

# Welcome to LEARNsynx



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The handout links are in the chat and will be available after the webinar.



This webinar will begin at the top of the hour. If you have any questions before or during the webinar, feel free to enter your questions in the Q&A panel in Zoom.



You may also reach out to us at [learn@allsynx.com](mailto:learn@allsynx.com) with any questions.



# A CLOSE ENCOUNTER

WITH COMPANY REPORTING

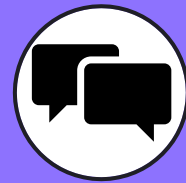
| PRESENTED BY 

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# A Few Reminders...



Questions



Chat



Handouts & Recordings

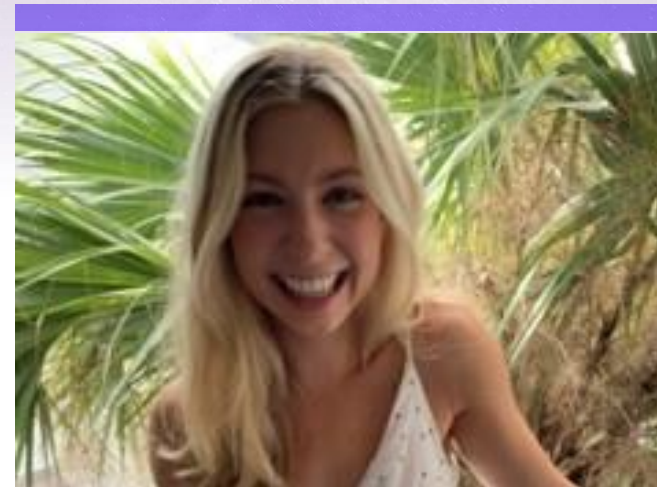


Feedback

# Your Speakers



Amber O'Reilly



Regan O'Hara



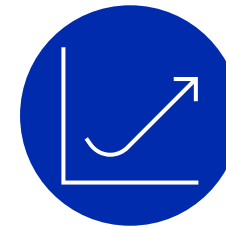
# Webinar Objectives



Recognize the relationship between different reports and common requests.



Summarize common reporting fields.



Run different THEbenefitsHUB reports for specific data and troubleshooting needs.

Reporting Help!





## The Learning Lab

Search for answers or browse The Learning Lab.

[System Documentation](#) | [Professional Development](#)

### Technology

- > [System and Service Knowledge](#)
- > [Process and Procedure Application](#)
- > [Strategic Implementation](#)

### Business

- > [Learning & Development](#)
- > [Planning & Organization](#)
- > [Creativity & Innovation](#)

### People

- > [Empowering Others](#)
- > [Strengthening Relationships](#)
- > [Enhancing Communication](#)





## Technology

- ∨ System and Service Knowledge
  - > THEbenefitsHUB - Introduction and General Navigation
  - > THEbenefitsHUB - EE Walkthrough, Menu, & Tools
  - > THEbenefitsHUB - Administration Dashboard
  - > THEbenefitsHUB - Employee Administration
- ∨ THEbenefitsHUB - Company Reporting
  - 📄 Quick Reports - General Navigation
  - 📄 My Report History
  - 📄 Reporting Results
  - 📄 Standard Reports Video
  - 📄 Quick Reports Video
  - 📄 My Report History Video
  - 📄 Standard Reports - Reporting Fields
  - 📄 Standard Reports Best Practices







[Show all articles \( 3 \)](#)

Reporting articles

# Searching for Reports

Search for answers or browse The Learning Lab.

report

-  Report Descriptions
-  Standard Reports - Reporting Fields
-  Standard Reports Best Practices
-  Quick Reports Video
-  Standard Reports Video
-  My Report History Video
-  Quick Reports Video
-  Employee Eligibility Report Video
-  Enrollment History Report Video
-  Standard Reports Video

**All Search Results (26)**

# Reporting Fields

Report Date Span    to

Select Divisions   
 Division 1  
 Division 2  
 Division 3

Select Employee Categories   
 All  
 Court Ordered Dependent Child(ren)  
 Limited  
 Principle

Select Employees   
 Adams, John Q.  
 Aguilar, Pepe  
 Arthur, Chester  
 Biden, Joseph , JR

Show Report For   
 Terminated  
 Active  
 COBRA  
 Retired

Employee Login Status

New Hires Only

Select Grouping

Available Groups	Selected Groups
	Company Name
	Division Name
	Employee

Move Up  
Move Down

Select Columns

Order Member Name	Selected Columns
	Last Name
	First Name
	Middle Initial
	Title

Move Up  
Move Down

Employee Columns

Available Columns	Selected Columns
Government Visa No.	Employee Name
EEO Ethnic Code	Social Security No.
EEO Job Category	Employment Status
Gender	Date of Birth
Tobacco User	Date of Employment
Residential Address (residential type)	Gross Annual Salary
Street Address 2 (residential type)	No. of Dependents
City (residential type)	Home Phone

Move Up  
Move Down

Include Transactions

<https://thebenefitshubtraining.com/the-learning-lab/standard-reports-reporting-fields/>

**Report Date Span** February ▼ 1 ▼ 2022 ▼ to 2022 ▼

Report Date Span:  
Select the date span for the report. The report will show the list of employees as of the date of the report run. The date span criteria works in conjunction with the other selection criteria you enter (for example, to pull employee transactions or employment statuses).

Division 2  
Division 3 ▼

**Select Employee Categories**

- All Employee Categories
- All
- Court Ordered Dependent Child(ren)
- Limited
- Principle

Report Field	Notes
Report Date Span	Select the date span for the report. The changes that were entered within the selected date span will be reported.
Select Divisions	Choose which Divisions you want to run the report for.
Select Employee Categories	Choose which Categories you want to run the report for.
Select Employees	Choose which employees you want to run the report for. For example, you may want to run the report for all employees in the company, or for just one particular employee.
Select Benefit Plan Types	If you are including enrollment changes on the report, choose the Benefit Plan Types for which to pull the changes.
Select Plans	If you are including enrollment changes on the report, choose the Benefit Plan Designs for which to pull the changes.
Select Providers	If you are including enrollment changes on the report, choose the Benefit Providers for which to pull the changes.
Detail By	You can choose whether to include all types of changes or only particular ones. Note that some changes (such as payroll-related changes) do not have a separate detail category listed and can only be seen when "All" is selected.
Employee Login Status	Choose which current (as of the day the report is run) Employee Login Statuses to include on the report: Incomplete, Complete, or All. Note that the determination is made by the current Employee Login Status as of the day the report is run, NOT by the login status during the report date span.
Select Grouping	Grouping is the way of organizing the report data on the page. You can select grouping choices by moving them from Available Groups to Selected Groups. The order in which you organize the Selected Groups dictates how the report data will be displayed. For example, if you selected Company Name – Division Name – Employee, the page will be organized like this: ABC Company - Accounting Division ---- Appleby, Judy - report data for this employee

# Reporting Fields Best Practices

1

Make sure the date span is always for 1 full month.

Report Date Span February 1 2022 to February 28 2022

Select Divisions All Divisions  
Division 1  
Division 2  
Division 3

Select Employee Categories All Employee Categories  
All  
Court Ordered Dependent Child(ren)  
Limited  
Principle

Select Employees All Employees  
Adams, John Q.  
Aguilar, Pepe  
Arthur, Chester  
Biden, Joseph, JR

Show Report For All Statuses  
Terminated  
Active  
COBRA  
Retired

Employee Login Status All

New Hires Only No

Select Grouping Available Groups Selected Groups  
> >> < << Move Up Move Down  
Company Name  
Division Name  
Employee

Select Columns Order Member Name Selected Columns  
> >> < << Move Up Move Down  
Last Name  
First Name  
Middle Initial  
Title

Employee Columns Available Columns Selected Columns  
> >> < << Move Up Move Down  
Government Visa No.  
EEO Ethnic Code  
EEO Job Category  
Gender  
Tobacco User  
Residential Address (residential type)  
Street Address 2 (residential type)  
City (residential type)  
Employee Name  
Social Security No.  
Employment Status  
Date of Birth  
Date of Employment  
Gross Annual Salary  
No. of Dependents  
Home Phone

Include Transactions No

Employee	Social Security No.	Employment Status	Date of Birth	Date of Employment	Gross Annual Salary	Employee Login Status	Plan Name	Health Tier	Member Name	Member Type
Adams, John	100-40-9764	COBRA	3/17/1974	7/1/2015	\$58,823.00	Complete	Dental Plan	Employee	Adams, John	Employee
Employee, Elaine	654-65-4654	Active	1/1/1980	1/1/2001	\$40,000.00	Incomplete	Dental Plan	Employee & Spouse	Employee, Elaine	Employee
								Employee & Spouse	Spouse, Sam	Spouse
HUBster, Benny	123-56-7543	Active	1/1/1980	1/1/2001	\$50,000.00	Incomplete	Employee Life	- - -	HUBster, Benny	Employee
Harrison, Benjamin	100-84-1581	Active	4/22/1966	2/18/2000	\$53,911.00	Complete	Dental Plan	Employee	Harrison, Benjamin	Employee
Reagan, Ronald	100-83-0296	Active	8/11/1966	3/1/2000	\$64,779.00	Incomplete	Dental Plan	Employee & Spouse	Reagan, Ronald	Employee
								Employee & Spouse	Reagan, Nancy	Spouse
Test, Amber	464-64-3213	Active	12/22/1983	1/1/2001	\$40,000.00	Incomplete	Dental Plan	Employee	Test, Amber	Employee
Test, Brad	000-00-0009	Active	1/1/1975	5/11/2021	\$40,000.00	Incomplete	Dental Plan	Employee	Test, Brad	Employee
							Employee Life	- - -	Test, Brad	Employee
Test, Fake	000-00-0064	Active	1/1/1980	1/1/2001	\$40,000.00	Incomplete	Dental Plan	Employee	Test, Fake	Employee
								Employee & Spouse	Test, Fake	Employee
								Employee & Spouse	Test, Anna	Spouse
							Low Option PPO	Employee	Test, Fake	Employee
								Employee & Spouse	Test, Fake	Employee
								Employee & Spouse	Test, Anna	Spouse
Test, Temp	000-00-0004	Active	1/1/1975	3/18/2021	\$40,000.00	Incomplete	Dental Plan	Family	Test, Temp	Employee
								Family	Test, SP	Spouse
								Family	Test, CH1	Child
Test, Testing 1	000-00-0029	Active	1/1/1980	1/1/2001	\$40,000.00	Incomplete	Group Cancer - Base Option with ICU Rider	Employee & Spouse	Test, Testing 1	Employee
								Employee & Spouse	Test, Spouse	Spouse
								Family	Test, Testing 1	Employee
								Family	Test, Spouse	Spouse
								Family	Test, Sarah	Child
							Option 2	Family	Test, Testing 1	Employee
								Family	Test, Spouse	Spouse
								Family	Test, Sarah	Child
Test, Testing 2	000-00-0044	Active	1/1/1980	1/1/2001	\$40,000.00	Incomplete	Dental Plan	Employee & Spouse	Test, Testing 2	Employee
								Employee & Spouse	Test, Spouse	Ex-Spouse
								Employee	Test, Testing 2	Employee
							Group Cancer - Base Option with ICU Rider	Employee & Spouse	Test, Testing 2	Employee
								Employee & Spouse	Test, Spouse	Ex-Spouse
								Employee	Test, Testing 2	Employee
							Option 1	Employee & Spouse	Test, Testing 2	Employee
								Employee & Spouse	Test, Spouse	Ex-Spouse
								Employee	Test, Testing 2	Employee



2

Run your report for all statuses so you can view COBRA and FLMA employees in your report.



Report Date Span: February 1 2022 to February 28 2022

Select Divisions: All Divisions, Division 1, Division 2, Division 3

Select Employee Categories: All Employee Categories, All, Court Ordered Dependent Child(ren), Limited, Principle

Select Employees: All Employees, Adams, John Q., Aguilar, Pepe, Arthur, Chester, Biden, Joseph, JR

Show Report For: All Statuses, Terminated, Active, COBRA, Retired

Employee Login Status: All

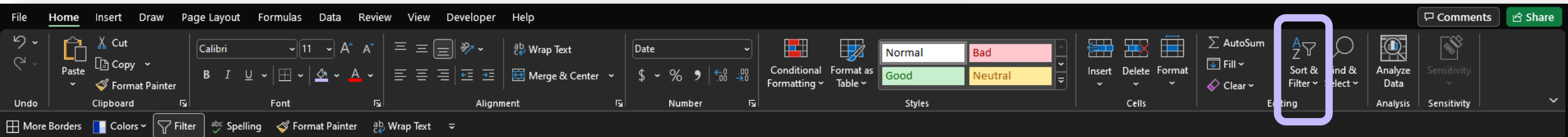
New Hires Only: No

Select Grouping: Available Groups, Selected Groups (Company Name, Division Name, Employee), Move Up, Move Down

Select Columns: Order Member Name, Selected Columns (Last Name, First Name, Middle Initial, Title), Move Up, Move Down

Employee Columns: Available Columns (Government Visa No., EEO Ethnic Code, EEO Job Category, Gender, Tobacco User, Residential Address, Street Address 2, City), Selected Columns (Employee Name, Social Security No., Employment Status, Date of Birth, Date of Employment, Gross Annual Salary, No. of Dependents, Home Phone), Move Up, Move Down

Include Transactions: No



Employee	Social Security No.	Employment Status	Date of Birth	Date of Employment	Gross Annual Salary	Employee Login Status	Plan Name	Health Tier	Member Name	Member Type
Adams, John	100-40-9764	COBRA	3/17/1974	7/1/2015	\$58,823.00	Complete	Dental Plan	Employee	Adams, John	Employee
Employee, Elaine	654-65-4654	Active	1/1/1980	1/1/2001	\$40,000.00	Incomplete	Dental Plan	Employee & Spouse	Employee, Elaine	Employee
								Employee & Spouse	Spouse, Sam	Spouse
HUBster, Benny	123-56-7543	Active	1/1/1980	1/1/2001	\$50,000.00	Incomplete	Employee Life	---	HUBster, Benny	Employee
Harrison, Benjamin	100-84-1581	Active	4/22/1966	2/18/2000	\$53,911.00	Complete	Dental Plan	Employee	Harrison, Benjamin	Employee
Reagan, Ronald	100-83-0296	Active	8/11/1966	3/1/2000	\$64,779.00	Incomplete	Dental Plan	Employee & Spouse	Reagan, Ronald	Employee
								Employee & Spouse	Reagan, Nancy	Spouse
Test, Amber	464-64-3213	Active	12/22/1983	1/1/2001	\$40,000.00	Incomplete	Dental Plan	Employee	Test, Amber	Employee
Test, Brad	000-00-0009	Active	1/1/1975	5/11/2021	\$40,000.00	Incomplete	Dental Plan	Employee	Test, Brad	Employee
							Employee Life	---	Test, Brad	Employee
Test, Fake	000-00-0064	Active	1/1/1980	1/1/2001	\$40,000.00	Incomplete	Dental Plan	Employee	Test, Fake	Employee
								Employee & Spouse	Test, Fake	Employee
								Employee & Spouse	Test, Anna	Spouse
							Low Option PPO	Employee	Test, Fake	Employee
								Employee & Spouse	Test, Fake	Employee
								Employee & Spouse	Test, Anna	Spouse

Report Date Span February 1 2022 to February 28 2022

Select Divisions All Divisions  
Division 1  
Division 2  
Division 3

Select Employee Categories All Employee Categories  
All  
Court Ordered Dependent Child(ren)  
Limited  
Principle

Select Employees All Employees  
Adams, John Q.  
Aguilar, Pepe  
Arthur, Chester  
Biden, Joseph, JR

Show Report For All Statuses  
Terminated  
Active  
COBRA  
Retired

Employee Login Status All

New Hires Only No

Select Grouping Available Groups Selected Groups  
> >> < << Move Up Move Down  
Company Name  
Division Name  
Employee

Select Columns Order Member Name Selected Columns  
> >> < << Move Up Move Down  
Last Name  
First Name  
Middle Initial  
Title

Employee Columns Available Columns Selected Columns  
> >> < << Move Up Move Down  
Government Visa No.  
EEO Ethnic Code  
EEO Job Category  
Gender  
Tobacco User  
Residential Address (residential type)  
Street Address 2 (residential type)  
City (residential type)  
Employee Name  
Social Security No.  
Employment Status  
Date of Birth  
Date of Employment  
Gross Annual Salary  
No. of Dependents  
Home Phone

Include Transactions No

Always make sure  
Company Name  
displays in the  
Selected Groups...  
And is listed first!

Adams, John														
Social Security No.	Employment Status	Date of Birth	Date of Employment	Gross Annual Salary	Employee Login Status	Plan Name	Health Tier	Member Name	Member Type	Member DOB	Member SSN	Member Gender	Effective Date	Termination Date
100-40-9764	COBRA	3/17/1974	7/1/2015	\$58,823.00	Complete	Dental Plan	Employee	Adams, John	Employee	3/17/1974	100-40-9764	M	2/1/2022	12/31/2022
Adams, John Total:1 returned plan														
Employee, Elaine														
Social Security No.	Employment Status	Date of Birth	Date of Employment	Gross Annual Salary	Employee Login Status	Plan Name	Health Tier	Member Name	Member Type	Member DOB	Member SSN	Member Gender	Effective Date	Termination Date
654-65-4654	Active	1/1/1980	1/1/2001	\$40,000.00	Incomplete	Dental Plan	Employee & Spouse	Employee, Elaine	Employee	1/1/1980	654-65-4654	F	9/1/2021	8/31/2022
							Employee & Spouse	Spouse, Sam	Spouse	1/1/1980	- - -	M	9/1/2021	8/31/2022
Employee, Elaine Total:1 returned plan														
HUBster, Benny														
Social Security No.	Employment Status	Date of Birth	Date of Employment	Gross Annual Salary	Employee Login Status	Plan Name	Health Tier	Member Name	Member Type	Member DOB	Member SSN	Member Gender	Effective Date	Termination Date
123-56-7543	Active	1/1/1980	1/1/2001	\$50,000.00	Incomplete	Employee Life	- - -	HUBster, Benny	Employee	1/1/1980	123-56-7543	M	1/1/2022	12/31/2022
HUBster, Benny Total:1 returned plan														
Harrison, Benjamin														
Social Security No.	Employment Status	Date of Birth	Date of Employment	Gross Annual Salary	Employee Login Status	Plan Name	Health Tier	Member Name	Member Type	Member DOB	Member SSN	Member Gender	Effective Date	Termination Date
100-84-1581	Active	4/22/1966	2/18/2000	\$53,911.00	Complete	Dental Plan	Employee	Harrison, Benjamin	Employee	4/22/1966	100-84-1581	M	10/13/2021	8/31/2022
Harrison, Benjamin Total:1 returned plan														
Reagan, Ronald														
Social Security No.	Employment Status	Date of Birth	Date of Employment	Gross Annual Salary	Employee Login Status	Plan Name	Health Tier	Member Name	Member Type	Member DOB	Member SSN	Member Gender	Effective Date	Termination Date
100-83-0296	Active	8/11/1966	3/1/2000	\$64,779.00	Incomplete	Dental Plan	Employee & Spouse	Reagan, Ronald	Employee	8/11/1966	100-83-0296	M	10/13/2021	8/31/2022
							Employee & Spouse	Reagan, Nancy	Spouse	1/17/1958	200-40-4085	F	10/13/2021	8/31/2022
Reagan, Ronald Total:1 returned plan														
Test, Amber														
Social Security No.	Employment Status	Date of Birth	Date of Employment	Gross Annual Salary	Employee Login Status	Plan Name	Health Tier	Member Name	Member Type	Member DOB	Member SSN	Member Gender	Effective Date	Termination Date

Division Name	Employee	Social Security No.	Employment Status	Date of Birth	Date of Employment	Gross Annual Salary	Employee Login Status	Plan Name	Health Tier	Member Name	Member Type	Member DOB	Member SSN	
Division 1	Adams, John	100-40-9764	COBRA	3/17/1974	7/1/2015	\$58,823.00	Complete	Dental Plan	Employee	Adams, John	Employee	3/17/1974	100-40-9764	
	Employee, Elaine	654-65-4654	Active	1/1/1980	1/1/2001	\$40,000.00	Incomplete	Dental Plan	Employee & Spouse	Employee, Elaine	Employee	1/1/1980	654-65-4654	
									Employee & Spouse	Spouse, Sam	Spouse	1/1/1980	- - -	
	HUBster, Benny	123-56-7543	Active	1/1/1980	1/1/2001	\$50,000.00	Incomplete	Employee Life	- - -	HUBster, Benny	Employee	1/1/1980	123-56-7543	
	Test, Amber	464-64-3213	Active	12/22/1983	1/1/2001	\$40,000.00	Incomplete	Dental Plan	Employee	Test, Amber	Employee	12/22/1983	464-64-3213	
	Test, Brad	000-00-0009	Active	1/1/1975	5/11/2021	\$40,000.00	Incomplete	Dental Plan	Employee	Test, Brad	Employee	1/1/1975	000-00-0009	
								Employee Life	- - -	Test, Brad	Employee	1/1/1975	000-00-0009	
	Test, Fake	000-00-0064	Active	1/1/1980	1/1/2001	\$40,000.00	Incomplete	Dental Plan	Employee	Test, Fake	Employee	1/1/1980	000-00-0064	
								Low Option PPO	Employee	Test, Fake	Employee	1/1/1980	000-00-0064	
	Test, Temp	000-00-0004	Active	1/1/1975	3/18/2021	\$40,000.00	Incomplete	Dental Plan	Family	Test, Temp	Employee	1/1/1975	000-00-0004	
									Family	Test, SP	Spouse	1/1/1975	000-00-0006	
									Family	Test, CH1	Child	1/1/2011	000-00-0007	
	Test, Testing 1	000-00-0029	Active	1/1/1980	1/1/2001	\$40,000.00	Incomplete	Group Cancer - Base Option with ICU Rider	Employee & Spouse	Test, Testing 1	Employee	1/1/1980	000-00-0029	
									Employee & Spouse	Test, Spouse	Spouse	1/1/1980	- - -	
	Trainer, Anna	111-55-9999	Active	1/7/1982	2/14/2022	\$80,000.00	Complete	Basic Life	- - -	Trainer, Anna	Employee	1/7/1982	111-55-9999	
								Dental Plan	Employee & 1 Child	Trainer, Anna	Employee	1/7/1982	111-55-9999	
									Employee & 1 Child	Trainer, Teri	Child	3/2/2001	444-22-3333	
									Employee & 1 Child	Trainer, Keri	Child	2/28/2022	- - -	
								Employee Life	- - -	Trainer, Anna	Employee	1/7/1982	111-55-9999	
								Option 1	Employee & 2+ Children	Trainer, Anna	Employee	1/7/1982	111-55-9999	
									Employee & 2+ Children	Trainer, Teri	Child	3/2/2001	444-22-3333	
									Employee & 2+ Children	Trainer, Keri	Child	2/28/2022	- - -	
									Spouse Life	- - -	Trainer, Jerry	Ex-Spouse	11/3/1980	222-77-6666
Division 2	Harrison, Benjamin	100-84-1581	Active	4/22/1966	2/18/2000	\$53,911.00	Complete	Dental Plan	Employee	Harrison, Benjamin	Employee	4/22/1966	100-84-1581	
	Test, Testing 2	000-00-0044	Active	1/1/1980	1/1/2001	\$40,000.00	Incomplete	Dental Plan	Employee & Spouse	Test, Testing 2	Employee	1/1/1980	000-00-0044	
									Employee & Spouse	Test, Spouse	Ex-Spouse	1/1/1980	- - -	
									Employee	Test, Testing 2	Employee	1/1/1980	000-00-0044	
								Group Cancer - Base Option with ICU Rider	Employee & Spouse	Test, Testing 2	Employee	1/1/1980	000-00-0044	
									Employee & Spouse	Test, Spouse	Ex-Spouse	1/1/1980	- - -	
									Employee	Test, Testing 2	Employee	1/1/1980	000-00-0044	
								Option 1	Employee & Spouse	Test, Testing 2	Employee	1/1/1980	000-00-0044	
									Employee & Spouse	Test, Spouse	Ex-Spouse	1/1/1980	- - -	
									Employee	Test, Testing 2	Employee	1/1/1980	000-00-0044	
Division 3	Reagan, Ronald	100-83-0296	Active	8/11/1966	3/1/2000	\$64,779.00	Incomplete	Dental Plan	Employee & Spouse	Reagan, Ronald	Employee	8/11/1966	100-83-0296	
									Employee & Spouse	Reagan, Nancy	Spouse	1/17/1958	200-40-4085	

Report Date Span: February 1, 2022 to February 28, 2022

Select Divisions: All Divisions, Division 1, Division 2, Division 3

Select Employee Categories: All Employee Categories, All, Court Ordered Dependent Child(ren), Limited, Principle

Select Employees: All Employees, Adams, John Q., Aguilar, Pepe, Arthur, Chester, Biden, Joseph, JR

Show Report For: All Statuses, Terminated, Active, COBRA, Retired

Employee Login Status: All

New Hires Only: No

Select Grouping: Available Groups, Selected Groups (Company Name, Division Name, Employee), Move Up, Move Down

Select Columns: Order Member Name, Selected Columns (Last Name, First Name, Middle Initial, Title), Move Up, Move Down

Employee Columns: Available Columns (Government Visa No., EEO Ethnic Code, EEO Job Category, Gender, Tobacco User, Residential Address (residential type), Street Address 2 (residential type), City (residential type)), Selected Columns (Employee Name, Social Security No., Employment Status, Date of Birth, Date of Employment, Gross Annual Salary, No. of Dependents, Home Phone), Move Up, Move Down

Include Transactions: No

4

Suggestion: Arrange your Selected Columns to minimize edits.

Employee Columns	Available Columns		Selected Columns	
	<ul style="list-style-type: none"> <li>Status Change Notes</li> <li>Date COBRA Notification Mailed</li> <li>Pay Contributions on Last Pay Date</li> <li>System Access Expiration Date</li> <li>Date of Termination</li> <li>Employee Login Disabled</li> <li>Last Page Accessed</li> <li>Last Page Accessed Benefit</li> </ul>	<ul style="list-style-type: none"> <li>&gt;</li> <li>&gt;&gt;</li> <li>&lt;</li> <li>&lt;&lt;</li> </ul>	<ul style="list-style-type: none"> <li>Employee Name</li> <li>Social Security No.</li> <li>Employment Status</li> <li>Reason for Status Change</li> <li>Previously Enrolled</li> <li>Date of Birth</li> <li>Date of Employment</li> <li>Gross Annual Salary</li> </ul>	<ul style="list-style-type: none"> <li>Move Up</li> <li>Move Down</li> </ul>

Employee Columns	Available Columns		Selected Columns	
	<ul style="list-style-type: none"> <li>Status Change Notes</li> <li>Date COBRA Notification Mailed</li> <li>Pay Contributions on Last Pay Date</li> <li>System Access Expiration Date</li> <li>Date of Termination</li> <li>Employee Login Disabled</li> <li>Last Page Accessed</li> <li>Last Page Accessed Benefit</li> </ul>	<ul style="list-style-type: none"> <li>&gt;</li> <li>&gt;&gt;</li> <li>&lt;</li> <li>&lt;&lt;</li> </ul>	<ul style="list-style-type: none"> <li>Employment Status</li> <li>Reason for Status Change</li> <li>Previously Enrolled</li> <li>Date of Birth</li> <li>Date of Employment</li> <li>Gross Annual Salary</li> <li>Home Phone</li> <li>Employee Login Status</li> </ul>	<ul style="list-style-type: none"> <li>Move Up</li> <li>Move Down</li> </ul>

Employee	Social Security No	Employment Status	Reason for Status Change	Previously Enrolled	Date of Birth	Date of Employment	Gross Annual Salary	Home Phone	Employee Login Status	Plan Name	Health Tier	Member Name	Member Type	Member DOE
Adams, John Q.	100-40-9764	COBRA	Termination	[- Not Applicable -]	3/17/1974	7/1/2015	\$58,823.00	972-881-221	Complete	Dental Plan	Employee	Adams, John Q.	Employee	3/17/1974
Employee, Elaine	654-65-4654	Active	Select Reason	[- Not Applicable -]	1/1/1980	1/1/2001	\$40,000.00	---	Incomplete	Dental Plan	Employee & Spouse	Employee, Elaine	Employee	1/1/1980
											Employee & Spouse	Spouse, Sam	Spouse	1/1/1980
HUBster, Benny	123-56-7543	Active	---	[- Not Applicable -]	1/1/1980	1/1/2001	\$50,000.00	---	Incomplete	Employee Life	---	HUBster, Benny	Employee	1/1/1980
Harrison, Benjamin	100-84-1581	Active	Select Reason	[Sick Leave Bank]	4/22/1966	2/18/2000	\$53,911.00	972-881-221	Complete	Dental Plan	Employee	Harrison, Benjamin	Employee	4/22/1966
Reagan, Ronald	100-83-0296	Active	---	[Sick Leave Bank]	8/11/1966	3/1/2000	\$64,779.00	972-881-221	Incomplete	Dental Plan	Employee & Spouse	Reagan, Ronald	Employee	8/11/1966
											Employee & Spouse	Reagan, Nancy	Spouse	1/17/1958
Test, Amber	464-64-3213	Active	Select Reason	[- Not Applicable -]	12/22/1983	1/1/2001	\$40,000.00	---	Incomplete	Dental Plan	Employee	Test, Amber	Employee	12/22/1983
Test, Brad	000-00-0009	Active	---	[- Not Applicable -]	1/1/1975	5/11/2021	\$40,000.00	---	Incomplete	Dental Plan	Employee	Test, Brad	Employee	1/1/1975
										Employee Life	---	Test, Brad	Employee	1/1/1975
Test, Fake	000-00-0064	Active	---	[- Not Applicable -]	1/1/1980	1/1/2001	\$40,000.00	---	Incomplete	Dental Plan	Employee	Test, Fake	Employee	1/1/1980
										Low Option PPO	Employee	Test, Fake	Employee	1/1/1980
Test, Temp	000-00-0004	Active	---	[- Not Applicable -]	1/1/1975	3/18/2021	\$40,000.00	---	Incomplete	Dental Plan	Family	Test, Temp	Employee	1/1/1975
											Family	Test, SP	Spouse	1/1/1975
											Family	Test, CH1	Child	1/1/2011
Test, Testing 1	000-00-0029	Active	---	[- Not Applicable -]	1/1/1980	1/1/2001	\$40,000.00	---	Incomplete	Group Cancer - Base Option with ICU Ride	Employee & Spouse	Test, Testing 1	Employee	1/1/1980
											Employee & Spouse	Test, Spouse	Spouse	1/1/1980
Test, Testing 2	000-00-0044	Active	---	[- Not Applicable -]	1/1/1980	1/1/2001	\$40,000.00	---	Incomplete	Dental Plan	Employee & Spouse	Test, Testing 2	Employee	1/1/1980
											Employee & Spouse	Test, Spouse	Ex-Spouse	1/1/1980
											Employee	Test, Testing 2	Employee	1/1/1980
										Group Cancer - Base Option with ICU Ride	Employee & Spouse	Test, Testing 2	Employee	1/1/1980
											Employee & Spouse	Test, Spouse	Ex-Spouse	1/1/1980
										Option 1	Employee	Test, Testing 2	Employee	1/1/1980
											Employee & Spouse	Test, Spouse	Ex-Spouse	1/1/1980
											Employee	Test, Testing 2	Employee	1/1/1980
Trainer, Anna	111-55-9999	Active	Select Reason	[- Not Applicable -]	1/7/1982	2/14/2022	\$80,000.00	573-999-55	Complete	Basic Life	---	Trainer, Anna	Employee	1/7/1982
										Dental Plan	Employee & 1Child	Trainer, Anna	Employee	1/7/1982
											Employee & 1Child	Trainer, Teri	Child	3/2/2001
											Employee & 1Child	Trainer, Keri	Child	2/28/2022
										Employee Life	---	Trainer, Anna	Employee	1/7/1982
										Option 1	Employee & 2+ Children	Trainer, Anna	Employee	1/7/1982
											Employee & 2+ Children	Trainer, Teri	Child	3/2/2001
											Employee & 2+ Children	Trainer, Keri	Child	2/28/2022
										Spouse Life	---	Trainer, Jerry	Ex-Spouse	1/13/1980



**Select Columns** Order Member Name Selected Columns

Last Name  
First Name  
Middle Initial  
Title

Move Up  
Move Down

Select Plan Details: Enrollments Only

Select Health Tier Label: Health Tier Label

Member Types: All Member Types, Employees, Spouses, Children

**Enrollment Columns** Enrollment Columns Selected Columns

Employee SSN  
New Hire  
Plan Option  
Buy Up  
COBRA Premium  
Elected Coverage  
Elected Employer Premium  
Elected Employee Premium

Health Tier  
Member Name  
Member Type  
Member DOB  
Member SSN  
Member Gender  
Effective Date  
Termination Date

Move Up  
Move Down

**Employee Columns** Available Columns Selected Columns

Government Visa No.  
EEO Ethnic Code  
EEO Job Category  
Gender  
Tobacco User  
Residential Address (residential type)  
Street Address 2 (residential type)  
City (residential type)

Employee Name  
Social Security No.  
Employment Status  
Date of Birth  
Date of Employment  
Gross Annual Salary  
No. of Dependents  
Home Phone

Move Up  
Move Down

PDF Page Type: Landscape

Archival Type: PDF

Display Report Cover: Yes

Report Debugging: No

Display Subtotals: Yes, but only if there is more than one item

No  
Yes  
Yes, but only if there is more than one item

Select

5

Suggestion: Change Display Subtotals to No.

Training - BrightPassage Employee	Social Security Number	Employment Status	Date of Birth	Date of Employment	Gross Annual Salary	Employee Login Status	Plan Name	Health Tier	Member Name	Member Type	Member DOE	Member SSN	Member Gender	Effective Date	Termination Date	Enrollment Date	Date Terminated	Approved Coverage	
Adams, John	100-40-9764	COBRA	3/17/1974	7/1/2015	\$58,823.00	Complete	Dental Plan	Employee	Adams, John	Employee	3/17/1974	100-40-9764	M	2/1/2022	12/31/2022	1/24/2022	---	\$0.00	
Dental Plan Subtotal:																			\$0.00
Adams, John Subtotal: 1 returned plan																			\$0.00
Employee, Elaine	654-65-4654	Active	1/1/1980	1/1/2001	\$40,000.00	Incomplete	Dental Plan	Employee & Spouse	Employee, Elaine	Employee	1/1/1980	654-65-4654	F	9/1/2021	8/31/2022	4/29/2021	---	\$0.00	
								Employee & Spouse	Spouse, Sam	Spouse	1/1/1980	---	M	9/1/2021	8/31/2022	4/29/2021	---	\$0.00	
Dental Plan Subtotal:																			\$0.00
Employee, Elaine Subtotal: 1 returned plan																			\$0.00
HUBster, Benny	123-56-7543	Active	1/1/1980	1/1/2001	\$50,000.00	Incomplete	Employee Life	---	HUBster, Benny	Employee	1/1/1980	123-56-7543	M	1/1/2022	12/31/2022	3/2/2022	---	\$0.00	
Employee Life Subtotal:																			\$0.00
HUBster, Benny Subtotal: 1 returned plan																			\$0.00
Harrison, Benjamin	100-84-1581	Active	4/22/1966	2/18/2000	\$53,911.00	Complete	Dental Plan	Employee	Harrison, Benjamin	Employee	4/22/1966	100-84-1581	M	10/13/2021	8/31/2022	10/13/2021	---	\$0.00	
Dental Plan Subtotal:																			\$0.00
Harrison, Benjamin Subtotal: 1 returned plan																			\$0.00
Reagan, Ronald	100-83-0296	Active	8/11/1966	3/1/2000	\$64,779.00	Incomplete	Dental Plan	Employee & Spouse	Reagan, Ronald	Employee	8/11/1966	100-83-0296	M	10/13/2021	8/31/2022	10/13/2021	---	\$0.00	
								Employee & Spouse	Reagan, Nancy	Spouse	1/17/1958	200-40-408	F	10/13/2021	8/31/2022	10/13/2021	---	\$0.00	
Dental Plan Subtotal:																			\$0.00
Reagan, Ronald Subtotal: 1 returned plan																			\$0.00
Test, Amber	464-64-3213	Active	12/22/1983	1/1/2001	\$40,000.00	Incomplete	Dental Plan	Employee	Test, Amber	Employee	12/22/1983	464-64-3213	F	9/1/2021	8/31/2022	4/29/2021	---	\$0.00	
Dental Plan Subtotal:																			\$0.00

Employee	Social Security No	Employment Status	Date of Birth	Date of Employment	Gross Annual Salary	Employee Login Status	Plan Name	Health Tier	Member Name	Member Type	Member DOE	Member SSN	Member Gender	Effective Date	Termination Date	Enrollment Date	Date Terminated	Approved Coverage
Adams, John	100-40-3764	COBRA	3/17/1974	7/1/2015	\$58,823.00	Complete	Dental Plan	Employee	Adams, John	Employee	3/17/1974	100-40-3764	M	2/1/2022	12/31/2022	1/24/2022	---	\$0.00
Employee, Elaine	654-65-4654	Active	1/1/1980	1/1/2001	\$40,000.00	Incomplete	Dental Plan	Employee & Spouse	Employee, Elaine	Employee	1/1/1980	654-65-4654	F	9/1/2021	8/31/2022	4/29/2021	---	\$0.00
								Employee & Spouse	Spouse, Sam	Spouse	1/1/1980	---	M	9/1/2021	8/31/2022	4/29/2021	---	\$0.00
Dental Plan Subtotal:																		\$0.00
Employee, Elaine Subtotal: 1 returned plan																		\$0.00
HUBster, Benny	123-56-7543	Active	1/1/1980	1/1/2001	\$50,000.00	Incomplete	Employee Life	---	HUBster, Benny	Employee	1/1/1980	123-56-7543	M	1/1/2022	12/31/2022	3/2/2022	---	\$0.00
Harrison, Benjamin	100-84-1581	Active	4/22/1966	2/18/2000	\$53,911.00	Complete	Dental Plan	Employee	Harrison, Benjamin	Employee	4/22/1966	100-84-1581	M	10/13/2021	8/31/2022	10/13/2021	---	\$0.00
Reagan, Ronald	100-83-0296	Active	8/11/1966	3/1/2000	\$64,779.00	Incomplete	Dental Plan	Employee & Spouse	Reagan, Ronald	Employee	8/11/1966	100-83-0296	M	10/13/2021	8/31/2022	10/13/2021	---	\$0.00
								Employee & Spouse	Reagan, Nancy	Spouse	1/17/1958	200-40-408	F	10/13/2021	8/31/2022	10/13/2021	---	\$0.00
Dental Plan Subtotal:																		\$0.00
Reagan, Ronald Subtotal: 1 returned plan																		\$0.00
Test, Amber	464-64-3213	Active	12/22/1983	1/1/2001	\$40,000.00	Incomplete	Dental Plan	Employee	Test, Amber	Employee	12/22/1983	464-64-3213	F	9/1/2021	8/31/2022	4/29/2021	---	\$0.00
Test, Brad	000-00-0009	Active	1/1/1975	5/11/2021	\$40,000.00	Incomplete	Dental Plan	Employee	Test, Brad	Employee	1/1/1975	000-00-0009	M	11/1/2021	8/31/2022	10/11/2021	---	\$0.00
								Employee Life	Test, Brad	Employee	1/1/1975	000-00-0009	M	3/1/2022	12/31/2022	2/28/2022	---	\$280,000.00
Test, Brad Subtotal: 2 returned plans																		\$280,000.00
Test, Fake	000-00-0064	Active	1/1/1980	1/1/2001	\$40,000.00	Incomplete	Dental Plan	Employee	Test, Fake	Employee	1/1/1980	000-00-0064	F	1/1/2022	3/31/2022	3/2/2022	3/2/2022	\$0.00
								Low Option PPO	Test, Fake	Employee	1/1/1980	000-00-0064	F	1/1/2022	3/31/2022	3/2/2022	3/2/2022	\$0.00
Test, Fake Subtotal: 2 returned plans																		\$0.00
Test, Temp	000-00-0004	Active	1/1/1975	3/18/2021	\$40,000.00	Incomplete	Dental Plan	Family	Test, Temp	Employee	1/1/1975	000-00-0004	M	9/1/2021	8/31/2022	8/18/2021	---	\$0.00
								Family	Test, SP	Spouse	1/1/1975	000-00-0004	F	9/1/2021	8/31/2022	8/18/2021	---	\$0.00
								Family	Test, CH1	Child	1/1/2011	000-00-0004	F	9/1/2021	8/31/2022	8/18/2021	---	\$0.00
Dental Plan Subtotal:																		\$0.00
Test, Temp Subtotal: 1 returned plan																		\$0.00
Test, Testing 1	000-00-0029	Active	1/1/1980	1/1/2001	\$40,000.00	Incomplete	Group Cancer - Base Option with ICU Rider	Employee & Spouse	Test, Testing 1	Employee	1/1/1980	000-00-0029	F	1/1/2022	3/31/2022	2/28/2022	3/1/2022	\$0.00
								Employee & Spouse	Test, Spouse	Spouse	1/1/1980	---	M	1/1/2022	3/31/2022	2/28/2022	3/1/2022	\$0.00
Group Cancer - Base Option with ICU Rider Subtotal:																		\$0.00
Test, Testing 1 Subtotal: 1 returned plan																		\$0.00
Test, Testing 2	000-00-0044	Active	1/1/1980	1/1/2001	\$40,000.00	Incomplete	Dental Plan	Employee & Spouse	Test, Testing 2	Employee	1/1/1980	000-00-0044	F	1/1/2022	3/1/2022	2/28/2022	3/1/2022	\$0.00
								Employee & Spouse	Test, Spouse	Ex-Spouse	1/1/1980	---	M	1/1/2022	3/1/2022	2/28/2022	3/1/2022	\$0.00
								Employee	Test, Testing 2	Employee	1/1/1980	000-00-0044	F	3/2/2022	12/31/2022	3/1/2022	---	\$0.00




# Other Reporting Tips & Scenarios

Your report is running in THEbenefitsHUB, but you forgot about a meeting that's starting in one minute. How would you handle this situation?

## MY REPORTS

FILTER

1 - 25 26 - 50 51 - 75 NEXT

Report	Status	Queue	Date Ran	Ran By	File Type
Plan Enrollment	Pending	Processing	3/10/2022 3:01 PM	Amber O'Reilly	
Plan Enrollment	Pending	Next Up	3/10/2022 3:01 PM	Amber O'Reilly	
Plan Enrollment	Pending	3rd	3/10/2022 3:01 PM	Amber O'Reilly	
Plan Enrollment	Completed		3/10/2022 2:27 PM	Amber O'Reilly	  

You are completing an audit and need to find all the changes that occurred last week. How would you handle this situation?



Company Reporting



Company Communication

### Quick Reports

### Standard Reports

- Add/Change/Term ←
- Beneficiaries
- Benefit Renewal Opportunities
- Billing Report History
- Carrier Billing
- COBRA Employee Status
- Consolidated Billing
- Dependent Census
- Dependent Enrollment
- Employee Census
- Employee COB
- Employee Eligibility
- Employee Journal
- Employee Spending Credits
- Import Validation
- Imputed Income (Table 1)
- Payroll Deduction
- Payroll Deduction Changes
- Plan Comparison
- Plan Enrollment
- Plan Summary
- Reviews
- System Utilization

My Report History



Employee	Social Security No.	Employment Status	Date of Birth	Date of Employment	Gross Annual Salary	Actions	Detail	Date of Action
HUBster, Benny	123-56-7543	Active	1/1/1980	1/1/2001	\$50,000.00	E-mail Notification Message Sent	By the System Administrator	3/2/2022
						HUBster, Benny - Employee Plan Enrollment Information edited by system administrator "zcheek" at IP 47.214.18.54	HUBster, Benny - Employee Life [Employee Life] [3800799] coverage provided by Global Insurance was addedCoverage added through qualifying event Marriage with new coverage effective beginning 1/1/2022Policy No. -HUBster, Benny (Employee) coverage addedEmployee Cost = \$0.00 (per month)Employer Cost = \$0.00 (per month)Unapproved Coverage = \$350,000.00Employee Cost for Unapproved Coverage = \$70.00 (per month)The elected coverage of \$350,000.00 is greater than the maximum guaranteed issue/approved coverage of \$0.00	3/2/2022
Test, Fake	000-00-0064	Active	1/1/1980	1/1/2001	\$40,000.00	Test, Fake - Journal Record Added by system administrator "zcheek" at IP 47.214.18.54	Journal record 03/02/2022 @ 05:04:48 was added.	3/2/2022
						E-mail Notification Message Sent	By the System Administrator	3/2/2022
						Test, Fake - Employee Plan Enrollment Information edited by system administrator "zcheek" at IP 47.214.18.54	Test, Fake - Vision [Low Option PPO] [3800826] coverage provided by American Health Plans was changedCoverage changed through qualifying event Marriage with new coverage effective beginning 4/1/2022Policy No. VTest, Fake (Employee) coverage confirmedTest, Anna (Spouse) coverage addedEmployee Cost was changed from \$145.00 to \$475.00Employer Cost was changed from \$250.00 to \$250.00	3/2/2022
						E-mail Notification Message Sent	By the System Administrator	3/2/2022
						Test, Fake - Employee Plan Enrollment Information edited by system administrator "zcheek" at IP 47.214.18.54	Test, Fake - Dental [Dental Plan] [3394123] coverage provided by Nexus Health was changedCoverage changed through qualifying event Marriage with new coverage effective beginning 4/1/2022Policy No. 123456Test, Fake (Employee) coverage confirmedTest, Anna (Spouse) coverage addedEmployee Cost was changed from \$7.00 to \$17.00Employer Cost was changed from \$5.00 to \$5.00	3/2/2022
						E-mail Notification Message Sent	By the System Administrator	3/2/2022
						Test, Fake - Employee Plan Enrollment Information edited by system administrator "zcheek" at IP 47.214.18.54	Test, Fake - "Is your spouse currently age 65 or older?" No was added	3/2/2022
						E-mail Notification Message Sent	By the System Administrator	3/2/2022
						Test, Fake - Employee Plan Enrollment Information edited by system administrator "hkhan" at IP 70.113.149.247	Test, Fake - Dental [Dental Plan] [3394123] coverage provided by Nexus Health was addedCoverage added through qualifying event *Broker Only Correction with new coverage effective beginning 1/1/2022Policy No. 123456Test, Fake (Employee) coverage addedEmployee Cost = \$7.00 (per month)Employer Cost = \$5.00 (per month)	3/2/2022
						E-mail Notification Message Sent	By the System Administrator	3/2/2022
						Test, Fake - Employee Plan Enrollment Information edited by system administrator "hkhan" at IP 70.113.149.247	Test, Fake - Vision [Low Option PPO] [3800826] coverage provided by American Health Plans was addedCoverage added through qualifying event *Broker Only Correction with new coverage effective beginning 1/1/2022Policy No. VTest, Fake (Employee) coverage addedEmployee Cost = \$145.00 (per month)Employer Cost = \$250.00 (per month)	3/2/2022

You need to review payroll deductions before payroll runs. How would you gather this information?



Company Reporting



Company Communication

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**Quick Reports**

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**Standard Reports**

- Add/Change/Term
- Beneficiaries
- Benefit Renewal Opportunities
- Billing Report History
- Carrier Billing
- COBRA Employee Status
- Consolidated Billing
- Dependent Census
- Dependent Enrollment
- Employee Census
- Employee COB
- Employee Eligibility
- Employee Journal
- Employee Spending Credits
- Import Validation
- Imputed Income (Table 1)
- Payroll Deduction** ←
- Payroll Deduction Changes
- Plan Comparison
- Plan Enrollment
- Plan Summary
- Reviews
- System Utilization
- My Report History

### Payroll Deduction Report

Report Date Span:    to

Select Divisions:   
 Division 1  
 Division 2  
 Division 3

Select Employee Categories:   
 All  
 Court Ordered Dependent Child(ren)  
 Limited  
 Principle

Select Employees:   
 Adams, John Q.  
 Aguilar, Pepe  
 Arthur, Chester  
 Biden, Joseph , JR

Detail By:

Querying By:

New Hires Only:

Show Report For:   
 Terminated  
 Active  
 COBRA  
 Retired

Employee Login Status:

Show Credits:

Select Columns:


Selected Columns:

Changes Only:   
 Any  
 Effective Date  
 Enrollment Date


Display Report Cover:

Employee	SSN	Payroll File Number	Basic Li	Child(ren) Li	Long Term Disabili	AD&	Employee Li	Spouse Li	Medic	Dent	Visio	Canc	Total Payroll Deductio
Adams, John	100-40-9764	10101	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$10.00	\$0.00	\$0.00	\$10.00
Employee, Elaine	654-65-4654	---	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$17.00	\$0.00	\$0.00	\$17.00
Test, Amber	464-64-3213	---	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3.23	\$0.00	\$0.00	\$3.23
Test, Brad	000-00-0009	---	\$0.00	\$0.00	\$0.00	\$0.00	\$56.00	\$0.00	\$0.00	\$7.00	\$0.00	\$0.00	\$63.00
Test, Fake	000-00-0064	---	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3.23	\$66.92	\$0.00	\$70.15
Test, Temp	000-00-0004	---	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$17.00	\$0.00	\$0.00	\$17.00
Test, Testing 1	000-00-0029	---	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$23.08	\$23.08
Trainer, Anna	111-55-9999	---	\$0.00	\$0.00	\$0.00	\$0.00	\$46.15	\$23.08	\$91.38	\$3.23	\$0.00	\$0.00	\$163.84
Harrison, Benjamin	100-84-1581	10117	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$7.00	\$0.00	\$0.00	\$7.00
Test, Testing 2	000-00-0044	---	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$453.00	\$15.00	\$0.00	\$50.00	\$590.00
Reagan, Ronald	100-83-0296	10134	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$8.50	\$0.00	\$0.00	\$8.50

You want to compare last year's enrollment to this year's enrollment. How would you find this information?



**Company Reporting**



**Company Communication**

**Quick Reports**

- Benefit Level Comparison
- Employee Acknowledgments
- Login Statistics
- Monthly Billing
- New Hire Email
- Plan Election Comparison ←
- Skyward
- Standard Payroll
- TxEIS (RSCCC)

**Standard Reports**

**My Report History**

Select First Date: December 1 2021

Select Second Date: January 1 2022

Select Divisions:

Available	Selected
	Division 1
	Division 2
	Division 3

Select Providers:

Available	Selected
	Aetna
	American Health Plans
	American Public Life
	Blue Cross/Blue Shield
	Global Insurance
	National Benefit Services

Select Benefit Plan Types:

Available	Selected
	Global Insurance Basic Life
	Blue Cross/Blue Shield Medi
	Nexus Health Medical
	Nexus Health Dental
	Blue Cross/Blue Shield Visio
	American Health Plans Visio

Select Employee Pay Schedules:

Available	Selected
	12 Pay
	24 Pay
	28 Pay

Calculate Costs Based on Pay Frequency: No

Select Employee Categories:

Available	Selected
	All
	Court Ordered Dependent C
	Limited
	Principle

Show Report For:

Available	Selected
Terminated	Active
COBRA	
Retired	
Inactive	
Deceased	
FMLA	

Select Employee Columns:

Available	Selected
Current Division	Employee Name
Date of Birth	Social Security No.
Date of Employment	
Email Address	
Employee Category	
Employee Login Status	

Employee Name: LastName, FirstNan

File Format: CSV

Show Detail: No

Create Saved Report:

Employee Name	SSN	Benefit	First Date Employer Cost	First Date Employee Cost	First Date Tax Election	Second Date Employer Cost	Second Date Employee Cost	Second Date Tax Election	Employee Cost Difference
Arthur, Chester	100-53-7591	Basic Life	1	0	Post	0	0	N/A	0
Arthur, Chester	100-53-7591	Catastrophic Sick Leave Bank	0	0	Pre	0	0	N/A	0
Arthur, Chester	100-53-7591	Employee Life	0	6.4	Pre	0	0	N/A	-6.4
Arthur, Chester	100-53-7591	Medical Declination	0	0	Post	0	0	N/A	0
Arthur, Chester	100-53-7591	Medical Offering	0	0	N/A	0	0	N/A	0
Biden, Joseph	000-00-0100	AD&D	0	15	Post	0	0	N/A	-15
Biden, Joseph	000-00-0100	Basic Life	0.5	0	Post	0	0	N/A	0
Biden, Joseph	000-00-0100	Catastrophic Sick Leave Bank	0	0	Pre	0	0	N/A	0
Biden, Joseph	000-00-0100	Dental	5	15	Pre	0	0	N/A	-15
Biden, Joseph	000-00-0100	Employee Life	0	26.6	Pre	0	0	N/A	-26.6
Biden, Joseph	000-00-0100	Health Savings Account	0	100	N/A	0	0	N/A	-100
Biden, Joseph	000-00-0100	Medical	250	1211	Pre	0	0	N/A	-1211
Biden, Joseph	000-00-0100	Vision	250	600	Pre	0	0	N/A	-600
Buchanan, James	100-73-2522	Basic Life	1	0	Post	0	0	N/A	0
Buchanan, James	100-73-2522	Cancer	0	40	Pre	0	0	N/A	-40
Buchanan, James	100-73-2522	Catastrophic Sick Leave Bank	0	0	Pre	0	0	N/A	0
Buchanan, James	100-73-2522	Dental	5	15	Pre	0	0	N/A	-15
Buchanan, James	100-73-2522	Employee Life	0	8.8	Pre	0	0	N/A	-8.8
Buchanan, James	100-73-2522	Health Savings Account	0	100	N/A	0	0	N/A	-100
Buchanan, James	100-73-2522	Long Term Disability	0	40	Post	0	0	N/A	-40
Buchanan, James	100-73-2522	Medical	250	737	Pre	0	0	N/A	-737
Buchanan, James	100-73-2522	Vision	250	475	Pre	0	0	N/A	-475
Buffay, Phoebe	324-89-7273	Basic Life	1	0	Post	0	0	N/A	0
Buffay, Phoebe	324-89-7273	Dental	5	15	Pre	0	0	N/A	-15
Buffay, Phoebe	324-89-7273	Health Savings Account	0	100	N/A	0	0	N/A	-100
Buffay, Phoebe	324-89-7273	Medical	250	737	Pre	0	0	N/A	-737
Buren, Martin	100-35-7785	AD&D	0	24	Post	0	0	N/A	-24

# Report Descriptions

<https://thebenefitshubtraining.com/the-learning-lab/report-descriptions/>

< All Topics

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## Report Descriptions

TLL > Technology > System and Service Knowledge > THEbenefitsHUB - Company Reporting > Report Descriptions

Show 10 entries

Search:

Report Name	Report Type	Description	Report Purpose
18 Month COBRA Notification	IMNS Reports	Employees in this notification have active COBRA elections exceeding 18 months. Election termination dates should be confirmed or corrected on the Terminate Plan Elections screen under the Benefit Plan Information icon.	COBRA elections exceeding 18 months
5Star ESOI Status	IMNS Reports	Shows 5Star elections waiting on the carrier or employee. Remember: Please be sure to use your EOI reminders.	5Star EOI status
Add/Change/Term	Standard Reports	Displays detailed information about any changes made to employee records within the selected date span or on a daily basis.	Details adds/changes made to an employees record
Basic Life Reduction Notification	IMNS Reports	Employees in this notification have an active Basic Life election expected to reduce at the end of the employees' birth month due to plan reduction schedule.	Basic Life reductions
Beneficiaries	Standard Reports	Displays Employee Beneficiary information for the selected Benefit Types	Beneficiary details
Benefit Level Comparison	Quick Reports	This report shows the difference in participation and premiums at the benefit level as a whole.	Comparing differences between plan years
Benefit Renewal Opportunities	Standard Reports	A summary report of all benefit renewals for employer groups, in a given month, including General Company Contact information, as well as Agent Contact information	Benefit renewals



# Suggested Post Action Items

1

Run an Employee Census and Dependent Census reports and see how the reports are similar and different.

2

Run a Plan Enrollment report adding your company's Additional Information questions to the Employee Columns section. Note how you could use those fields in the future.

3

Run the Monthly Billing Report and explore how the information displayed differs from the Plan Enrollment report.



Remember: You won't break anything by running a report wrong.

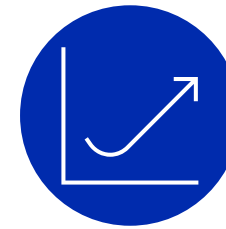
# Webinar Objectives



Recognize the relationship between different reports and common requests.



Summarize common reporting fields.



Run different THEbenefitsHUB reports for specific data and troubleshooting needs.

A futuristic space station interior with a large window showing Earth from space. The station has a metallic, industrial look with blue lighting accents. The window is framed by a complex, multi-layered structure. The Earth is seen from a high angle, with the sun low on the horizon, creating a bright glow and lens flare effect. The sky is dark with some stars visible.

Thank you for attending!

Contact us at [learn@allsynx.com](mailto:learn@allsynx.com)