see explanation of options below).
- Click **Ok**.
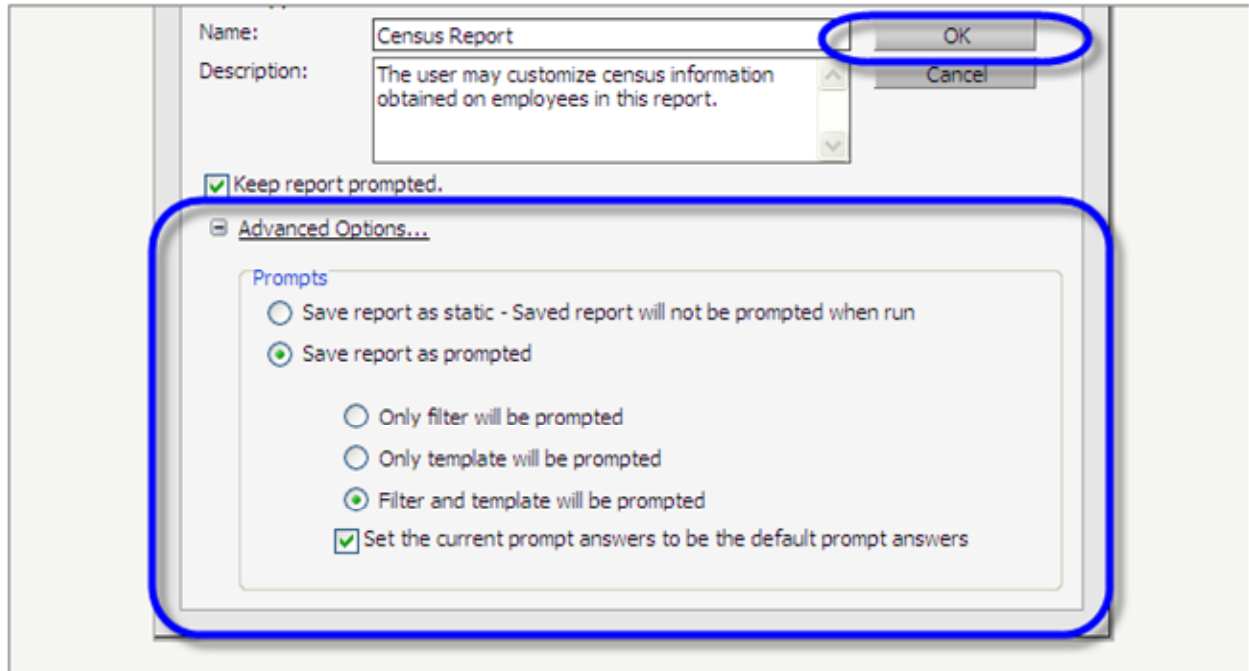
## Explanation of Advanced Save Options

- **Save the report as static.**
  - Report is saved "as-is." When you execute the saved report, none of the report prompts appear.
- **Save the report as prompted.**
  - **Only filter will be prompted** - only prompts that allow the user to filter the data in the report will be displayed. Any view filters the user applied will be saved.
  - **Only Template will be prompted** - only prompts that allow the user to add additional data to the report will be displayed. Any view filters the user applied will **not** be saved.
  - **Filter and template will be prompted** - the user will see all prompts but any view filtering the user applied will **not** be saved.
- **Set the current prompt answers to be the default prompt answers**.
  - Saves the choices the user makes in this window and applies it to all other reports.

## Retrieving a Saved Report

To retrieve a saved report from **My Reports** folder:
- Click **My Reports** from the Reporting Home page.
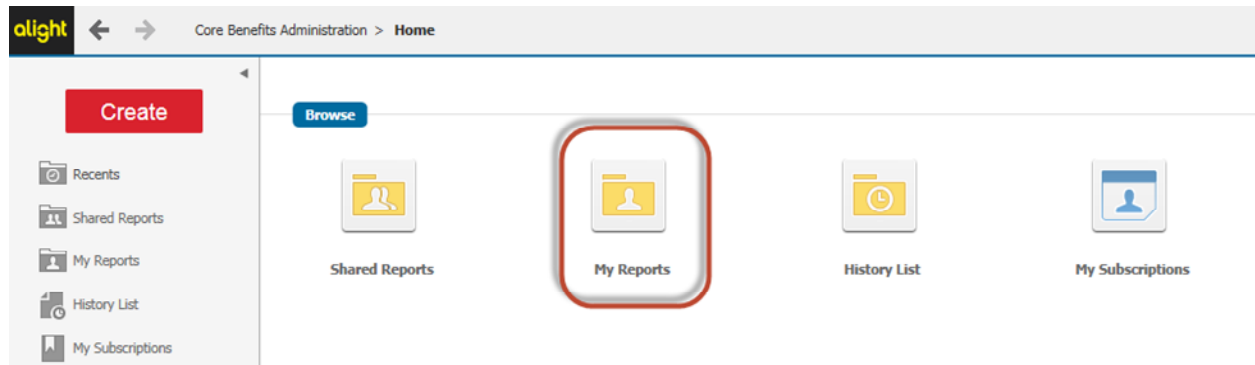
- The My Reports folder will open.
- Click on the desired report name to run it.
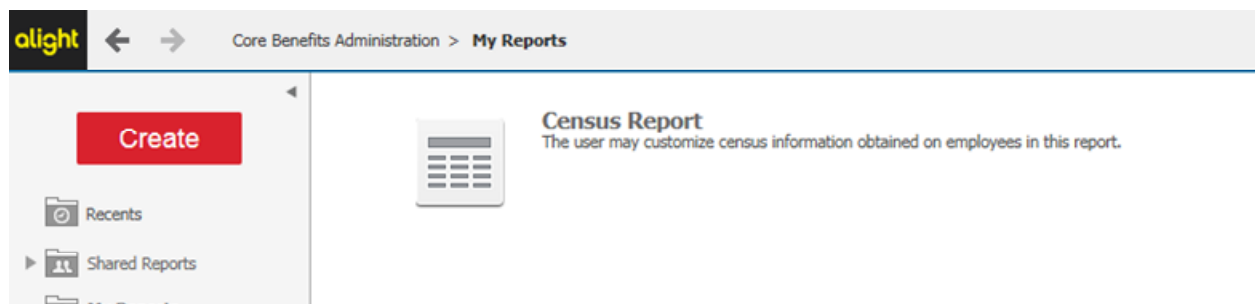
## Chapter 6: Scheduling Reports

Users can schedule reports to generate on an automatic basis so they will be ready for viewing at the time the user needs them.  This is a great way for users to save time.

To schedule reports:

- Locate the desired report that needs to be scheduled (either from the reports home page or from the My Reports folder).
- Click the **Subscriptions** link underneath the report description.
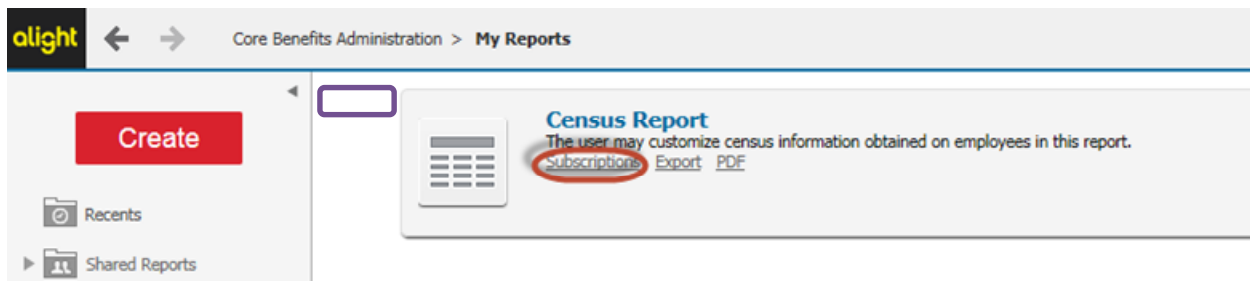


- Click **Add History List Subscription.**
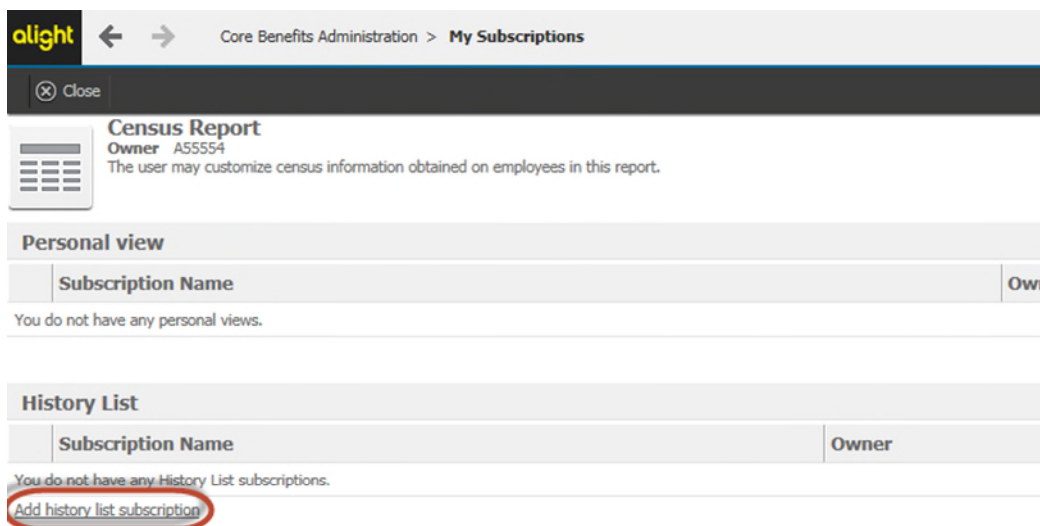


- Edit the report name if desired.
- Select a **Schedule** recurrence from the drop down menu.

- Check **Run subscription immediately** to receive an immediate copy upon scheduling the report.
- **Note:** The name/digits in the **To** field refer to the Manager Self Service reports user. This will eventually be changed to display the username of the person who scheduled the report.



- Click the ⊞ sign to expand the Advanced Options section (minus sign ⊟ to retract).

- Click to add a checkmark beside **The new scheduled report will overwrite older versions of itself** if a fresh report is desired each time it runs (otherwise the user will see a separate row for prior report copies).



- If desired, click to add a checkmark beside **Do not deliver after** and select a date from the calendar tool to select an end date for the schedule.



- To have an email sent to you when your report is finished running, select the **Send notification to email address** option and enter your email address
  - NOTE: an email with the report subscription information will be sent to the email address provided but users will need to login through MSS to retrieve the report. The report will **NOT** be attached to the email.

- Complete the report prompts at the bottom of the page (instructions for using prompts can be found in Chapter 2).
- Click **Ok**.



- **Important Note:** The date ranges are currently not "smart" dates.
  - For example, scheduling a weekly report to view weekly activity would result in cumulative data based on the beginning date and ending date ranges entered at the time the report was scheduled. The beginning date does not adjust to the current date each time it runs. This is being evaluated as a future enhancement.
- The **Scheduled History List Confirmation** message will display on the screen.
- Click **OK**.
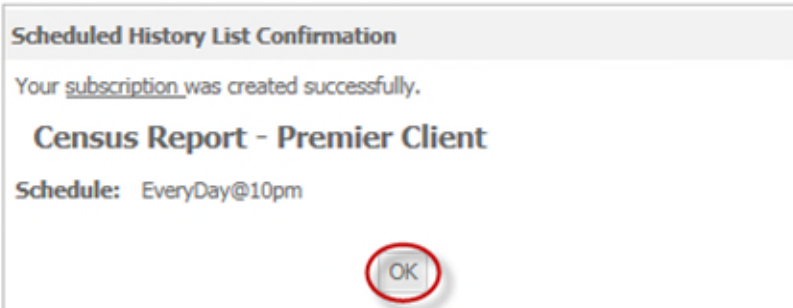
## Viewing Scheduled Reports from your History List

To view the generated report(s):

- From the home page, select your **History List** icon or link in the left navigation
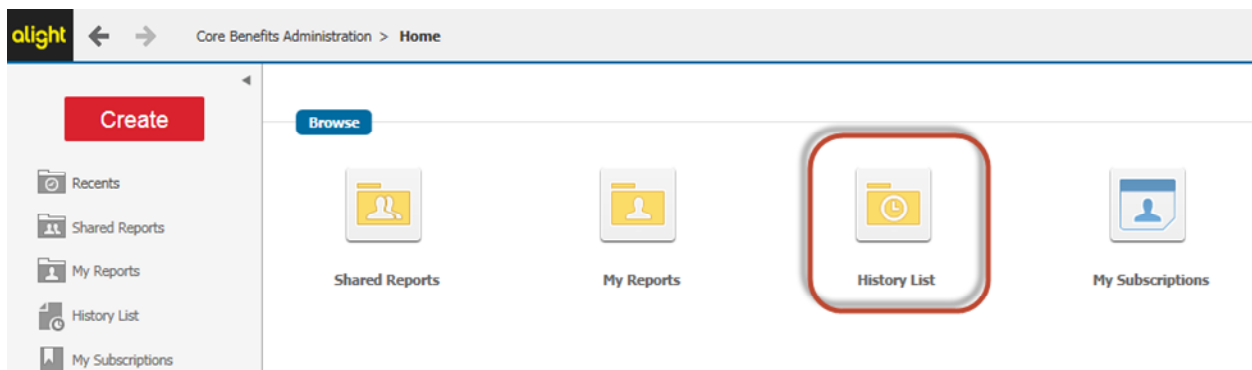


- Click on the report name.



- The report will display.

- You may also export the report from the History List by selecting the **Export** or **PDF** icons



## Editing Scheduled Reports

There may be times when users need to make changes to the report schedule or the end date.

- To edit subscription information, select the **My Subscriptions** icon or link from the Home page
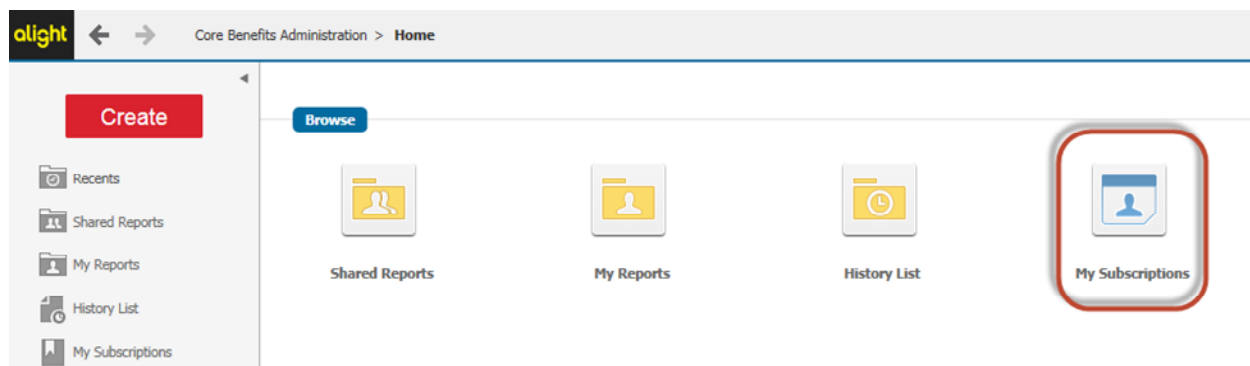


- Click on the pencil icon under the Action column to make changes to the subscription information.

---
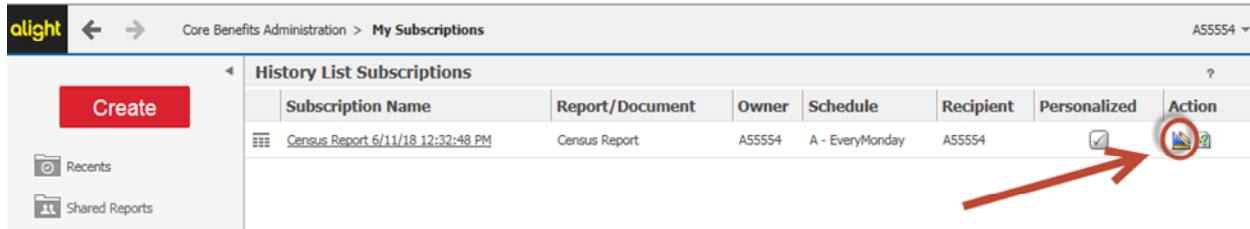
- Click on the '?' icon under the Action column to make changes to the personalization of the subscription.
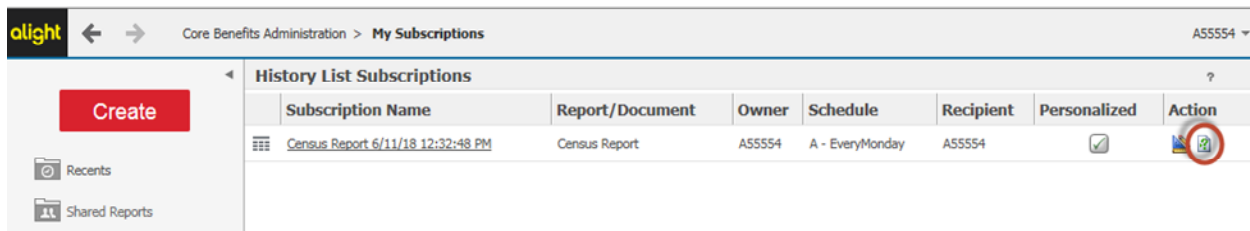


- The subscription history page will appear.
- Make the desired updates to the schedule, advanced options or personalization.
- Click **Ok** to save changes.



- The **Scheduled History List Confirmation** will appear.
- Click **Ok**.
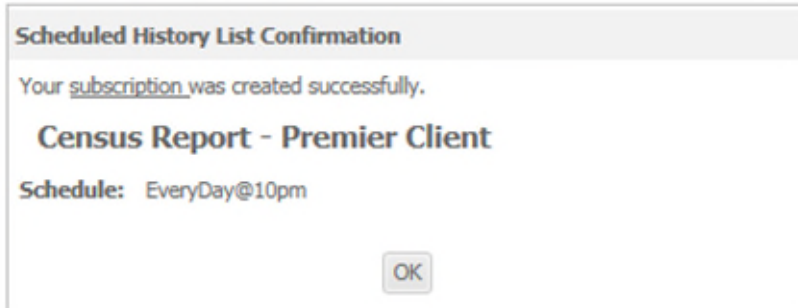
## Discontinuing Scheduled Reports

To discontinue the report schedule,

- Click the **Unsubscribe** checkbox.
  - o Note: Historical reports in the history list more than 30 days old will be automatically purged from the system.



- You can also stop the subscription schedule by changing the end date of the report using the **Action** icon.
- Click **Ok** to save the date change.

## Chapter 7: Creating Your Own Report (ad-hoc reporting)

Users can now create their own reports by utilizing the ad-hoc reporting functionality. A listing of available fields can be found in the **Ad Hoc Reporting Fields Listing** document on the training site, accessible from Manager Self Service.

To create your own report:

- From the home page, click on the **Create** button
- When you select **New Report**, you will be prompted with 2 options, to create a **Custom Report with Elections** or a **Custom Report without Elections**
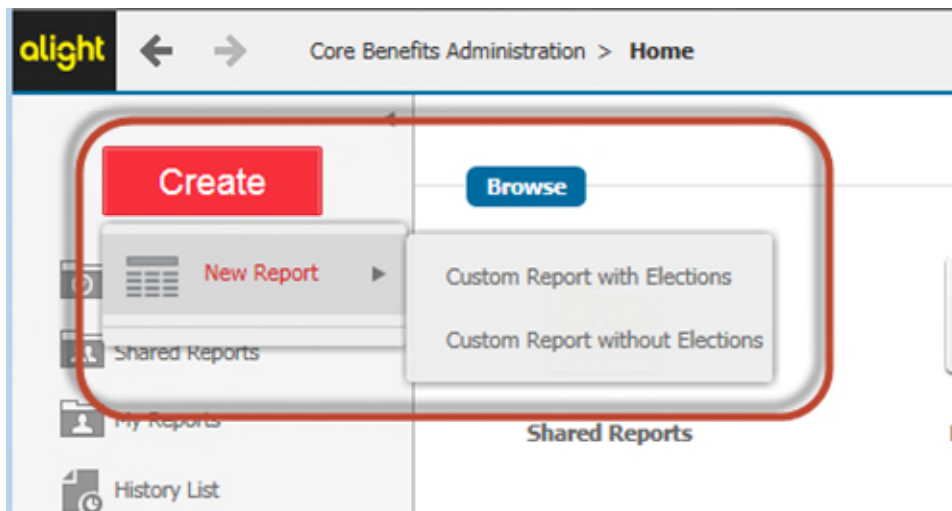


## Custom Report with Elections

After selecting to create a Custom Report with Elections, you will be taken through two prompt pages prior to reaching the ad-hoc page to select your fields.

- Confirm your **Employer** and update the **Plan Year** (plan year will be defaulted to current year)
- Click **Edit in Design Mode** at the bottom of the page

- On the following page, select the desired **Employment Status'** and **Plans** needed for your custom report
  - Plan Names are displayed in the following order: Partner/carrier Name, Plan Name and then Plan Subtype. This creates the ability to search by any of those values.
- Click **Edit in Design Mode** at the bottom of the page
- Please follow the instructions from the **List Selection Prompts** section on how to select more than one value and entering search criteria

- You will now be taken to the ad-hoc creation page and will need to select **All Objects** from the left navigation.

- **All Objects** is where you can select the fields/objects you want to add to your report by selecting the folder category that contains the objects you want to add
  - o *NOTE: A full listing of available fields can be found in the **Ad Hoc Reporting Fields Listing document** on the training site.*
  - o **Dependent Demographic** folder contains fields related to dependent demographic fields like dependent name, SSN, address and dependent verification information
  - o **Dependent Elections** folder contains dependent election fields like benefit effective and end date
    - ▪ **NOTE:** Since elections are created at the employee level, you will need to add the appropriate fields from the **Employee Elections** folder to see items like plan name, tier, etc.
  - o **Employee Demographic** folder contains the employee demographic fields like name, SSN, address and Medicare information
  - o **Employee Elections** folder contains all fields related to the employee elections. This includes plan name, election tier, election cost, effective start and end dates, etc.
  - o **Employee Work Information** folder contains fields related to the employer like Employee ID,  location, department, hire/rehire/term dates, user defined fields, etc.
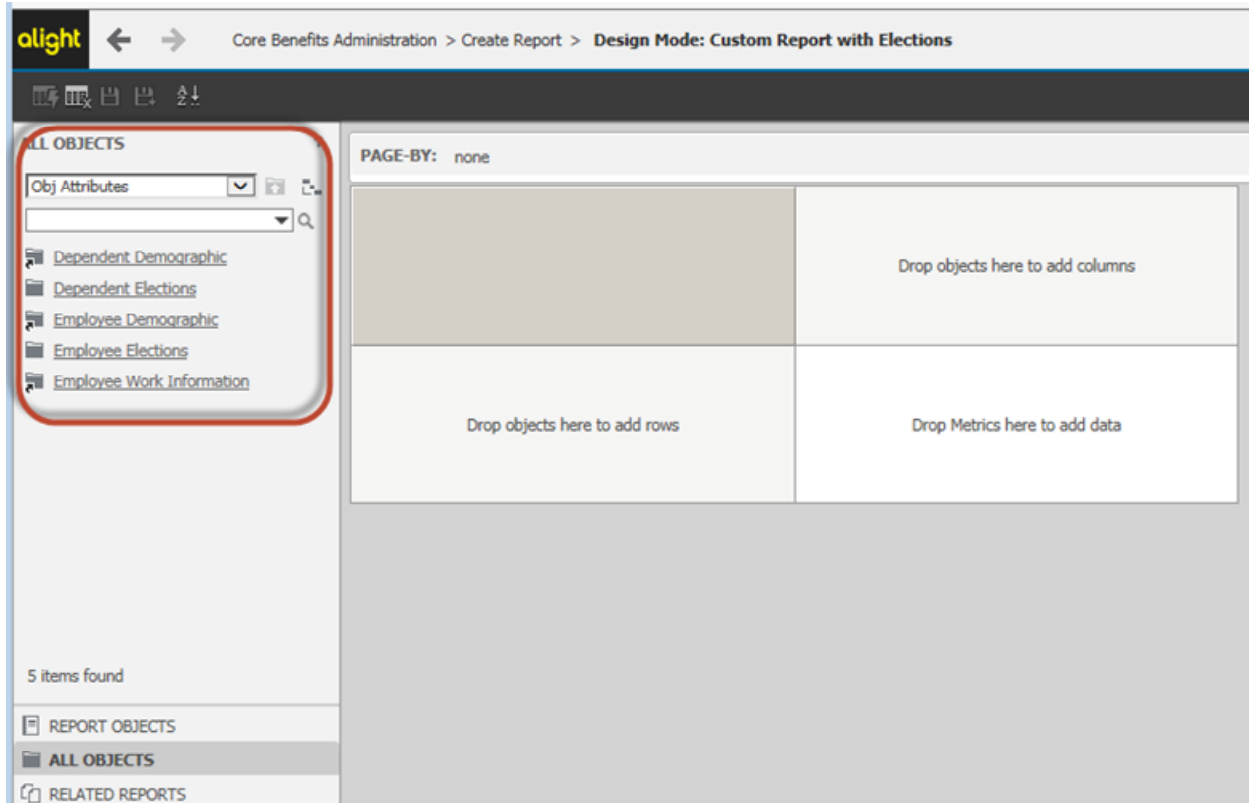
- Once you select a folder and are presented with the available fields, you may double click on a field name OR drag the field to the right report builder frame to add the field to your report. Simply drop the field where you would like for it to be placed on the report.
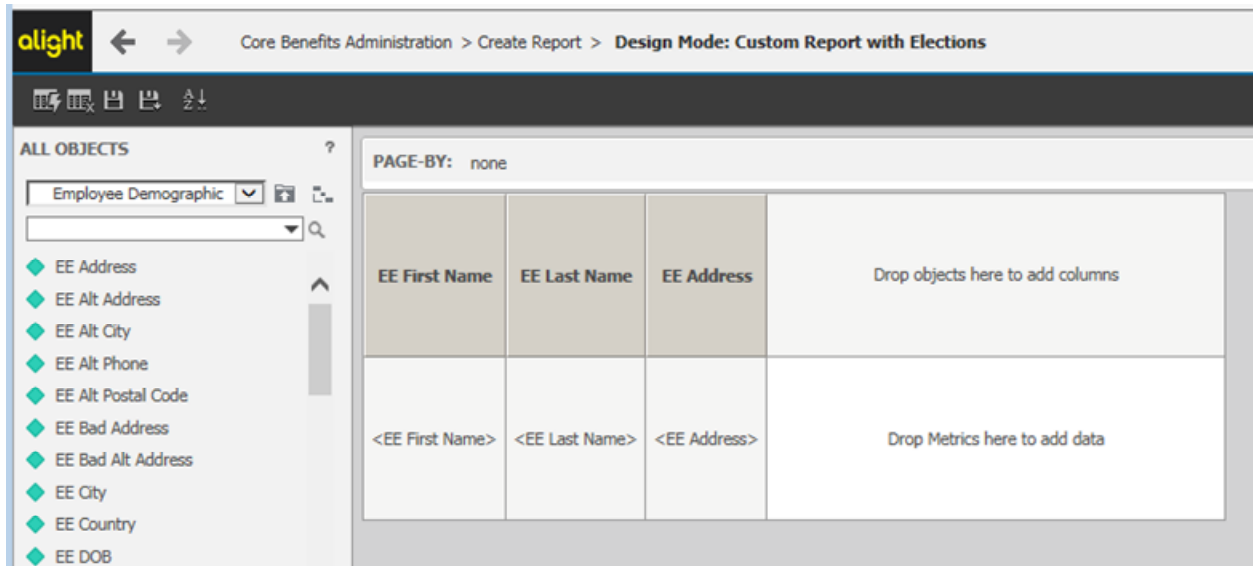
- If you would like to select fields from another folder, select the **Up Folder** icon to the right of the folder name to be returned to the main folder directory page. Your fields will continue to display in the right pane so that you may continue to add fields to your report.
  - o **NOTE**: you may need to select the Up Folder icon twice to get back to the **Obj Attributes** folder and see all folder categories.
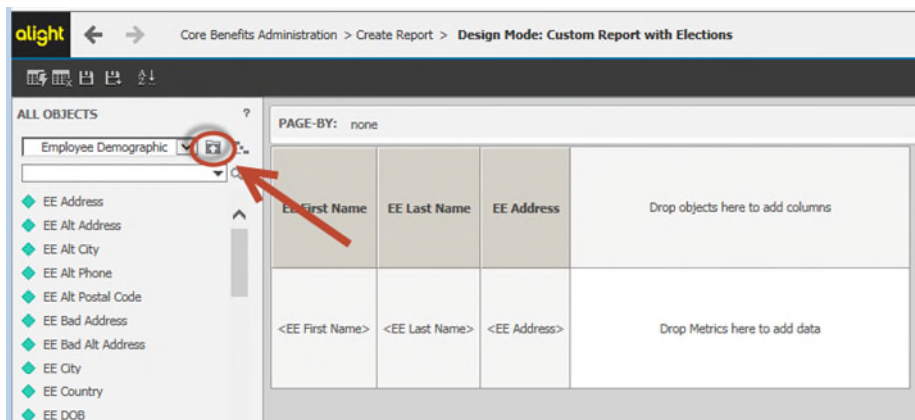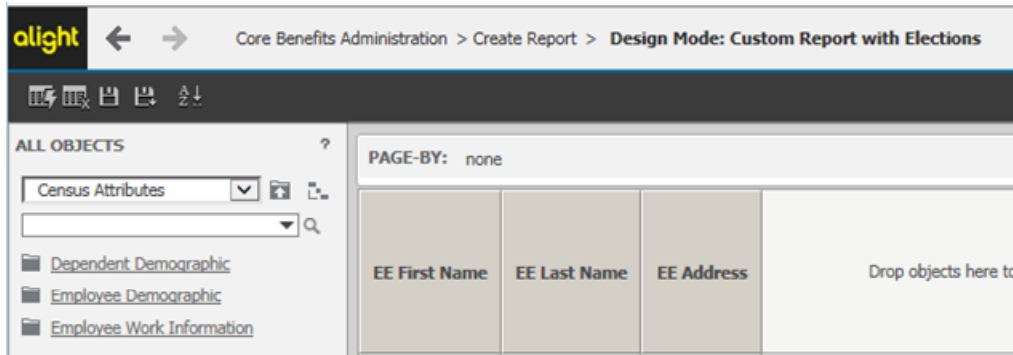
- When you have selected all of the fields you wish to be on your report, you are now ready to Save or Run your export. If this is a report that you will want to run again, ***be sure to save the report now*** following the steps outlined in **Chapter 5**.  If this is a one-time report or one that you can easily recreate again, you may wish to run the report at this step.
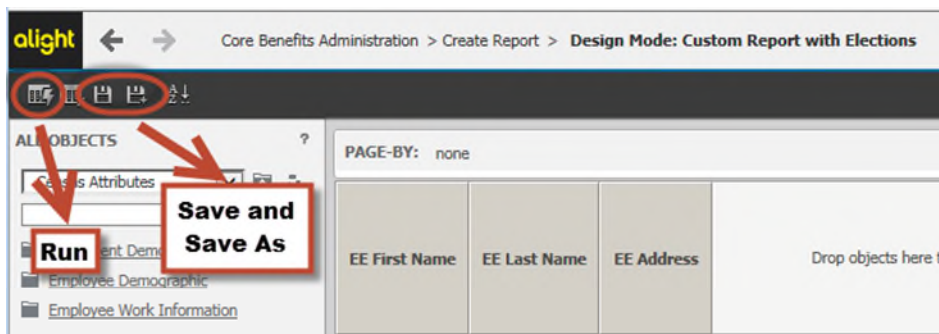


- Other task bar options at this step include cancel and sort as shown below
  - Cancel: if you would like to start your report over, you may cancel
  - Sort: you may select to sort your data prior to running, follow the sorting steps as outlined in Chapter 3.
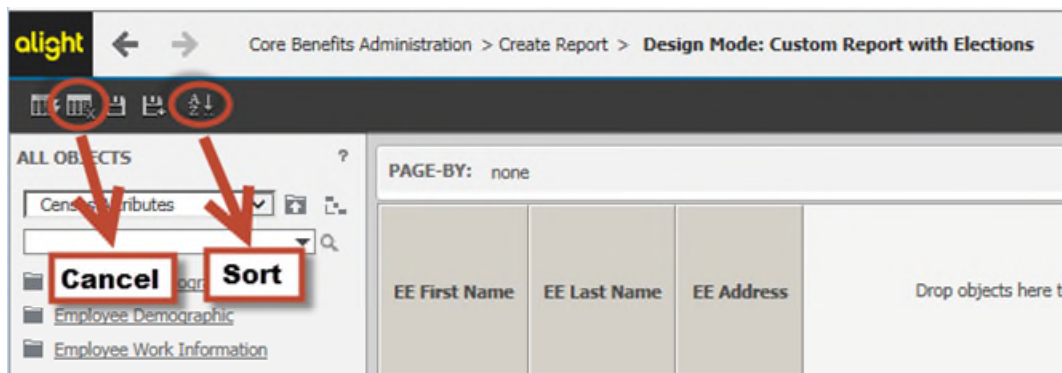
- Once you are ready to Run the report, select the **Run** icon
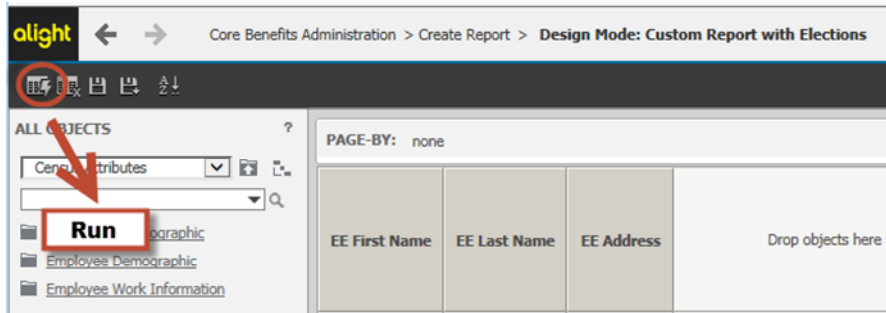


- Your report will now be displayed
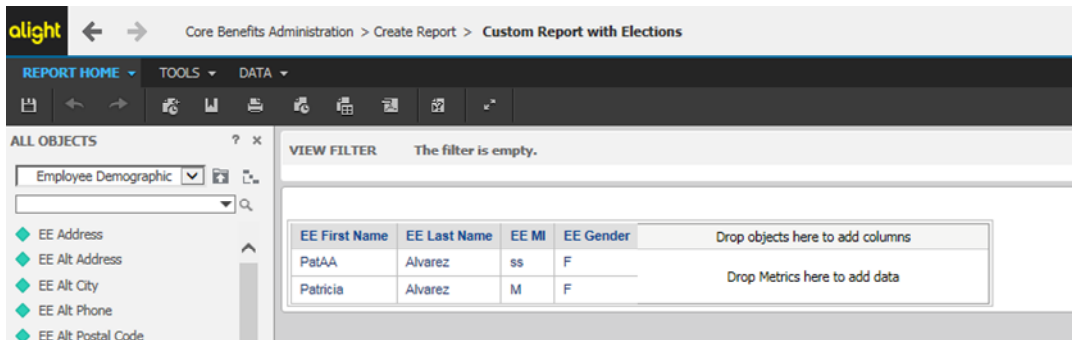


- Once your report has been Run, you now have several options to finish your report before you Save or Export it
  - You may continue to edit the column order as demonstrated in Chapter 3, Moving Columns
  - You may add new columns to your report by continuing selection from the left navigation. When a new column is added, the report will refresh to include all of that data in the report
  - You may add a filter to your report by selecting the **Add View Filter Condition** from the **Data** drop down menu
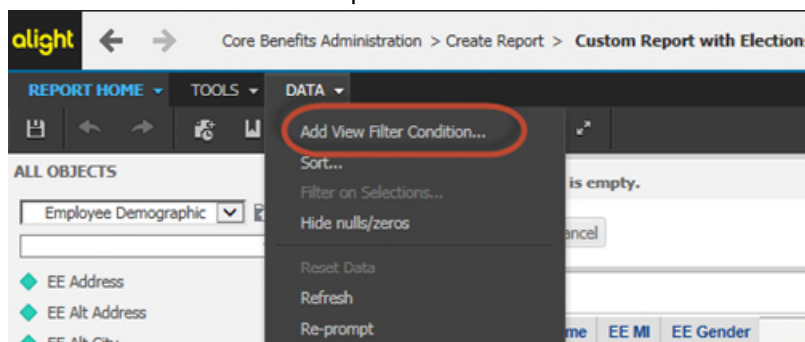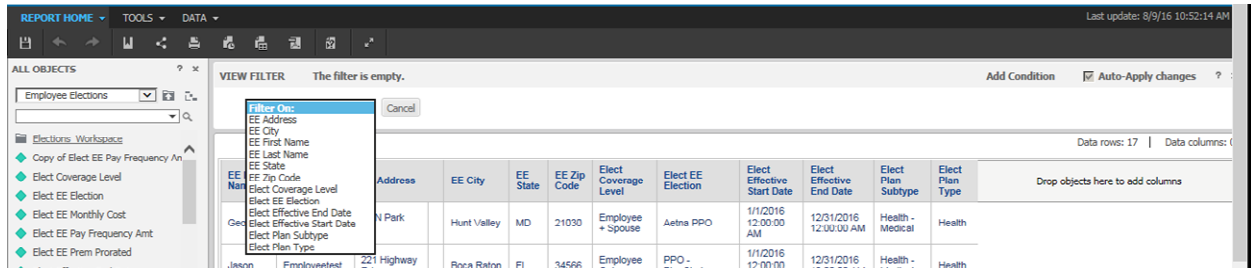
- Now that your report is finished, you can select an option from the taskbar to finalize this report. Below is a description of each available option:
  - Save: this allows you to save the report into your Reports folder so that you can easily rerun it in the future
  - Redo: this will redo an action that you had previously selected to undo
  - Undo: this will undo/take away the last action you completed
  - Create Personal View: this option will save the report in your Personal View on your Subscriptions Page. This allows you to easily rerun the report again in the future similar to saving the report in My Reports. It will not generate the report for you on an ongoing basis like a subscription/history list will.
  - Print: this selection will present printing options
  - Schedule Delivery to History List: this option will save the report in your History List on your Subscriptions Page. This allows you to have the report generated without your action in the timing you select.
  - Export: this will start the exporting process. For step by step instructions on the export options, please reference Chapter 4
  - PDF: this will print the report to PDF
  - Reprompt: this will take you through the prompt pages again if you wished to change how you answered those questions (i.e. employment status, plans, etc.)
  - Full Screen: this removes the left navigation and opens the report in full screen mode
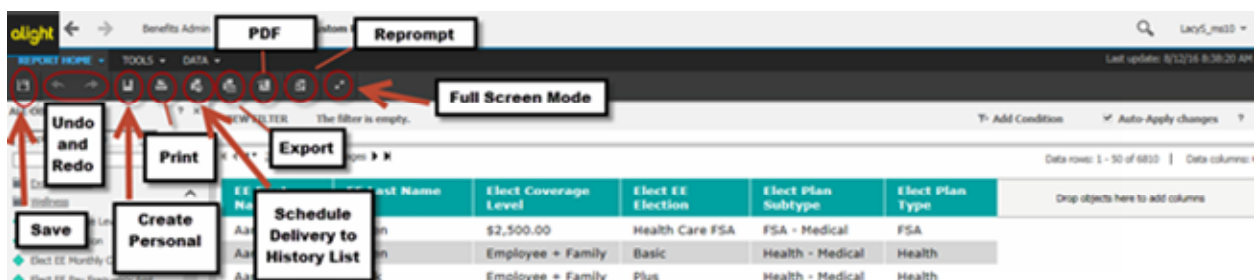
## Import Tips when creating a Custom Report with Elections

1. When exporting large reports, always export to CSV. This will make the download process faster.
2. Always include benefit effective start/end dates or election status. Since reports will return all results for the year and as participants make changes, there could be more than one row per benefit line
   a. NOTE: You can then use a filter to only include active elections through the filtering functionality
3. When wanting to view dependent elections, remember to place the Employee Election information as well since elections are initially stored at the employee level.
4. If you are looking to gather summary level data (i.e. what locations are stored in the system), just don't include Employee Demographic data and the tool will provide just the information requested.

## Custom Report without Elections

The Custom Report without Elections experience is identical to the Custom Report without Elections except for the prompt pages and the available fields/objects available for selection vary slightly.

After selecting to create a Custom Report without Elections, you will be taken through two prompt pages prior to reaching the custom ad-hoc page to select your fields.

- Confirm your **Employer**, then click **Edit in Design Mode** at the bottom of the page

- Select the **Employment Status'** that are required for your report from the List Select Prompt, then click **Edit in Design Mode** at the bottom of the page



- You will now be taken to the ad-hoc creation page and will need to select **All Objects** from the left navigation.

- **All Objects** is where you can select the fields/objects you want to add to your report by selecting the folder that contains the objects you want to add. You will notice that the election folders are not available since you have selected to run a report without elections. Your available options are:
    - ○ *NOTE: A full listing of available fields can be found in the Ad Hoc Reporting Fields Listing document on the training site.*
    - ○ **Dependent Demographic** folder contains fields related to dependent demographic fields like name, SSN, address and dependent verification information
    - ○ **Employee Demographic** folder contains the employee demographic fields like name, SSN, address and Medicare information
    - ○ **Employee Work Information** folder contains fields related to the employer like Employee ID, location, department, hire/rehire/term dates, user defined fields, etc.
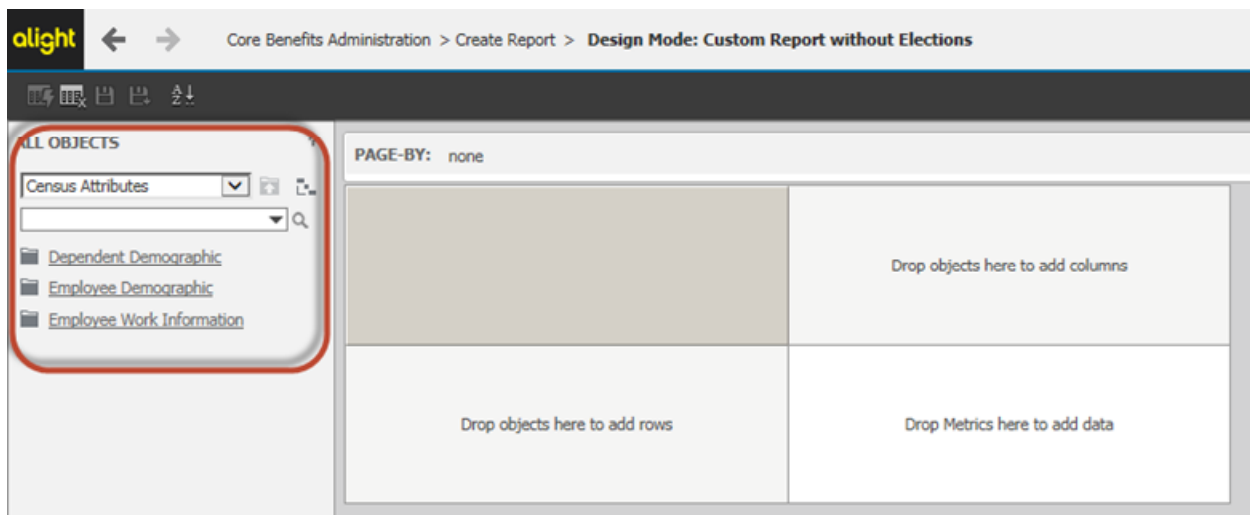


- For all remaining steps, please follow the process outlined in the **Custom Report with Elections** section

## Appendix A: Report Listing

This appendix contains a chart listing all available reports.

- **Column One** - lists each report folder and subfolder (if applicable).
- **Column Two** - lists each report available within the folders.
- **Column Three** - provides a brief description of the report.

| Folder/Subfolder | Available Report(s) | Report Description |
|---|---|---|
| A. Census | Census | Includes basic information about employees such as name, address, gender, date of birth, employment status, and email address. |
| | Emergency Contact Information | Provides census data along with primary and secondary emergency contact names and phone numbers. |
| B. Early Warnings | EW Certification Review Required | Lists an employee's dependents and condition code(s) identifying the type of certification required for them to maintain eligibility and to remove them from the report. |
| | EW Coverage Pending Termination | Identifies those employees and dependents whose coverage will terminate within the specified timeframe, along with the reason coverage is terminating. |
| | EW Dependent Coverage Pending Termination | Lists dependents whose coverage will terminate within the specified timeframe because of reaching child or student max age. |
| | EW Pending Coverage Revocation | Lists those employees that have elected excess coverage for one or more plans (such as life insurance) AND for whom approval/denial decision has not yet been entered. |

| Folder/Subfolder | Available Report(s) | Report Description |
|---|---|---|
| **C. Enrollment Summary and Details / Enrollment Disability** | Detail of Enrollment Summary Disability Report | Provides employee-specific detail (name, SSN, date of birth, elected coverage, and costs) about those employees enrolled in the disability plan(s). |
| | Enrollment Summary Disability Report | Provides summary information (total number of employees enrolled, total coverage volume, total costs) about those employees enrolled in the disability plan(s). |
| **C. Enrollment Summary and Details / Enrollment FSA** | Detail of Enrollment Summary FSA Report | Provides employee-specific detail (name, SSN, date of birth, deduction per pay, and annual contribution goal) about those employees enrolled in the flexible spending accounts. |
| | Enrollment Summary FSA Report | Provides summary information (total number of employees enrolled at each level of annual contribution goal) about those employees enrolled in the flexible spending accounts. |
| **C. Enrollment Summary and Details / Enrollment Health** | Detail of Enrollment Summary Health Report | Provides employee-specific detail (name, SSN, date of birth, tier level, and costs) about those employees enrolled in the health plan(s).<br><br>**NOTE:** Costs will include the 2% administrative surcharge for COBRA participants and should not be used for Premium Billing purposes. |
| | Enrollment Summary Health Report | Provides summary information (total number of employees enrolled in each plan and tier level with associated total cost) about those employees enrolled in the health plan(s). |

| Folder/Subfolder | Available Report(s) | Report Description |
|---|---|---|
| **C. Enrollment Summary and Details / Enrollment HSA** | Detail of Enrollment Summary HAS Report | Provides employee-specific detail (name, SSN, deduction per pay, and monthly contribution amount) about those employees enrolled in the healthcare savings account(s). |
| | Enrollment Summary HSA Report | Provides summary information (total number of employees enrolled at each level of monthly contribution amount) about those employees enrolled in the healthcare savings account(s). |
| **C. Enrollment Summary and Details / Enrollment Life** | Detail of Enrollment Summary Life Report | Provides employee-specific detail (name, SSN, date of birth, coverage volume, and costs) about those employees enrolled in the life and AD&D plan(s). |
| | Enrollment Summary Life Report | Provides summary information (total number of employees enrolled, total coverage volume, total costs) about those employees enrolled in the life and AD&D plan(s). |
| **C. Enrollment Summary and Details/Enrollment Other: Parking** | Detail of Enrollment Summary Other Report | Lists the name, SSN, date of birth, election amount, and costs for those employees enrolled in the Parking reimbursement or other parking plans offered. |
| **C. Enrollment Summary and Details / Enrollment Other: Parking** | Enrollment Summary Other Report | Lists the number of employees enrolled in each election amount along with total costs for the Parking reimbursement or other parking plans offered. |
| **D. Missing Enrollments** | Missing Enrollment | Displays those employees who have not yet enrolled in benefits for the specified time period. |
| **E. Pended** | Pended Report | Lists those employees whose benefit enrollment is pended, along with the elected and pended amounts. |

| Folder/Subfolder | Available Report(s) | Report Description |
|---|---|---|
| **F. Premium Statements / Premium Statement Disability** | Premium Disability Detail Report<br><br>*(in Premium Disability Age Based subfolder)* | Lists employee-level detail for all employees enrolled in the disability plan(s). Includes group number, age group, and rate per $100 for LTD and per $10 for STD.<br>*Excludes COBRA populations* |
| | Premium Disability Summary Report<br><br>*(in Premium Disability Age Based subfolder)* | Displays the total coverage amount and number of employees enrolled in the disability plan(s). Includes group number, age group, and rate per $1000.<br>*Excludes COBRA populations* |
| | Premium Statement Detail Disability Report - Department, Location<br><br>*(in Premium Statement Disability by Department, Location subfolder)* | Lists employee-level detail for all employees enrolled in the disability plan(s) by department and location. Includes coverage level and rate per $1000.<br>*Excludes COBRA populations* |
| | Premium Statement Summary Disability Report - Department, Location<br><br>*(in Premium Statement Disability by Department, Location subfolder)* | Lists the costs and total number of employees enrolled in the disability plan(s) by department and location. Includes coverage level and rate per $1000.<br>*Excludes COBRA populations* |
| | Premium Statement ER Detail Disability Report | Lists employee-level detail for all employees enrolled in the disability plan(s) by department and location. Includes paysite, coverage level, and rate per $1000.<br>*Excludes COBRA populations* |
| | Premium Statement ER Summary Disability Report | Lists the costs and total number of employees enrolled in the disability plan(s) by department and location. Includes paysite, coverage level, and rate per $1000. |

| Folder/Subfolder | Available Report(s) | Report Description |
|---|---|---|
| **F. Premium Statements / Premium Statement FSA** | Premium Statement Detail FSA Report by Department, Location<br><br>*(in Premium Statement FSA by Department, Location subfolder)* | Lists employee-specific detail (coverage level, name, SSN, pay frequency, deductions per pay, annual contribution amount) by department and location for employees enrolled in the flexible spending account(s). *\*Excludes COBRA populations* |
| | Premium Statement Summary FSA Report - Department, Location<br><br>*(in Premium Statement FSA by Department, Location subfolder)* | Lists the total number of employees enrolled in each annual contribution goal amount by department and location for employees enrolled in the flexible spending account(s). *\*Excludes COBRA populations* |
| | Premium Statement ER Detail FSA Report | Lists employee-level detail for all employees enrolled in the flexible spending account(s) by department and location. *\*Excludes COBRA populations* |
| | Premium Statement ER Summary FSA Report | Lists the total number of employees enrolled in each annual contribution goal amount for the flexible spending account(s) by department and location. *\*Excludes COBRA populations* |

| Folder/Subfolder | Available Report(s) | Report Description |
|---|---|---|
| **F. Premium Statements / Premium Statement Health** | Premium Statement Detail Health Report - Department, Location<br><br>*(in Premium Statement Health by Department, Location subfolder)* | Lists employee-specific detail (coverage level, name, SSN, effective dates, and costs) by department and location for employees enrolled in the health plan(s).<br>*Excludes COBRA populations* |
| | Premium Statement Summary Health Report - Department, Location<br><br>*(in Premium Statement Health by Department, Location subfolder)* | Lists the total number of employees enrolled in each health plan and tier level, along with associated costs, by department and location.<br>*Excludes COBRA populations* |
| | Premium Statement ER Detail Health Report | Lists the name, SSN and date of birth of those employees enrolled in the health plans offered and the costs associated with each level of coverage.<br>*Excludes COBRA populations* |
| | Premium Statement ER Summary Health Report | Lists the total number of employees enrolled in the health plans offered and the costs associated with each level of coverage.<br>*Excludes COBRA populations* |
| **F. Premium Statements / Premium Statement HSA** | Premium Statement ER Detail HSA Report | Lists the name, SSN and date of birth of those employees enrolled in the healthcare savings account(s) offered.<br>*Excludes COBRA populations* |
| | Premium Statement ER Summary HSA Report | This report lists the total number of employees enrolled in the healthcare savings account(s) offered and their associated costs.<br>*Excludes COBRA populations* |

| Folder/Subfolder | Available Report(s) | Report Description |
|---|---|---|
| **F. Premium Statements / Premium Statement Life** | Premium Life Detail Report – Age Based<br><br>*(in Premium Life Age Based subfolder)* | Lists employee-level detail for all employees enrolled in the life and AD&D plan(s). Includes group number, age group, and rate per $1000.<br>*\*Excludes COBRA populations* |
| | Premium Life Summary Report - Age Based<br><br>*(in Premium Life Age Based subfolder)* | Displays the total coverage amount and number of employees enrolled in the life and AD&D plan(s). Includes group number, age group, and rate per $1000.<br>*\*Excludes COBRA populations* |
| | Premium Statement Detail Life Report - Department, Location<br><br>*(in Premium Statement Life by Department, Location subfolder)* | Lists employee-level detail for all employees enrolled in the life and AD&D plan(s) by department and location. Includes coverage level and rate per $1000.<br>*\*Excludes COBRA populations* |
| | Premium Statement Summary Life Report - Department, Location<br><br>*(in Premium Statement Life by Department, Location subfolder)* | Lists the costs and total number of employees enrolled in the life and AD&D plan(s) by department and location. Includes coverage level and rate per $1000.<br>*\*Excludes COBRA populations* |
| | Premium Statement ER Detail Life Report | Lists employee-level detail for all employees enrolled in the life and AD&D plan(s) by department and location. Includes paysite, coverage level, and rate per $1000.<br>*\*Excludes COBRA populations* |
| | Premium Statement ER Summary Life Report | Lists the costs and total number of employees enrolled in the life and AD&D plan(s) by department and location. Includes paysite, coverage level, and rate per $1000.<br>*\*Excludes COBRA populations* |

| Folder/Subfolder | Available Report(s) | Report Description |
|---|---|---|
| **G. Transactions** | Loss/Gain Event Transactions | Lists the history information associated with the employee's loss of eligibility event and current information associated with the employee's gain of eligibility event within a designated time period. |
| | Transactions | Lists the requested transactions that have occurred within the specified time period. Includes date and time of the transaction, the person who performed the transaction, and details of what was done. |
| **H. Dependent and Beneficiary Data** | Beneficiary Designation Listing | Lists employees' beneficiaries and designations for the specified benefit plans and plan year. Identifies those employees who have not assigned beneficiaries. |
| | DCFSA with no Dependent Under 13 Years Old | Lists employees who have a Dependent Care Account with no dependents on file who are under 13 years of age. |
| | Dependent Audit Report | Identifies elections for dependents that may be questionable, such as dependents whose last name is different than the employee. |
| | Dependent Report | Lists detailed dependent information including name, SSN, relationship to employee, date of birth, and disabled/student indicators. |
| **I. Elections Data** | Elections Report | For each employee, lists benefit elections including coverage level, tax status, costs, effective dates, COBRA Indicator and Direct Bill Paid Thru Date. |
| | Employer HSA Report | Returns ER HSA elections that are active on the date input by the user at runtime. Information on the employee HSA and medical election for the employee is also included. |

| Folder/Subfolder | Available Report(s) | Report Description |
|---|---|---|
| **J. Eligibility Assignment Report** | Eligibility Assignment Report | Lists the name, social security number and employment status of those employees who<br>are either assigned to more than one eligibility group or who are not assigned to an eligibility group. |
| **K. Employee Survey Feedback** | Comment Listing | Provides a listing of all comments submitted<br>via the online survey by employees for the specified timeframe. |
| | Survey Summary Report | Summarizes online survey ratings provided by employees for the specified timeframe. |
| **L. User Login Information** | Unique Login Information | Lists users that have logged into the website<br>during the specified timeframe. Each user is shown once with earliest login time. |
| **M. Two Year Plan Comparison** | Two Year Plan Comparison – Disability | Information on employees migrating from one disability plan to another for the plan years specified |
| | Two Year Plan Comparison – FSA | Information on employees migrating from one FSA plan to another for the plan years specified |
| | Two Year Plan Comparison – Health | Information on employees migrating from one health plan to another for the plan years specified |
| | Two Year Plan Comparison – HSA | Information on employees migrating from one HSA plan to another for the plan years specified |
| | Two Year Plan Comparison – Life | Information on employees migrating from one life plan to another for the plan years specified |
| | Two Year Plan Comparison – Other | Information on employees migrating from one 'other' plan to another for the plan years specified |
| | Two Year Plan Comparison – Wellness | Information on employees migrating from one wellness plan to another for the plan years specified |

| Folder/Subfolder | Available Report(s) | Report Description |
|---|---|---|
| N. COBRA Reports | Active Elections With COBRA | For each employee or COBRA Qualified Beneficiary, lists benefit elections coverage level, costs, effective dates, COBRA Status, COBRA Subsidy information and Direct Bill Paid Through Date.<br><br>**NOTE:** Costs will include the 2% administrative surcharge for COBRA participants and should not be used for Premium Billing purposes. |
| | COBRA Continuant Status Report | Lists COBRA Qualified Beneficiaries by status, COBRA Qualifying Event details, Direct Billing information and Paid Through Date and COBRA Subsidy information. |

## Appendix B: Report Codes

This appendix contains a listing of report codes that appear on various reports along with the explanation of what each code represents.

| Report Name | Category or Column Name | Codes and Descriptions |
|---|---|---|
| EW Certification Review Required | Dep Relationship | C = Child<br>D = Domestic Partner<br>H = Disabled Child<br>L = Legal Dependent<br>N = Civil Union<br>Q = Child of Domestic Partner<br>S = Spouse |
| | Condition Code | DP = Domestic Partner<br>HC = Disabled<br>LD = Legal Dependent<br>NC = New Child Dependent (Birth/Adoption)<br>NS = New Spouse Dependent<br>SC = FT Student Dependent Child |
| EW Coverage Pending Termination | Reason | LOPE = Loss of Plan Eligibility<br>MED = Missing Eligible Dependents |
| EW Dependent | Dep Relationship | C = Child |

| Coverage Pending Termination | | S = Spouse |
|---|---|---|
| | Condition Code | CMA = Child Maximum Age<br>DEL = Deactivated / Deleted Dependent<br>DMA = Disabled Maximum Age INVREL = Invalid Relationship SMA = Student Maximum Age |
| EW Pending Coverage Revocation | Condition Code | PEND = Pending |
| Dependent Report | DEP Type | BEN = Beneficiary Only<br>BTH = Both Dependent and Beneficiary<br>DEP = Dependent Only |