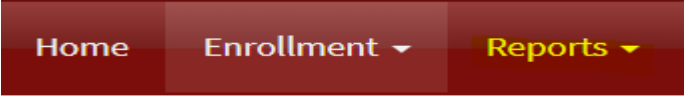

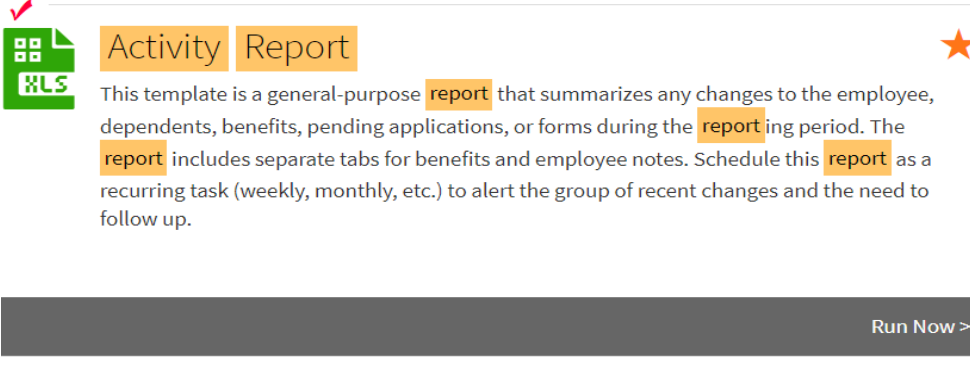












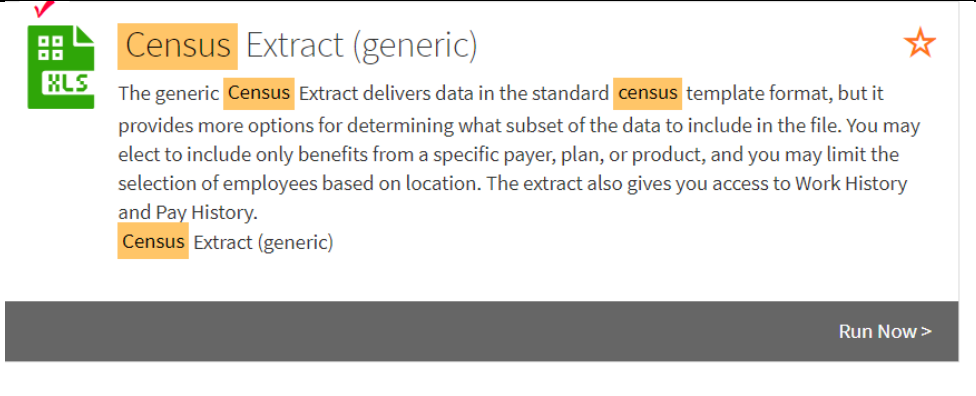




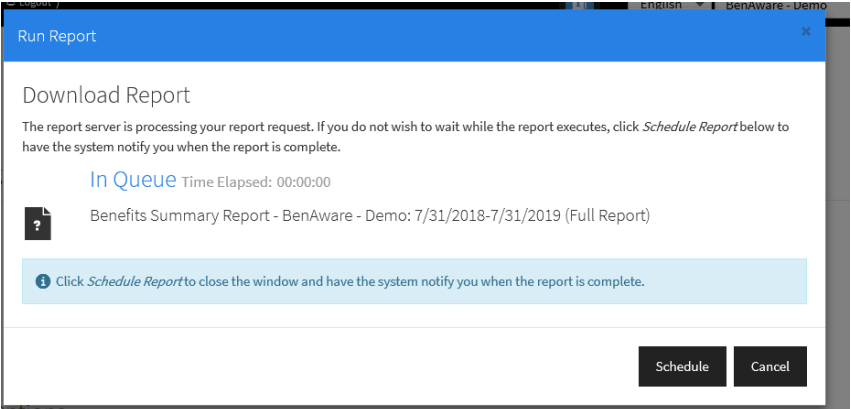


➤ How to Pull a Report

Step	Action
	<p>1) How to run reports</p> <p>a. Standard Report Options</p> <ul style="list-style-type: none"> i. Activity Report ii. Enrollment Report iii. OE Status Report iv. Generic Payroll v. Generic Payer vi. Census Extract
1	<p>From the home screen, click on "Report" tab</p> 
2	<p>Click on "Run Report"</p>
3	<p>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.</p> 
<p>Activity Report (HR Staff – deduction file & ALL Changes to records)</p>	 <p>Activity Report</p> <p>This template is a general-purpose report that summarizes any changes to the employee, dependents, benefits, pending applications, or forms during the reporting period. The report includes separate tabs for benefits and employee notes. Schedule this report as a recurring task (weekly, monthly, etc.) to alert the group of recent changes and the need to follow up.</p> <p>Run Now ></p>

<p><i>Enrollment Report (HR Staff – deduction file – all enrollment)</i></p>	  <h3>Enrollment Report.xls</h3> <p>The 'Enrollment Report' is a generic report showing overall employee benefit enrollment.</p> <p style="text-align: right;"></p> <p style="text-align: right;">Run Now ></p>
<p><i>OE Status Report (During OE – Status of Enrollment)</i></p>	  <h3>OE Enrollment Status Report</h3> <p>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.</p> <p style="text-align: right;"></p> <p style="text-align: right;">Run Now ></p>
<p><i>Generic Payroll Report (HR Staff – deduction file)</i></p>	  <h3>Generic Payroll Report</h3> <p>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.</p> <p style="text-align: right;"></p> <p style="text-align: right;">Run Now ></p>
<p><i>Generic Payer Report (for carriers)</i></p>	  <h3>Generic Payer Report</h3> <p>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).</p> <p style="text-align: right;"></p> <p style="text-align: right;">Run Now ></p>

<p><i>Census Extract</i> (all data in system)</p>	 <p>Census Extract (generic) </p> <p>The generic Census Extract delivers data in the standard census template format, but it provides more options for determining what subset of the data to include in the file. You may elect to include only benefits from a specific payer, plan, or product, and you may limit the selection of employees based on location. The extract also gives you access to Work History and Pay History.</p> <p>Census Extract (generic)</p> <p>Run Now ></p>
<p><i>Making Favorites</i></p>	<p>To save a report in your “Favorites” for ease of running it in the future –</p> <p>Click on the  in the top right corner of the report display. This adds it to you favorites folder.</p>
	<p>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” –</p>  <p>Run Reports Browse Favorites Generic </p>
<p><i>Notes</i></p>	<p>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.</p>
<p><i>Schedule the Report</i></p>	<p>If you have numerous activities occurring 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,</p>

	<p>reports could take an hour to generate. Waiting may not be ideal.</p> 
<i>Email Link</i>	<p>Once you receive the email with the link your report is ready, you have two options. Option 1: You can click 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.</p>
<i>Trouble-shooting</i>	<p>If your report has no data, you will need to rerun the report and change the scope of dates, or data you are requesting.</p>