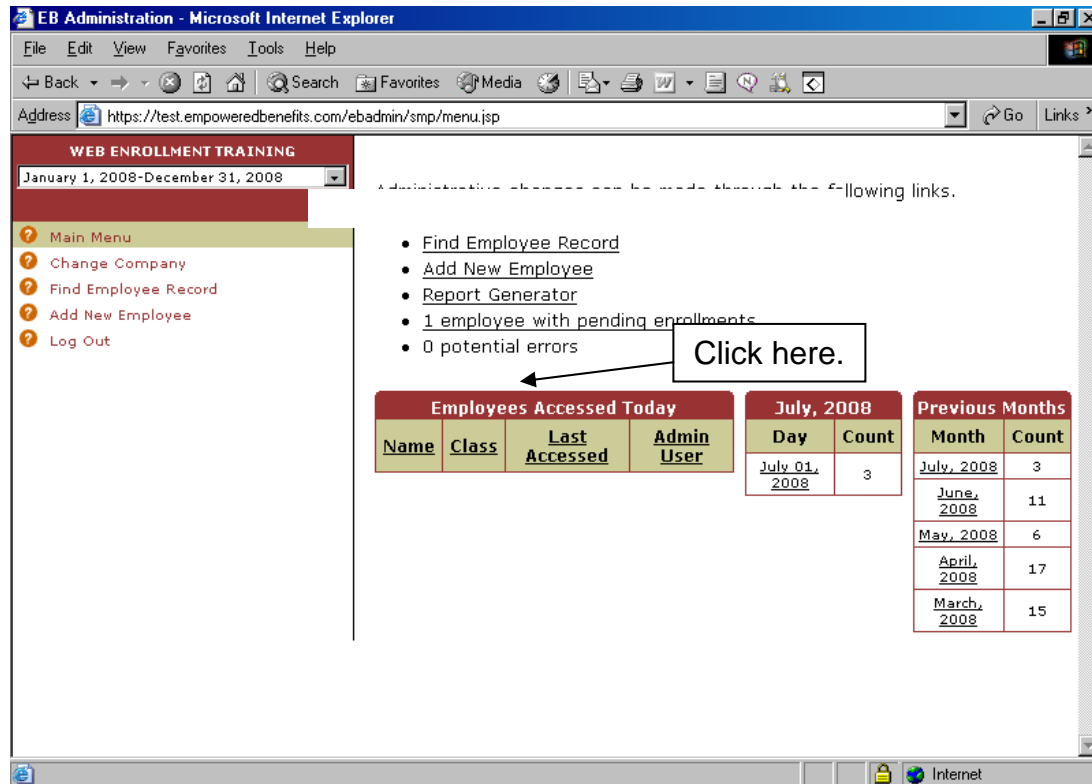


## Report Generator

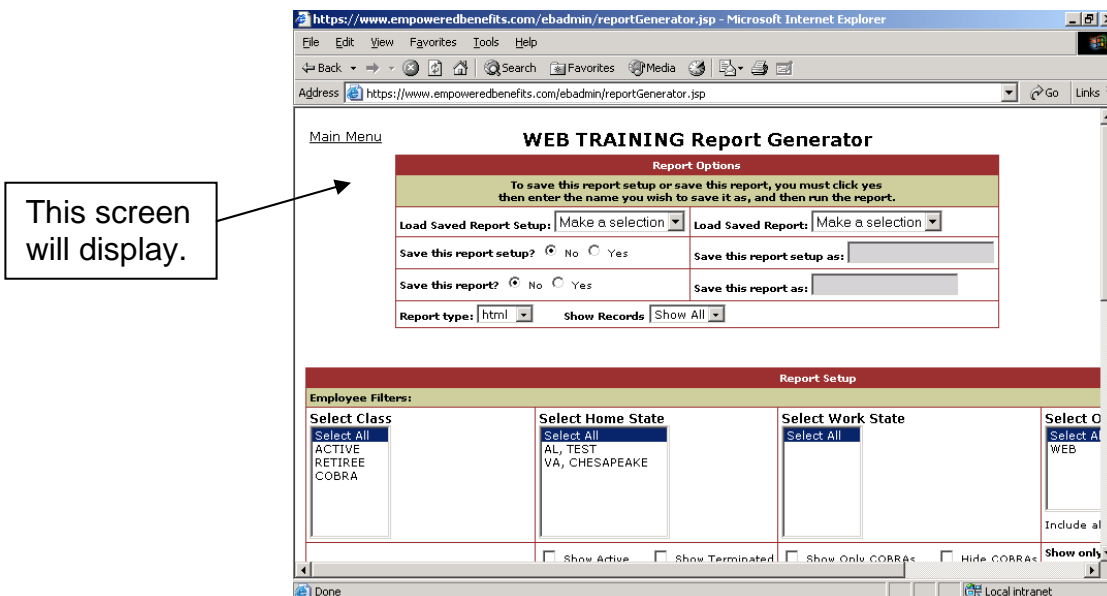
The system has the capabilities of running a detailed report if needed for group reporting. The report generator has different functionality to show needed information such as a complete list of all membership, reporting by subgroup level, and reporting for daily new enrollments and terminations. Ability to save the report setting so they can be used again without having to re-select the requested fields.



How to

begin the report:

- From the group's main menu screen click the report generator selection.



## Report Generator screen:

The screenshot shows a web browser window with the URL <https://www.empoweredbenefits.com/ebadmin/reportGenerator.jsp>. The page is titled "WEB TRAINING Report Generator".

**Report Options**

To save this report setup or save this report, you must click yes then enter the name you wish to save it as, and then run the report.

Load Saved Report Setup:  Load Saved Report:

Save this report setup?  No  Yes Save this report setup as:

Save this report?  No  Yes Save this report as:

Report type:  Show Records

**Report Setup**

**Employee Filters:**

|  |   |   |   |
|--|---|---|---|
| <b>Select Class</b><br><input type="text" value="Select All"/><br>ACTIVE<br>RETIREE<br>COBRA | <b>Select Home State</b><br><input type="text" value="Select All"/><br>AL, TEST<br>VA, CHESAPEAKE | <b>Select Work State</b><br><input type="text" value="Select All"/> | <b>Select O</b><br><input type="text" value="Select A"/><br>WEB |
|--|---|---|---|

Show Active   
  Show Terminated   
  Show Only COBRAs   
  Hide COBRAs   
 Show only

## Report Options:

- **Load Saved Report Setup:** - Select the down arrow to select a save report setup. If create a new report then just leave the default to Make a selection.
- **Save this report setup?** – Select the button beside the “No” to create a one time report or select the button beside the “Yes” to save the report setup to be used again. Please note. If “Yes” is selected it will be necessary to name the setup. Enter the file name in the “Save this report setup as” section. This is a free text field and can only be access when “Yes” is selected.
- **Save this report?** - Select the button beside the “No” you do not want to save the report results. Select the button beside the “Yes” to save the report results. If “Yes” is selected it will be necessary to name the report. Enter the file name in the “Save this report” section. This is a free text field and can only be access when “Yes” is selected
- **Report type:** This drop down selection will allow different formats of files to be downloaded. Example HTML, Excel
- **Show Records** – The default is Show All. On the larger groups it will display an option to show records 1 –200, 200-400 etc.

The reportable fields are separated into the following sections.

### Employee Filters:

- **Select class:** select all to include all subgroups or select one subgroup to get a more precise or narrowed search.
- **Select Home State:** select all.
- **Select Work State:** select all.
- **Select Org Name:** select all..
- **Show Only Enrollees:** check this option for most reports
- **Show Declination Summary:** check this option only for specific decline information.
- **Show Non-Enrollees During Open Enrollment Only:** not required or used at this time.
- **Select Coverage Start Date:** use this date option only if enrollment information is needed. Leave the selection blank to “show all” transactions shown in above example.
- **Show Active:** check this option to show active membership.
- **Show Terminated:** check this option to show termed employees.
- **Coverage End Date:** use this date option only if termed information is needed. Leave the selection blank to “show all” transactions shown in above example.
- **Show Only COBRAs and Hide Cobras** – Are not used at this time. The “Class” (subgroup) they are enrolled identifies cobra members.
- **Cobra End Date and Coverage Period Start Date:** Are not used at this time. The “Class” (subgroup) they are enrolled identifies cobra members.

- **Show only records with changes in Demographics or Enrollment:** the drop-down selection will allow different selection criteria based on need. The choices are:
  - **Demographics or Enrollment**
  - **Demographics**
  - **Enrollment**

**Enrollment Date Filters:** - This will limit the selection of employees based on their enrollment dates.

- Coverage Start Date
- Coverage End Date
- Coverage Period Start Date
- Coverage Period End Date

**Select Employee fields to show:** - This section will identify which fields should be included in the report for the employee record. Click in the checkboxes (buttons to the left of the field names) to select the fields to be included in the report.

Select fields to show in report:

- **Sort by:** The drop down selection has all the select fields needed on the report. The sort can be done for example by Name, SSN#, Home Street and so forth.

**Select Dependent fields to show** – This section will identify which fields should be included in the report for the dependents record. Click in the checkboxes (buttons to the left of the field names) to select the fields to be included in the report

**Select Enrollment Fields to show** – This section will identify tiers, coverage dates, rates associated with an employee.

**Select products to report on:** -

**Check All or Un-Check All** - This feature will allow all fields to be select at once or un-select for convenience. It is best to select only one product at a time. This will make the report easier to print..

- **Records Only:** This feature will show only the active or pending records according to the radio button selected.
  - Active
  - Pending
  - Hide Prices
  - HMO, PPO, or any product type can be select separately or together for full reporting.

**\*\*Click Show Report button and the system should automatically create the report.** Depending on the file format chosen the report can display on the screen (HTML) or through another software application (Excel) for example.

## Create a report of all employees that were entered after a specific date:

### Example:

The example shown to the right illustrates how to run the Report Generator for all active membership listed on the group plan.

The screenshot shows the Report Generator interface with the following settings:

- Select Class:** Select All
- Select Home State:** Select All
- Select Work State:** Select All
- Select Org:** Select All
- Set Filters for Employees:**
  - Show Only Enrollees
  - Show Declination Summary
  - Show Non-Enrollees during Open Enrollment Only
  - Show Active
  - Show Terminated
  - Show Only COBRAs
  - Hide COBRAs
  - Show only Demographics
- Termination Date:** Before
- Cobra End Date:** Before
- Coverage Start Date:** Before
- Coverage End Date:** Before
- Coverage Period Start Date:** Before
- Coverage Period End Date:** Before
- Select fields to show in report:**
  - Name
  - SSN#
  - Home Street
  - Home City,St,Zip
  - Home Phone
  - Work Street
  - Work City,St,Zip
  - Work Phone
  - Date of Hire
  - Date of Birth
  - Age
  - Date of Termination
  - Username
  - Gender
  - Contrib Status
  - Org Name
  - Home Email
  - Work Email
  - Dependent Enrollments
  - Aged-out Depend's
  - Dependent CoB Info
  - Date of Change
  - Changed By
  - Coverage Period Start
  - Coverage Period End
  - Dependent DOB
- Sort by:** Name
- Report type:** excel

- The “Select all” feature has been chosen for Class, Home State, Work State, and Org.
- Show active and terminated has been checked.
- All coverage dates in the first three sections have been left blank intentionally.
- The screenshot below shows the request to only show records with changes in Demographics or Enrollments with “On or after” chosen and current date.

The screenshot shows the Report Generator interface with the following settings:

- Show only records with changes in:** Demographics or Enrollment
- Termination Date:** Before
- Cobra End Date:** Before
- Coverage End Date:** Before
- Coverage Period Start Date:** Before
- Coverage Period End Date:** Before
- Show only records with changes in:** On or after 10/27/2005
- Sort by:** Name
- Report type:** excel
- Show:** ACTIVE
- Hide Prices:**

Use this section to select dates for report.

The screenshot shown is the bottom portion of the web screen.

The screenshot shows the bottom portion of a web report generator interface. It includes sections for setting filters, selecting fields to show, and selecting products to view. A callout box labeled "Click" points to the "Show Report" button.

**Set Filters for Employees:**

- Show Only Enrollees
- Show Declination Summary
- Show Non-Enrollees during Open Enrollment Only
- Show Active
- Show Terminated
- Show Only COBRAs
- Hide COBRAs
- Show only Demographic

**Termination Date:** Before [dropdown] Show All [button]

**Cobra End Date:** Before [dropdown] Show All [button]

**Coverage Start Date:** Before [dropdown] Show All [button]

**Coverage End Date:** Before [dropdown] Show All [button]

**Coverage Period Start Date:** Before [dropdown] Show All [button]

**Coverage Period End Date:** Before [dropdown] Show All [button]

**Select fields to show in report:**

- Name
- SSN#
- Home Street
- Home City,St,Zip
- Home Phone
- Work Street
- Work City,St,Zip
- Work Phone
- Date of Hire
- Date of Birth
- Age
- Date of Termination
- Username
- Gender
- Contrib Status
- Org Name
- Home Email
- Work Email
- Dependent Enrollments
- Aged-out Depend's
- Dependent CoB Info
- Date of Change
- Changed By
- Coverage Period Start
- Coverage Period End
- Dependent DOB

**Select Products to view:** Check All | Un-Check All

Show  ACTIVE  PENDING Records Only

Hide Prices

HMO1000  PPO1000

**Employee Payroll Deduction is listed first with Employer Contribution following on the enrollment detail record, Coverage Start Date and End Dates are listed last.**

**The Premium Equivalent is now listed before Employee Payroll Deduction on the enrollment records.**

Show Report [button] Download [button]

- This section of Report Generator shows all specific fields to be selected to show on the report.
- Each product type will need to be selected for all membership and active radio button.
- Click "Show Report" button and the report will be opened by the report type chosen previously. In this illustration the report type is Excel.

### Example of Excel report:

The screenshot shows an Excel spreadsheet with the following data:

| 1  | Status     | Last name | Suffix | First name | Middle name | SocialSecurityNumber | Home Street           | Home City      | S |
|----|------------|-----------|--------|------------|-------------|----------------------|-----------------------|----------------|---|
| 2  | ACTIVE_NEW | Bush      |        | George     | W           | '000774444'          | 1600 Pennsylvania Ave | Virginia Beach | V |
| 3  | ACTIVE_NEW | DAVID     |        | SPENCE     |             | '589987489'          | 123 SAMPLE WAY        | CHESAPEKE      | V |
| 4  | ACTIVE_NEW | FRANKLIN  |        | BEN        |             | '222110000'          | 123 Hur St            | Virginia Beach | V |
| 5  | ACTIVE_NEW | SAMPLE    |        | JOHN       |             | '222559999'          | 123 PARK LANE         | CHESAPEAKE     | V |
| 6  | ACTIVE_NEW | SAMPLE    |        | MARY       |             | '000224444'          | 500 ANYWHERE ST       | VA BEACH       | V |
| 7  | ACTIVE_NEW | SAMPLE    |        | SAMPLE     |             | '588985858'          | 123 MAIN ST           | CHESAPEKE      | V |
| 8  | ACTIVE     | SMITH     |        | JANE       |             | '000554444'          | 517 ANYWHERE ST       | VIRGINIA BEACH | V |
| 9  | ACTIVE_NEW | SMITH     |        | JASON      |             | '222334444'          | 123 MAIN ST           | ANYWHERE       | V |
| 10 |            |           |        |            |             |                      |                       |                |   |
| 11 |            |           |        |            |             |                      |                       |                |   |
| 12 |            |           |        |            |             |                      |                       |                |   |

Below the table, there are checkboxes for "Decline Medical Plan" (unchecked) and "HMC" (checked). A note states: "Employee Payroll Deduction is listed first with Employer Contribution following on the enrollment detail record, Coverage Start Date and End Dates are listed last. The Premium Equivalent is now listed before Employee Payroll Deduction on the enrollment records." Buttons for "Show Report" and "Download" are visible at the bottom.

**Example of HTML version (shown on display screen):**

- The name field can be used as a link back to the employee detail screen for easier access.

https://www.empoweredbenefits.com/cgi-bin/ebreport.pl?CPDID=1 - Microsoft Internet Explorer

Address: https://www.empoweredbenefits.com/cgi-bin/ebreport.pl?CPDID=1

Show Report Download

|   | Status     | Name                  | SocialSecurityNumber | Home Street     | Home City      | State | Zip   | Date of Hire | Date of Birth | gender | C |
|---|------------|-----------------------|----------------------|-----------------|----------------|-------|-------|--------------|---------------|--------|---|
| 1 | ACTIVE_NEW | <u>Bush, George W</u> | 000774444            | 1600            | Virginia       | VA    | 23451 | 03/01/2003   | 03/20/1957    | M      | S |
|   | HMO1000    | ES                    |                      |                 |                |       |       | 2005-03-01   | 2006-01-31    |        |   |
| 2 | ACTIVE_NEW | <u>DAVID, SPENCE</u>  | 589987489            |                 |                | VA    | 23321 | 01/20/2000   | 10/05/1968    | M      | H |
|   | PPO1000    | EE                    | 397.000              | 397.000         | 0.000          |       |       | 2005-02-01   | 2006-01-31    |        |   |
| 3 | ACTIVE_NEW | <u>FRANKLIN BEN</u>   | 222110000            | 123 Hur St      | Virginia Beach | VA    | 23462 | 00/00/0000   | 02/14/1969    | M      | H |
|   | HMO1000    | EE                    | 266.000              | 266.000         | 0.000          |       |       | 2005-02-01   | 2006-01-31    |        |   |
| 4 | ACTIVE_NEW | <u>SAMPLE, JOHN</u>   | 222559999            | 123 PARK LANE   | CHESAPEAKE     | VA    | 23321 | 10/15/2003   | 05/15/1974    | M      | H |
|   | PPO1000    | EE                    | 397.000              | 397.000         | 0.000          |       |       | 2005-02-01   | 2006-01-31    |        |   |
| 5 | ACTIVE_NEW | <u>SAMPLE, MARY</u>   | 000224444            | 500 ANYWHERE ST | VA BEACH       | VA    | 23462 | 11/01/2000   | 11/01/1970    | F      | S |
|   | HMO1000    | EF                    | 869.000              | 869.000         | 0.000          |       |       | 2005-02-01   | 2006-01-31    |        |   |
| 6 | ACTIVE_NEW | <u>SAMPLE, SAMPLE</u> | 588985858            | 123 MAIN ST     | CHESAPEAKE     | VA    | 23321 | 00/00/0000   | 05/14/1978    | M      | H |

Done Internet