



# **Core Benefits Administration**

Reports Reference Guide

July 2019

**alight**

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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

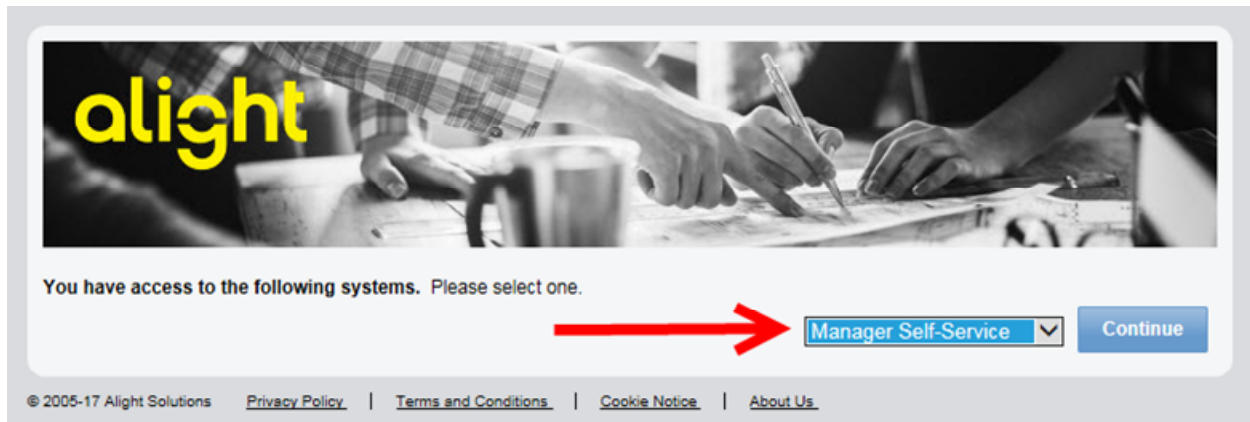
To access the reporting tool:

- 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.

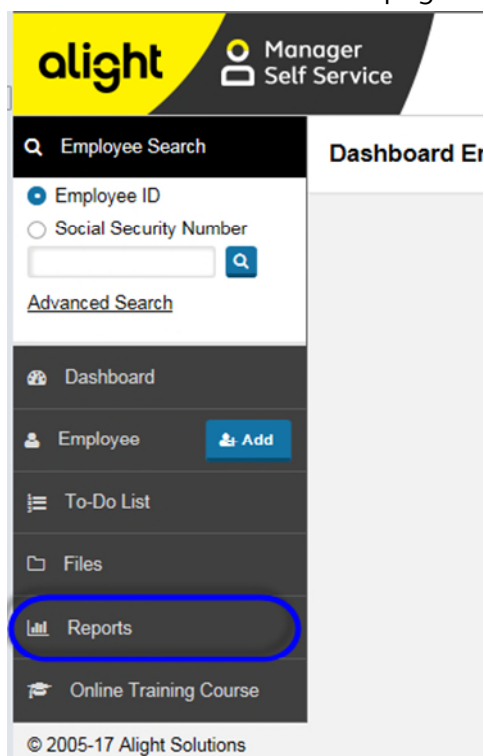
The screenshot shows a login interface for the CBA X Internal Environment. On the left, under the heading "Log On to Your Health & Insurance Benefits", there is a light blue box containing a login form. The form has two input fields: "Username:" and "Password:", both marked with a red asterisk as required fields. Below these fields is a blue "Log On" button. At the bottom of the box, it says "By logging on, you agree to the [Terms & Conditions](#)." On the right side of the page, under the heading "Welcome to CBA X Internal Environment", there is a message: "We are pleased to offer this web based enrollment and communication solution. Through this site, you can learn about, enroll in, and manage your benefits year round." At the bottom of the page, there is a footer with the text "© 2005-17 Alight Solutions" followed by links for "Privacy Policy", "Terms and Conditions", "Cookie Notice", and "About Us".

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



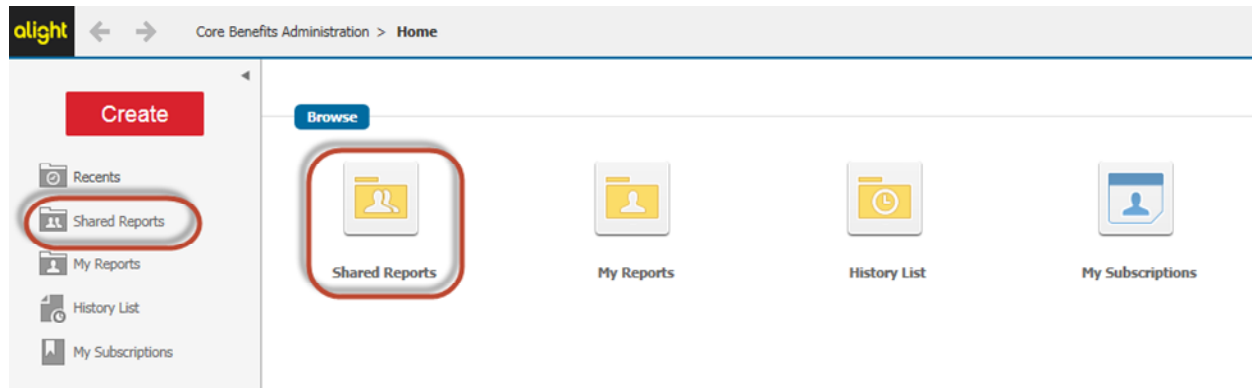


- From the MSS home page click on the **Reports** link from the left navigation bar.



## Report Organization

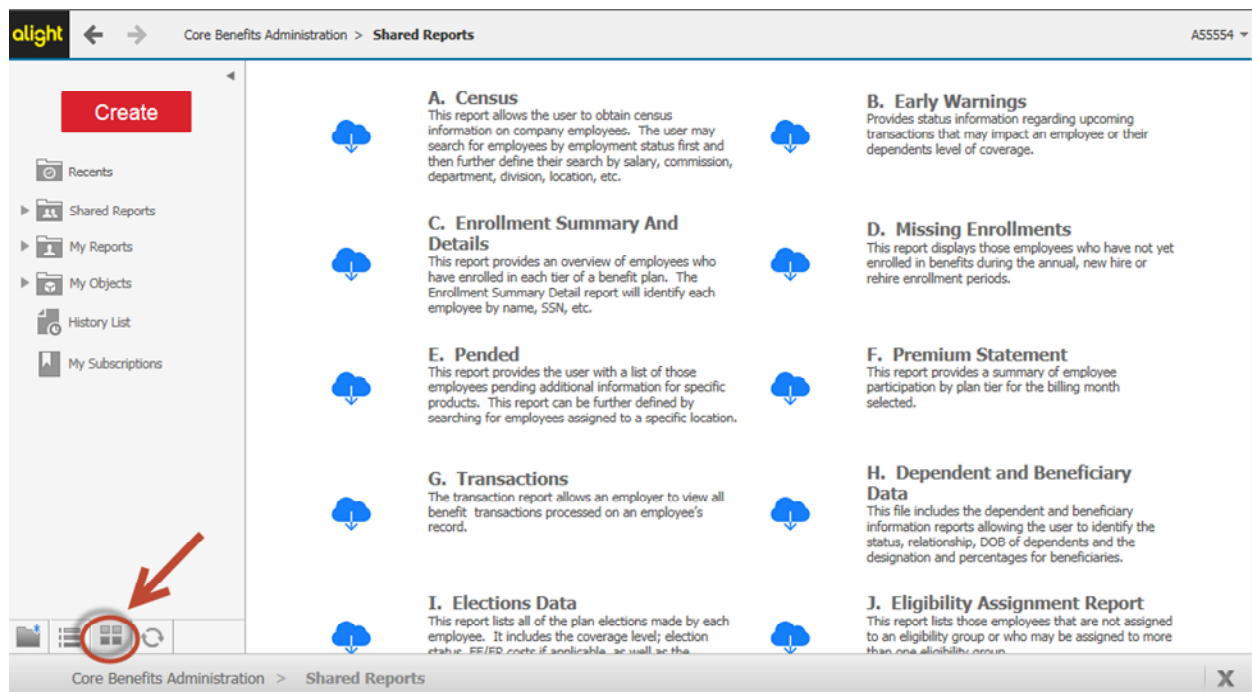
Reports are grouped in folders based on the type of data included in the report. From the homepage, you can select the **Shared Reports** icon or select **Shared Reports** from the left navigation.



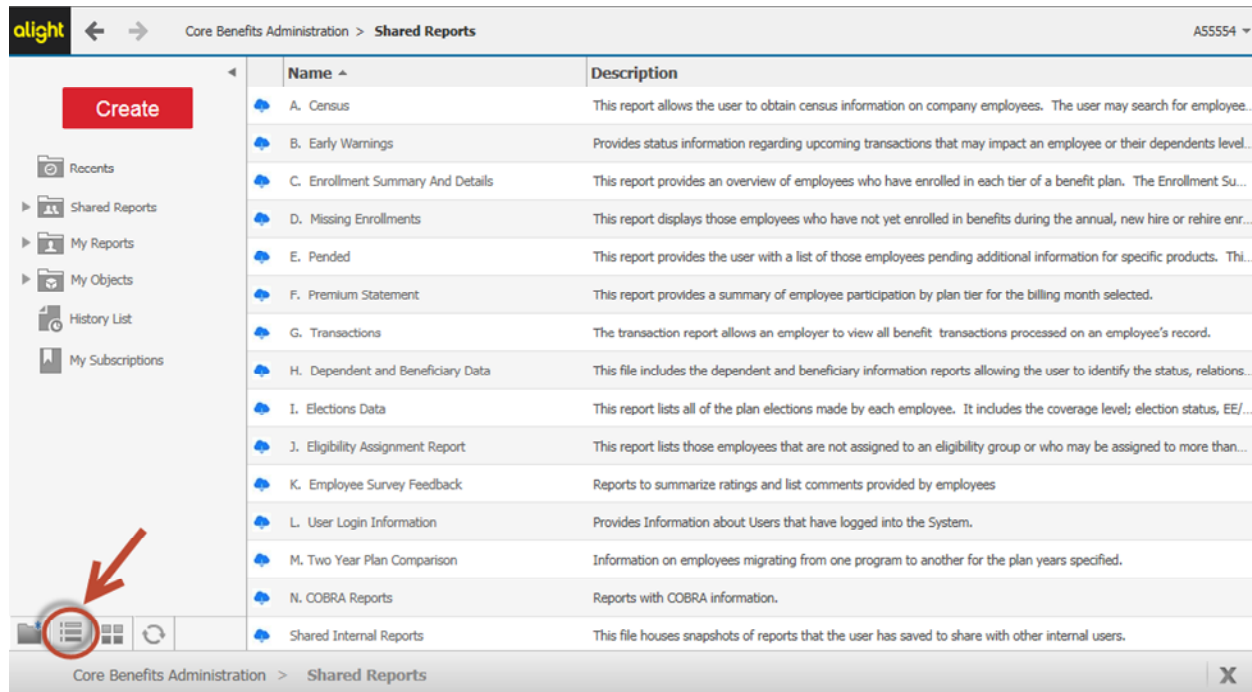
Once within the **Shared Reports** main folder, users can see all of the report folders. Beside each folder icon users will see the name and a description of the type of reports included in that folder.

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.

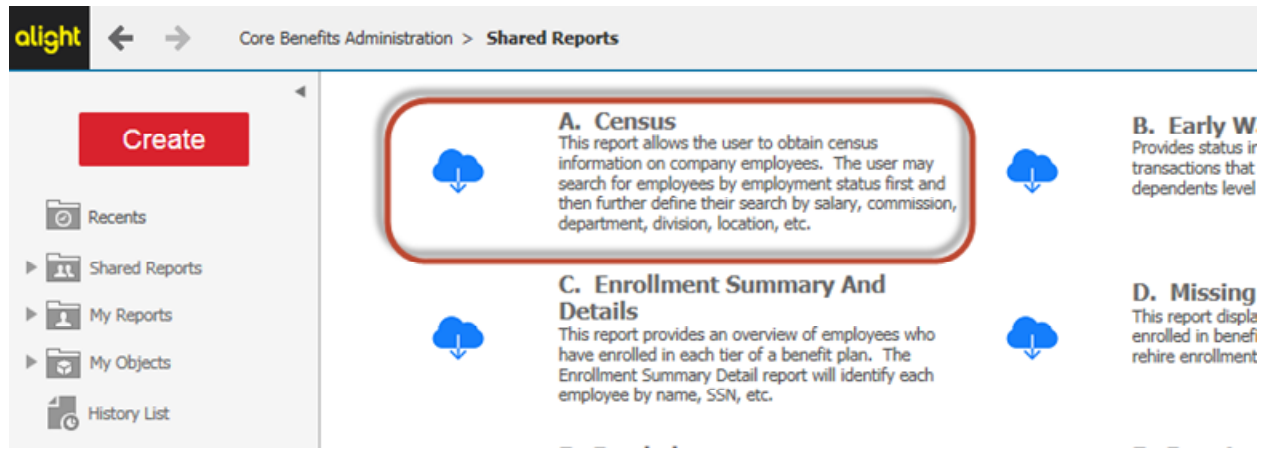
## Chapter 2: Running Reports

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

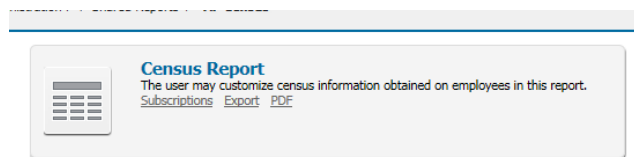
### Running a Quick Report (Standard)

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

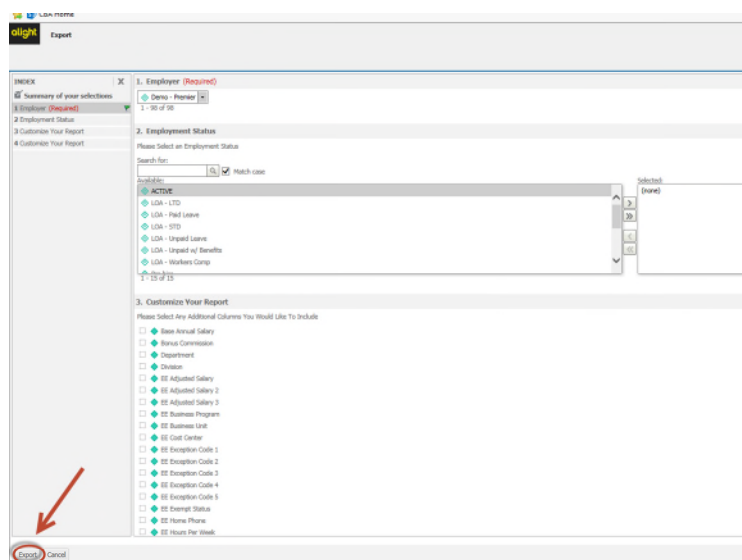
- From the main **Shared Reports** page click the desired report folder and subfolder (if necessary).
- Users can click on the folder icon or the name.



- 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

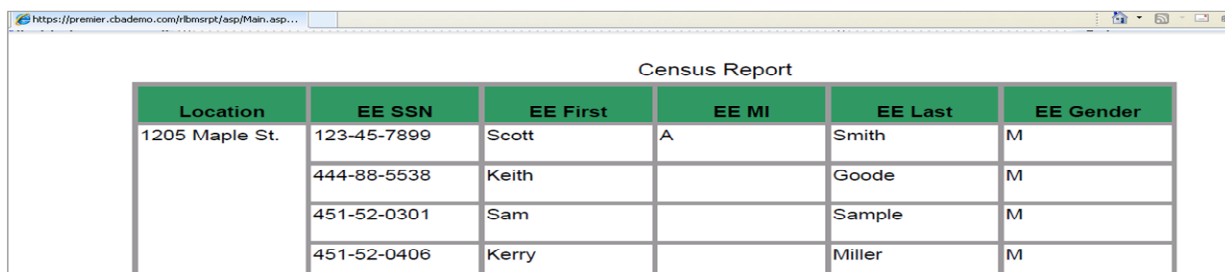
Current status: Report ready

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.

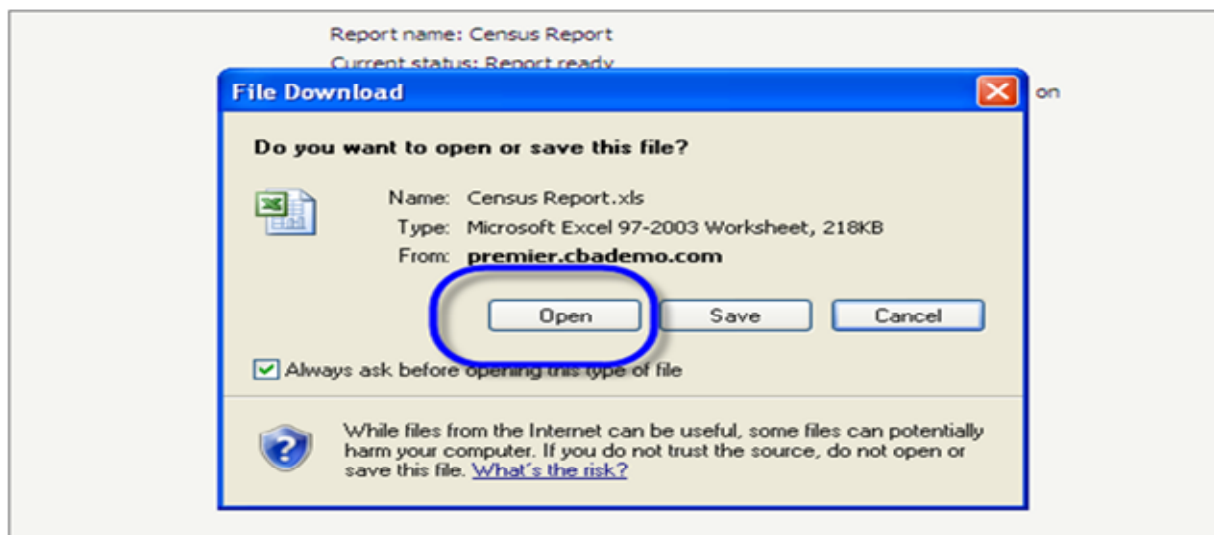
[Close window](#)

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



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

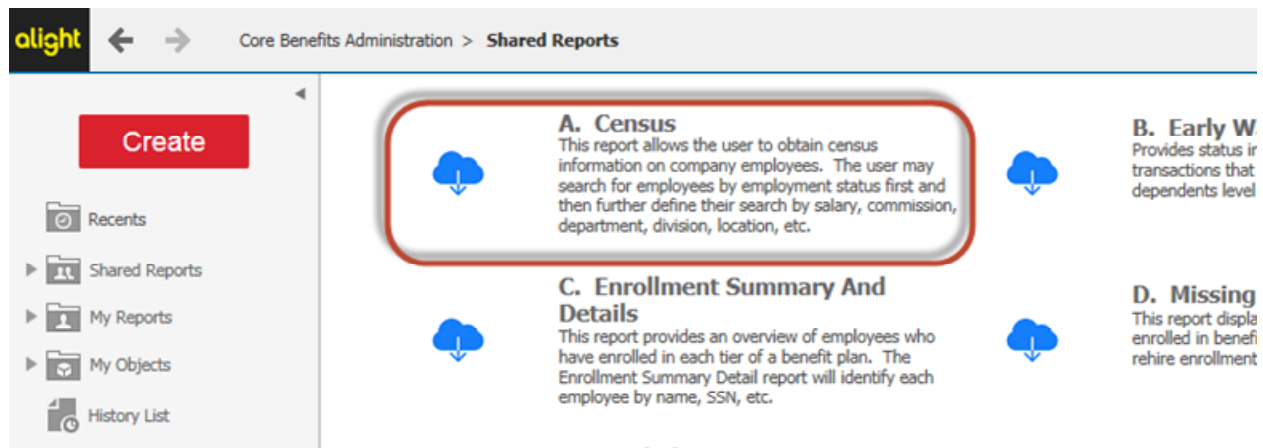
- If you selected Export the report will automatically be exported to Excel. Once the report is complete a pop up box will appear prompting the user to open the report in Excel.



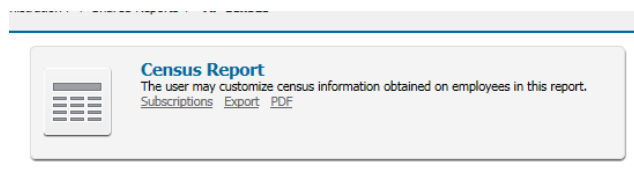
## Using Prompt Pages to Add/Narrow down Report Data

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.



alight Core Benefits Administration > Shared Reports > A. Census > Census Report

**INDEX**

Summary of your selections

1. Employer (Required) ✓

2. Employment Status

3. Customize Your Report

4. Customize Your Report

**1. Employer (Required)**

◆ Demo - Premier

1 - 98 of 98

**2. Employment Status**

Please Select an Employment Status

Search for:  ☒ Match case

Available:

- ◆ ACTIVE
- ◆ LOA - LTD
- ◆ LOA - Paid Leave
- ◆ LOA - STD
- ◆ LOA - Unpaid Leave
- ◆ LOA - Unpaid w/ Benefits
- ◆ LOA - Workers Comp

1 - 15 of 15

Selected: (none)

**3. Customize Your Report**

Please Select Any Additional Columns You Would Like To Include

- ☐ ◆ Base Annual Salary
- ☐ ◆ Bonus Commission
- ☐ ◆ Department
- ☐ ◆ Division

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.

alight Core Benefits Administration > Shared Reports > C. Enrollment Summary And Details > Enrollment Summary

**INDEX**

- Summary of your selections
- 1 Employer (Required) ✓
- 2 Start Date (Required)
- 3 End Date (Required)
- 4 Customize Your Report
- 5 Customize Your Report
- 6 Customize Your Report

**1. Employer (Required)**

Please Select An Employer

◆ Demo - Premier

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**2. Start Date (Required)**

Enter a Value(Date) - This date value reports against the plan effective start dates.

**3. End Date (Required)**

Enter a Value(Date) - This date value reports against the plan effective start dates.

**4. Customize Your Report**

- 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.

alight Core Benefits Administration > Shared Reports > F. Premium Statement > Premium Statement Disability > Premium Disability Age

**INDEX**

- Summary of your selections
- 1 Employer (Required) ✓
- 2 Billing Month (Required)
- 3 Billing Year (Required)
- 4 Customize Your Report
- 5 Customize Your Report
- 6 Include Mid-Month Changes and Terms in Report Results

**1. Employer (Required)**

◆ Demo - Premier

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**2. Billing Month (Required)**

Please Enter a Numeric Month Value Between (1 for Jan) and (12 for Dec)  
This prompt requires a value between 1 and 12.

**3. Billing Year (Required)**

Enter a value (Number).  
This prompt requires a value between 2010 and 2019.

**4. Customize Your Report**

Optional column to include on the report.

- ◆ EE Division
- ◆ EE ER Assigned ID
- ◆ EE Exception Code 1
- ◆ EE Exception Code 2

## 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.

2. Employment Status

Please Select an Employment Status

Search for:  ☒ Match case

Available:

- Active
- LOA - LTD
- LOA - Paid Leave
- LOA - STD
- LOA - Unpaid Leave
- LOA - Unpaid w/ Benefits
- LOA - Workers Comp

Selected: (none)

1 - 15 of 15

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.

2. Employment Status

Please Select an Employment Status

Search for:  ☒ Match case

Available:

- Active
- LOA - LTD
- LOA - Paid Leave
- LOA - STD
- LOA - Unpaid Leave
- LOA - Unpaid w/ Benefits
- LOA - Workers Comp

Selected: (none)

1 - 15 of 15

**2. Employment Status**

Please Select an Employment Status

Search for:  ☒ Match case

Available:

- LOA - LTD
- LOA - Paid Leave
- LOA - STD
- LOA - Unpaid Leave
- LOA - Unpaid w/ Benefits
- LOA - Workers Comp
- Pre-hire

Selected:

- Active

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- 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 – Unpaid Leave.**

**2. Employment Status**

Please Select an Employment Status

Search for:  ☒ Match case

Available:

- Active
- LOA - LTD
- LOA - Paid Leave
- LOA - STD
- LOA - Unpaid Leave
- LOA - Unpaid w/ Benefits
- LOA - Workers Comp

Selected:

(none)

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**2. Employment Status**

Please Select an Employment Status

Search for:  ☒ Match case

Available:

- LOA - LTD
- LOA - STD
- LOA - Unpaid w/ Benefits
- LOA - Workers Comp
- Pre-hire
- Retired
- Surviving Dependent

Selected:

- Active
- LOA - Paid Leave
- LOA - Unpaid Leave

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- 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.

**2. Employment Status**

Please Select an Employment Status

Search for:  ☒ Match case

Available:

- LOA - LTD
- LOA - STD
- LOA - Unpaid w/ Benefits
- LOA - Workers Comp
- Pre-hire
- Retired
- Surviving Dependent

Selected:

- Active
- LOA - Paid Leave
- LOA - Unpaid Leave

1 - 15 of 15

**2. Employment Status**

Please Select an Employment Status

Search for:  ☒ Match case

Available:

- Active
- LOA - LTD
- LOA - STD
- LOA - Unpaid w/ Benefits
- LOA - Workers Comp
- Pre-hire
- Retired
- Surviving Dependent

Selected:

- LOA - Paid Leave
- LOA - Unpaid Leave

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- 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.

**2. Employment Status**

Please Select an Employment Status

Search for:  ☒ Match case

Available:

- LOA - LTD
- LOA - STD
- LOA - Unpaid w/ Benefits
- LOA - Workers Comp
- Pre-hire
- Retired
- Surviving Dependent

Selected:

- Active
- LOA - Paid Leave
- LOA - Unpaid Leave

1 - 15 of 15

**2. Employment Status**

Please Select an Employment Status

Search for:  ☒ Match case

Available:

- Active
- LOA - LTD
- LOA - STD
- LOA - Unpaid Leave
- LOA - Unpaid w/ Benefits
- LOA - Workers Comp
- Pre-hire
- Retired
- Surviving Dependent

Selected:

- LOA - Paid Leave

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**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.

The screenshot shows a web interface titled "1. Plans". At the top, there is a "Search for:" box containing the word "Dental", followed by a magnifying glass icon and a "Match case" checkbox. Below this is a list of "Available:" items, each preceded by a diamond icon. The list includes: "Cigna:Dental - HMO:Health - Dental", "Cigna:Dental - Out of Area PPO:Health - Dental", "Cigna:Dental - Out of Area PPO:Health - Dental", "Cigna:Dental - PPO:Health - Dental", "Cigna:Dental - HMO:Health - Dental", and "Cigna:Dental - PPO:Health - Dental". To the right of the available list is a "Selected:" box, which currently contains "(none)". Navigation arrows are present between the available and selected lists. A red circle highlights the search box, and another red circle highlights the list of available 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.

alight Core Benefits Administration > Shared Reports > F. Premium Statement > Premium Statement Disability > Premium Dis

INDEX X

Summary of your selections

- 1 Employer (Required)
- 2 Billing Month (Required)
- 3 Billing Year (Required)
- 4 Customize Your Report
- 5 Customize Your Report
- 6 Include Mid-Month Changes and Terms in Report Results

Enter a value (required):

This prompt requires a value between 2010 and 2019.

2018

#### 4. Customize Your Report

Optional column to include on the report.

- ☒ EE Division
- ☒ EE ER Assigned ID
- ☒ EE Exception Code 1
- ☒ EE Exception Code 2
- ☒ EE Exception Code 3
- ☐ EE Exception Code 4
- ☐ EE Exception Code 5
- ☐ EE Exempt Status
- ☐ EE Hours Per Week
- ☐ EE HRIS
- ☐ EE Job Class

## 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

alight Core Benefits Administration > Shared Reports > A. Census > Census Report

REPORT HOME TOOLS DATA

ALL OBJECTS

DATA

- Add View Filter Condition...
- Sort...
- Filter on Selections...
- Hide nulls/zeros
- Reset Data
- Refresh
- Re-prompt

	EE First	EE MI	EE Last	EE Gender	EE DOB	Address
159	Smoke Test		Aug Release	M	8/24/1970 12:00:00 AM	10 North Par Dr. Suite 1C
111	Jon		Doe	M	1/1/1980 12:00:00 AM	123 Main

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:

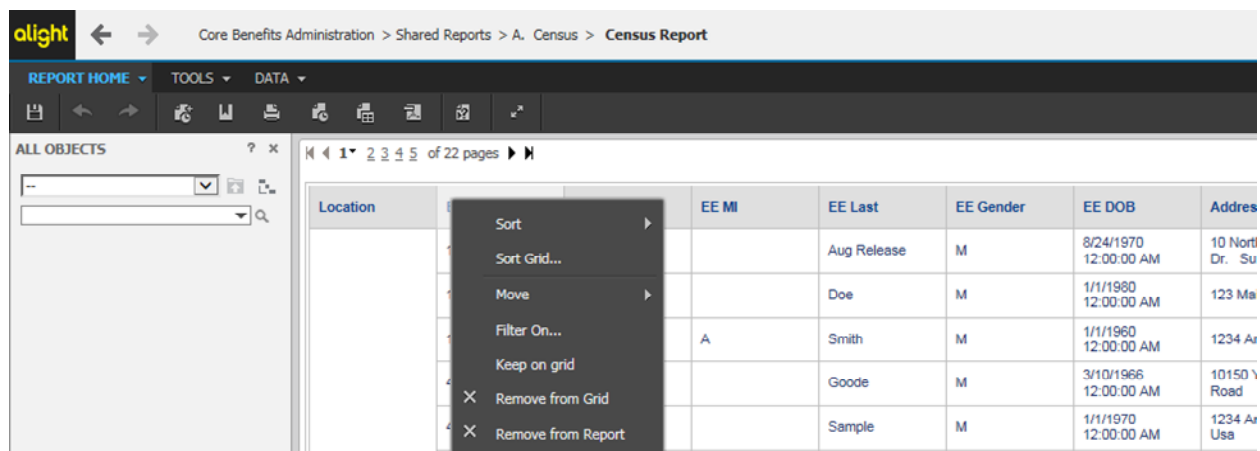
- Deleting or moving columns
- Sorting
- Filtering
- Changing formatting and colors

### 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.



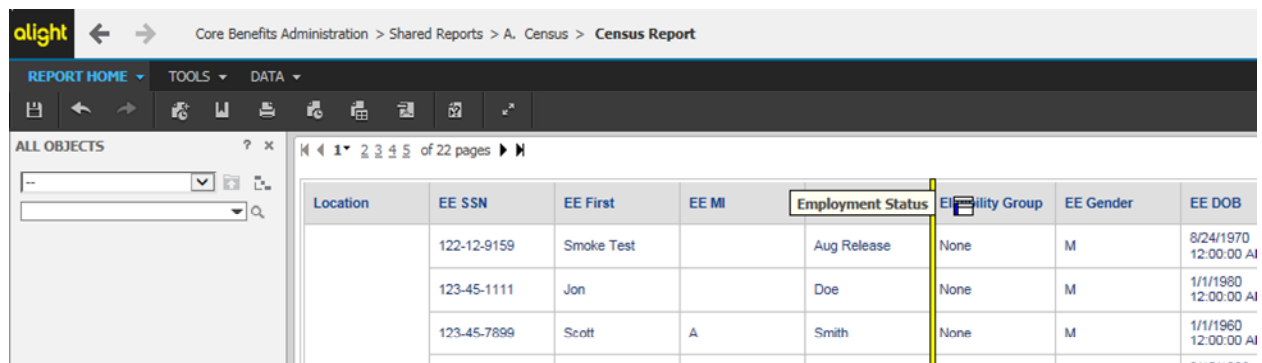
There are three options for moving columns:

- 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.

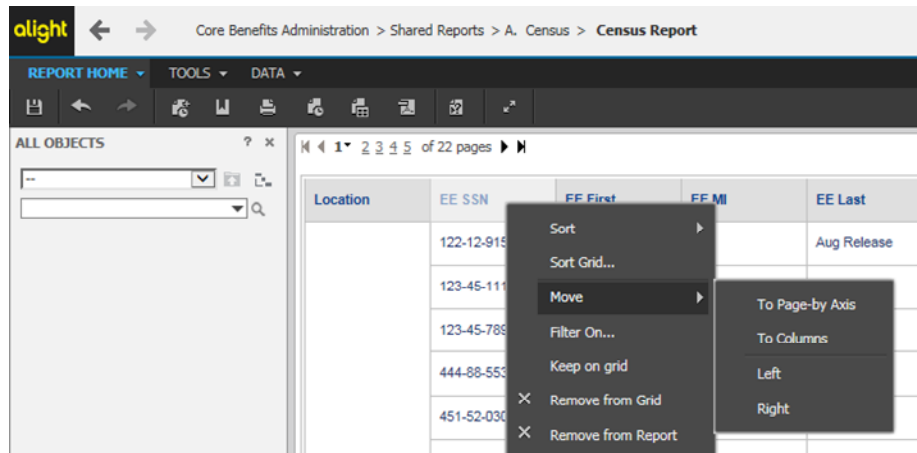


Location	EE SSN	EE First	EE MI	Employment Status	Eligibility Group	EE Gender	EE DOB
	122-12-9159	Smoke Test		Aug Release	None	M	8/24/1970 12:00:00 AI
	123-45-1111	Jon		Doe	None	M	1/1/1980 12:00:00 AI
	123-45-7899	Scott	A	Smith	None	M	1/1/1960 12:00:00 AI

## Drop Down Menu

To move a column using the drop down menu:

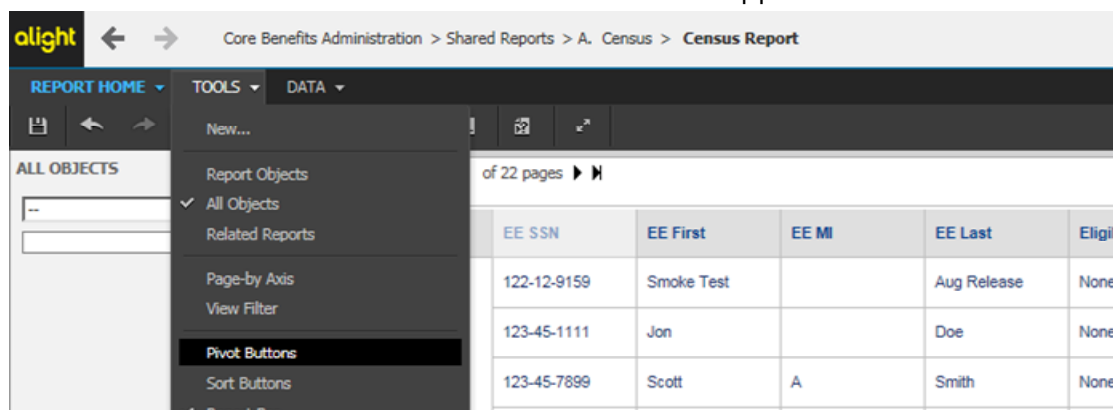
- Place the cursor over the column heading that needs to be moved.
- Right click to display the drop down menu.
- Place your cursor over the **Move** option to expand a second menu.
- Select either **Left** or **Right** to move the column one spot in that direction.
  - In the screen shot below the EE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



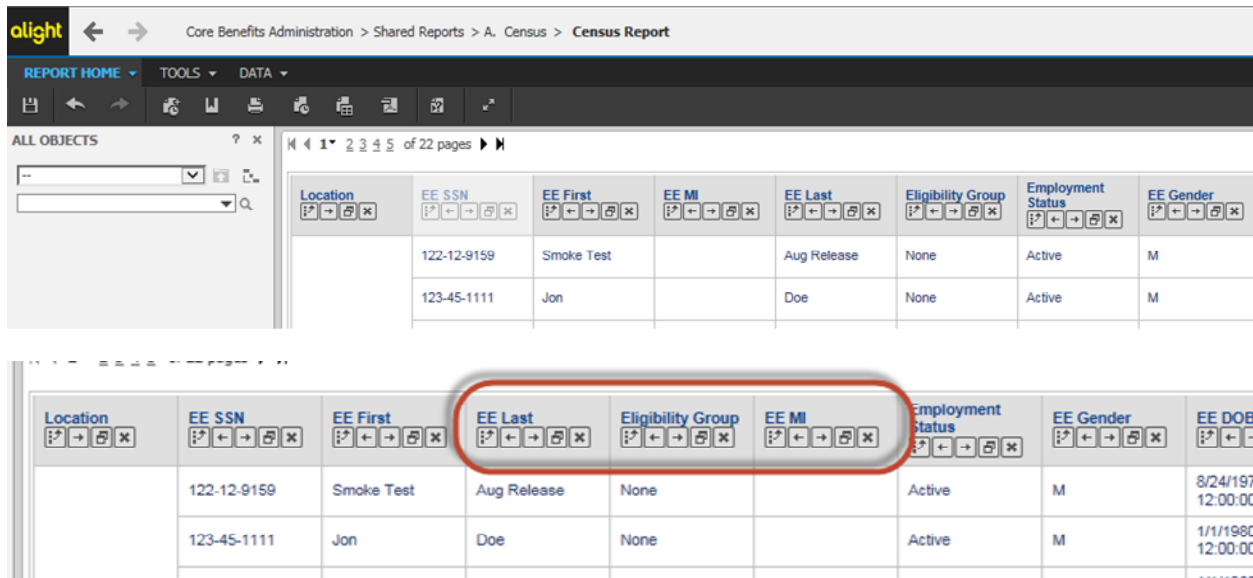
## Pivot Buttons

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.
  - 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.



Location	EE SSN	EE First	EE MI	EE Last	Eligibility Group	Employment Status	EE Gender
122-12-9159		Smoke Test		Aug Release	None	Active	M
123-45-1111		Jon		Doe	None	Active	M

Location	EE SSN	EE First	EE Last	Eligibility Group	EE MI	Employment Status	EE Gender	EE DOB
122-12-9159		Smoke Test	Aug Release	None		Active	M	8/24/197 12:00:00
123-45-1111		Jon	Doe	None		Active	M	1/1/1980 12:00:00

## Sorting Data

Users may need to sort reports in order to display report information in a certain order.

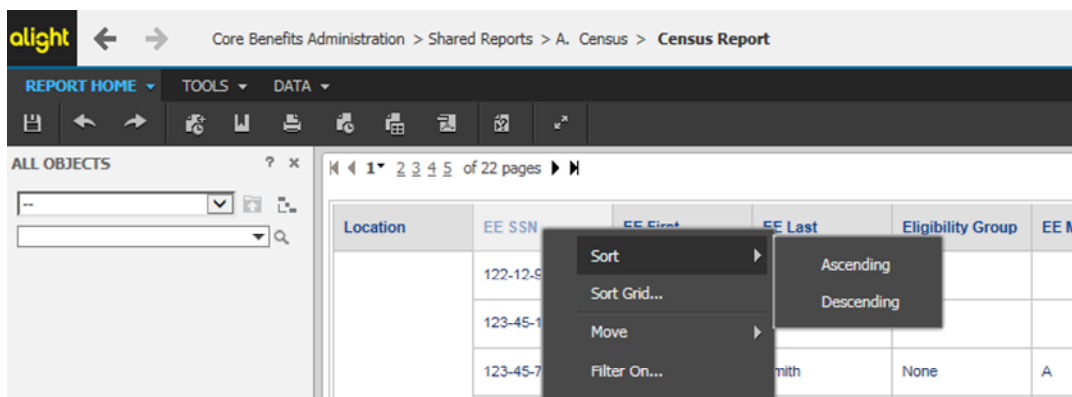
There are two different options for sorting data:

- 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**.



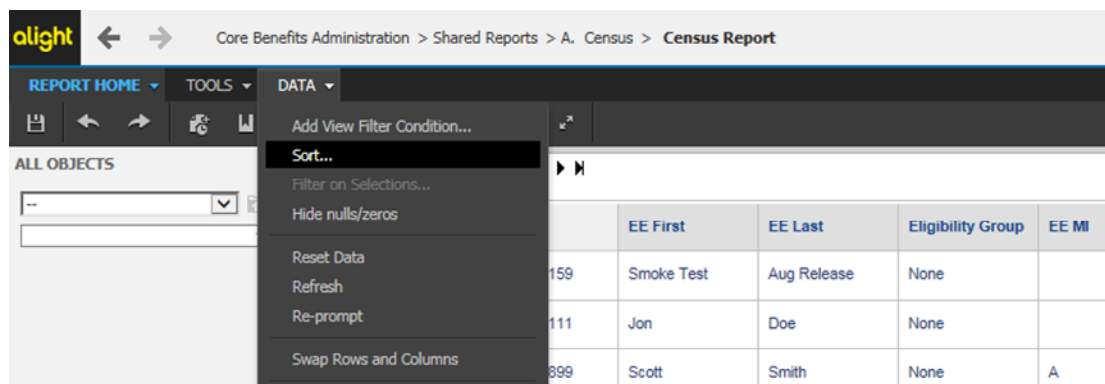
Location	EE SSN	EE First	EE Last	Eligibility Group	EE MI
122-12-9159		Smoke Test	Aug Release	None	
123-45-1111		Jon	Doe	None	
123-45-7			Smith	None	A

## Tool Bar Options

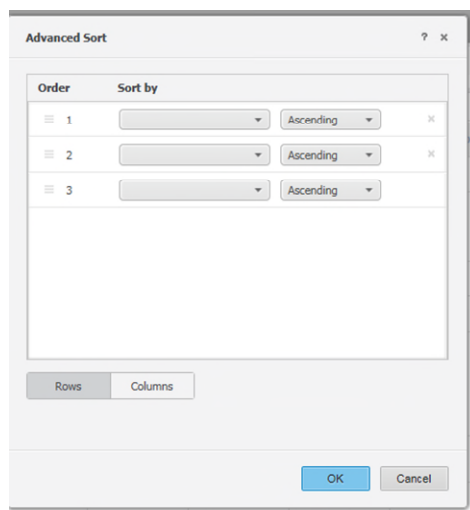
The tool bar option allows users to sort using up to three columns of data.

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**.

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

The 'Advanced Sort' dialog box shows a table with three rows. Row 1 is sorted by 'EE First Name (EE ID)' in 'Ascending' order. Row 2 is sorted by 'EE Location (Location Na. v)' in 'Ascending' order. Row 3 is currently empty. Below the table are 'Rows' and 'Columns' tabs, and 'OK' and 'Cancel' buttons.

Order	Sort by
1	EE First Name (EE ID) Ascending
2	EE Location (Location Na. v) Ascending
3	

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	Giro	None		Active	F	3/9/1960 12:00:00 AM
	999-39-0038	Allison	Keaton	None		Active	F	9/16/1977 12:00:00 AM

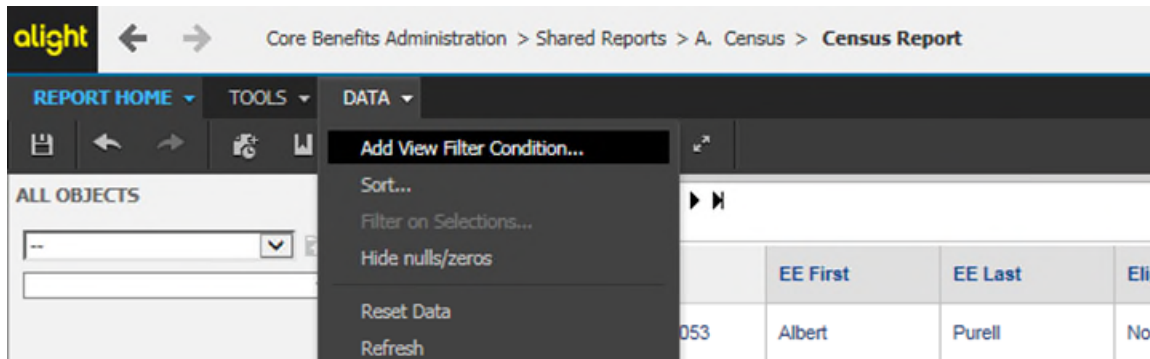
- Users have the option to select Ascending or Descending after they have made their prompt selections.

## Filtering Data

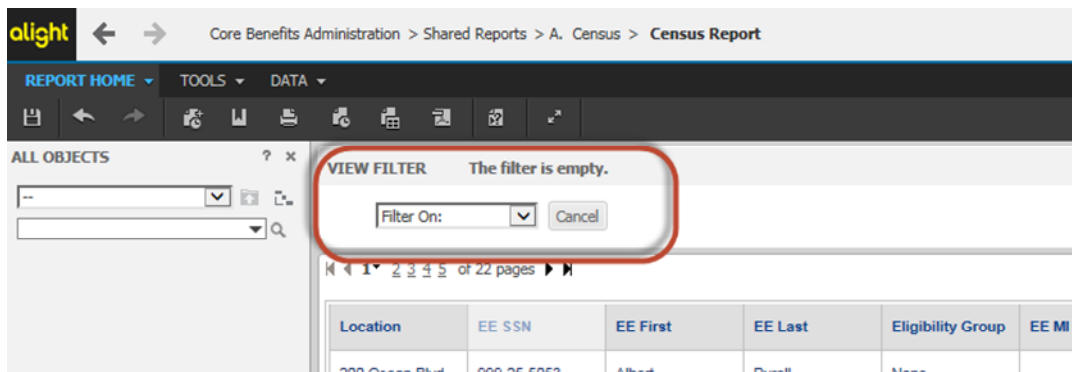
Reports often contain a large amount of data and users may want to narrow down the information by filtering out unwanted data.

To add a filter(s) to the report:

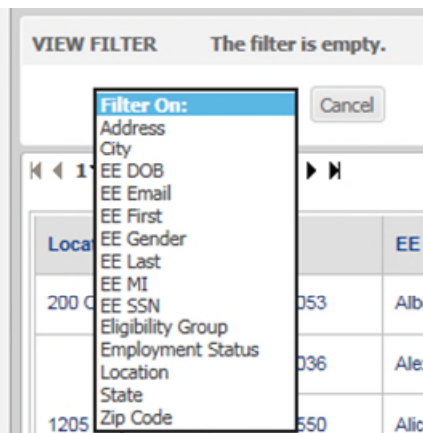
- Click on the **Data** tab on the gray tool bar.
- The drop down menu will display.
- Click **Add View Filter Condition**.



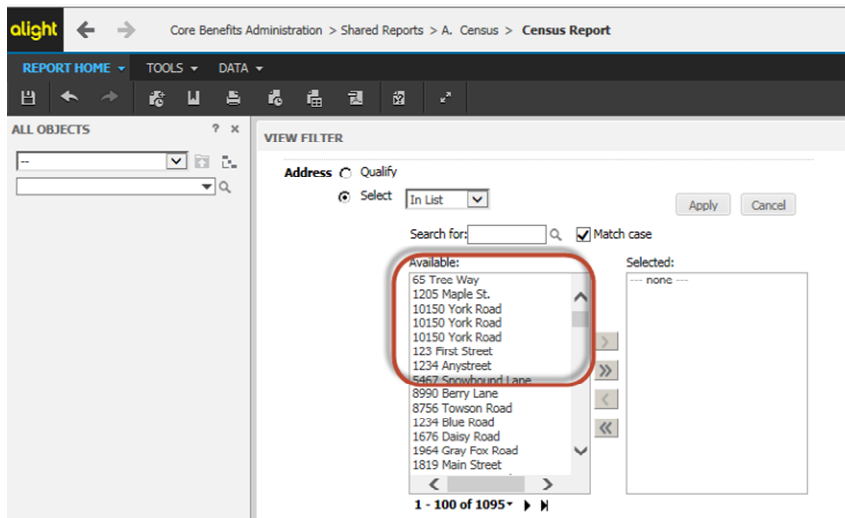
- This will turn the filter option on.



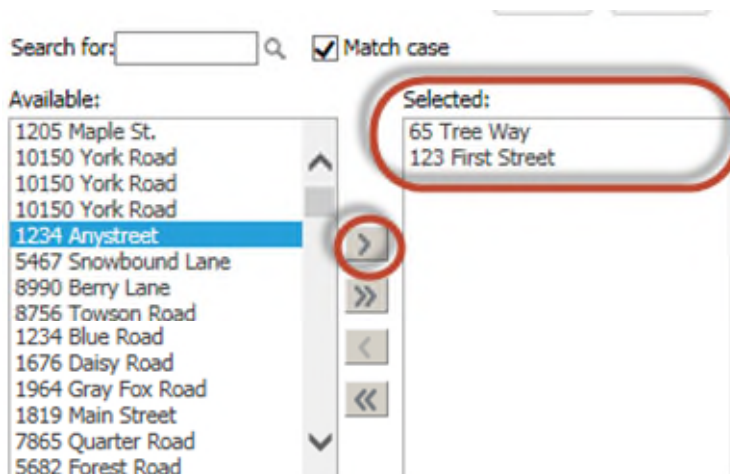
- Click the drop down arrow beside **Filter On**.
- A list of options will display.
- Select the desired option to filter the report on.



- Based on the selection additional filter items will appear in the **Available** box.
  - 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.

Core Benefits Administration > Shared Reports > A. Census > Census Report

REPORT HOME TOOLS DATA

ALL OBJECTS

VIEW FILTER

Address Qualify

Select In List

Search for: Match case

Available:

- 1205 Maple St.
- 10150 York Road
- 10150 York Road
- 10150 York Road
- 1234 Anystreet
- 5467 Snowbound Lane
- 8990 Berry Lane

Selected:

- 65 Tree Way
- 123 First Street

Apply Cancel

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

Core Benefits Administration > Shared Reports > A. Census > Census Report

REPORT HOME TOOLS DATA

ALL OBJECTS

VIEW FILTER

Address In List (65 Tree Way , 123 First Street )

Location	EE SSN	EE First	EE Last	Eligibility Group	EE MI
----------	--------	----------	---------	-------------------	-------

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

Core Benefits Administration > Shared Reports > A. Census > Census Report

REPORT HOME TOOLS DATA

ALL OBJECTS

VIEW FILTER

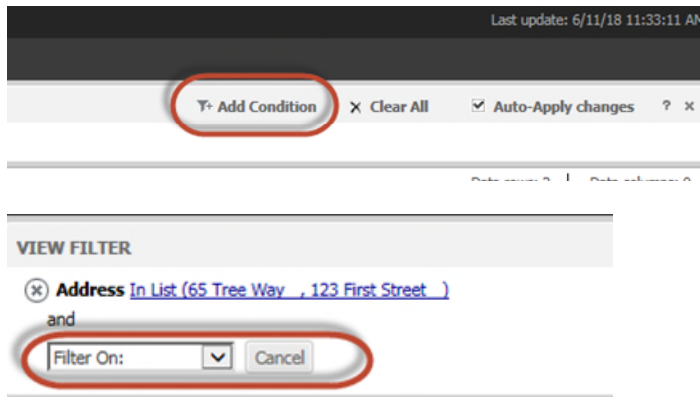
Address In List (65 Tree Way , 123 First Street )

Location	EE SSN	EE First	EE Last	Eligibility Group	EE MI
----------	--------	----------	---------	-------------------	-------

- 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**.

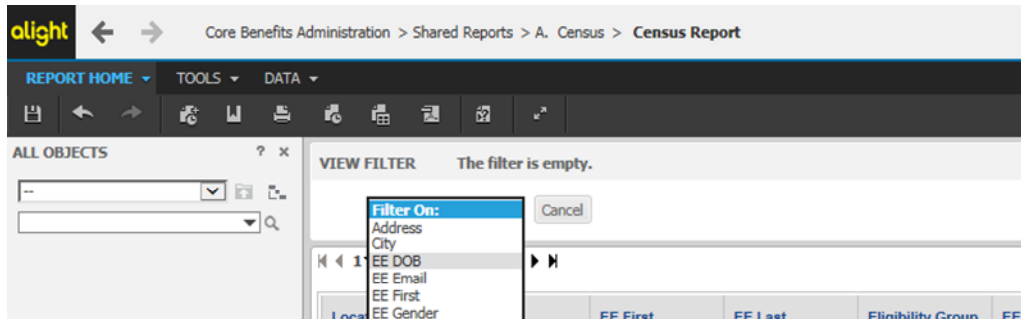


## Using a Qualifier (range)

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.



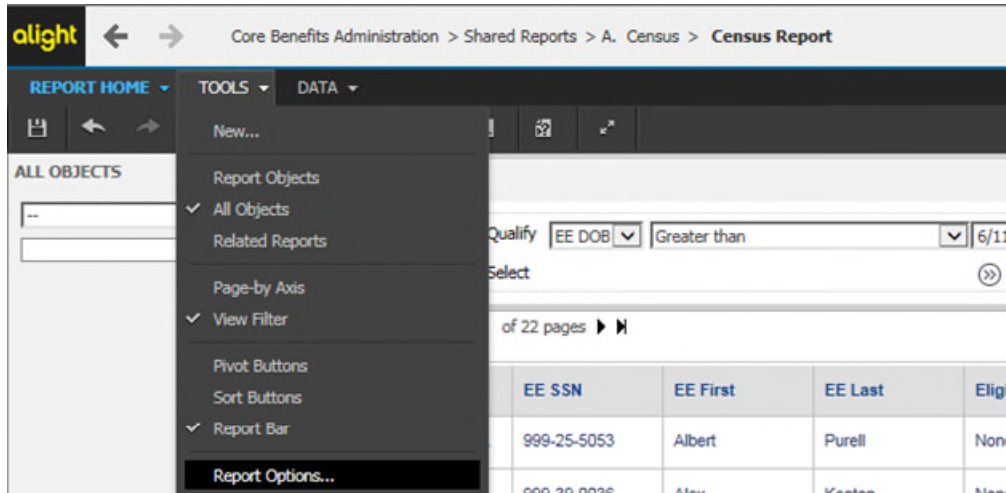
- Click the drop down arrow beside **Equals** to select the desired criteria for your filter. Then add the amount in the numeric field.
  - In the example below the user wants Employees with DOB after 6/11/1980
- Once the fields are complete click the **Apply** button to apply the filter.

## Locking Column Headers

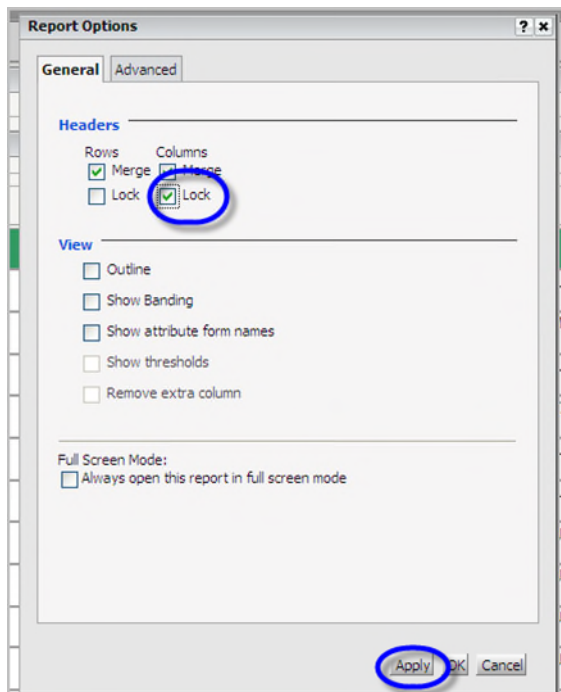
When users scroll down in a report the headers at the top of the page will disappear from view making it difficult to determine the data that is being seen. The solution for this is to lock the report headers.

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.

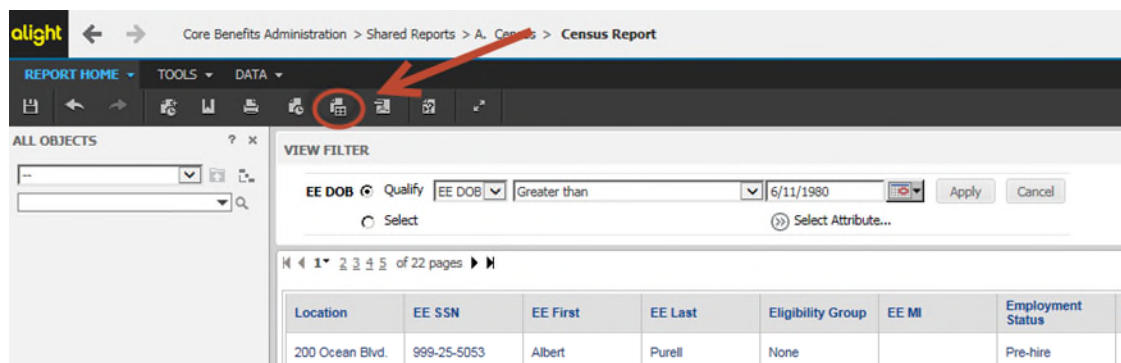
The following exporting formats are available:

- 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

**alight** Export Options

Census Report

Export: Whole report

Export Header and Footer: Edit Custom Settings...

Excel options:

☒ Excel with plain text

☐ CSV file format

☐ Excel with formatting

☐ HTML

☐ Plain text Delimiter: Comma

☒ Export Report Title

☐ Export filter details

Remove extra column: Automatic

☐ Export metric values as text

☐ Export headers as text

Excel with formatting options:

☒ Embed all images

- 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.

**alight** Export Options

Census Report

Export: Whole report  
Portion displayed only

Export Header and Footer: Edit Custom Settings...

Excel options:

☒ Excel with plain text

☐ CSV file format

☐ Excel with formatting

☐ HTML

☐ Plain text Delimiter: Comma

☒ Export Report Title

☐ Export filter details

Remove extra column: Automatic

☐ Export metric values as text

☐ Export headers as text

Excel with formatting options:

☒ Embed all images

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

Census Report

Export: **Whole report**

Export Header and Footer: [Edit Custom Settings...](#)

Excel options:

- ☒ Excel with plain text
- ☐ CSV file format
- ☐ Excel with formatting
- ☐ HTML
- ☐ Plain text

Delimiter: **Comma**

Excel with formatting options:

- ☒ Embed all images

☒ Export Report Title

☐ Export filter details

Remove extra column: **Automatic**

☐ Do not prompt me again.

**Export**

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

Export Options

Sheet Header / Footer Editor

Insert Auto-text...

**Header:**

☒ Display before standard headers

☐ Display after standard headers

☐ Replace other headers

**Footer:**

**Apply** **Cancel**

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

Census Report

Export: **Whole report**

Export Header and Footer: [Edit Custom Settings...](#)

Excel options:

- ☒ Excel with plain text
- ☐ CSV file format
- ☐ Excel with formatting
- ☐ HTML
- ☐ Plain text

Delimiter: **Comma**

Excel with formatting options:

- ☒ Embed all images

☒ Export Report Title

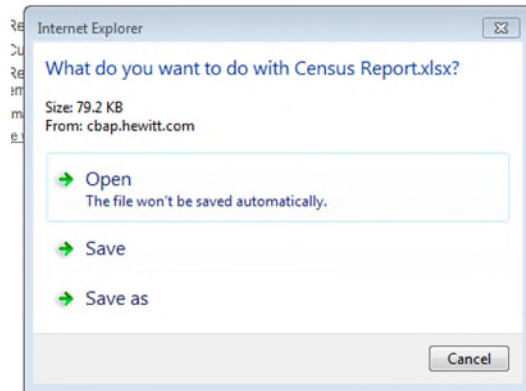
☐ Export filter details

Remove extra column: **Automatic**

☐ Do not prompt me again.

**Export**

- A pop up box will display with options to Open, Save or Cancel the Excel report.



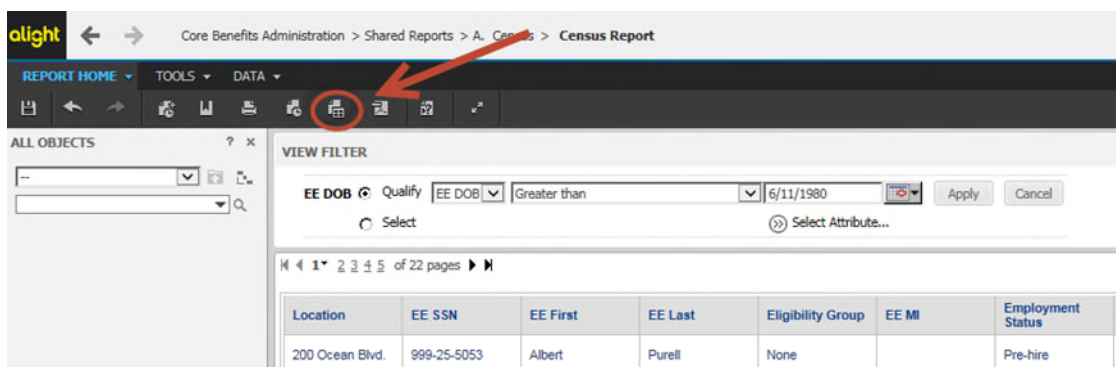
- Note: selecting the Excel with plain text option means the report will not contain any formatting.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Census Report															
2																
3	Location	EE SSN	EE First	EE MI	EE Last	EE Gender	EE DOB	Address	City	State	Zip Code	Employment	Eligibility	EE Email		
4	1205 Mapl	123-45-78	Scott	A	Smith	M	#####	1234 Any	Lincolnshi	IL	60069	Pre-hire	None	name@aonhewitt.com		
5	1205 Mapl	444-88-55	Keith		Goode	M	#####	10150 Yorl	Hunt Valle	MD	21030	Active	None	Unknown		
6	1205 Mapl	451-52-03	Sam		Sample	M	#####	1234 Anyc	Chicago	IL	12345	Active	None	dhrriley@hewitt.com		
7	1205 Mapl	451-52-04	Kerry		Miller	M	#####	2601 Rese	the Wood	TX	77381	Active	None	dhrriley@hewitt.com		
8	1205 Mapl	555-44-12	John		Knupp	M	#####	123 Wacke	Chicago	IL	60606	Active	None	sample1@hotmail.com		
9	1205 Mapl	555-53-01	David		Brown	M	#####	3459 State	Chicago	IL	54444	Active	None	Unknown		
10	1205 Mapl	555-53-03	David		Barnes	M	#####	45 Alta Pe	Deer Valle	UT	84111	Terminate	None	jason.bertola@hewitt.com		
11	1205 Mapl	555-53-06	Steve		Gates	M	#####	48 Solitud	Park City	UT	84100	Active	None	jason.bertola@hewitt.com		
12	1205 Mapl	555-53-08	Steve		Gates	M	#####	33 Sun Val	Park City	UT	84100	Active	None	jason.bertola@hewitt.com		
13	1205 Mapl	555-53-08	Steve		Gates	M	#####	45 Lake Ta	Deer Valle	UT	84111	Active	None	jason.bertola@hewitt.com		
14	1205 Mapl	555-53-11	Tom		Smith	M	#####	2343 Deer	Salt Lake	UT	84111	Active	None	Unknown		
15	1205 Mapl	555-55-04	Wayne		Gies	M	#####	48 Solitud	Deer Valle	UT	84100	Active	None	jason.bertola@aonhewitt.com		

## 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**.

Census Report

Export: Whole report

Export Header and Footer: [Edit Custom Settings...](#)

**Excel options:**

☐ Excel with plain text

☐ CSV file format

☒ Excel with formatting

☐ HTML

☐ Plain text Delimiter: Comma

☒ Export Report Title

☐ Export filter details

Remove extra column: Automatic

**Excel with formatting options:**

☐ Export metric values as text

☐ Export headers as text

☐ Embed all images

Export

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

Census Report

Export: Whole report

Export Header and Footer: [Edit Custom Settings...](#)

**Excel options:**

☐ Excel with plain text

☐ CSV file format

☒ Excel with formatting

☐ HTML

☐ Plain text Delimiter: Comma

☒ Export Report Title

☐ Export filter details

Remove extra column: Automatic

**Excel with formatting options:**

☐ Export metric values as text

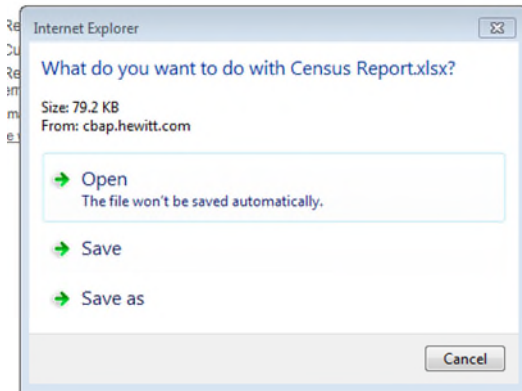
☐ Export headers as text

☐ Embed all images

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.

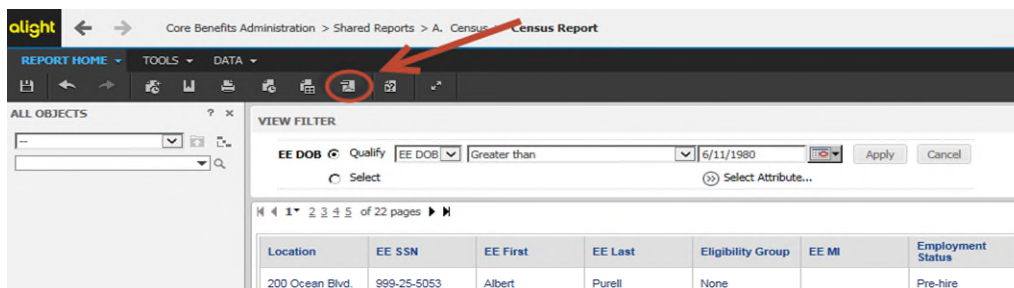
	Location	EE SSN	EE First	EE MI	EE Last	EE Gender	EE DOB	Address	City	State	Zip Code
1	1205 Maple St.	123-45-7899	Scott	A	Smith	M	1/1/1960 12:00:00 AM	1234 Any Lane	Lincolnshire	IL	60069
2		444-88-5538	Keith		Goode	M	3/10/1966 12:00:00 AM	10150 York Road	Hunt Valley	MD	21030
3		451-52-0301	Sam		Sample	M	1/1/1970 12:00:00 AM	1234 Anyplace Usa	Chicago	IL	12345
4		451-52-0406	Kerry		Miller	M	1/30/1970 12:00:00 AM	2601 Research Forest	the Woodlands	TX	77381
5		555-44-1234	John		Knupp	M	6/10/1960 12:00:00 AM	123 Wacker	Chicago	IL	60606
6		555-53-0118	David		Brown	M	4/4/1970 12:00:00 AM	3450 State Street	Chicago	IL	54444

## 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.

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

## 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

20130922101259468.exp.aspx [Read-Only] - Microsoft Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Census Report																	
2																		
3	Location	EE SSN	EE First	EE MI	EE Last	EE Gender	EE DOB	Address	City	State	Zip Code	Employment	Eligibility	EE Email				
4	1205 Mapl 123-45-78	Scott	A	Smith	M	#####	1234 Any (Lincolnshi	IL			60069	Pre-hire	None	name@aonhewitt.com				
5	1205 Mapl 444-88-55	Keith		Goode	M	#####	10150 Yori Hunt Valle	MD			21030	Active	None	Unknown				
6	1205 Mapl 451-52-03	Sam		Sample	M	#####	1234 Any Chicago	IL			12345	Active	None	dhrriley@hewitt.com				
7	1205 Mapl 451-52-04	Kerry		Miller	M	#####	2601 Rese the Wood TX				77381	Active	None	dhrriley@hewitt.com				
8	1205 Mapl 555-44-12	John		Knupp	M	#####	123 Wacke Chicago	IL			60606	Active	None	sample1@hotmail.com				
9	1205 Mapl 555-53-01	David		Brown	M	#####	3459 State Chicago	IL			54444	Active	None	Unknown				
10	1205 Mapl 555-53-03	David		Barnes	M	#####	45 Alta Pe Deer Valk	UT			84111	Terminate	None	jason.bertola@hewitt.com				
11	1205 Mapl 555-53-06	Steve		Gates	M	#####	48 Solitud Park City	UT			84100	Active	None	jason.bertola@hewitt.com				
12	1205 Mapl 555-53-08	Steve		Gates	M	#####	33 Sun Val Park City	UT			84100	Active	None	jason.bertola@hewitt.com				
13	1205 Mapl 555-53-08	Steve		Gates	M	#####	45 Lake Ta Deer Valle	UT			84111	Active	None	jason.bertola@hewitt.com				
14	1205 Mapl 555-53-11	Tom		Smith	M	#####	2343 Deer Salt Lake	UT			84111	Active	None	Unknown				
15	1205 Mapl 555-55-04	Wayne		Giggs	M	#####	48 Solitud Deer Valle	UT			84100	Active	None	jason.bertola@aonhewitt.com				
16	1205 Mapl 675-45-76	William		State	M	#####	7987 Dowi City	IL			78979	Active	PremierC	Unknown				
17	1205 Mapl 709-67-64	Spring		Time	F	#####	123 Main City	MD			98673	Active	PremierC	Unknown				
18	1205 Mapl 796-78-68	Jane		Jones	F	#####	345 White City	IL			23453	Active	PremierC	Unknown				
19	1205 Mapl 852-23-55	John		Clancy	M	#####	10150 Yori Hunt Valle	MD			21030	Pre-hire	None	Unknown				
20	1205 Mapl 876-54-32	Demo		Demoing	M	#####	100 Half D Lincolnshi	IL			60069	Active	None	alloutze@aonhewitt.com				
21	1205 Mapl 954-15-88	Kate		Rendell	F	#####	51896 Frar New Have	CT			6520	Active	None	betsy.turnbaugh@hewitt.com				
22	1205 Mapl 987-65-43	May		TwentyTw	Release	F	#####	100 Half D Lincolnshi	IL		60069	Active	None	alloutze@aonhewitt.com				
23	1205 Mapl 987-65-65	John		Dixon	M	#####	123 Any St Winthrop	IL			60096	Active	None	Unknown				
24	1205 Mapl 989-25-55	John		Walker	M	#####	10150 Yori Hunt Valle	MD			21030	Active	None	Unknown				
25	1205 Mapl 993-25-55	Jack		Johnson	M	#####	10150 Yori Hunt Valle	MD			21030	Active	None	Unknown				

## Excel with Formatting

20130922101541016.exp.aspx [Read-Only] - Microsoft Excel

FileHomeInsertPage LayoutFormulasDataReviewViewAdd-Ins

ClipboardFontAlignmentNumber

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## CSV File Format

20130922101821376.exp [Read-Only] - Microsoft Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Census Report																	
2																		
3	Location,"EE SSN","EE First","EE MI","EE Last","EE Gender","EE DOB","Address","City","State","Zip Code","Employment Status","Eligibility Group","EE Email"																	
4	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,"name@aonhewitt.c																	
5	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,"Unknown"																	
6	1205 Maple St.,451-52-0301,"Sam","","Sample","M",1/1/1970 12:00:00 AM,"1234 Anyplace Usa","Chicago","IL",12345,"Active",None,"dhriley@hewitt.com"																	
7	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,"dhriley@hewitt.com"																	
8	1205 Maple St.,555-44-1234,"John","","Knupp","M",6/10/1960 12:00:00 AM,"123 Wacker","Chicago","IL",60606,"Active",None,"sample1@hotmail.com"																	
9	1205 Maple St.,555-53-0118,"David","","Brown","M",4/4/1970 12:00:00 AM,"3459 State Street","Chicago","IL",54444,"Active",None,"Unknown"																	
10	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,"jason.bertola@aonhewitt.com"																	
11	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,"jason.bertola@aonhewitt.com"																	
12	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,"jason.bertola@aonhewitt.com"																	
13	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,"jason.bertola@aonhewitt.com"																	
14	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,"Unknown"																	
15	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,"jason.bertola@aonhewitt.com"																	
16	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 Executives 2014,"Unknown"																	
17	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 Executives 2014,"Unknown"																	
18	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 Executives 2014,"Unknown"																	
19	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,"Unknown"																	
20	1205 Maple St.,876-54-3210,"Demo","","Demoling","M",5/18/1978 12:00:00 AM,"100 Half Day Road","Lincolnshire","IL",60069,"Active",None,"alloutte@aonhewitt.com"																	
21	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,"betsy.turnbaugh@aonhewitt.com"																	
22	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,"allc																	
23	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,"Unknown"																	
24	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,"Unknown"																	
25	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,"Unknown"																	

## HTML

Census Report - Windows Internet Explorer

https://premier.cbdemo.com/r/bmsrpt.asp/Main.aspx?evt=3012&src=Main.aspx.3012&exp=

File Edit View Favorites Tools Help

★ Favorites Free Hotmail Web Slice Gallery

Census Report

Census Report

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

Done Internet 100%



## 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,	Michelle,	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,	Skyilar,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,	5/2/1966 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

https://premier.cbdemo.com/rbmsrpt/asp/Main.aspx?rn=/20130922102410516&n=/Census\_Report.pdf - Windows Internet Explorer

https://premier.cbdemo.com/rbmsrpt/asp/Main.aspx?rn=/20130922102410516&n=/Census\_Report.pdf

File Edit Go To Favorites Help

Favorites Free Hotmail Web Slice Gallery

https://premier.cbdemo.com/rbmsrpt/asp/Main.aspx...

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

Done Unknown Zone

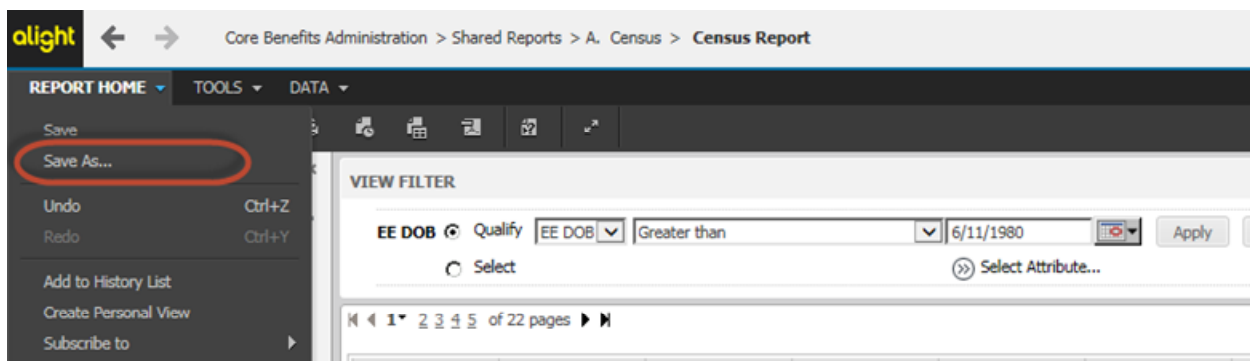
## Chapter 5: Saving Reports

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).

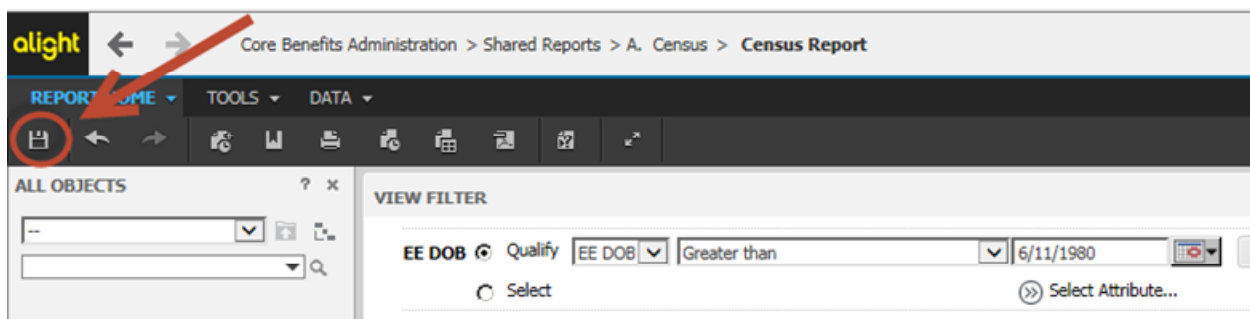
### Saving Reports to a Personal Folder

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**.

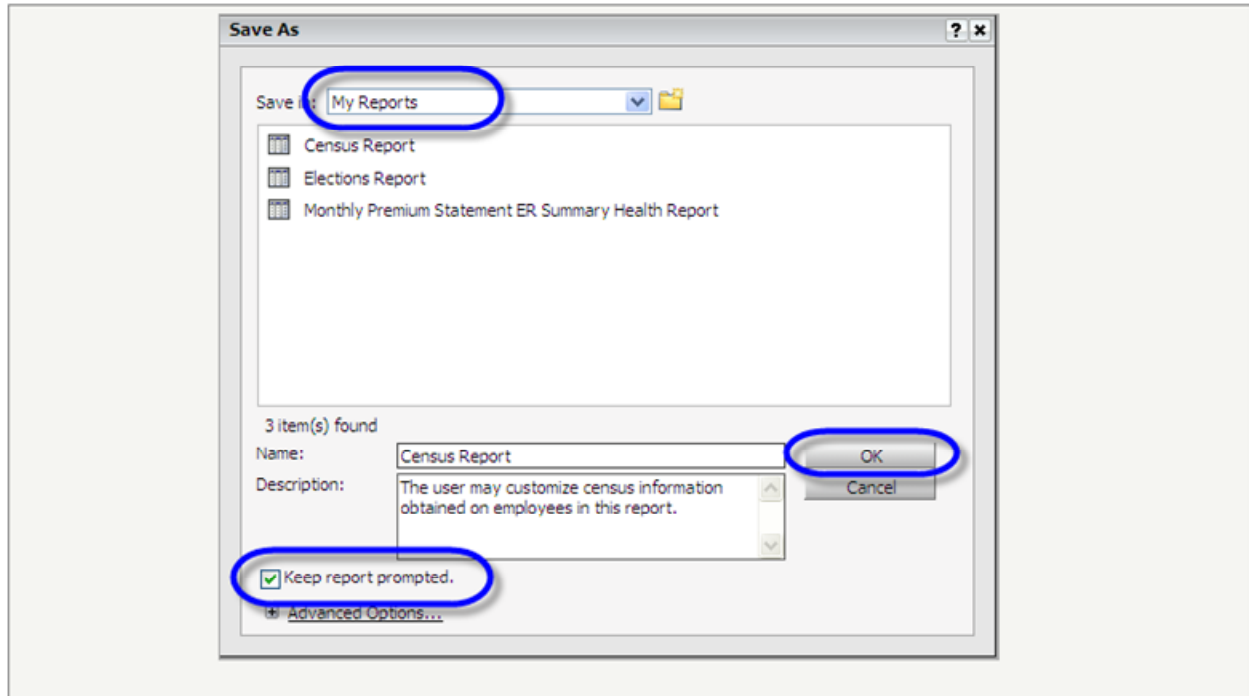


- Or click on the **Save** icon on the gray tool bar.



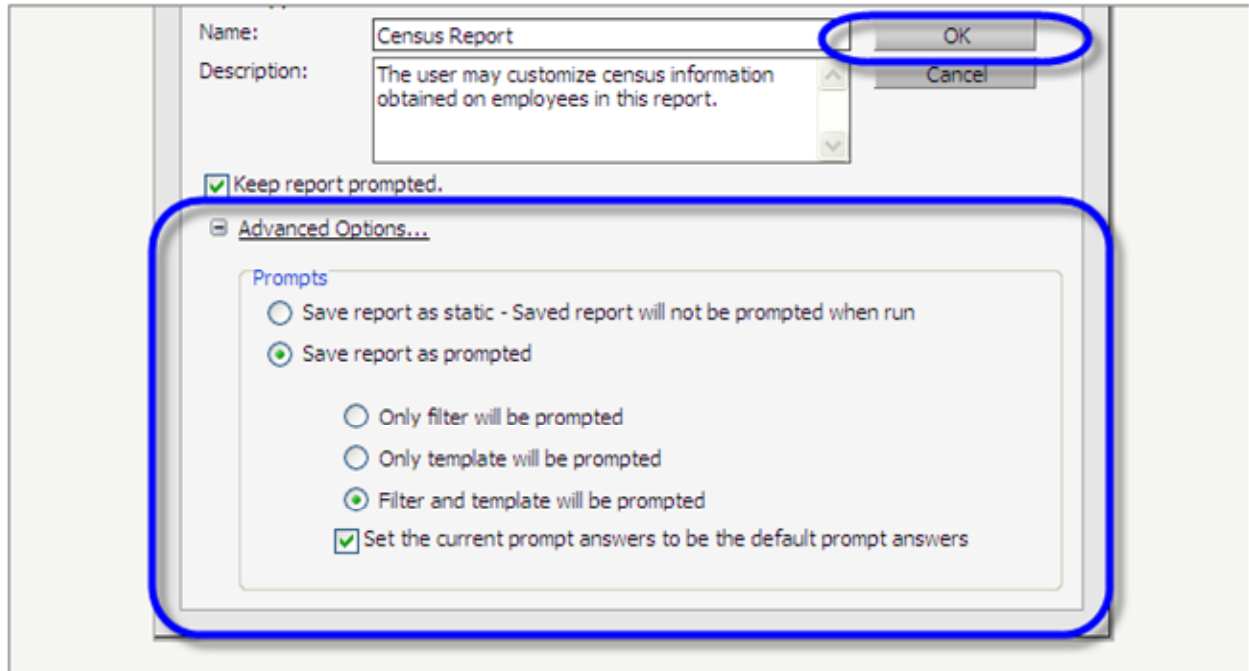
- A pop up box will appear.
- Make sure **My Reports** is showing in the **Save in** field.
- Make sure there is a checkmark in the box beside **Keep report prompted** in order to keep all of the prompts that were selected.
- Update the name of the report if desired.
- Click **Ok**.





## 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**.



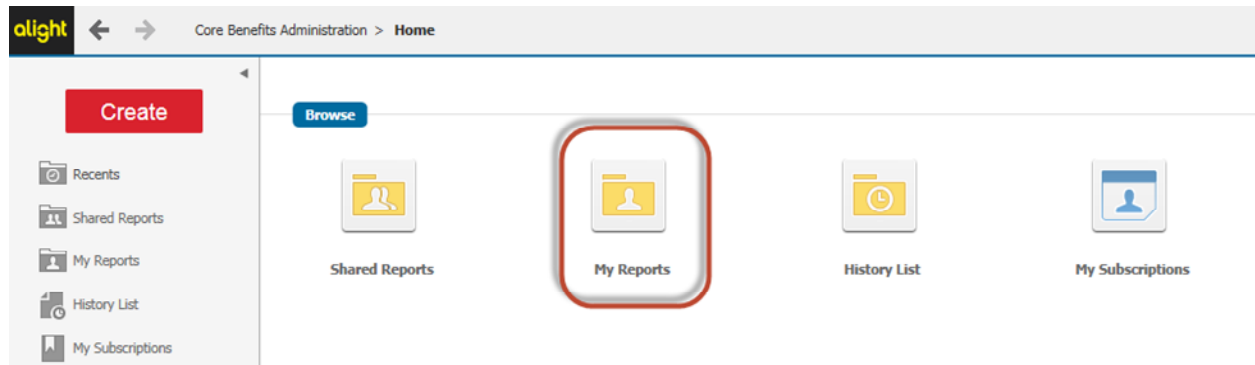
## Explanation of Advanced Save Options

- **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.

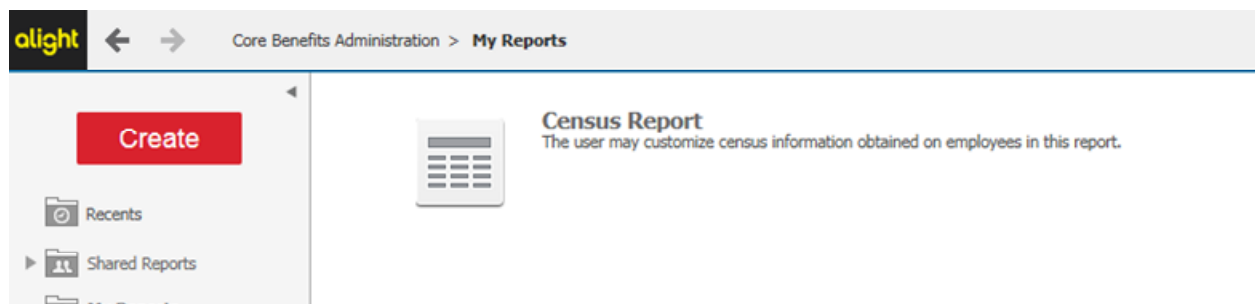
## Retrieving a Saved Report

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.

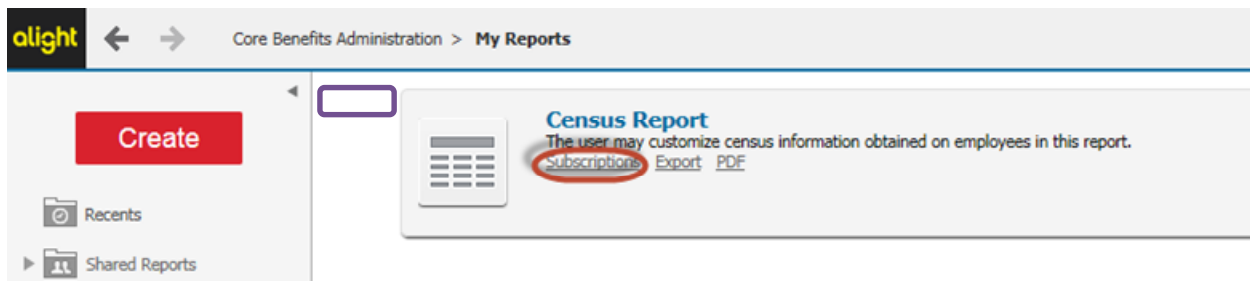


## Chapter 6: Scheduling Reports

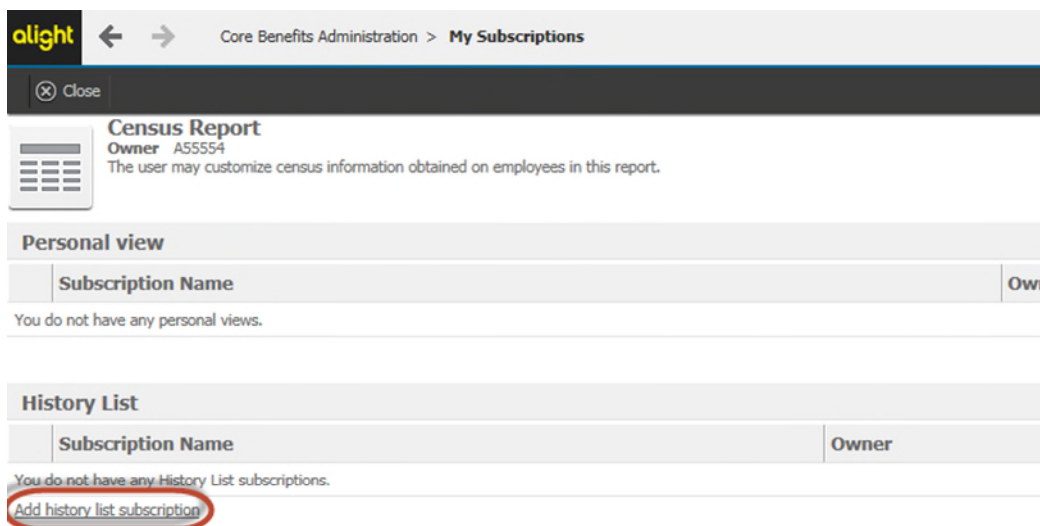
Users can schedule reports to generate on an automatic basis so they will be ready for viewing at the time the user needs them. This is a great way for users to save time.

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.

alight Core Benefits Administration > My Subscriptions

**Subscription**

**History List Subscription**

Name: Census Report 6/11/18 12:12:51 PM

Report: Census Report

Schedule: A - EveryMonday

To: A55554 (\_77c9a65b-723145\_1380183)

☐ Run subscription immediately

**+ Advanced Options**

- 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.

alight Core Benefits Administration > My Subscriptions

**Subscription**

**History List Subscription**

Name: Census Report 6/11/18 12:12:51 PM

Report: Census Report

Schedule: A - EveryMonday

To: A55554 (\_77c9a65b-723145\_1380183)

☒ Run subscription immediately

**+ Advanced Options**

- Click the **+** sign to expand the Advanced Options section (minus sign **-** to retract).

To: A55554 (\_77c9a65b-723145\_1380183)

☒ Run subscription immediately

**+ Advanced Options**

**Delivery Notification**

- 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).

## [-] Advanced Options

☒ The new scheduled report will overwrite older versions of itself.

### Delivery

☐ Do not deliver after  

### Delivery Notification

☐ Send notification to email address:

- 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.

## [-] Advanced Options

☒ The new scheduled report will overwrite older versions of itself.

### Delivery

☒ Do not deliver after  

### Delivery Notification

☐ Send notification to email address:

← August 2016 →						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

INDEX Y 1. Employer (Required)

### Delivery

☒ Do not deliver after  

- 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.

**Delivery Notification**

☒ Send notification to email address:

New Address:

Only one address is allowed when editing a subscription.

[Send to an existing address](#)

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

**History List Subscription**

Name:

Report:

Schedule:

To:

☐ Run subscription immediately

☒ Advanced Options

**Delivery Notification**

☐ Send notification to email address:

---

**INDEX**

**Summary of your selections**

1 Employer (Required) ☒ Demo - Premier

2 Employment Status ☒ 1 - 100 of 100

3 Customize Your Report ☒

4 Customize Your Report ☒

**1. Employer (Required)**

☒ Demo - Premier

**2. Employment Status**

Please Select an Employment Status

Search for:  ☒ Match case

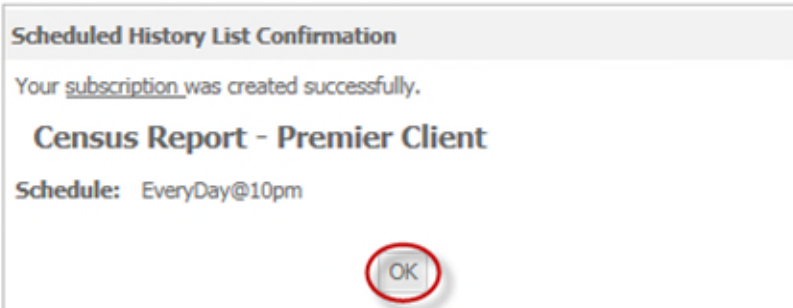
Available:

Selected:

☒ LOA - LTD

☒ LTD - Paid Leave

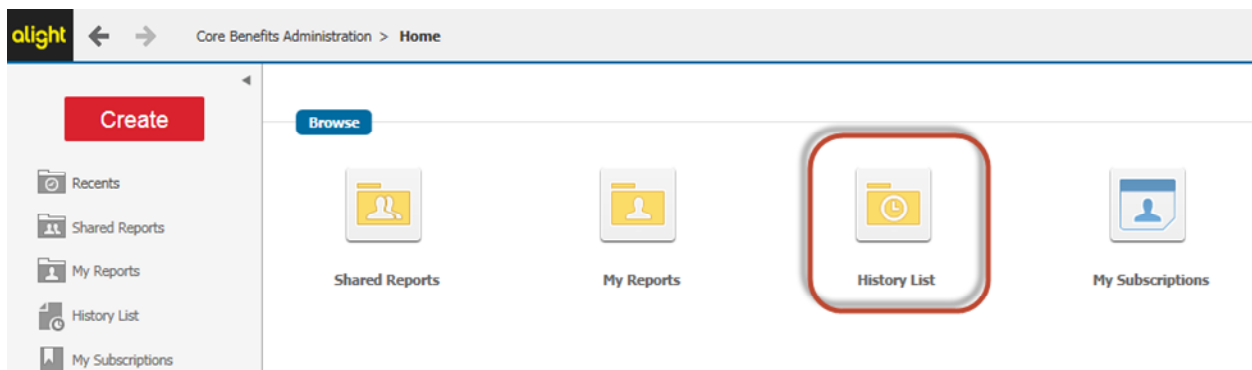
- **Important Note:** The date ranges are currently not "smart" dates.
  - For example, scheduling a weekly report to view weekly activity would result in cumulative data based on the beginning date and ending date ranges entered at the time the report was scheduled. The beginning date does not adjust 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**.



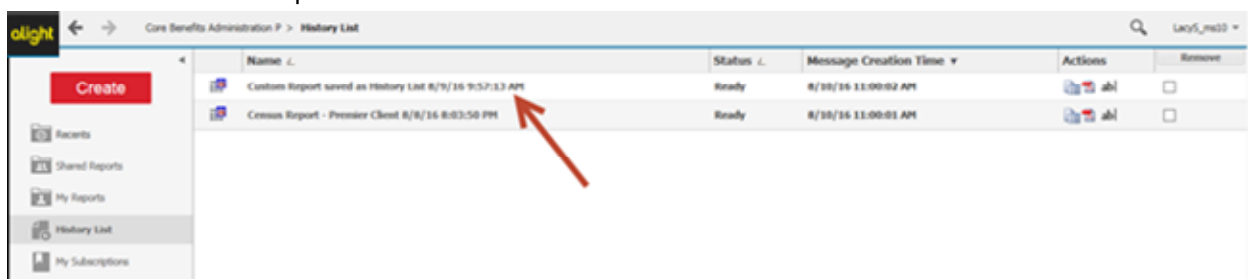
## Viewing Scheduled Reports from your History List

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.



EE First Name	EE Last Name	EE Address	EE City	EE State	EE Zip Code	Elect Coverage Level	Elect EE Election	Elect Effective Start Date	Elect Effective End Date	Elect Plan Subtype	Elect Plan Type
George	Teeler	10 N Park Dr	Hunt Valley	MD	21030	Employee + Spouse	Aetna PPO	1/1/2016 12:00:00 AM	12/31/2016 12:00:00 AM	Health - Medical	Health
Jason	Employment	221 Highway Rd	Boca Raton	FL	34066	Employee Only	PPO - BlueChoice	1/1/2016 12:00:00 AM	12/31/2016 12:00:00 AM	Health - Medical	Health

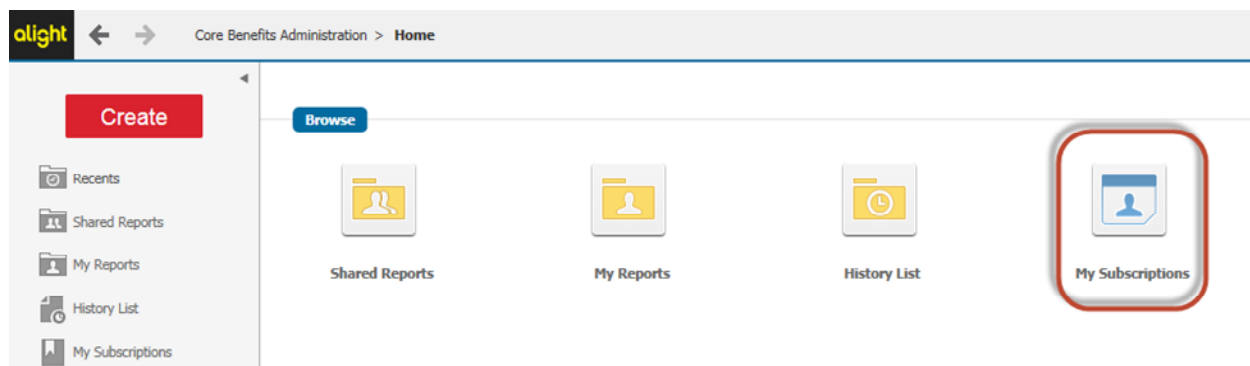
- You may also export the report from the History List by selecting the **Export** or **PDF** icons

Name	Status	Message Creation Time	Actions	Remove
Custom Report saved as History List 8/9/16 9:57:13 AM	Ready	8/9/16 11:00:02 AM	Export PDF	<input type="checkbox"/>
Custom Report - Premier Client 8/8/16 8:03:50 PM	Ready	8/9/16 11:00:01 AM	Export PDF	<input type="checkbox"/>

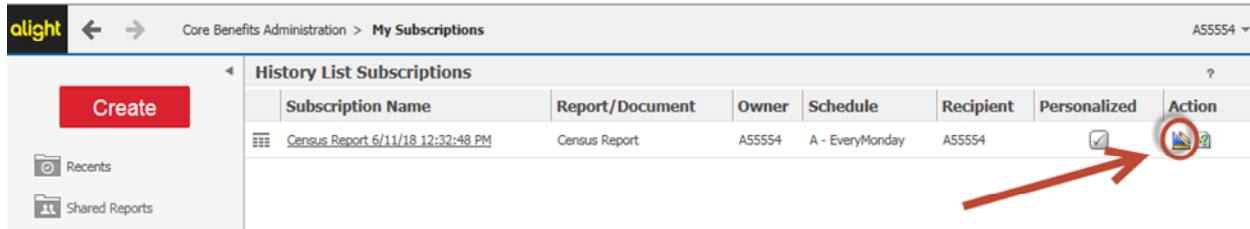
## Editing Scheduled Reports

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

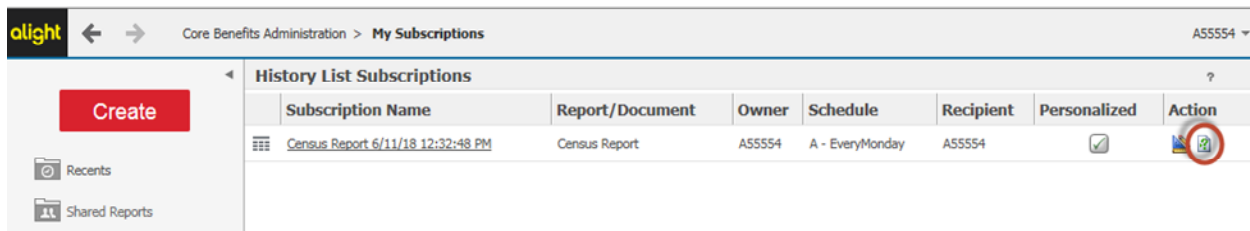
- To edit subscription information, select the **My Subscriptions** icon or link from the Home page



- 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.

Subscription

**History List Subscription**

Name:

Report:

Schedule:

To:

☐ Run subscription immediately

☒ Advanced Options

**Delivery Notification**

☐ Send notification to email address:

---

**INDEX**

Summary of your selections

1 Employer (Required) ☒ Demo - Premier

2 Employment Status ☒ 1 - 100 of 100

3 Customize Your Report ☒

4 Customize Your Report ☒

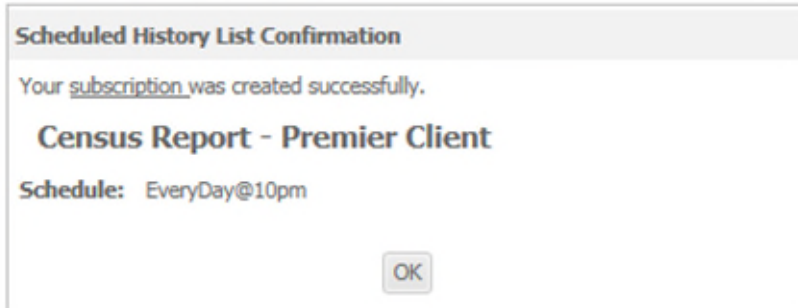
Please Select an Employment Status

Search for:  ☒ Match case

Available:

Selected:

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



## Discontinuing Scheduled Reports

To discontinue the report schedule,

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

History List Subscriptions								?
Subscription Name	Report/Document	Owner	Schedule	Recipient	Personalized	Action	Unsubscribe	
Census Report - Premier Client 8/8/16 8:03:50 PM	Census Report - Premier Client	LacyS_ms10	EveryDay@10pm	LacyS_ms10	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	

- 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.

alight

←

→

Core Benefits Administration > My Subscriptions

A55554

Create

Recents

Shared Reports

History List Subscriptions

Subscription Name	Report/Document	Owner	Schedule	Recipient	Personalized	Action
<div>Census Report 6/11/18 12:32:48 PM</div>	Census Report	A55554	A - EveryMonday	A55554	<input checked="" type="checkbox"/>	<div><div></div><div></div></div>

☐ Run subscription immediately

☒ **Advanced Options**

☒ The new scheduled report will overwrite older versions of itself.

**Delivery**

☒ Do not deliver after

**Delivery Notification**

☐ Send notification to email address:

← June 2018 →

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

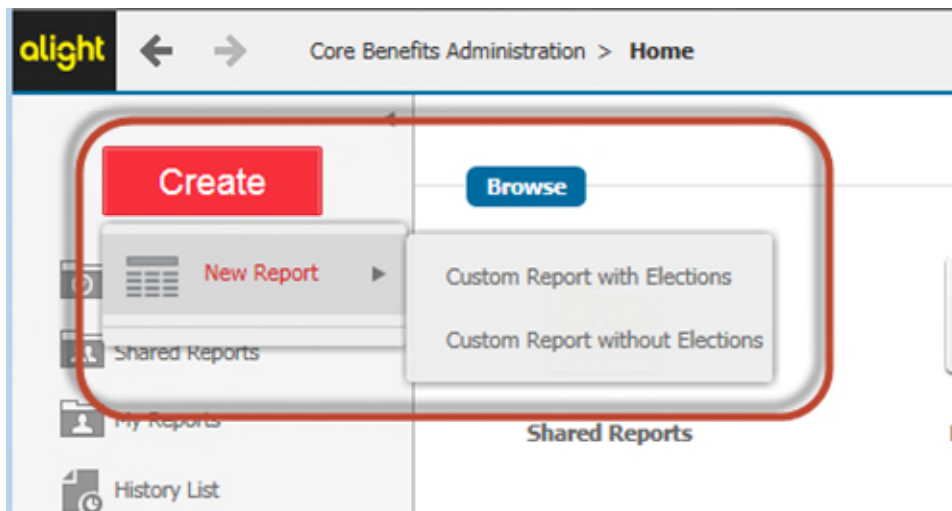
NDEX X 1. Employer (Required)

## 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

alight Core Benefits Administration > Create Report > Design Mode: Custom Report with Elections

INDEX X

Summary of your selections

1 Select an Employer (Required) ✓

2 Elect Plan Year (Required) ✓

1. Select an Employer (Required)

Demo - Premier 1 - 98 of 98

2. Elect Plan Year (Required)

Please select desired plan year.

2018

Report Message Name: Custom Report with Elections

Edit in Design Mode Save Cancel

- 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

alight Core Benefits Administration > Create Report > Design Mode: Custom Report with Elections

INDEX

Summary of your selections

1 Employment Status

2 Plans

1. Employment Status

Please Select an Employment Status

Search for:

Available:

- Active
- Pre-hire
- Retired
- Terminated

Selected: (none)

2. Plans

Search for:

Available:

- Aetna: <p>Medical PPO</p>: Health - Medical
- Aetna: Aetna Choice POS Balanced: Health - Medical
- Aetna: Aetna Choice POS Basic: Health - Medical

Selected: (none)

Report Message Name: Custom Report with Elections

Edit in Design Mode Save Cancel

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

alight Core Benefits Administration > Create Report > Design Mode: Custom Report with Elections

ALL OBJECTS

Obj Attributes

Dependent Demographic

Dependent Elections

Employee Demographic

Employee Elections

Employee Work Information

5 items found

REPORT OBJECTS

ALL OBJECTS

RELATED REPORTS

PAGE-BY: none

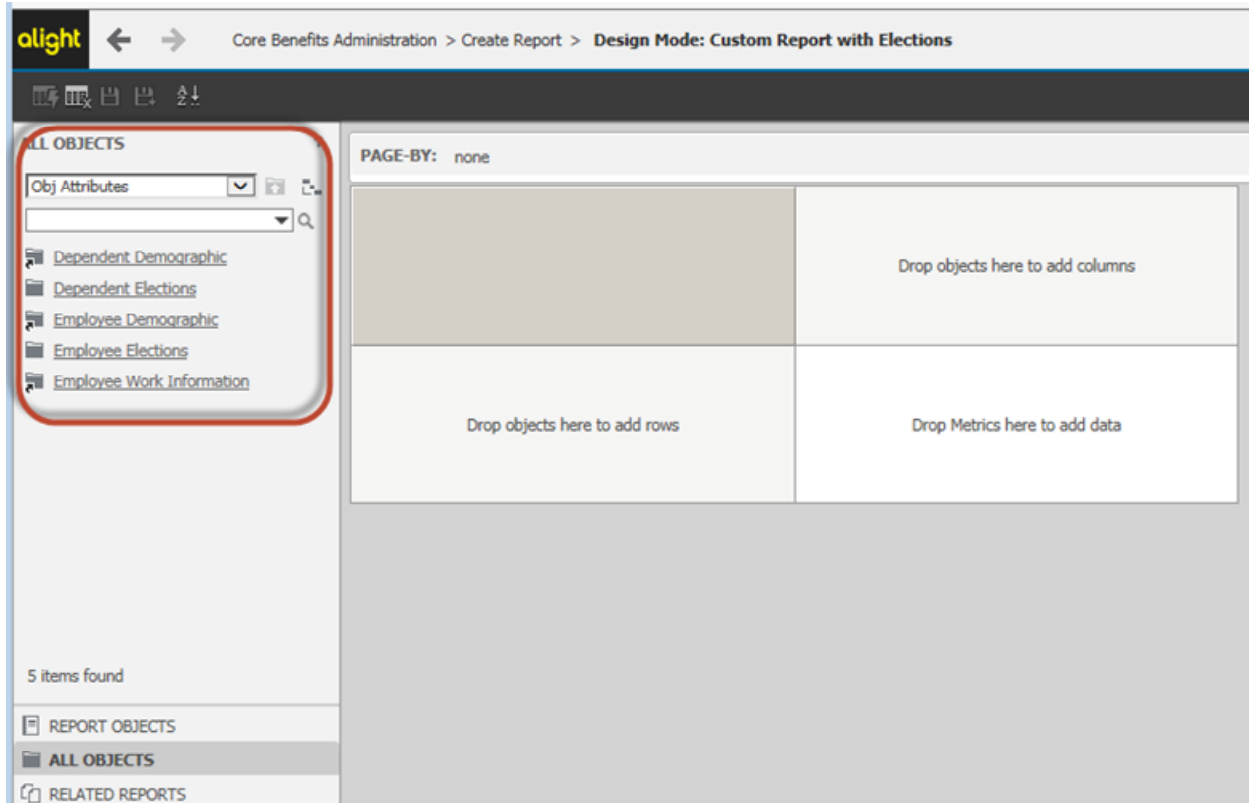
Drop objects here to add columns

Drop objects here to add rows

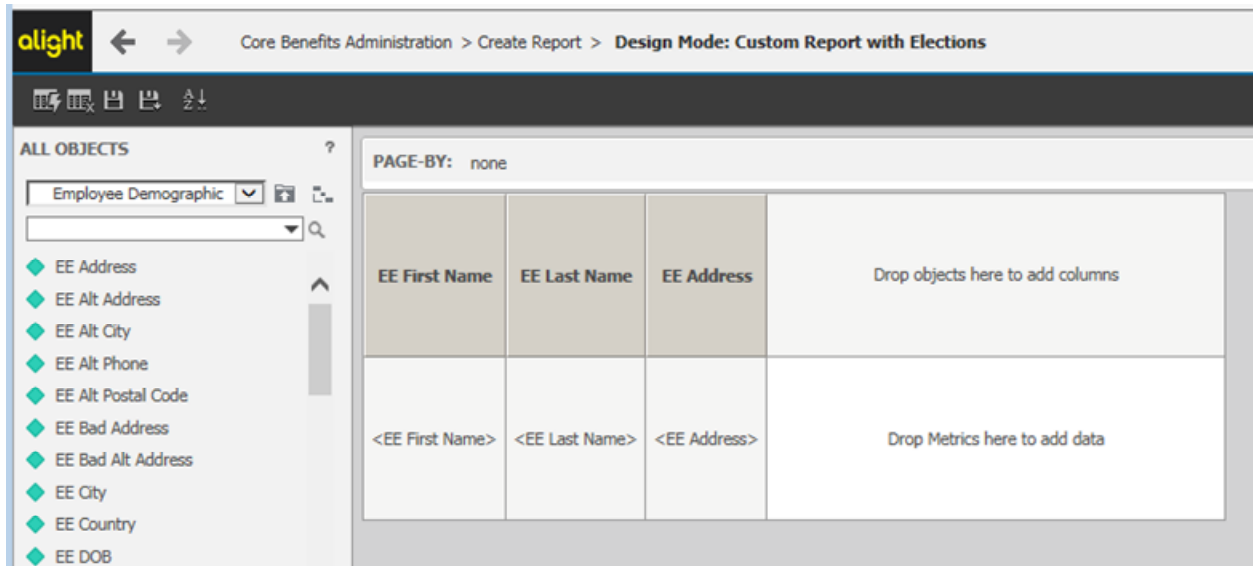
Drop Metrics here to add data

- **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
  - **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 dependent name, SSN, address and dependent verification information
  - **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.
  - **Employee Demographic** folder contains the employee demographic fields like name, SSN, address and Medicare information
  - **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.
  - **Employee Work Information** folder contains fields related to the employer like Employee ID, location, department, hire/rehire/term dates, user defined fields, etc.

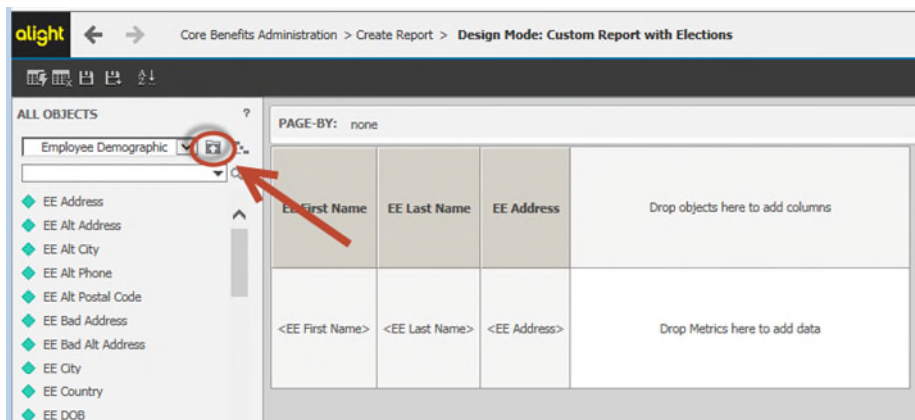


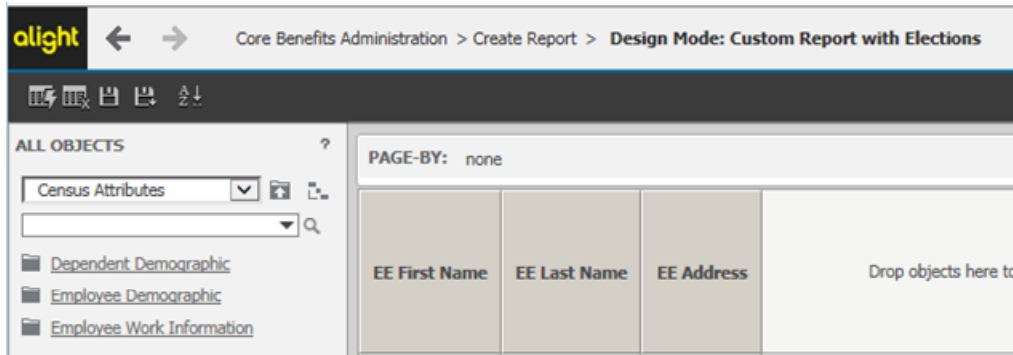


- Once you select a folder and are presented with the available fields, you may double click on a field name OR drag the field to the right report builder frame to add the field to your report. Simply drop the field where you would like for it to be placed on the report.

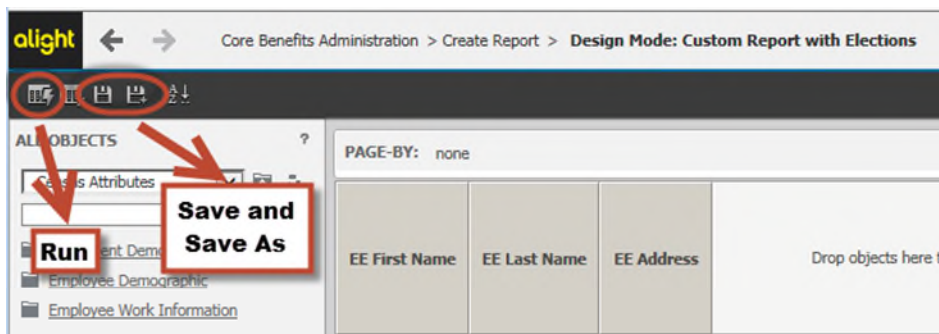


- If you would like to select fields from another folder, select the **Up Folder** icon to the right of the folder name to be returned to the main folder directory page. Your fields will continue to display in the right pane so that you may continue to add fields to your report.
  - **NOTE:** you may need to select the Up Folder icon twice to get back to the **Obj Attributes** folder and see all folder categories.

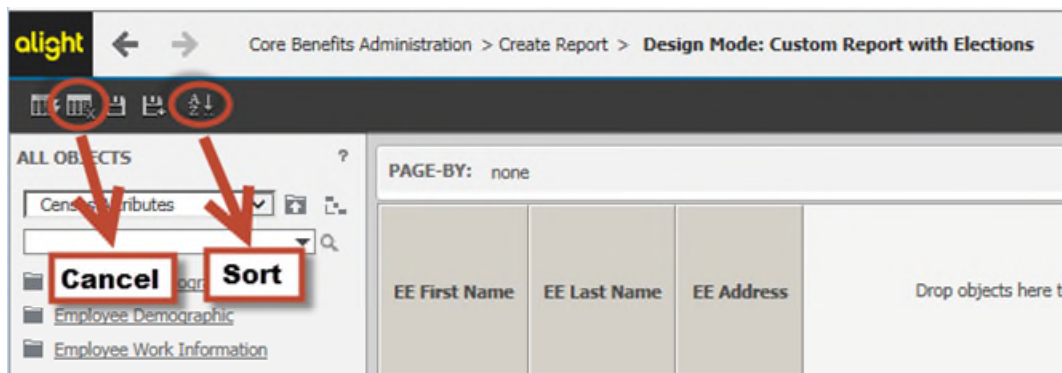




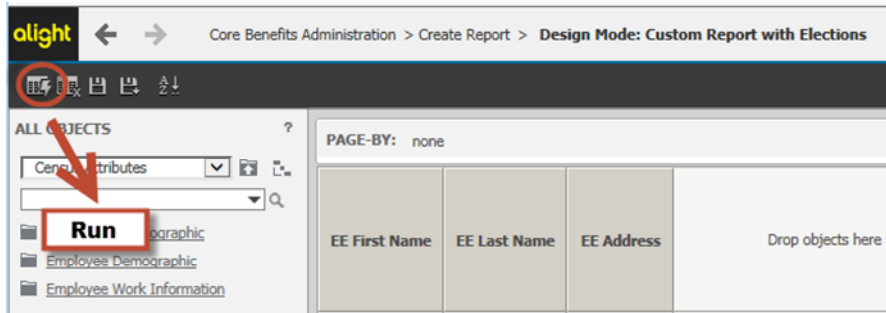
- When you have selected all of the fields you wish to be on your report, you are now ready to Save or Run your export. If this is a report that you will want to run again, **be sure to save the report now** following the steps outlined in **Chapter 5**. If this is a one-time report or one that you can easily recreate again, you may wish to run the report at this step.



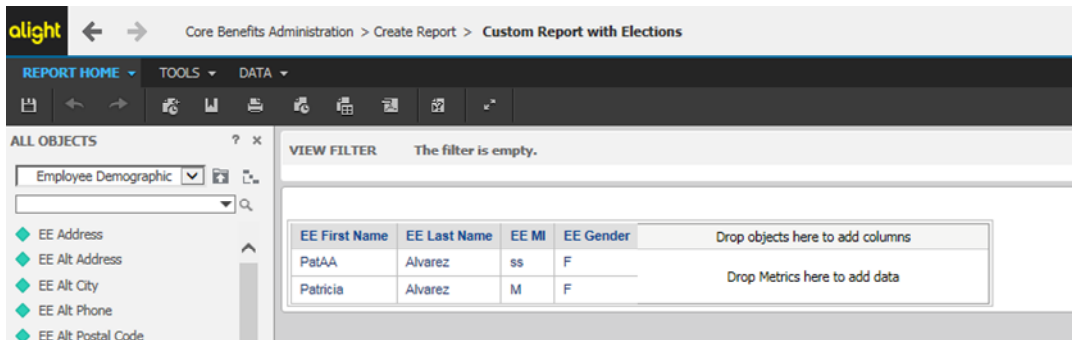
- Other task bar options at this step include cancel and sort as shown below
  - Cancel: if you would like to start your report over, you may cancel
  - Sort: you may select to sort your data prior to running, follow the sorting steps as outlined in Chapter 3.



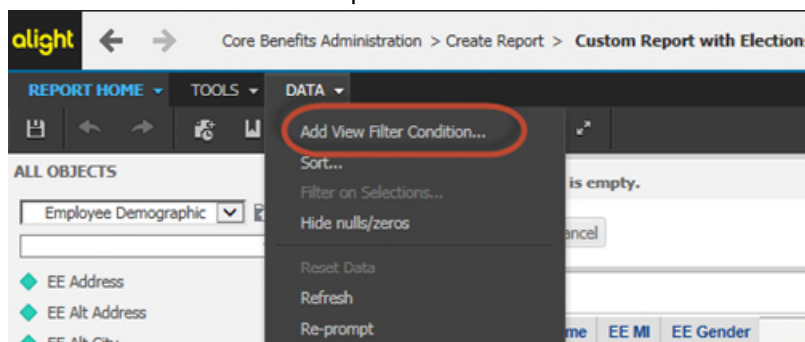
- Once you are ready to Run the report, select the **Run** icon

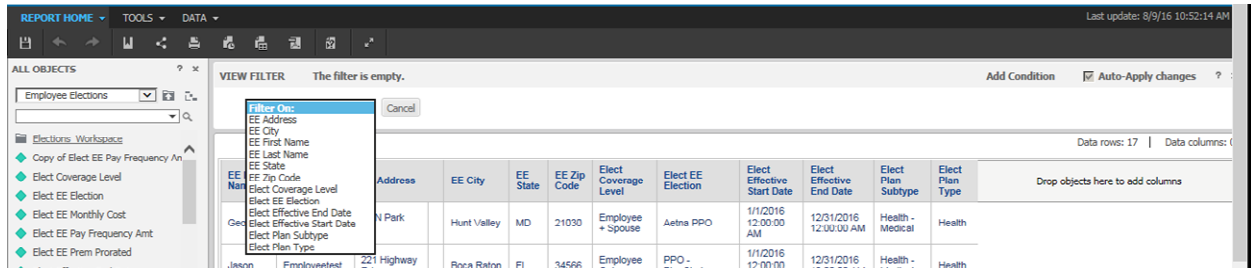


- Your report will now be displayed

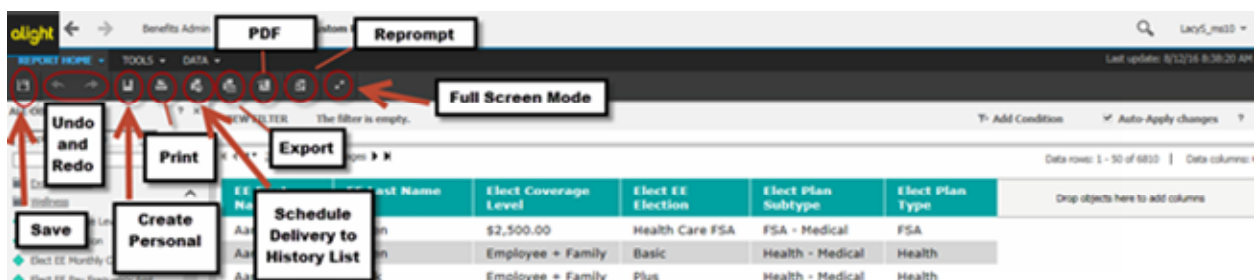


- Once your report has been Run, you now have several options to finish your report before you Save or Export it
  - You may continue to edit the column order as demonstrated in Chapter 3, Moving Columns
  - You may add new columns to your report by continuing selection from the left navigation. When 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

alight ← → Core Benefits Administration > Create Report > Design Mode: Custom Report without Elections

Select an Employer (Required)

🔍 Demo - Premier ▼

1 - 98 of 98

Report Message Name: Custom Report without Elections

Edit in Design Mode Save Cancel

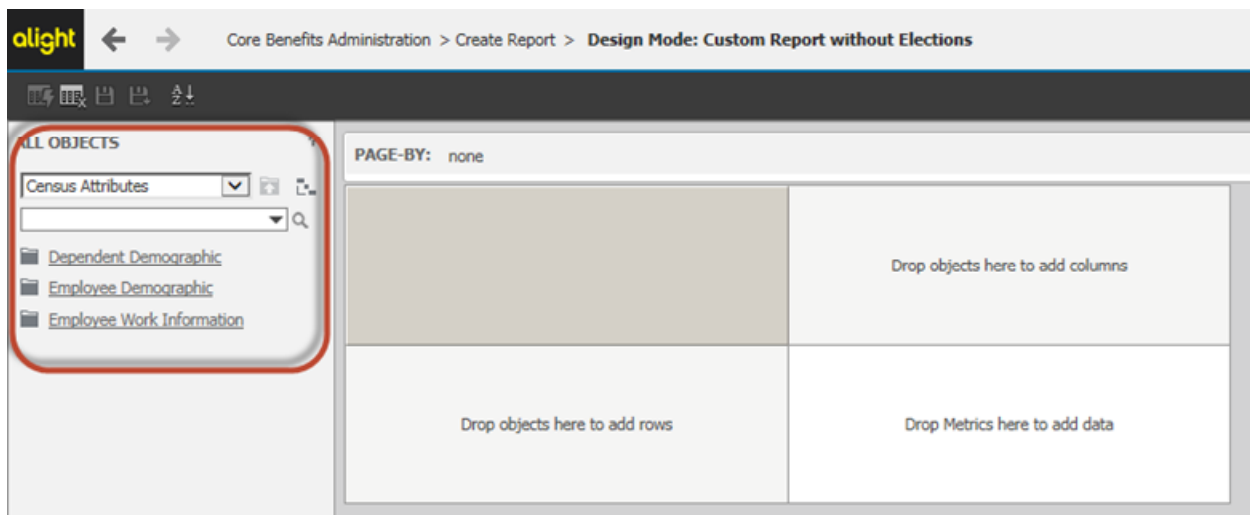
- Select the **Employment Status** that are required for your report from the List Select Prompt, then click **Edit in Design Mode** at the bottom of the page

The screenshot shows the 'Employment Status' selection screen. At the top, the breadcrumb trail reads: 'Core Benefits Administration > Create Report > Design Mode: Custom Report without Elections'. Below this, the title 'Employment Status' is followed by the instruction 'Please Select an Employment Status'. A search bar with a magnifying glass icon and a 'Match case' checkbox is present. The 'Available:' list on the left contains four items: 'Active', 'Pre-hire', 'Retired', and 'Terminated', each with a diamond icon. To the right of this list are four arrow buttons: a single right arrow, a double right arrow, a single left arrow, and a double left arrow. The 'Selected:' list on the right is currently empty, showing '(none)'. At the bottom, the 'Report Message Name' is set to 'Custom Report without Elections'. Below this, there are three buttons: 'Edit in Design Mode', 'Save', and 'Cancel'.

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

The screenshot shows the ad-hoc creation page. The breadcrumb trail at the top is 'Core Benefits Administration > Create Report > Design Mode: Custom Report without Elections'. Below the breadcrumb, there is a toolbar with icons for report actions. The main area is divided into two sections. On the left, under the heading 'REPORT OBJECTS', there is a search bar and a list of items. The list currently shows '0 items found'. Below the list, there are three navigation options: 'REPORT OBJECTS', 'ALL OBJECTS', and 'RELATED REPORTS'. A red arrow points to the 'ALL OBJECTS' option, which is highlighted with a red circle. On the right side of the page, there is a 'PAGE-BY:' dropdown set to 'none'. Below this, there is a large table with two columns and two rows. The top-left cell is shaded grey and contains the text 'Drop objects here to add columns'. The bottom-left cell is white and contains the text 'Drop objects here to add rows'. The bottom-right cell is white and contains the text 'Drop Metrics here to add data'.

- **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
<b>A. Census</b>	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>B. Early Warnings</b>	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
<b>C. Enrollment Summary and Details / Enrollment Disability</b>	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).
<b>C. Enrollment Summary and Details / Enrollment FSA</b>	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.
<b>C. Enrollment Summary and Details / Enrollment Health</b>	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).  <b>NOTE:</b> 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
<b>C. Enrollment Summary and Details / Enrollment HSA</b>	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).
<b>C. Enrollment Summary and Details / Enrollment Life</b>	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).
<b>C. Enrollment Summary and Details/Enrollment Other: Parking</b>	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.
<b>C. Enrollment Summary and Details / Enrollment Other: Parking</b>	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.
<b>D. Missing Enrollments</b>	Missing Enrollment	Displays those employees who have not yet enrolled in benefits for the specified time period.
<b>E. Pended</b>	Pended Report	Lists those employees whose benefit enrollment is pended, along with the elected and pended amounts.

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

Folder/Subfolder	Available Report(s)	Report Description
<b>F. Premium Statements / Premium Statement Health</b>	Premium Statement Detail Health Report - Department, Location  <i>(in Premium Statement Health by Department, Location subfolder)</i>	Lists employee-specific detail (coverage level, name, SSN, effective dates, and costs) by department and location for employees enrolled in the health plan(s). <i>*Excludes COBRA populations</i>
	Premium Statement Summary Health Report - Department, Location  <i>(in Premium Statement Health by Department, Location subfolder)</i>	Lists the total number of employees enrolled in each health plan and tier level, along with associated costs, by department and location. <i>*Excludes COBRA populations</i>
	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. <i>*Excludes COBRA populations</i>
	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. <i>*Excludes COBRA populations</i>
<b>F. Premium Statements / Premium Statement HSA</b>	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. <i>*Excludes COBRA populations</i>
	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. <i>*Excludes COBRA populations</i>

Folder/Subfolder	Available Report(s)	Report Description
<b>F. Premium Statements / Premium Statement Life</b>	Premium Life Detail Report – Age Based  <i>(in Premium Life Age Based subfolder)</i>	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. <i>*Excludes COBRA populations</i>
	Premium Life Summary Report - Age Based  <i>(in Premium Life Age Based subfolder)</i>	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. <i>*Excludes COBRA populations</i>
	Premium Statement Detail Life Report - Department, Location  <i>(in Premium Statement Life by Department, Location subfolder)</i>	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. <i>*Excludes COBRA populations</i>
	Premium Statement Summary Life Report - Department, Location  <i>(in Premium Statement Life by Department, Location subfolder)</i>	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. <i>*Excludes COBRA populations</i>
	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. <i>*Excludes COBRA populations</i>
	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. <i>*Excludes COBRA populations</i>

Folder/Subfolder	Available Report(s)	Report Description
<b>G. Transactions</b>	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.
<b>H. Dependent and Beneficiary Data</b>	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.
<b>I. Elections Data</b>	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
<b>J. Eligibility Assignment Report</b>	Eligibility Assignment Report	Lists the name, social security number and employment status of those employees who are either assigned to more than one eligibility group or who are not assigned to an eligibility group.
<b>K. Employee Survey Feedback</b>	Comment Listing	Provides a listing of all comments submitted via the online survey by employees for the specified timeframe.
	Survey Summary Report	Summarizes online survey ratings provided by employees for the specified timeframe.
<b>L. User Login Information</b>	Unique Login Information	Lists users that have logged into the website during the specified timeframe. Each user is shown once with earliest login time.
<b>M. Two Year Plan Comparison</b>	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.  <b>NOTE:</b> 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 D = Domestic Partner H = Disabled Child L = Legal Dependent N = Civil Union Q = Child of Domestic Partner S = Spouse
	Condition Code	DP = Domestic Partner HC = Disabled LD = Legal Dependent NC = New Child Dependent (Birth/Adoption) NS = New Spouse Dependent SC = FT Student Dependent Child
EW Coverage Pending Termination	Reason	LOPE = Loss of Plan Eligibility MED = Missing Eligible Dependents
EW Dependent	Dep Relationship	C = Child

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