# Reviewing Benefit Reports

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## **Benefits Menu**

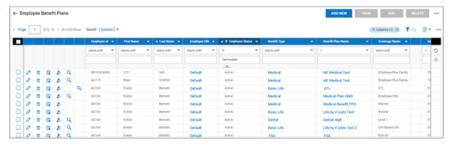
The following sections cover the options available in the Benefits menu.

### Benefit Plans

The options available here are dependent on your individual security permissions. This menu allows you to view and manage your employees' benefit plans. You can view and edit one employee at a time with the row icons or can select multiple employees and use the buttons at the top of the page and scroll through the employee selections.

The row icons allow you to view an employee's benefit plan, delete a plan, navigate to their employee profile, use the employee quick links, view a benefit plan deduction, or view a benefit plan earning.

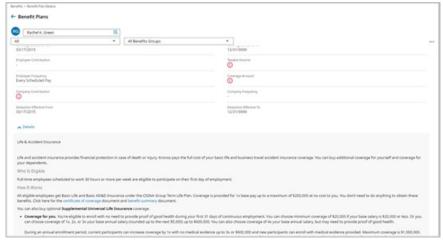
Many of the columns contain data with hyperlinks that will open and allow viewing and/or editing. The page contains all the standard report options available on most report pages in the system.



#### Benefit Plan Details

You can view the details of an employee benefit plan. After selecting the menu option, you will choose an employee. Additional options will then display in drop-down selection lists. You can select Past, Current, Future, All, Waived, and All Waived to determine the kind of benefit plan and time period you wish to review. The other drop-down-list allows you to select benefit groups that may be associated with an employee's benefit plan.

When the benefit plans display, each benefit type contains a **Details** link and when selected will display all the details of that plan. In the ellipsis icon is an option to print the benefit plans.



## Court Mandated Benefit Coverage

This functionality allows you to manage benefits for employees under a court order who are required to provide certain

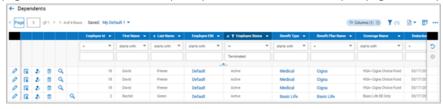
types of benefits to their dependents.

### **Dependents**

This menu allows you to view and manage your employees' dependents attached to their benefit plans.

The row icons allow you to view an employee's benefit plan, delete a plan, navigate to their employee profile, use the employee quick links, view a benefit plan deduction, or view a benefit plan earning.

Many of the columns contain data with hyperlinks that will open and allow viewing and/or editing. The page contains all the standard report options available on most report pages in the system.



### **Enrollment Requests**

This menu contains report pages and actions to help you manage benefit open enrollment or life change events for benefits enrollment.

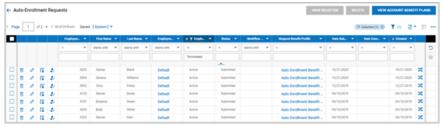
### **Auto-Enrollment Requests**

This report page shows employees who have enrolled in benefits via auto-enrollment processes. Users with proper security permissions can view and/or delete auto-enrollment requests.

Row options are available to view/delete individual auto-enrollment requests, as well as icons linking you to the employee's account and quick links.

Within the report, some contents provide a hyperlink to open other areas of the application related to either the employee or the auto-enrollment process. Options include links to EINs, the Request Benefit Profile, and the workflow associated with the auto-enrollment in read-only format. Your ability to edit the areas of the application for any of these options is also dependent on your security permissions.

Selecting the **View Account Benefit Plans** button will open the **Employee Benefit Plans** report page where you can view or manage employee benefit plans.



#### Change Requests Details

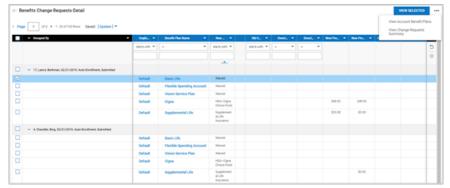
This report page shows the change request details for benefits by employee. Each change request is listed by employee and the affected benefit. Grouping by employee will pull all the benefit plans for an employee into rows for easy viewing.

Some of the columns contain hyperlinked data and when selected will open the maintenance pages for that column where you can view and possibly edit, depending on your security permissions.

When checking one or more rows, you can select the **View Selected** button to view the details of the benefit change request. The button also has other options.

The View Account Benefit Plans option will open the Employee Benefit Plans report page.

The View Change Request Summary option will open the Benefits Change Requests Summary report page.



#### Change Requests Summary

This report page has options to view summarized information around benefit change requests. Row level actions are available to view the employee's change request and also have options to open the employee's account or use employee quick links.

The EIN column data contains a hyperlink and when selected will open the maintenance page for the column where you can view and possibly edit, depending on your security permissions.

You can select multiple employees and select the **View Selected** to scroll through the selections and view their change requests. Other options under this button include:

The **Delete** option will remove the selected entries from the report page.

The View Account Benefit Plans option will open the Employee Benefit Plans report page.

The View Change Request Detail option will open the Benefits Change Requests Detail report page.



### Reports

## Benefit Census Report

This report shows, by an employee, details of each employee's assigned benefit plans, along with multiple employee profile fields.



#### Benefit New Hire Status

This report shows the benefits enrollment status as new employees are hired. The columns will show those employees who have not started benefits enrollment, those in progress, completed, or rejected, and the enrollment status.



## Benefit Open Enrollment Status

This report shows the benefits enrollment status of all employees. The columns will show those employees who have not started benefits enrollment, those in progress, completed, or rejected, and the enrollment status.



## Benefit Questionnaire Answers

This report shows the answers employees have given to benefit questionnaires. To make the report easier to read, it is recommended that you group the report by employee. It will show the question label, question answer, answer type and date completed. Additional columns can be added.

