

Creating a QA report :

This type of report analyzes case setup, employee, and enrollment information for various types of problems. The diagnosis is summarized in the report, together with links to help resolve the problem.

Step 1 :

Access desired case and navigate to Case Set up >> Plug-Ins

The screenshot displays the 'selerix test RW sandboxing Administrative Site' interface. The top navigation bar includes links for Home, Enrollment, Reports, Access, Case Setup, Data Management, Session, and Billing. The 'Case Setup' menu is open, showing options: New Case, Case Info, Product Library, Benefit Plans, Locations, Eligibility, Pay Group, Decision Support, EDI, Form Library, Plug-Ins (highlighted), Text Bank Editor, Themes, and Error Check. A large black arrow points to the 'Case Setup' menu, and another points to the 'Plug-Ins' option. Below the menu, there is a search bar for employees and a table with columns: SSN, EID, Name, Job Class, Emp Status, and Enroll Status. To the right, a dashboard shows a pie chart with 14 Complete (blue), 2 Incomplete (purple), and 1 Not Begun (orange) cases. A legend below the chart confirms these counts. Below the search bar, there are buttons for New, Edit, Life Event, and Enroll. At the bottom, there are search bars for 'Run a report' and 'Search Sent Reports', and a table with columns 'Received Report' and 'Date'. On the far right, a 'Deliverables' section shows 'No items found.'

Received Report	Date
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Step 2 :

Along the right of this new view select the “+ New Local” option

...s with other systems, file transfers, and Single Sign-On sessions for evidence of

Component	License
	N/A
Feature Plugin	Valid
	N/A
	N/A
	N/A
ayer Extract	N/A
t	N/A
ML Index	N/A
mployer Extract	N/A
ML Index	N/A

Filter

Q

+ New Local

+ New Global

Copy

Edit

Delete

Import

Export

Run Report

<

1

2

3

4

5

>

>>

Step 3 :

In the 'Add New Plug-in' view search for "QA" in the search bar. You should see BenefitAgent QA Report as the first result. Select the 'Copy' option here

Add a New Plug-in

1. Select a plug-in type from the list at the left.
2. If you wish to copy an existing plug-in from any of your cases, enter the search criteria above.

ⓘ Plug-in configurations copied from other cases may contain hard-coded values, such as group numbers. Be sure and check the plug-in thoroughly before sending production data.

qa Return

3 results found.

Plugin


Imports

Engines


Engine Extensions

Form Providers

Payment Methods

 **BenefitAgent QA Report**
Type: BenefitAgent QA Report

[Open](#) - [Copy](#)

 **QA: Expired Users**
Type: BenefitAgent QA Report

[Open](#) - [Copy](#)

Step 4 :

This will then take you to the Plug-in Configuration view. Verify that the report shows Location : Local and rename the plugin and save.

Plug-in Configuration

ⓘ The QA report analyzes case setup, employee, and enrollment information for various types of problems. The diagnosis is summarized in the report, together with links to help resolve the problem. Use of the QA Report requires a valid license for the case. If you need a license, [contact Selerix](#).
The QA report can perform a set of tests on coverages created by the system. These tests are useful for identifying calculation errors or rate configuration errors in the system. To enter coverage test cases, click the Edit link for the *Expected rates*.


Plugin: **Copy of: QA Report**; Type: **BenefitAgent QA Report**; Location: **Local**

General Options Parameters Child Reports Schedule Change Control

Reports - BenefitAgent QA Report

Template Name: **Rename Here**

Default Report Title:

Thumbnail: 

Step 5 :

Once the Plugin-In has been renamed and saved Select the “Options” tab.

Scroll through and select which items you want the QA report to test and provide an analysis on (there are also options at the bottom of the view for ‘All’ or None’ to make selecting the specific settings quicker)

Plugin: Copy of: QA Report; Type: BenefitAgent QA Report; Location: Local

Description	Value
Email Delivery Filename	<input type="text"/>
Report Life Span	Default
Expected rates	Config...
Title	<input type="text"/>
Description	<input type="text"/>
Case Setup: Users	Include
Case Setup: Unused Rate Groups	Include
Case Setup: Rates & Rules	Include
Case Setup: Missing Files	Include
Case Setup: Location City/State	Include
Case Setup: Life Events	Include
Employees: Pay Group	Include
Case Setup: UW Questions	Include

Scroll down for more configuration options

Step 6 :

Once you have set up the Options tab to ‘Include’ or ‘Do not include’ for all settings to customize to the specific test or analysis select the ‘Save and Run’ button at the bottom of the view.

QA_REPORT_EmployeesWithNoLocation_FILE

Include


All None

Save Save and Run Save and Return Cancel

Step 7 :

Run the report, as seen in the view below when running the report there are not many parameters. Utilize the 'Run Now' or 'Deliver Report' and run for today's date to get an out put of the reports analysis of options selected in step 5.

Copy of: QA Report

The Case Profile provides a summary of general information about the case setup. The report supports multiple formats, which provide different views of the case. One of the most important is the QA Report, which performs a selected set of tests on the case. This report must be configured in the Plug-in screen prior to use. 

General Parameters

Plan Year: <All Plan Years> 

Reporting Period

Start Date: 03/02/2022 

Delivery Options

Task Description: QA Report: [CASE] - [ENDDATE] 

Filename: 

Deliverable: <Not a Deliverable>  

Delivery: ☒ Run Now ☐ Deliver Report ☐ Schedule Recurring Report



Run Now

Edit Template

Export Report Parameters

Cancel