PPi BENEFIT SOLUTIONS

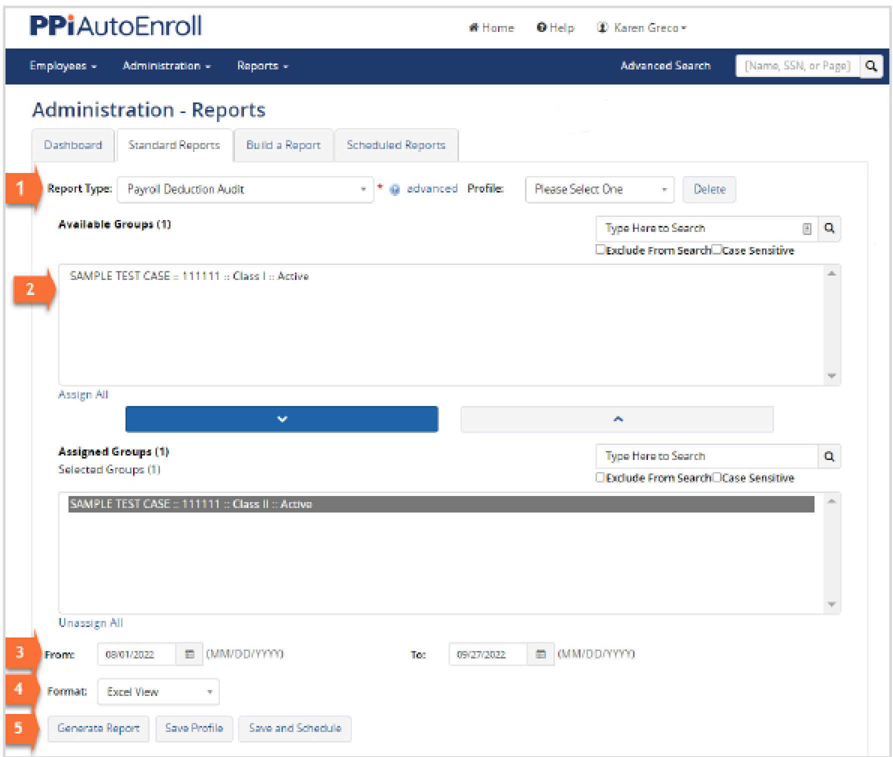
AutoEnroll
How to Run Reports

Reporting from AutoEnroll is simple! AutoEnroll offers many standard reports accessible from the Reports tab on the main toolbar.

To run a report:

1. Select your Report Type
2. Assign the Structure Group(s) you want to review
3. Enter the appropriate Date Range (based on report type)
4. Select the report Viewing Format (Defaults to Excel)
5. Click Generate Report

Your report will appear after a few seconds under the "Saved Reports" tab. Reports will remain in your report window until you delete them.



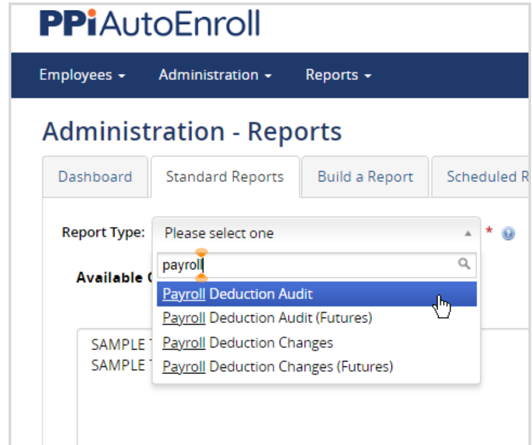
Note!

- Not all reports require a "From" date. Some may default to pull data through the current date.
- Several reports have an Advanced Tab option which allows you to select/deselect fields to include in the report.
- A Payroll Frequency field is included on several reports. If this information has not been identified at the member level (on the "Add An Employee" screen), the frequency will default to monthly.
- Payroll reports display benefit deduction amounts IF your organization's contribution schedule is loaded in AutoEnroll. Contact your PPI account manager to exercise this option.
- An Administrator Handbook is available by clicking on the blue Question Mark Icon next to the Report Type drop down menu.

Creating a Report Profile

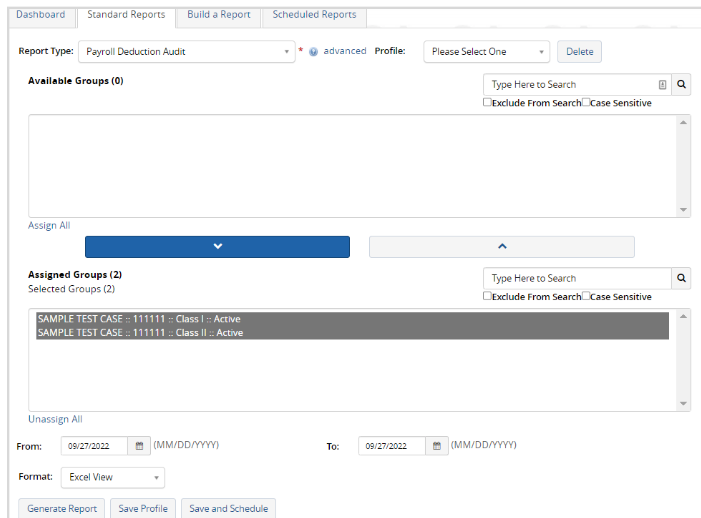
The Reports Profile feature will allow you to create custom templates reports that you can run on an ongoing basis without having to reselect structures groups. Depending on the report, you may need to update the date range.

Select a report under the Create a Report tab from the Report Type drop down menu.



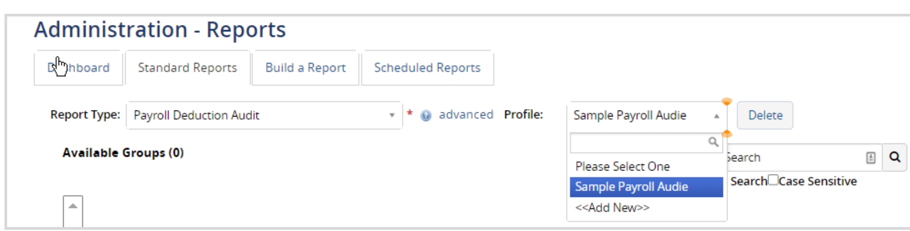
Assign the structure group(s) you want to report on and the date range. Payroll reports should indicate a specific date range. Other reports like the employee census benefit should include today's date in the "To" field.

Click on "Save Profile".



Create a profile name and click "OK".

The report profile you created will appear in the Profile drop down box as an option whenever you run this report moving forward. You can delete the profile report by selecting it and clicking on the Delete button next to the report name.

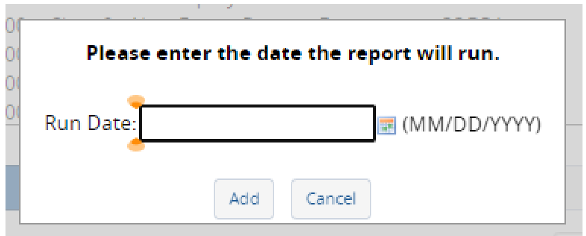


Note! The profile name cannot be edited.

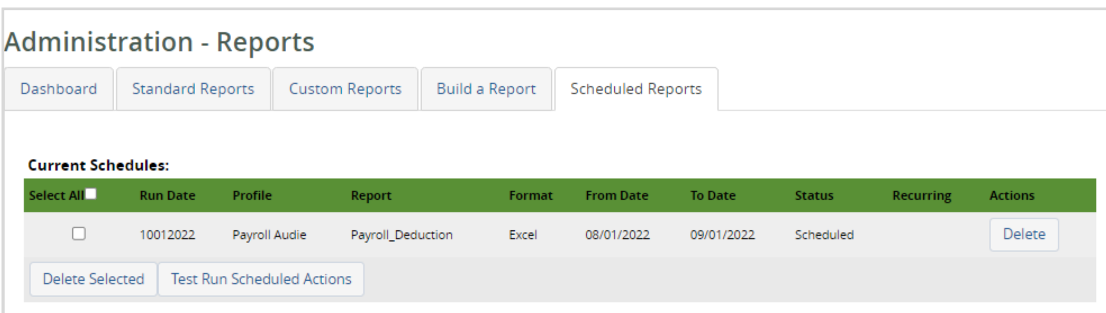
Save and Schedule a Report

The Save and Schedule feature allows you to save a report and schedule it to run at a later date.

Select your report from the drop down Report Type menu and assign the appropriate structure groups and dates or select one of your Profile reports then click on “Save and Schedule”. Enter the future date you want the report to run and click “Add”.



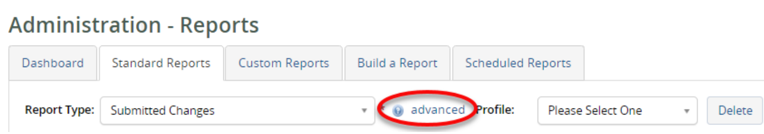
The scheduled report will be saved under your Scheduled Reports tab. Once the report runs you will receive an email notification and the report will appear under the Saved Reports tab. The Status field below will change from Scheduled to Completed. The report will remain in this section until you delete it.



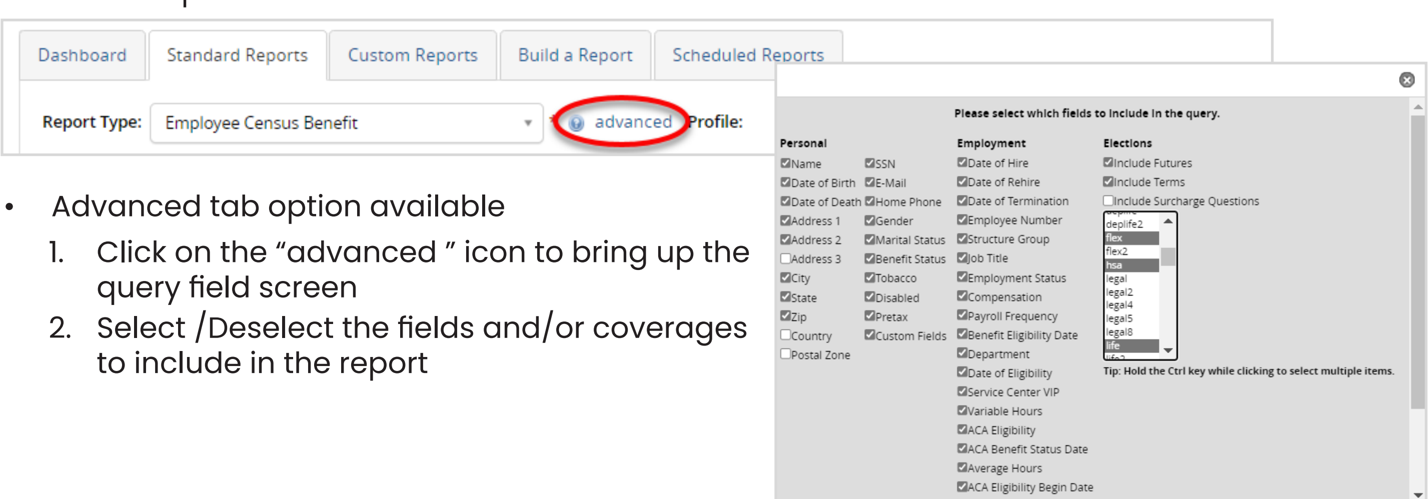
Standard Reports

Top 3 Frequently Used Reports

1. Employee Census Benefit



- Report includes all active/terminated employees with at least one benefit election on record
- Defaults to pull data through the current date (no “From” date necessary)
- If a “From” date is entered only employees with changes within that window will be included on the report



- Advanced tab option available
  1. Click on the “advanced ” icon to bring up the query field screen
  2. Select /Deselect the fields and/or coverages to include in the report

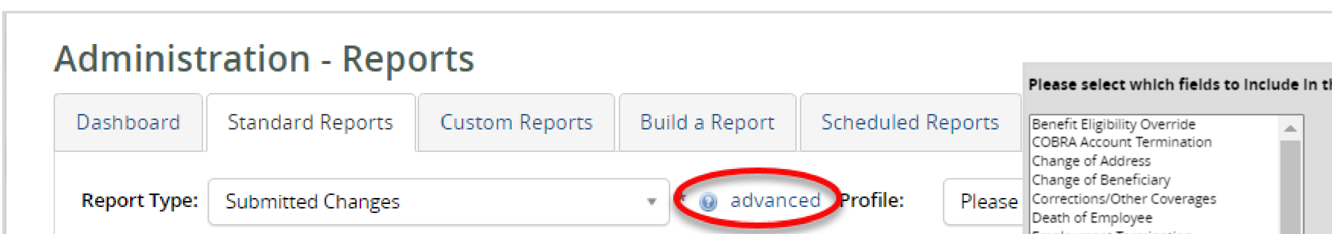
Employee Census Benefit

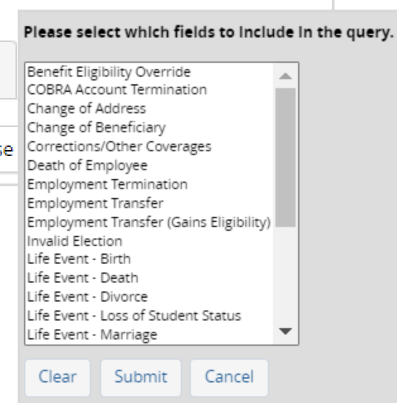
The following data fields will automatically be pulled into the Employee Census Benefit report if the advanced feature is not utilized.

- Member Name
- SSN
- Employee Number
- Date of Birth
- Date of Hire
- Date of Rehire
- Date of Termination
- Gender
- Marital Status
- Address 1
- Address 2
- City
- State
- Zip
- Email
- Home Phone
- Employment Status
- Benefit Status
- Tobacco
- Disabled
- Payroll Frequency
- Compensation
- Job Title
- Structure Group
- ANY CUSTOM FIELDS
- Subgroup Elections

2. Submitted Changes

- Report includes a history of all transactions performed during the date range selected
- "From" and "To" dates should be entered
- Advanced tab option available
  1. Click on the "advanced" icon to bring up the query field screen
  2. Narrow down the reason codes to include in the report





The following data fields will automatically be pulled into the Submitted Changes report. If the advanced feature is use, only changes for those reason codes selected will be included in the report.

- SSN
- Last Name
- First Name
- Payroll Frequency
- Company (PPI)
- Structure Group
- Date transaction approved & completed (system time stamp
- **Input** (original system import vs. manual update)
- BA (Benefit Access) Rule
- Reason for Change
- Effective Date (of the change)
- Editor (administrator who made the change)

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	Submitted Changes Report																
2	Today's Date: 09/28/2022																
3	Report Start Date: 09/01/2022																
4	Report End Date: 09/28/2022																
5																	
6	SSN	Lname	Fname	Mname	Suffix	Pay Freq	Company	Structure	Status	Approved	Complete	Input	Reason	BA Rule	Effective I	Editor	
7	1.89E+08	testsampl	test			BI	PPI Benef	SAMPLE TI		Fri 09/23/:		Manual	New Hire	New Hire	9232022	Michael Avery - PPI1	
8	1.6E+08	testsampl	test			BI	PPI Benef	SAMPLE TI		Fri 09/23/:		Manual	New Hire	New Hire	9232022	Michael Avery - PPI1	

3. Payroll Deductions

- The Payroll Deduction Change and Payroll Deduction Audit reports both display payroll deductions that are effective during a specified time period.
- The Payroll Deduction Change report is a “change only” file which will include all payroll related changes (plan/tier changes) based on the effective/termination date of the employee’s benefits as well as the date/time stamp of the submitted change. If an election with an effective/termination date prior to the specified time period is process within the specified time period (such as retroactive a change or add), the record and related deduction(s) will be included on the report.
- The Payroll Deduction Audit report includes payroll deductions for all employees in effect during the timeframe requested.
- To use these reports, your company’s contribution schedule(s) and payroll frequency must be loaded in AutoEnroll.
- The payroll frequency must also be identified on any new employee record you enter (last item on the “Add An Employee” screen). If payroll frequency for an employee has not been specified the deductions will default to a monthly calculation.
- PPI will need updated contribution figures from you on an annual basis.
- Payroll Reports during Open Enrollment – Use the date open enrollment begin in the “From” field and the effective date of new elections in the “To” field.
- Payroll Reports Year Round – Run reports using dates concurrent to your payroll cycle.

The following data fields will automatically be pulled into the Payroll Deduction Change and Payroll Deduction Audit report. If the advanced feature is use, only changes for those reason codes selected will be included in the report.

- SSN
- Employee Number
- Last Name
- First Name
- Structure Group
- Election
- Deduction
- Imputed Income
- Deduction Frequency
- Effective Date
- Term Date
- Coverage (Tier/Benefit)

1	Payroll Deduction Audit																					
2	Todays Date: 09/28/2022																					
3	Report Start Date: 09/28/2022																					
4	Report End Date: 09/28/2022																					
5																						
6	SSN	Dept Code	Employee	Lname	Fname	Mname	Suffix	Structure	Election	Linetype	Deductior	Annual Ar	Imputed I	Ded. Freq	Effective I	Term Date	Coverage	HSA Per P	ER Cont	Pay Sched	Pay Frequ	Pay Periods Remaining
7	6.67E+08			Potter	Harry			SAMPLE TI	Aetna Dental PPO		9.06			BI	1/1/2019		EMP		13.6			
8	6.67E+08			Potter	Harry			SAMPLE TI	Guardian Vision		2.99			BI	1/1/2019		EMP		0			
9	6.67E+08			Potter	Harry			SAMPLE TI	CIGNA Open Access		101.7			BI	9/1/2021		EMP		474.3			
10	6.67E+08			Potter	Harry			SAMPLE TI	Long Term Disability		0			BI	9/1/2021				8.88			
11	6.67E+08			Potter	Harry			SAMPLE TI	Short Term Disability		0			BI	9/1/2021				6.21			
12	6.67E+08			Potter	Harry			SAMPLE TI	Basic Life and ADD				0	BI	9/1/2021		50000		5.08			
13	6.67E+08			Charming	Prince			SAMPLE TI	TERM Empire HSA Op		0			BI	1/1/2019		EMP		0			
14	6.67E+08			Charming	Prince			SAMPLE TI	Guardian Vision		2.99			BI	1/1/2019		EMP		0			
15	6.67E+08			Charming	Prince			SAMPLE TI	Health Savings Accou		125	500		BI	########		500	125	38.46	ADL 2019	BI	4
16	6.67E+08			Charming	Prince			SAMPLE TI	Aetna Dental PPO		9.06			BI	5/1/2019		EMP		13.6			

Additional AutoEnroll Reports

Dependent Census Benefit

The following data fields will automatically be pulled into the Payroll Deduction Change and Payroll Deduction Audit report. If the advanced feature is use, only changes for those reason codes selected will be included in the report.

- Member Name
- SSN
- Structure Group
- Dependent Name
- Date of Birth
- Gender
- Relationship
- Address 1
- Address 2
- City
- State
- Zip
- Student
- Disabled
- Subgroup Election

Employee Census

This report includes employee demographic and employment information. It defaults to pull data through the current date. The following data fields will be pulled:

- Current/Future
- Member Name
- SSN
- Employee Number
- Date of Birth
- Date of Hire
- Date of Rehire
- Date of Termination
- Gender
- Marital Status
- Address 1
- Address 2
- City
- State
- Zip
- Employment Status
- Benefit Status
- Disabled
- Compensation
- Job title
- Structure Group
- ANY CUSTOM FIELDS
- Subgroup Elections

Minimum Student Age

All dependents turning minimum student age in the specified "From/To" period will be reported. The following data fields will be pulled:

- SSN
- Last Name
- First Name
- Address 1
- Address 2
- City
- State
- Zip
- Structure Group
- Dependent Last Name
- Dependent First name
- Dependent Date of Birth
- Dependent Disability Status
- Dependent Student Status
- Coverage Type
- Coverage Tier
- Effective Date

Maximum Student Age

All dependents turning maximum student age in the specified "From/To" period will be reported. The following data fields will be pulled:

- SSN
- Last Name
- First Name
- Address 1
- Address 2
- City
- State
- Zip
- Structure Group
- Dependent Last Name
- Dependent First name
- Dependent Date of Birth
- Dependent Disability Status
- Dependent Student Status
- Coverage Type
- Coverage Tier
- Effective Date

Open Enrollment Status (for use with SelfEnroll)

The report will display the Open Enrollment status for all employees, and does not require a date range to generate. The following data fields will be pulled:

- SSN
- Last Name
- First Name
- Email
- Structure Group
- Enrollment Status

The results will show Not Started, Approved, Complete, Admin Complete, In Progress, Pending Approval, or Complete No Changes.

COBRA

This report pulls based on the date/time stamp of the submitted COBRA events (not the COBRA event date). A COBRA event submitted between the "From" and the "To" dates will be reported. (For example, if a COBRA event with a last day of coverage of 03/13/2022 was entered on 04/15/2022 and the "From" date for the report is 04/10/2022 and the "To" date is 04/18/2022, then the COBRA event will display.) The following data fields will be pulled:

- Name
- SSN
- Address 1
- Address 2
- City
- State
- Zip
- Structure Group
- Date of Birth
- Date of Hire
- Dependent Name
- Dependent SSN
- Dependent Date of Birth
- Qualifying Event
- Date of Event
- Dental Plan*
- Life Plan*
- LTD Plan*
- Medical Plan*
- Vision Plan*
- Voluntary Plans*

*Includes: Effective Date, Last Date of Coverage

Address Change

This report pulls by date range. The following data fields will be pulled:

- Transaction Date
- SSN
- Name
- Employee Number
- Date of Birth
- Marital Status
- Address 1
- Address 2
- City
- State
- Zip

Employee Directory

This report defaults to pull data through the current date. All active employees will display. Active employees as of the report date, with or without benefit elections, will be included in this report. The following data fields will be pulled:

- Name
- Employee Number
- Street Address
- City
- State
- Zip
- Home Phone
- Work Phone Email
- Structure Group

New Hire

The "From" and "To" dates will pull data based on DOH. (For example, entering from 04/01/2010 to 4/15/2010 will report any employees with DOH within the range.) The following data fields will be pulled:

- Name
- Address 1
- Address 2
- City
- State
- Zip
- SSN
- Date of Birth
- Date of Hire
- Date of Rehire
- Structure Group
- Employment Status
- Subgroup Elections

Employee Termination

The “From” and “To” dates will pull data based on DOT. (For example, entering from 04/01/2020 to 04/15/2020 will report any employees with a DOT within that range.) The following data fields will be pulled:

- Name
- SSN
- Date of Birth
- Date of Rehire
- Date of Termination
- Structure Group
- Employment Status
- Benefit Status
- Subgroup Election

EEO-1

This report provides a count of the workforce by ethnicity, race, and gender. It will default to pull data through the current date. The “From” date is not populated. The following data fields will be pulled:

- Name
- SSN
- Address
- City
- State
- Zip
- Home Phone
- Work Phone
- Structure Group
- Ethnic Identification
- EEO Classification

Evidence of Insurability

This report will default to pull data through the current date. The “To” date will automatically pre-fill with the current date. Any employee with a benefit that has an EOI flag triggered (meaning the Elected amount is greater than the Approved amount) will display. The following data fields will be pulled:

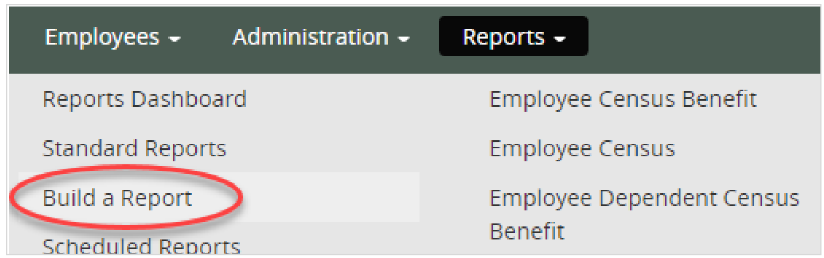
- Name
- SSN
- Structure Group
- Plan Name
- Elected Amount
- Approved Amount
- Plan Effective Date

Build-A-Report

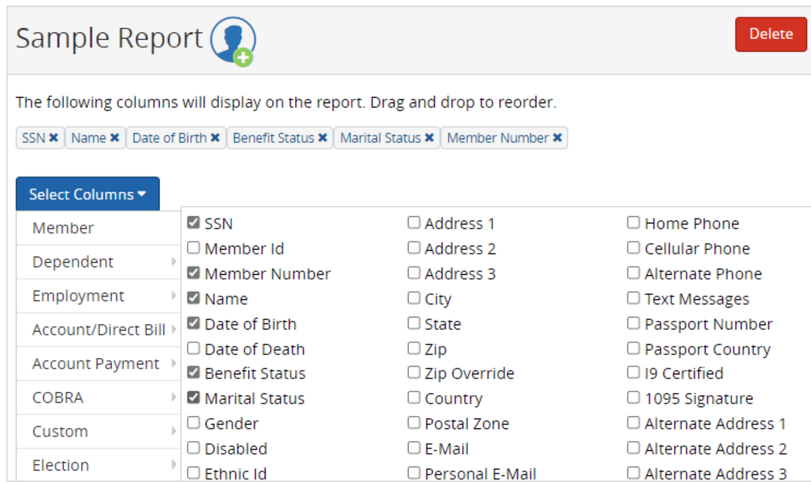
Build a Report makes it quick and easy to create custom-built reports with a multitude of field options that allow you to control the final output rather than relying on more rigid standard formats such as the Employee Census Benefit (ECB).

Start a New Report:

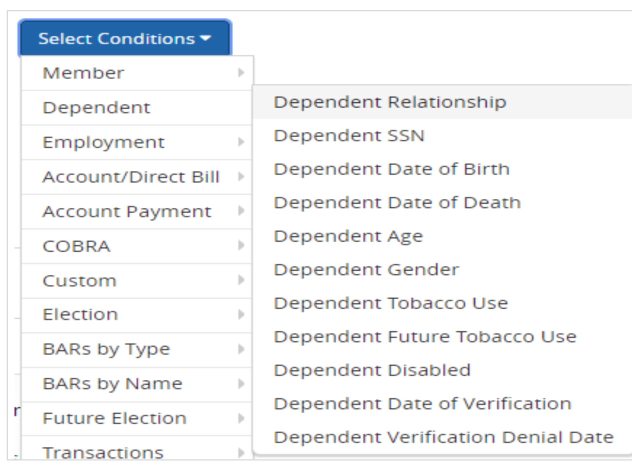
1. Navigate to Reports > Build a Report.
2. On the Administration - Reports, click +New Report in the blue bar.
3. Enter a name for the report and click Submit.



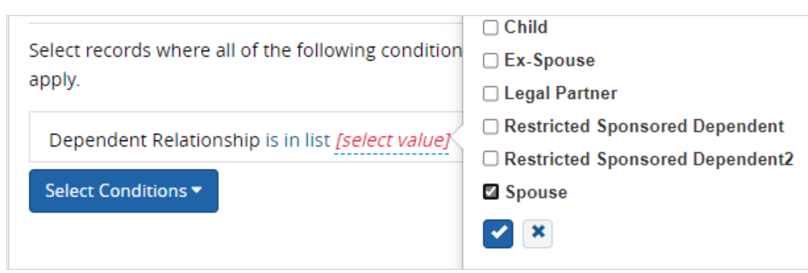
4. Click Select Columns to display column options for the report.
5. Hover over the options to select fields to include in your report, and repeat as necessary.



6. Click Select Conditions to filter which member records will display in the rows of the report.
7. Hover over a main condition category to display options for that condition.



8. Click the value for the condition (some options have a drop list, some have checkboxes, some open a calendar, and some are open text), and click the check mark to activate the condition + value rule for which members will display in the report rows.
9. Repeat to add multiple conditions.



10. When all desired columns and conditions are finalized, click Save. The page will look the same, but doing so will save your configured columns and conditions and prepare the report for generation.
11. From here you can click Check Results to reveal the number of returned results or view a list of members who match the conditions and values or see a list of the members . Click Build a Report from the top menu to get back to the Report menu, where you can select the saved report from the My Reports list.
12. When ready, click Generate Report.
13. The report will appear in the main Reports Dashboard, and you will receive an email when the report is complete.
14. At any time, you can make changes to the report and Save over the original or Save As... to save it as a different report.