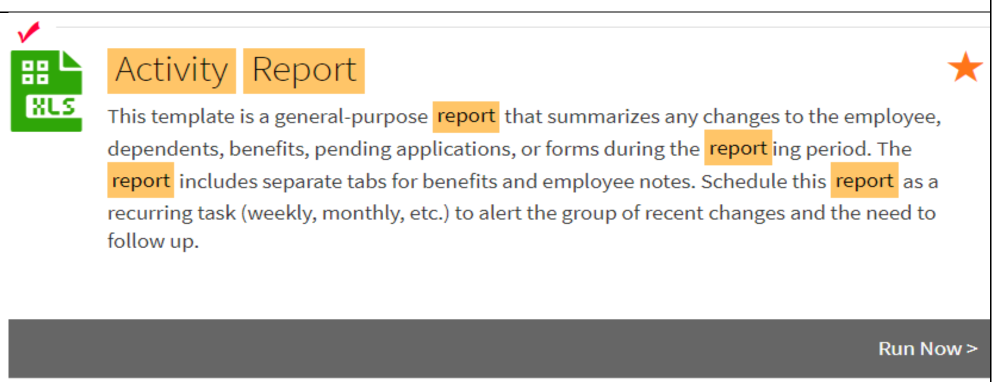
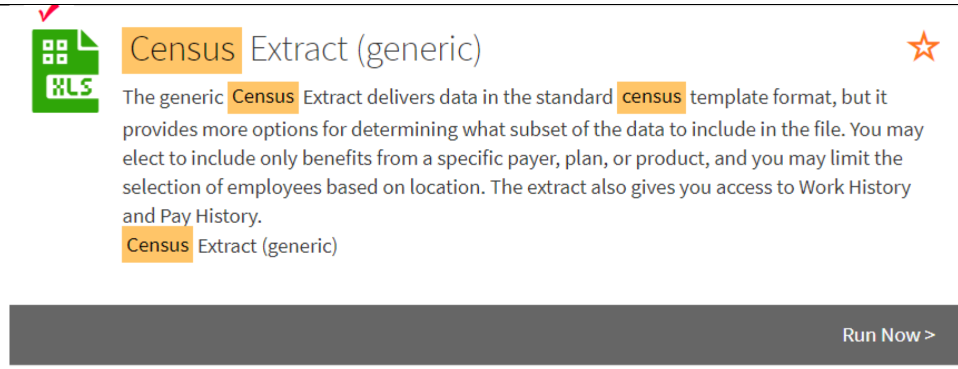
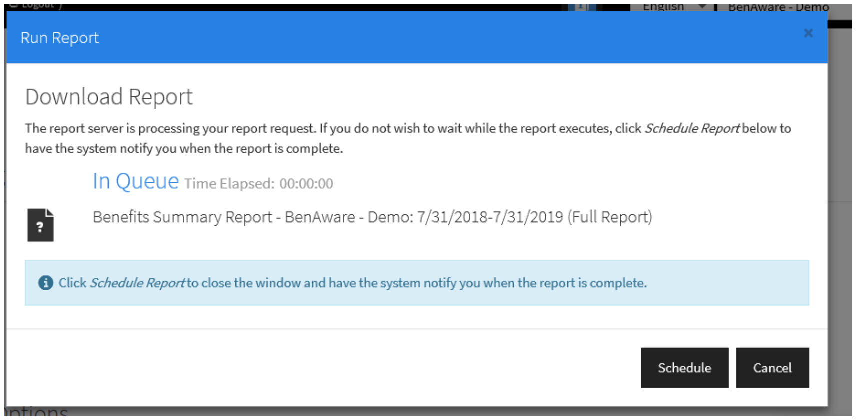
➢ *How to Pull a Report*

Step	**Action**
	1) How to run reports *a. Standard Report Options* *i. Activity Report* *ii. Enrollment Report* *iii. OE Status Report* *iv. Generic Payroll* *v. Generic Payer* *vi. Census Extract*
1	*From the home screen, click on "Report" tab* 
2	*Click on "Run Report"*
3	*From the Run Report screen, Click in the search box and type the name of the report you want to run - *Make sure the "standard" report option is displayed.* 
Activity Report (HR Staff – deduction file & ALL Changes to records)	

Enrollment Report (HR Staff – deduction file – all enrollment)	Enrollment Report.xls The 'Enrollment Report' is a generic report showing overall employee benefit enrollment. Run Now >
OE Status Report (During OE – Status of Enrollment	OE Enrollment Status Report The OE Enrollment Status Report lists employee data along with their current Enrollment Status (Not Begun, Incomplete, Complete). Ideal for running during OE to determine progress of enrollment. Run Now >
Generic Payroll Report (HR Staff – deduction file)	Generic Payroll Report This generic payroll report shows deductions effective for the pay date within the reporting period. You may run this report as a full file (to get all payroll deductions) or a change file (to get only those deductions that are changing on the pay date). In either case, you should choose a date range that includes the specific pay date in which you are interested. Before running this report, set the deduction code(s) in EDI parameters. Run Now >
Generic Payer Report (for carriers)	Generic Payer Report This generic payer report provides a summary of enrolled individuals and their respective benefit coverages in each selected plan. The report provides two tabs -- one for enrolled employees and one for enrolled individuals (including all covered dependents). Run Now >

Census Extract *(all data in system)*	
Making Favorites	To save a report in your "Favorites" for ease of running it in the future – Click on the  in the top right corner of the report display. This adds it to you favorites folder.
	To Display your favorites folder – on the "Run Report" screen (step 3 above), click on the standard display next to the search box and choose "Favorites" – 
Notes	When running any of these reports (clicking "Run Now"), you will be prompted to input/verify the parameters of the report – for example, the Date Range, The Scope (full report or A/C/D (add, change, delete), Employees, Locations, etc.
Schedule the Report	If you have numerous activities occuring and do not want to wait for the report to generate, you may click Schedule once the report begins to generate. This will allow you to have an email sent to you when the report is completed. Selerix is a large global enrollment admin portal and there will be times, depending on your report and its scope,

	reports could take an hour to generate. Waiting may not be ideal. 
Email Link	Once you receive the email with the link your report is ready, you have two options. Option 1: You can cick on the link, it will open the portal(you may have to log in again if your session was timed out) and the report will automatically begin to open for you. Option 2: if you do not need your report right away, you may access anytime under “Received Reports” once you log into the portal. Hover over reports and click on Received Reports option.
Trouble-shooting	If your report has no data, you will need to rerun the report and change the scope of dates, or data you are requesting.