



REPORTING BASICS

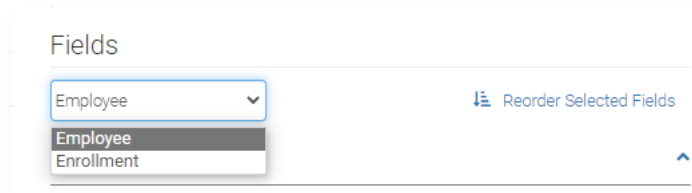
Employee Navigator has both pre-configured and customizable reporting options. Ad Hoc Reports allow you to select specific demographic and enrollment data to include in your reports. Pre-configured reports may allow for some customization; however, the title of the report indicates the type of data retrieved.

Useful Reports:

- **Ad Hoc Row-Based Report:** Customizable fields for reporting purposes
- **Pending EOI:** Used to identify employees pending voluntary benefit amount and notify employee EOI when needed
- **Payroll Deduction Report**
- **Enrollment Changes & Demographic Changes:** Shows changes with a side-by-side look of what the field was prior and the new value

Helpful Tips:

- Spend some time testing different reports
- Each report has a blue Info button ⓘ that displays a description of the report when clicked
- Toggle between **Employee** and **Enrollment** fields to select data to include



- Click **Reorder Selected Fields** to reorganize data fields
- After viewing a report, click **Fields** to add or remove selected data in your existing report if any data is missing or unneeded
- Select if you want to Include or Exclude Dependents, Declined, Ended, or Not Enrolled
- Select type of enrollment:
 - **Default:** Both Current and Open Enrollment
Note: Default enrollment is not available on all Ad-Hoc reports
 - **Current:** Current Enrollment
 - **Open:** Open Enrollment records only when Open Enrollment is active



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Building an Ad-Hoc Report:

1. Click **Row-Based Report**.
2. Select the Employee demographic data fields to include the report (SSN, Name, Address, DOB, Class, Salary, etc).

3. Select the Enrollment data fields to include (Benefit, Plan, Coverage Level, EE per Pay or Monthly Cost, Benefit Amount, etc.)



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4. Select as needed – Include Dependents; Exclude Declined, Ended, and/or Not Enrolled

- 5. Select **Type of Enrollment**.
- 6. Click **View** – Review the format & data included in the report
 - a. If changes are needed:
 - i. Click **Fields** to go back to the report you have just built and select more or remove options you included

Employee SSN	Relationship	Social Security Number	Last Name	First Name	Class	Plan	Start Date	End Date	Decline Reason	Benefit	Coverage Level	EE Monthly Cost	Benefit Amount
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b. If no changes to the data parameters are needed – Click **Download** to access the Excel file

Example: Build a Dependent Age Report to find Dependents who will age out of COBRA eligible benefits and possible Coverage Tier Changes



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1. Select **Row-Based Ad Hoc Report**
2. Employee Fields (information will pull for Dependents)
 - a. Social Security Number
 - b. Last Name, First Name
 - c. DOB & Age
 - d. Disabled (scroll down the page to find Disabled under the Medical section)

A screenshot of a web application's 'Fields' selection menu. The menu is titled 'Fields' and has a dropdown menu set to 'Employee'. Below the dropdown, there is a section titled 'Profile & Personal' with a 'Select All' checkbox. The following fields are listed with checkboxes: Social Security Number (checked), First Name (checked), Middle Name (unchecked), Last Name (checked), Suffix (unchecked), Preferred Name (unchecked), Display Name (unchecked), Full Name (unchecked), Sex (unchecked), Gender Identity (unchecked), DOB (checked), and Age (checked).

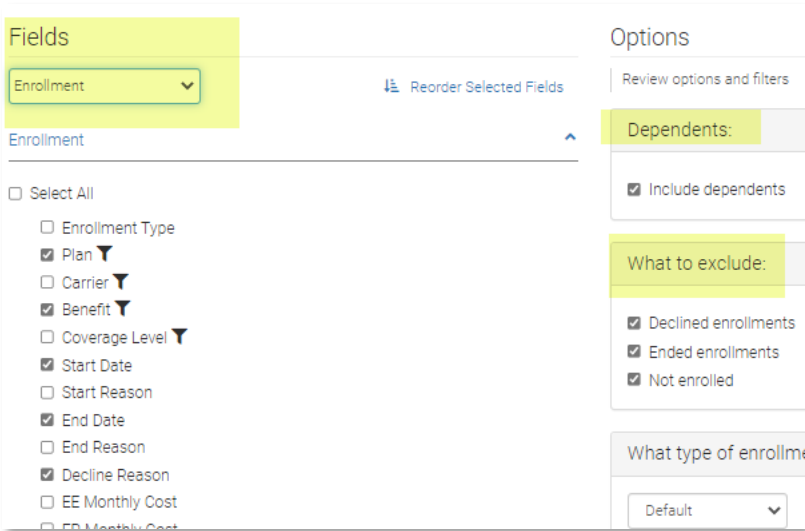
3. Enrollment Fields (click the drop down arrow under Fields to switch to Enrollment)
 - a. Plan (gives Plan Name)



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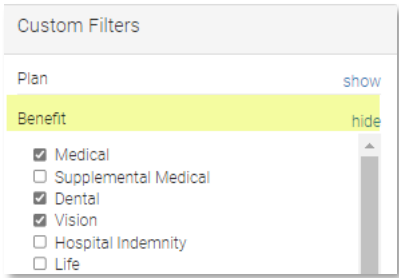
b. Benefit (type of Benefit ex. Medical, Dental, Vision)



4. Options:

- a. Include Dependents
- b. Exclude Declined, Ended and Not enrolled
- c. Custom Filters – Click Show & select benefits dependents could age out

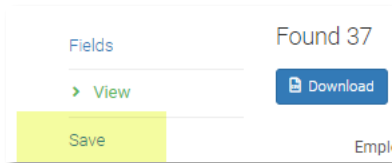
Note: Scroll down the page to find more data fields that you can include in the report



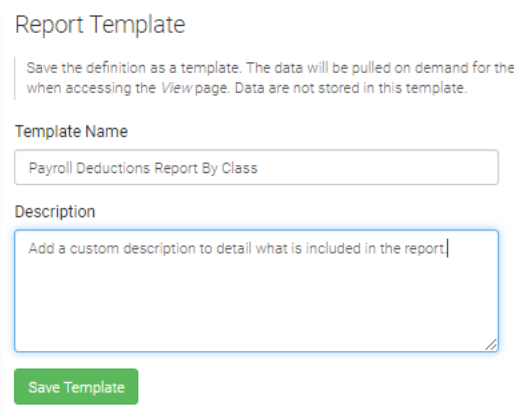
- 5. View & Download report if all data has been added
 - a. Filter by Age and Relationship to identify dependents nearing the age out rules for your benefits
- 6. Follow the steps in the [Saving a Customized Report](#) section to reuse this report as needed

Saving a Customized Report:

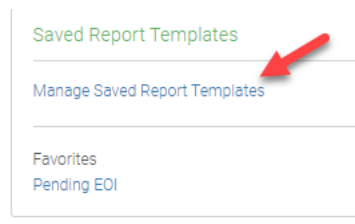
1. Create the report
2. Click **Save** instead of Download



3. Complete the **Template Name and Description** – Use a Report Title that aligns with the report you created

A screenshot of a 'Report Template' form. At the top, it says 'Report Template' and has a note: 'Save the definition as a template. The data will be pulled on demand for the when accessing the View page. Data are not stored in this template.' Below this are two input fields: 'Template Name' with the text 'Payroll Deductions Report By Class' and 'Description' with the placeholder text 'Add a custom description to detail what is included in the report'. At the bottom left is a green 'Save Template' button.

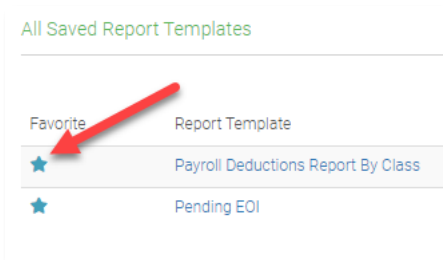
4. Click **Save Template**
5. Add it to your Reports tab
 - a. Go back to the main Reports Page – Click **Manage Saved Report Templates**



- b. Click the **Star** next the report you just saved



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6. The custom report will now show on your **Favorites** list

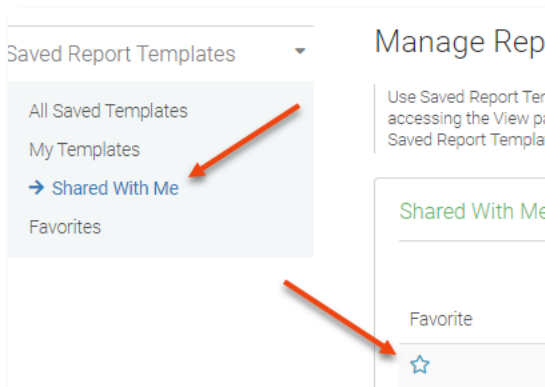




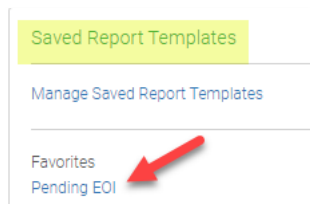
Pending EOI Report:

Employees may elect benefit amounts above the policy Guarantee Issue amount. You can quickly run the Pending EOI report to find employees needing to apply for Evidence of Insurability

1. **Add Pending EOI Report** to your Favorites list (if not already showing)
 - a. Click on **Manage Saved Report Templates**
 - b. Click on **Shared With Me** and click the Star next to Pending EOI



2. Click **Reports Menu** to find the Pending EOI report link under your Favorites



Note: The reporting fields are pre-selected; however, you can add more if needed after clicking on the Pending EOI link

3. Select any additional Employee and/or Enrollment fields needed
4. Select the Benefit(s) you need to review for Pending EOI
 - a. Click **Show** next to the Benefit under Custom Filter, then select Group Life and/or Voluntary Life



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Select All

- Social Security Number
- First Name
- Middle Name
- Last Name
- Suffix
- Preferred Name
- Display Name
- Full Name
- Sex
- Gender Identity
- DOB
- Age
- Marital Status
- Date of Marriage
- U.S. Citizen
- Visa Status
- Veteran Status
- Military Reserve Status
- Race/Ethnicity
- Office ▼

Declined enrollments

Ended enrollments

Not enrolled

What type of enrollment:

Default ▼

Limit enrollments based on dates:

Put in the system between: [] and []

Custom Filters

Benefit [hide](#)

- Group Life
- Voluntary Life

5. Select any additional Employee and/or Enrollment fields needed.
6. Click **View & Download** (if applicable)

Social Security Number	Last Name	First Name	Benefit	Start Date	End Date	Decline Reason	Employee Insurability Requested	Employee Pending Benefit Amount	Employee Pending Cost	Spouse Insurability Requested	Spouse Pending Benefit Amount	Spouse Pending Cost	Employee Approved Benefit Amount	Spouse Approved Benefit Amount	Spouse Approved Benefit Amount
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7. You will see which employees have a request amount that is pending approval and amounts that have been approved
8. **Follow up with the employee(s)** to ensure they complete the EOI application
 - a. HR Offices can submit paper applications via the secure SET SEG portal
 - b. Employees can apply directly with those carriers offering online applications.

During Open Enrollment

1. Change Type of Enrollment from Default to Open

What type of enrollment:

Open ▼

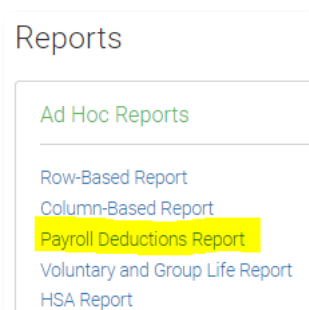
Note: SET SEG will monitor EOI's and requested coverage will be withdrawn if the EOI is not received within 2 weeks from the date the new hire and/or open enrollment window closes



Payroll Deductions Report:

Used to determine the per pay deduction based on the number of pay deductions and employee cost share configured in Employee Navigator.

Note: Accuracy of report is contingent upon Payroll Groups and Employee Cost Share information being current in Employee Navigator





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1. Select the **Employee** and **Enrollment** fields you wish to include

Fields

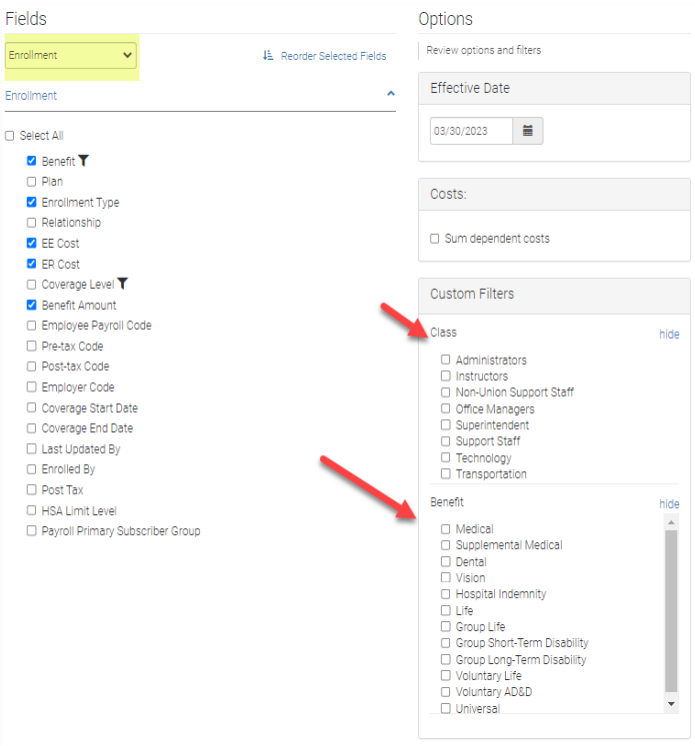
Employee ▾

Profile & Personal

Select All

- Social Security Number
- First Name
- Middle Name
- Last Name
- Suffix
- Preferred Name
- Display Name
- Full Name
- Sex
- Gender Identity
- DOB
- Age
- Marital Status
- Date of Marriage
- U.S. Citizen
- Visa Status
- Veteran Status
- Military Reserve Status
- Race/Ethnicity
- Office ▼
- Class ▼
- Payroll Group

- Custom Filters – you can pre-filter by selecting any field with the Filter icon next to it



The screenshot shows a web interface for reporting. On the left, under 'Fields', the 'Enrollment' dropdown is selected. A list of fields is shown with checkboxes: Benefit (checked), Plan, Enrollment Type (checked), Relationship, EE Cost (checked), ER Cost (checked), Coverage Level, Benefit Amount (checked), Employee Payroll Code, Pre-tax Code, Post-tax Code, Employer Code, Coverage Start Date, Coverage End Date, Last Updated By, Enrolled By, Post Tax, HSA Limit Level, and Payroll Primary Subscriber Group. On the right, under 'Options', the 'Effective Date' is set to 03/30/2023. The 'Costs' section has 'Sum dependent costs' checked. The 'Custom Filters' section has two filters: 'Class' and 'Benefit'. The 'Class' filter includes options like Administrators, Instructors, Non-Union Support Staff, Office Managers, Superintendent, Support Staff, Technology, and Transportation. The 'Benefit' filter includes options like Medical, Supplemental Medical, Dental, Vision, Hospital Indemnity, Life, Group Life, Group Short-Term Disability, Group Long-Term Disability, Voluntary Life, Voluntary AD&D, and Universal. Red arrows point to the 'Class' and 'Benefit' filter headers.

- Enter the **Effective Date**

Note: enrollments prior to or after the Effective date **will not be included**

- Sum dependent costs – When selected combines dependent & employee costs.
- Click View and Download when all needed data has been included



Enrollment and Demographic Changes Report:

1. Enter the **Date Range** for the enrollment changes needed
Note: Avoid using this report during your district's Open Enrollment period – other, preferred reporting methods are available during that period of time
2. You can choose to filter by Carrier, Plan, or Event Type (Ex, Add Coverage for New Spouse; Coverage level change, etc.)
 - a. "All" will pull all changes made in the date range given
3. Click **Generate**
4. Search the report with the **Search Field** – type employee name, dependent name, etc. or download and filter using the Excel file

Enrollment Changes BACK TO REPORTS MENU

Date Range: 02/01/2023 to 03/30/2023

Carrier: -- All --

Plan: -- All --

Event Type: -- All --

Generate

CSV Excel Print Search Report

SSN	First Name	Last Name	Carrier	Plan	Type	Enrollment Start Date	Enrollment End Date	Event	Changed Field	Changed On	From	To	Modified By
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