



PARTICIPATING EMPLOYEES WITH BENEFIT PLANS

REPORT DESCRIPTION B0011 | WEB INTELLIGENCE



The purpose of this report description is to explain the Participating Employees with Benefit Plans report and how to generate it in the system.

REPORT DESCRIPTION:

This report shows all employees who are participating in specified benefit plans as of the Selected Date and is associated with Two Reporting Views.

The Summary Reporting tab provides the summary of the Number of Employees by Plan and Plan Option.

REPORT LOCATION:

BN: Benefits

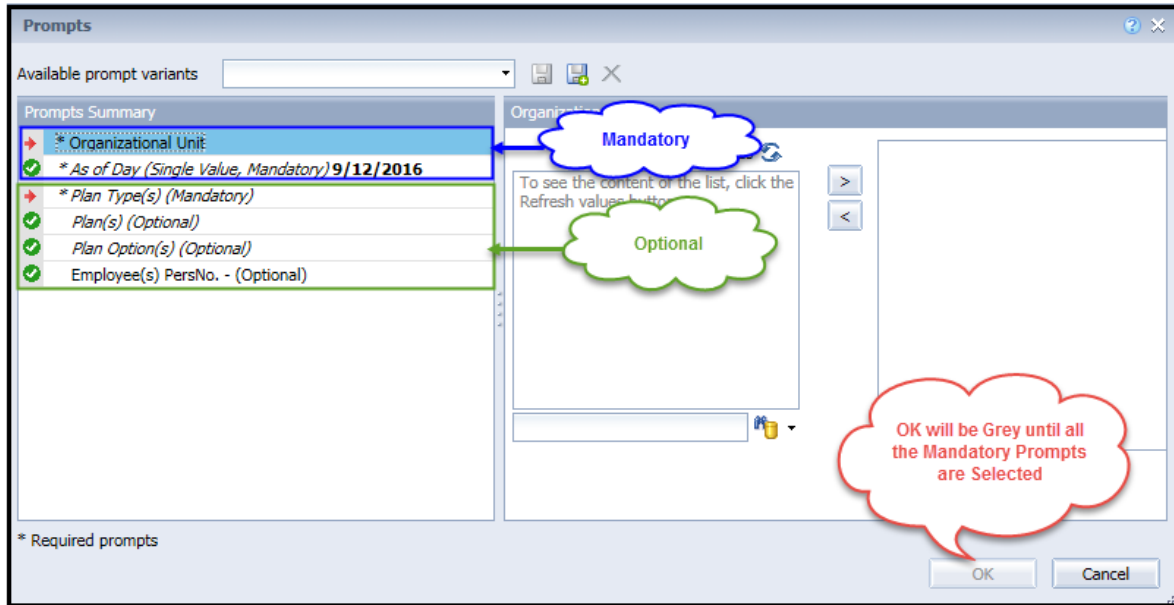
REPORT USES:

Agency could use the report during open enrollment as a reminder to reenroll for plans that require mandatory reenrollments and to recomplete wellness credits for premium reductions and continued participation in the next plan year. Allows core users to see the coverage amounts without looking up individual participants benefit options within PA20 IT168.

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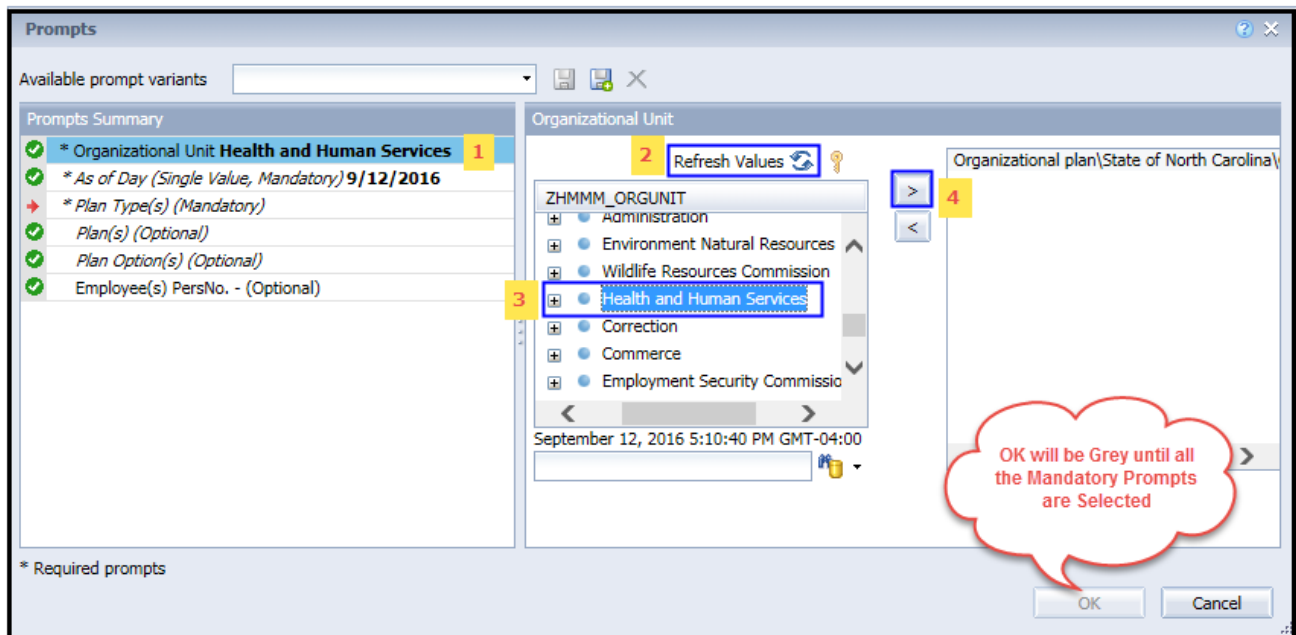
How to generate this report



Mandatory Prompts

Mandatory prompts have a red arrow indicator (➔) followed by an asterisk (*) on the left side of the prompts. When a valid value(s) is entered, this indicator will turn into a green check mark (✓).

- ➔ ***Organizational Unit:** To select data for this prompt:
 - Make sure the “Organizational Unit” prompt is selected (1).
 - Click the “Refresh Values” icon to see the list of Organizational Units (2).
 - Navigate down to select the desired Organizational Unit (3).
 - Click the right arrow to add it to the selection box (4).

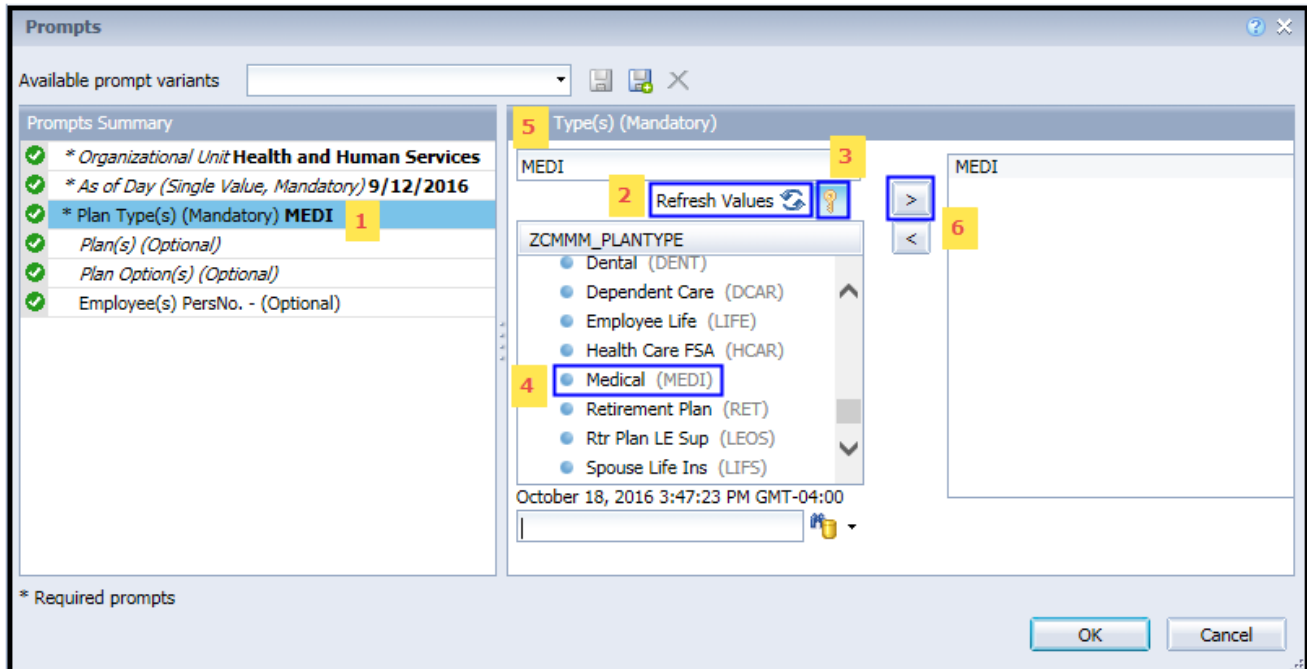


- **As of Day (Single Value, Mandatory):** To select data for this prompt,
- Make sure the 'As of Day (Single Value, Mandatory)' prompt is selected (1).
 - Enter a date in mm/dd/yyyy format (2).
 - Or choose a date from the calendar (3).

The screenshot shows a 'Prompts' dialog box with the following elements:

- Available prompt variants:** A dropdown menu.
- Prompts Summary:** A list of prompts with checkboxes:
 - * Organizational Unit **Health and Human Services**
 - * **As of Day (Single Value, Mandatory) 9/12/2016** (1)
 - * Plan Type(s) (Mandatory)
 - Plan(s) (Optional)
 - Plan Option(s) (Optional)
 - Employee(s) PersNo. - (Optional)
- As of Day (Single Value, Mandatory):** A text field containing '9/12/2016' (2) and a calendar icon (3). The calendar shows September 2016 with the 12th selected.
- Buttons:** 'Today', 'OK', and 'Cancel'.
- Callout:** A red speech bubble containing the text: 'OK will be Grey until all the Mandatory Prompts are Selected'.

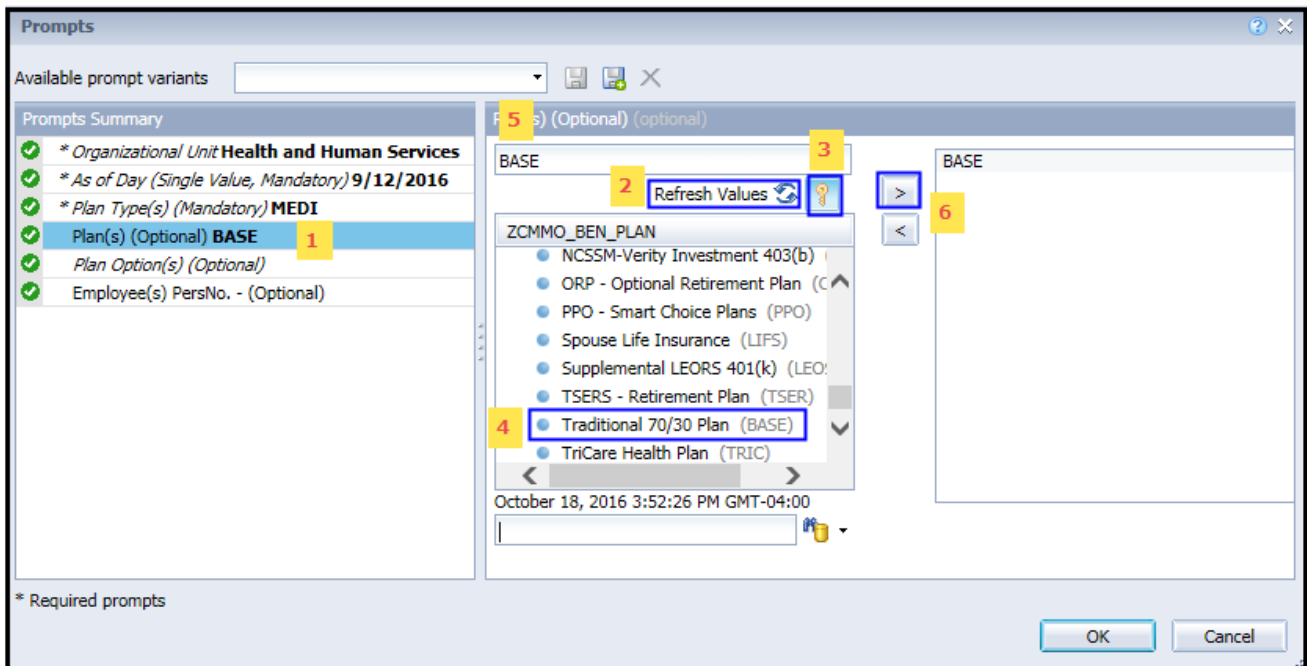
- ***Plan Type(s) (Mandatory):** To select data for this prompt:
- Make sure the “Plan Type(s) (Mandatory)” prompt is selected (1).
 - Click the “Refresh Values” icon to see the list of Plan Types (2).
 - Click the key icon (3) to see the key value for each Plan Type.
 - Select the desired Plan Type (4).
 - **OR** if the Plan Type key or Plan Type name are known, skip steps 2 through 4 and enter it directly in (5).
 - Click the right arrow to add the Plan Type to the selection box (6).
 - If no other prompts are required, click the “OK” button to run the report.



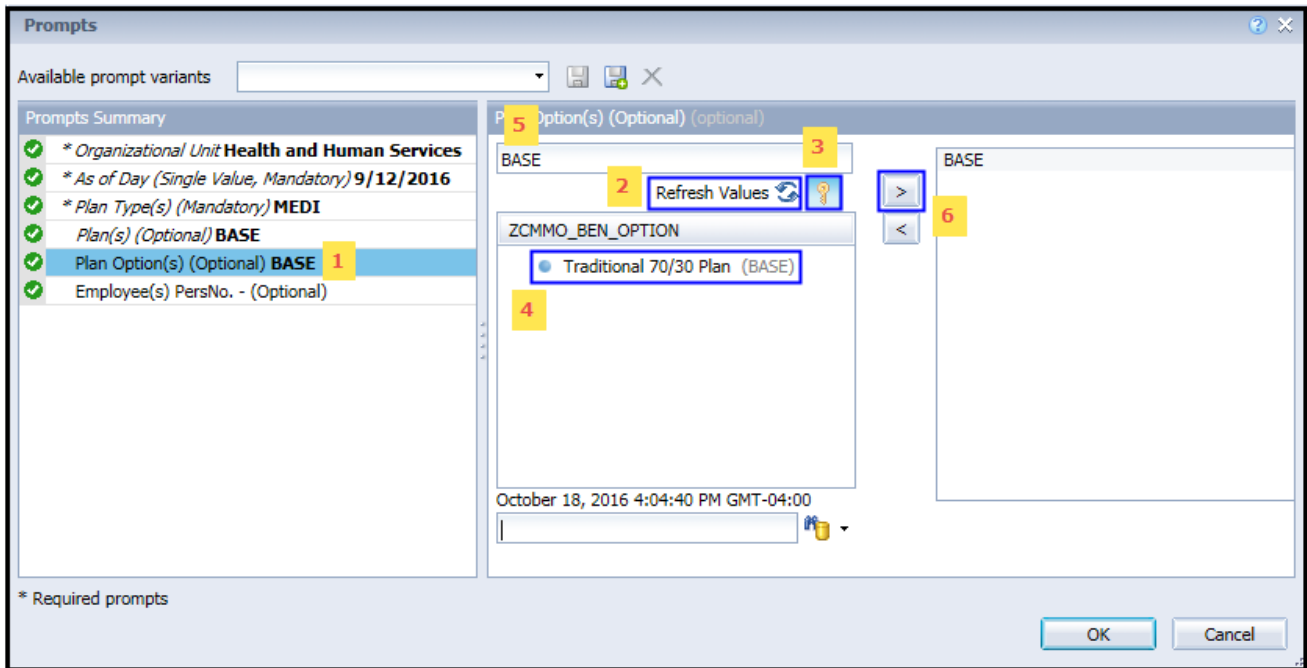
Optional Prompts

Optional prompts are indicated with a green check mark (✓) and are not required. They are used to assist in further limiting the amount of data that is retrieved into the body of the report.

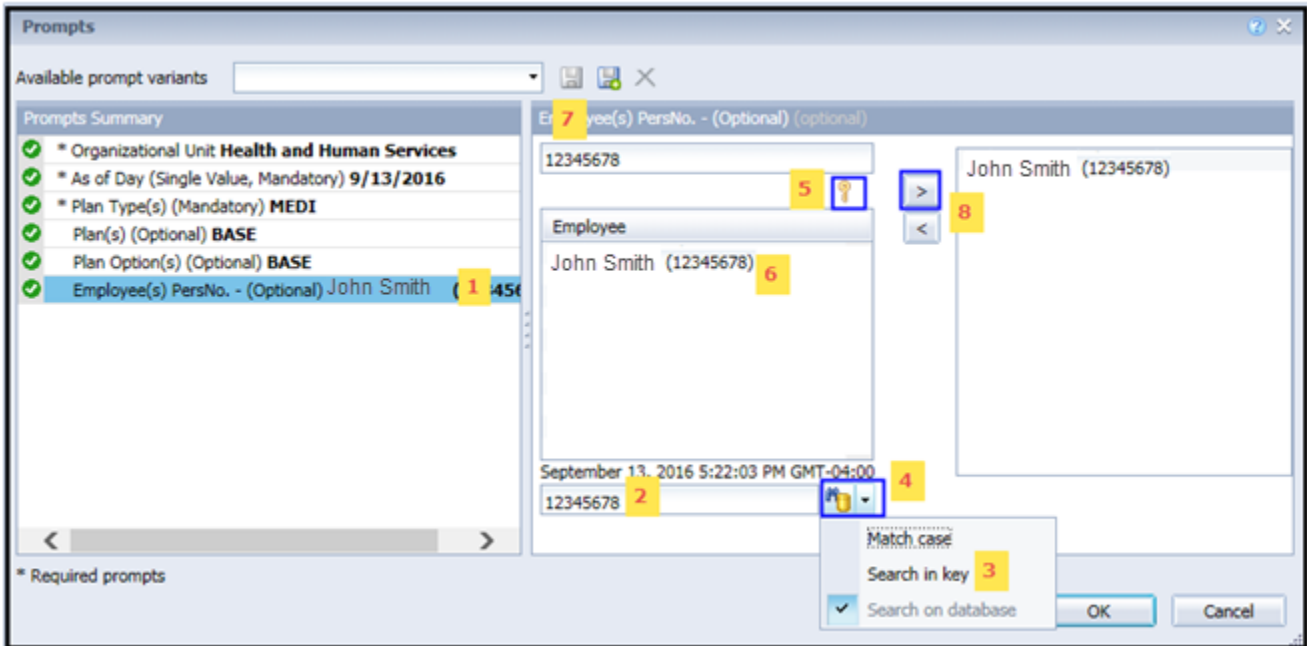
- ✓ **Plan(s) (Optional):** To select data for this prompt:
 - Make sure the “Plan(s) (Optional)” prompt is selected (1).
 - Click the “Refresh Values” icon to see the list of Plans (2).
 - Click on the key icon (3) to see the key value for each Plan.
 - Select the desired Plan (4).
 - **OR** if the Plan key or Plan name are known, skip steps 2 through 4 and enter it directly in (5).
 - Click the right arrow to add the Plan to the selection box (6).



- ✓ **Plan Option(s) (Optional):** To select data for this prompt:
 - Make sure the “Plan Option(s) (Optional)” prompt is selected (1).
 - Click the “Refresh Values” icon to see the list of Plan Options (2).
 - Click on the key icon (3) to see the key value for each Plan Option.
 - Select the desired Plan Option (4).
 - **OR** if the Plan Option key or Plan Option name are known, skip steps 2 through 2 and enter it directly in (5).
 - Click the right arrow to add the Plan Option to the selection box (6).



- ✓ **Employee(s) PersNo. - (Optional):** To select data for this prompt:
 - Make sure the “Employee(s) PersNo. - (Optional)” prompt is selected (1).
 - Enter an employee number in the search box to verify the employee name (2).
 - Click the search icon drop down arrow and select “Search in key” (3).
 - Click the search icon (4).
 - Click the key icon (5) to see the employee number.
 - Select the desired Employee (6).
 - **OR** if the employee number is known, skip steps 2 through 6 and enter it directly in (7).
 - Click the right arrow to add the Employee to the selection box (8).



NOTE: Since the system has a large number of employees, using broad wildcard searches can be very slow and may result in an error if the search exceeds the system limit. If the employee number is not known and a name search must be done, narrow down the search by using the wildcard with specific text strings when looking for an employee by name such as:

John*Smith*
*Smith

If the employee number is known, it is best to use the manual entry field (in step 7) to enter the selection.

Initial Layout

This report displays all employees who are participating in specified benefit plans.

B0011: Participating Employees with Benefit Plans as of 12/7/2017						
						Execution Date : 12/7/17
Personnel Area	Employee Name	Employee PersNo.	Plan	Plan Option	Insurance Coverage	Valid From
State Controller	ALICE, BOB	12121212	Consumer_Driven Plan	Consumer Driven All incentives		1/1/2016
				NC Flex Dental Plan	Dental Low Option	
	DOE, JOHN	13131313	NC Flex Dental Plan	Dental Low Option		1/1/2016
	HANCOCK, JOHN	14141414	NC Flex Dental Plan	Dental High Option		1/1/2017
			NC Flex Life Insurance	NC Flex Life Insurance	50,000.00	1/1/2017
			Traditional 70/30 Plan	Traditional 70/30 Non Smoker		1/1/2017
	SMITH, JAMES	15151515	Enhanced 80/20 Plan	Enhanced All Incentives		1/1/2017
			NC Flex Dental Plan	Dental Low Option		1/1/2017
			NC Flex Life Insurance	NC Flex Life Insurance	20,000.00	1/1/2017
	SMITH, JOHN	16161616	NC Flex Life Insurance	NC Flex Life Insurance	20,000.00	1/1/2016

Summary: This Reporting tab summarizes the Number of Employees by Plan and Plan Option.

Summary			
			Execution Date : 12/7/17
Plan	Plan Option	Insurance Coverage	Number of Employees
Consumer_Driven Plan	Consumer Driven All incentives		13
Consumer_Driven Plan	Consumer Driven NSMK & PCP		2
Enhanced 80/20 Plan	Enhanced All Incentives		64
Enhanced 80/20 Plan	Enhanced Non Smoker & PCP		1
Enhanced 80/20 Plan	Enhanced PCP Only		1
NC Flex Dental Plan	Dental High Option		65
NC Flex Dental Plan	Dental Low Option		67
NC Flex Life Insurance	NC Flex Life Insurance		81
Traditional 70/30 Plan	Traditional 70/30 No Credits		2
Traditional 70/30 Plan	Traditional 70/30 Non Smoker		12
Traditional 70/30 Plan	Traditional 70/30 Plan		4

Report Info: The Report Info tab displays the information about the prompts entered.

Report Info		Execution Date : 9/14/16
Prompt Input		
Organizational Unit	Health and Human Services	
As of Day	9/14/2016	
Plan Type(s)	Medical,Dental	
Plan(s)		
Plan Option(s)		
Employee(s) PersNo.	Bob Alice; Jane Doe, John Hancock	

Available Objects

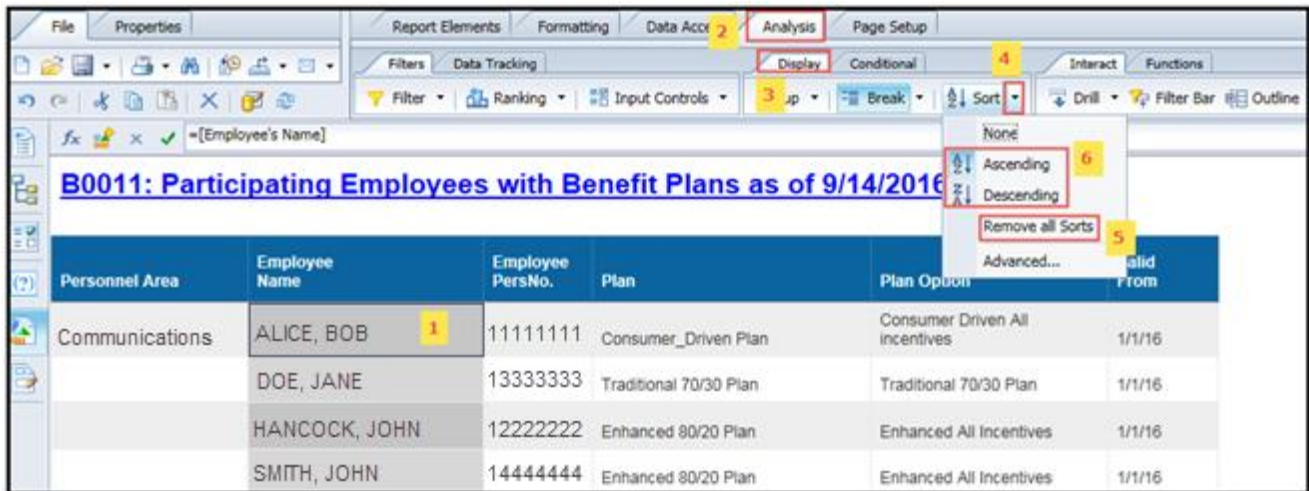
This is a list of the available objects that can be added to the report, once in Design mode:

- [-] B0011: Participating Employees with Benefit Plans
 - + **Changed On**
 - + **Dependent Coverage**
 - + Employee
 - + Employee's Name
 - + **Employee Group**
 - + **Employee Subgroup**
 - + **Employment Status**
 - + Insurance Coverage Amount
 - + **Job**
 - + **Organizational Unit**
 - + **Original Hire Date**
 - + Personnel Area
 - + **Personnel Subarea**
 - + Plan
 - + Plan Option
 - + **Position**
 - + Valid From
 - + **Valid To**
 - + Number of Employees
 - [-] Variables
 - + Employee PersNo.
 - + Prompt Response As of Day
 - + Prompt Response Employee PersNo
 - + Prompt Response Organizational Unit
 - + Prompt Response Plan
 - + Prompt Response Plan Option
 - + Prompt Response Plan Type
 - + Insurance Coverage
 - + References

Special Report Considerations/Features

✓ To change the sorting for the desired column
 By default, data is sorted by Personnel Area, Employee Name, Employee PersNo., and Plan. (This can be changed as needed).

- Make sure the “desired column” is selected (1).
- Click on “Analysis” Tab (2).
- By default, “Display” tab is selected (3).
- Click on the “Drop down icon” as shown (4).
- Click on “Remove all sorts” (5).
- Select ascending or descending sort order as needed (6).



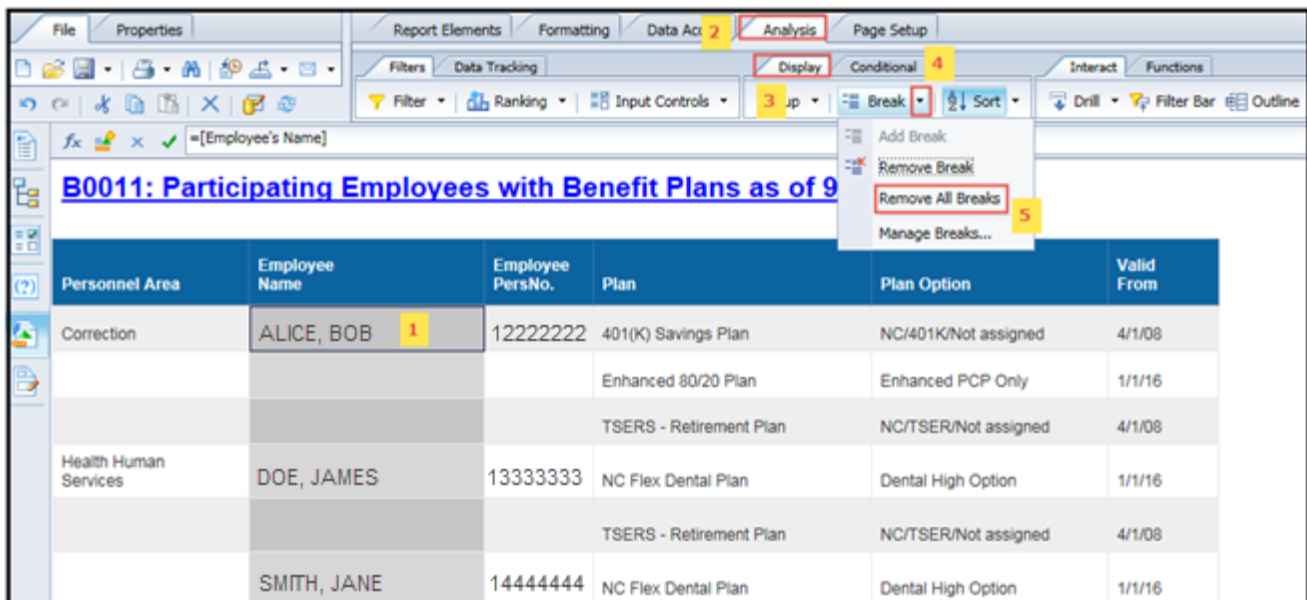
Report Description B0011 – Participating Employees with Benefit Plans

✓ To change the breaks in the Report while exporting the data to Excel

By default, breaks are applied in the report on Personnel Area, Employee Name and Employee PersNo. to avoid repeated values in the Columns.

If the repeated values of the above columns in Excel are needed, then remove breaks in the report before exporting the data to Excel.

- Select “any column” that has break applied (1).
- Click on “Analysis” Tab (2).
- By default, “Display” tab is selected (3).
- Click on the “Drop down icon” as shown (4).
- Click on “Remove all Breaks” (5).



The screenshot shows the report interface for 'B0011: Participating Employees with Benefit Plans as of 9'. The 'Analysis' tab is selected, and the 'Display' sub-tab is active. The 'Break' dropdown menu is open, showing options: 'Add Break', 'Remove Break', 'Remove All Breaks', and 'Manage Breaks...'. The 'Remove All Breaks' option is highlighted with a red box and a yellow '5'. The table below shows the data for three employees: ALICE, BOB; DOE, JAMES; and SMITH, JANE. The 'Employee Name' column has a yellow '1' next to 'ALICE, BOB'.

Personnel Area	Employee Name	Employee PersNo.	Plan	Plan Option	Valid From
Correction	ALICE, BOB	12222222	401(K) Savings Plan	NC/401K/Not assigned	4/1/08
			Enhanced 80/20 Plan	Enhanced PCP Only	1/1/16
			TSERS - Retirement Plan	NC/TSER/Not assigned	4/1/08
Health Human Services	DOE, JAMES	13333333	NC Flex Dental Plan	Dental High Option	1/1/16
			TSERS - Retirement Plan	NC/TSER/Not assigned	4/1/08
	SMITH, JANE	14444444	NC Flex Dental Plan	Dental High Option	1/1/16

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Now the Repeated values in all columns are visible and can be exported to Excel in the same format.

Personnel Area	Employee Name	Employee PersNo.	Plan	Plan Option	Valid From
Correction	ALICE, BOB	11111111	401(K) Savings Plan	NC/401K/Not assigned	4/1/08
Correction	DOE, JANE	12222222	Enhanced 80/20 Plan	Enhanced PCP Only	1/1/16
Correction	HANCOCK, JOHN	13333333	TSERS - Retirement Plan	NC/TSER/Not assigned	4/1/08
Health Human Services	SMITH, JOHN	14444444	NC Flex Dental Plan	Dental High Option	1/1/16

Change Log

Effective Date	Change Description	Modifier
10/13/2016	Initial report creation to convert from BI to BOBJ.	
12/7/2017	Added Insurance coverage amount for the Life and AD&D Insurance Plans	
3/26/19	NO changes have been made to the content of the report description. ONLY formatting changes to the headers and footers.	
9/3/2020	Screenshots modified	L. Lee
9/21/2020	Made accessible, alt text added.	L. Lee