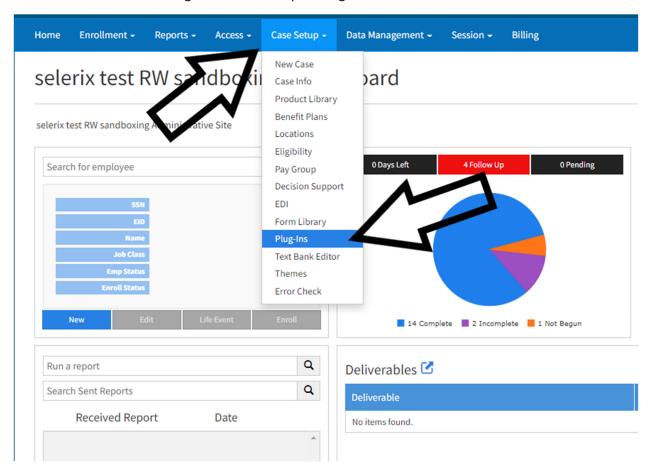
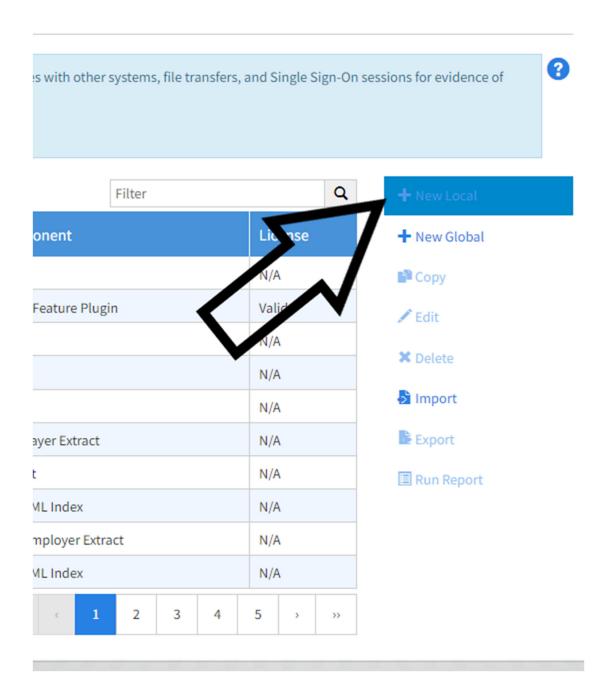
Creating a QA report:

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

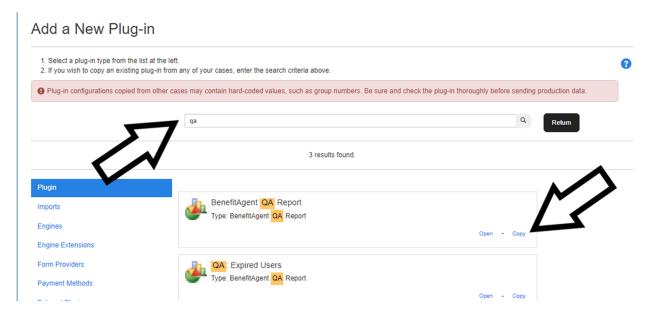


Step 2 :Along the right of this new view select the "+ New Local" option



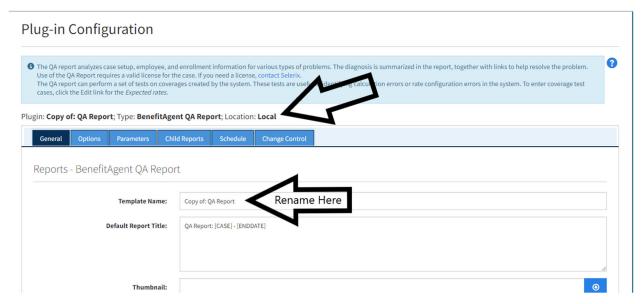
Step 3:

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



Step 4:

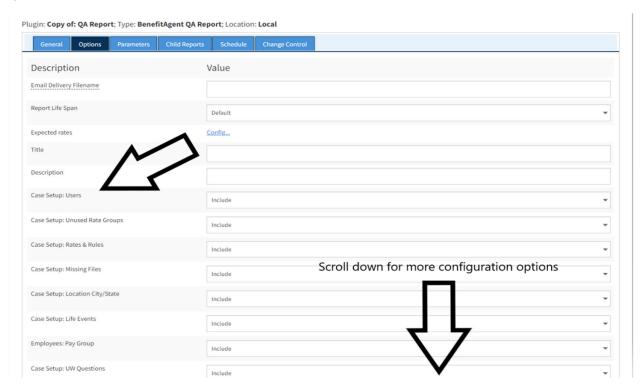
This will then take you to the Plug-in Configuration view. Verify that the report shows Location: Local and rename the plugin and save.



Step 5:

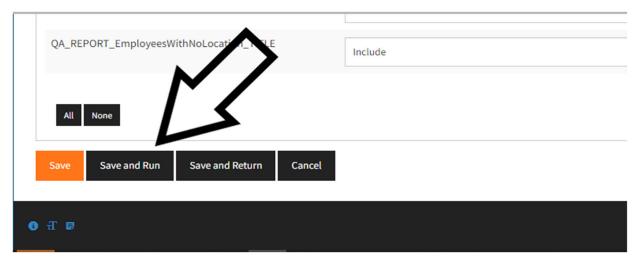
Once the Plugin-In has been renamed and saved Select the "Options" tab.

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)



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.



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 perfoms 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 03/02/2022 Ħ Start Date: **Delivery Options** Task Description: QA Report: [CASE] - [ENDDATE] Filename: <Not a Deliverable> Deliverable: