

(View Landscape)

Available Employee Reports

Details

Employment related details for employees may be found in reports generated from Employees > Actions and Reports > Available and may be accessed from Reports > Generated.

From Employees > Actions

From Reports > Available

See below for a list of reports designated as Employee:

Report	Location	Fields
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Basic Census	<p>Reports > Available</p> <p>Employees > Actions > Generate Census</p>	EID, Employee SSN, First Name, Middle Name, Last Name, SSN, Sex, Birth Date, Relationship, Hire Date, Employee Status, Employee Type, Job Title, Location, Department, Division, Job Class
Demographic Census	Reports > Available	EID, Employee SSN, First Name, Middle Name, Last Name, SSN, Sex, Birth Date, Relationship, Address 1, Address 2, City, State, Zip, County, Country, Email, Personal Email, Mobile Phone, Personal Phone, Work Phone, Hire Date, Employee Status, Employee Type, Job Title, Location, Department, Division, Job Class, Compensation, Compensation Type
Direct Deposit	Reports > Available	First Name, Last Name, SSN, Job Title, Bank Name, Routing Number, Accounting Number, Type, Amount
Document History	Reports > Available	Document Type, Document Name, Date, Modified By, Field, Old Value, New Value

Emergency Contacts	Reports > Available	For specified Employee Status and/or Type, Location, Division, Department, Job Class; includes Location, Employee First Name, and Last Name, Email, Phone, Contact's First and Last Name, Relationship, Email, Phone
Full Census	Reports > Available	Company Name, EID, Location, First Name, Middle Name, Last Name, Relationship, Relationship Code, SSN, Gender, Birth Date, Race, Citizenship, Address 1, Address 2, City, State, Zip, County, Country, Personal Phone, Work Phone, Mobile Phone, Email, Personal Email, Employee Type, Employee Status, Hire Date, Department, Division, Job Class, Job Title, Marital Status, Marital Date, Marital Location, Student Status, Scheduled Hours, Sick Hours, Personal Hours, W2 Wages, Compensation, Compensation Type, Pay Cycle, Remaining Pay Periods, Cost Factor, Tobacco User, Disabled, Medicare A Date, Medicare B Date, Medicare C Date, Medicare D Date, Medical PCP Name, Medical PCP ID, Dental PCP Name, Dental PCP ID, IPA Number, OBGYN, Benefit Eligible Date, Unlock Enrollment Date, Subscriber Key
Managers	Reports > Available	Employee (first and last name), Employee Hire Date, Manager, HR Manager

	Employees > Actions	
Onboarding Progress	Reports > Available	Onboarding Status, Signature Date, Locations, First Name, Last Name, Email, Personal Phone, Work Phone, Type, Job Class, Hire Date, Last Login Date, Benefit Eligible Date
Required Documents	Reports > Available Documents >Library > Actions	Location, First Name, Last Name, Email, Hire Date, Status, Termination Date, W-4, I-9, COBRA Notification, column for each document that required employee review
W-4 Details	Reports > Available	Location, First Name, Last Name, SSN, Type (Federal or State), Filing Status, Decline Withholding (exempt), Withholding Allowance, Additional Withholding, Last Name differs from that shown on Social Security Card (yes or no)

W-4 Forms	Reports > Available	.PDF for all employees
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Available Benefits Reports (Employer)

Notes

- Reports are made available based on Company Administrator login access provided by your broker.
 - For enrollment related reports, **Enrollment Forms Access** must be checked.
 - For those that contain or with volumes based on compensation, **Compensation Access** must be checked.

Instructions

From Reports > Available

See below for a list of reports designated as Benefits:

Report	Description	Fields
Activity	Contains detailed activity (e.g. adds, changes, terms) over a period of time	For a specified date range, a Detail report or one with, additions, changes or terminations; includes demographic and employment data, COBRA Date, Change Type, Change Date, Old Value, New Value, Enrollment Action, Qualifying Event, Qualifying Event Date, Effective Date, Plan Type, Carrier, Plan Name, Election, Riders, Coverage Amount, Benefit Create Date, Benefit Last Modified Date, Beneficiary Plan Type, Beneficiary Type, Beneficiary Percentage, Last Modified By, Last Modified Date

Age Change	Details employee and dependent changes related to age including eligibility, benefit reduction, and medicare. Only includes future age changes.	Company, Type, Employee, Member, Relationship, Birth Date, Age, Plan Type, Plan Name
Beneficiaries	Contains detailed information about beneficiaries	For specified plan(s); includes Employee First Name, Last Name, SSN, Status, Marital Status, Plan Type, Plan Name, Type (Primary, Secondary), Percentage, First Name, Last Name, SSN, Relationship, Birth Date, Sex, Address 1, Address 2, City, State, Zip, County
Payroll Deductions	Generates a payroll deduction report for selected plans	Company, EID, Location, First Name, Middle Name, Last Name, SSN, Employee Status, Hire Date, Termination Date, Job Title, Department, Division, Job Class, Pay Cycle, Pay Periods, Payroll Group, Plan Type, Plan Admin Name, Coverage Code, Election Status, Processed Date, Employee Cost Per Deduction Period Pre-Tax, Employee Cost Per Deduction Post-Tax, Employer Cost Per Deduction Period, Plan Deduction Periods, Benefit Allowance - Available, Benefit Allowance - Used, Benefit Allowance - Remaining, Benefit Allowance - Cash Back, Effective Date, Activity Date

Annual Benefits Contributions	Shows the monthly Total Rates, Employer Costs, and Employee Costs for all Plan Types for a given year. Useful for fulfilling the reporting requirements of the CARES Act.	For a specified calendar year, EID, Location, First Name, Last Name, SSN, Birth Date, Status, Hire Date, Termination Date, Address 1, Address 2, City, State, Zip, Mailing Address, Plan Type, Monthly Total Rate (Premium) for January - December, Annual Total Rate, Plan Type, Monthly Employer Cost for January - December, Plan Type, Monthly Employee Cost for January - December, Annual Employee Cost
Consolidated Billing	Generates a consolidated billing report for selected plans	EID, Location, First Name, Last Name, SSN, Status, Hire Date, Termination Date, Department, Division, Job Class, Job Title, Pay Cycle, Pay Periods, Remaining Pay Periods, for each [plan:] Monthly Premium, Employer Cost Per Pay Period, Employee Cost Per Pay Period, Effective Date, Deduction Periods, Remaining Deduction Periods; Coverage Code, Coverage Details, Total Cost Per Pay Period, Total Employee Cost Per Pay Period, Total Employee Pre-Tax Cost Per Pay Period, Total Employee Post-Tax Cost Per Pay Period, Total Employer Cost Per Pay Period

Enrollment Census	Contains demographic and election information for employees and their dependents	<p>Company, EID, Location, First Name, Middle Name, Last Name, Relationship, Relationship Code, SSN, Sex, Birth Date, Race, Citizenship, Address 1, Address 2, City, State, Zip, County, Country, Mailing Address, Personal Phone, Work Phone, Mobile Phone, Email, Personal Email, Employee Type, Employee Status, Hire Date, Termination Date, Termination Type, Department, Division, Job Class, Job Title, Marital Status, Marital Date, Marital Location, Student Status, Scheduled Hours, Sick Hours, Personal Hours, W2 Wages, Pay Cycle, Pay Periods, Cost Factor, Tobacco User, Disabled, Medicare A Date, Medicare B Date, Medicare C Date, Medicare D Date, Medical PCP Name, Medical PCP ID, Dental PCP Name, Dental PCP ID, IPA Number, OBGYN, Benefit Eligible Date, Unlock Enrollment Date, Original Effective Date Info, Subscriber Key, Plan Type, Plan Effective Start Date, Plan Effective End Date, Plan Admin Name, Plan Display Name, Plan Import ID, Effective Date, Activity Date, Benefit Compensation Amount, Benefit Compensation Type, Coverage Details, Election Status, Processed Date, Rider Codes, Action, Waive Reason, Policy Number, Subgroup Number, Age Determination, Carrier, Total Rate, Employee Rate, Spouse Rate, Children Rate, Employee Contribution, Employee Pre-Tax Cost, Employee Post-Tax Cost, Employee Cost Per Deduction Period, Employer Contribution, Employer Cost Per Deduction Period, Plan Deduction Cycle, Last Modified Date, E-Sign Date, Benefit Allowance - Available, Benefit Allowance - Used, Benefit Allowance - Remaining, Benefit Allowance - Cash Back, and any custom fields added</p>
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Enrollment Progress	Shows the progress of employees going through enrollment	Enrollment Status, Signature Date, First Name, Last Name, Email, Personal Phone, Work Phone, Type, Job Class, Department, Hire Date, Last Login Date, Benefit Eligible Date
Open Enrollment Changes	Contains election change information for employees related to current and previous plan years	Last Modified, Location, EID, Employee, Plan Type, Effective Date, Coverage Change From, Coverage Change To, Plan Change From, Plan Change To, Employee Cost Change From, Employee Cost Change To, Employer Cost Change From, Employer Cost Change To
Enrollment Forms	Generates Enrollment Forms	.PDF for all employees; ready for submission to carriers
(Current) Enrollment Summaries*	Generates an enrollment summary based off of current elections	.PDF with benefit election information to include dependents and costs for current enrollment

(Open Enrollment) Enrollment Summaries*	Generates an enrollment summary based off of elections made during open enrollment	.PDF with benefit election information to include dependents and costs for open enrollment
(Current) Compensation* Statements	Generates a compensation statement based off of current elections	.PDF with total compensation to include the value of benefits and employer contributions to an employee's overall employment offering
(Open Enrollment) Compensation Statements*	Generates a compensation statement based off of elections made during open enrollment	.PDF with total compensation to include the value of benefits and employer contributions to an employee's overall employment offering
Previous/Concurrent Coverage	Generates a report detailing members' previous/concurrent coverage	EDI, Location, Employee Name, Contract Holder, Covered Persons, Insurance Company, Insurance City, Insurance State, Insurance Zip, Policy Number, Policy Type, Start Date, End Date, Termination Reason, Plan Types, Concurrent Coverage

Medicare Coverage	Generates a report detailing members' medicare coverage	EID, Location, Employee Name, Covered Person, Claim Number, Part A Effective Date, Part B Effective Date, Part C Effective Date, Part D Effective Date, Eligibility Reason, Dialysis Start Date, Transplant Date, Is Primary
Guaranteed Issue Amounts	Contains details of what members elected coverage over the Guaranteed Issue Amount	EID, Employee Name, Member Name, Relationship, Plan Name, Plan Type, Effective Date, Benefit Amount, Requested Amount
Pending Elections	Shows the details of employees and/or their dependents that have pending benefit elections that have yet to be electronically signed	Company, Location, EID, Employee Name, Member Name, Relationship, Plan Name, Plan Type, Effective Date, Status, Benefit Amount, Requested Amount, Last Modified Date
Plan Eligibility	Details whether or not employees and/or dependents are eligible for a specific plan	EID, First Name, Last Name, Hire Date, Benefit Eligible Date, Location, Job Class, Division, Department, Plan Type, Plan Admin Name, Is Eligible, Eligibility in Effect, Waiting Period, Effective Date, Eligibility Matches, Reasons for Ineligibility

Plan Premium	Generates a plan premium report for selected plans	Agency, Agent, Company, State, Carrier, Plan Type, Plan Name, Policy Number, Effective Date, End Date, Active Employees (count), Eligible (count), Enrolled (count), Waived (count), Participation Ratio, Employee Premium, Spouse Premium, Child Premium, Total Premium, Employer Cost
Carrier Enrollers	Employee enrollments for carriers and who assisted them	Carrier Name, Company Name, Account Key, Eligible Employees (count), Employees Seen (count), Percentage Seen
Plan Configuration	Generates a report with detailed setup information about each plan	Company Profile, Benefits: Profile, Eligibility, Rates, Contributions, Forms, Documents, Customize (Settings)