Maintenance Report Training
3/23/2018

What is a Maintenance Report?

A Maintenance Report can be used to automate certain tasks within the system, such as sending emails on certain events, recalculating benefits on certain events (such as dependent birthday), or auto-enrolling in benefits at the end of an employee's grace period.

How is a Maintenance Report different from other report engines?

Typically, a report engine does not alter or change data in the case, instead it is changed on the output. Maintenance Reports however trigger action and therefore can cause benefits to be changed or emails to be delivered. The user must be very careful when testing Maintenance Reports to ensure data is not changed incorrectly or emails are not delivered in error.

What would be some typical uses for a Maintenance Report?

- Invitation to Enroll Emails
- Enrollment Confirmation Emails
- Auto-Enrolling employees at the completion of their grace period
- Recalculating benefits based on dependent birthdays
- Enrollment Reminder Emails

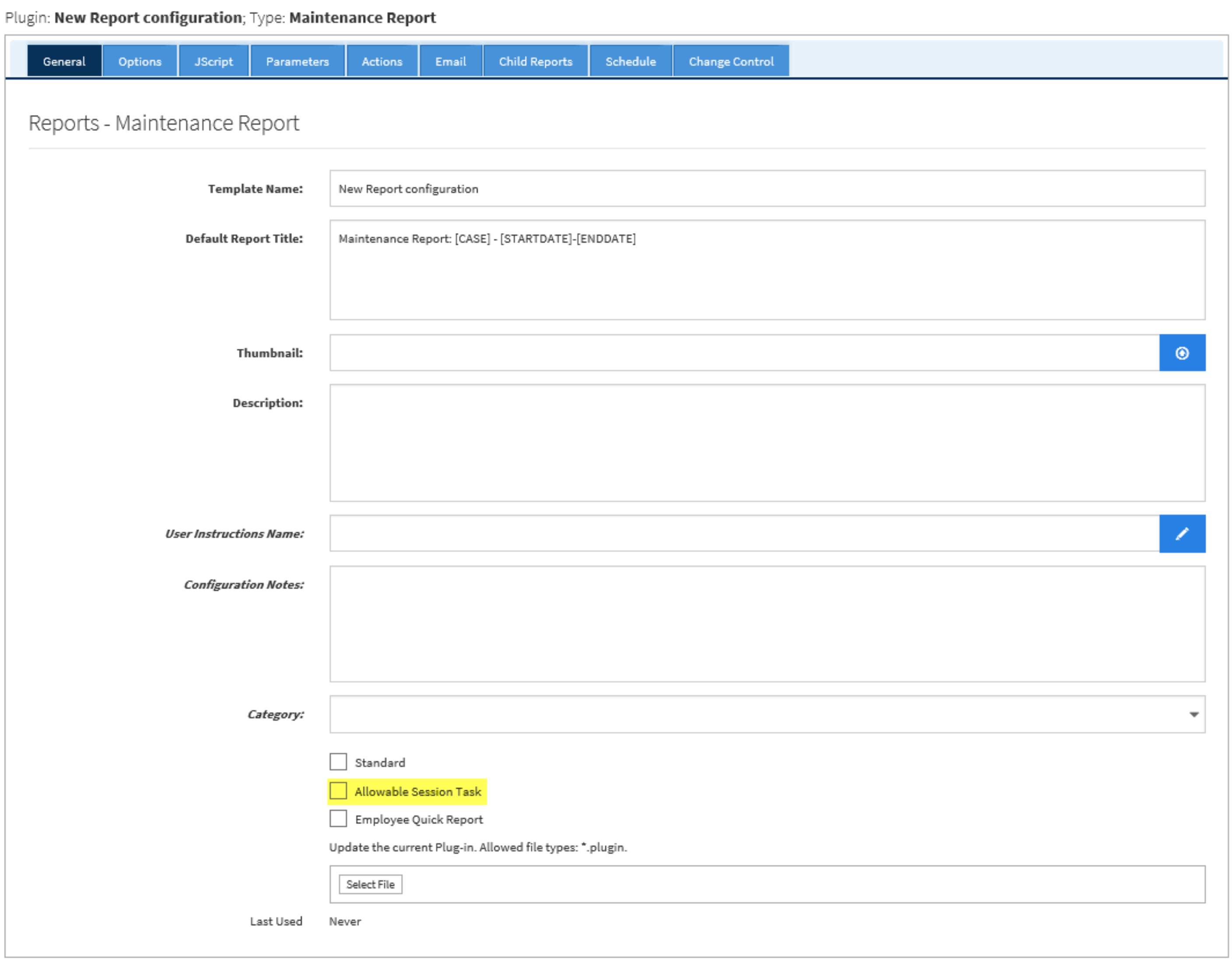
Group Discussion - What are some other uses that you have used Maintenance Reports for?

Global Maintenance Reports

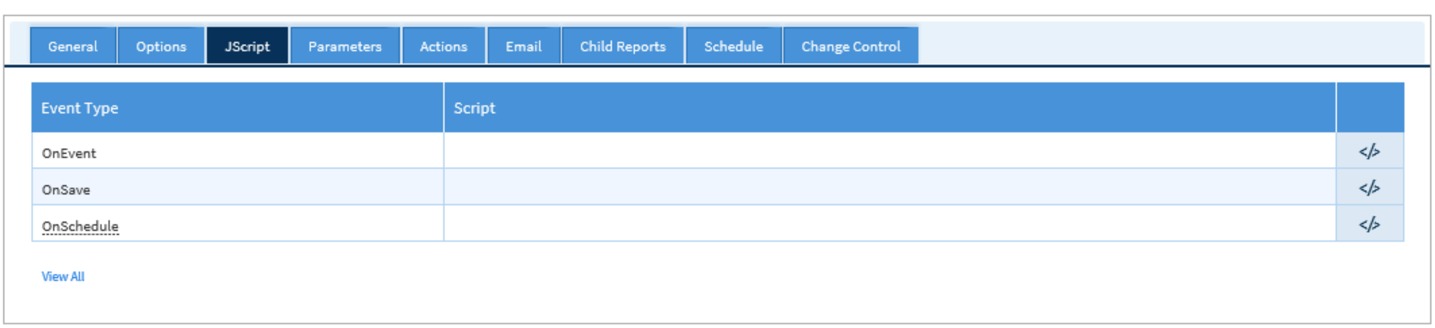
- Enrollment Confirmation Email Report
- Pre-Enrollment Summary Email Report
- Invitation to Enroll

Configuring a Maintenance Report Plugin

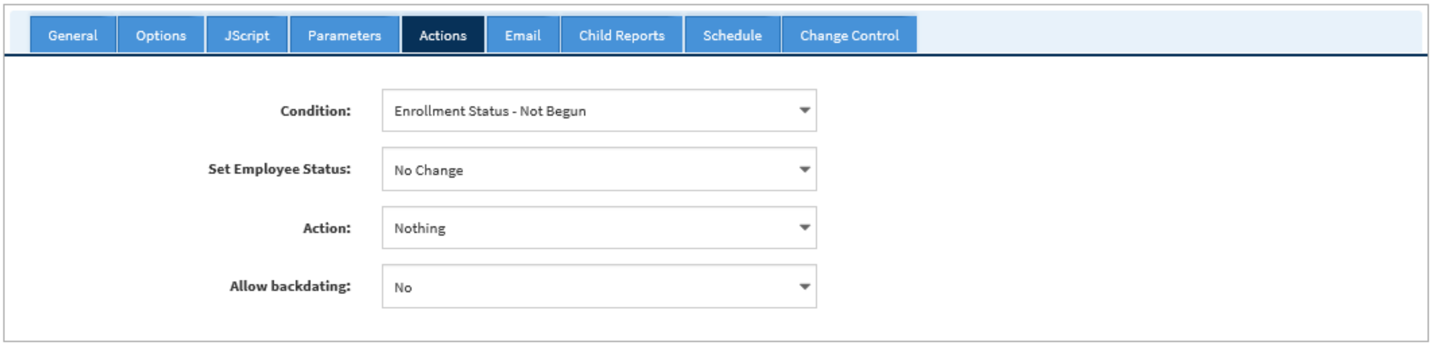
General Tab – This tab is the same as what you are familiar with on other report types, but I want to bring attention to the “Allowable Session Task” option checkbox on this tab. We will discuss Session Tasks and how they relate to Maintenance Reports a little later in the training.



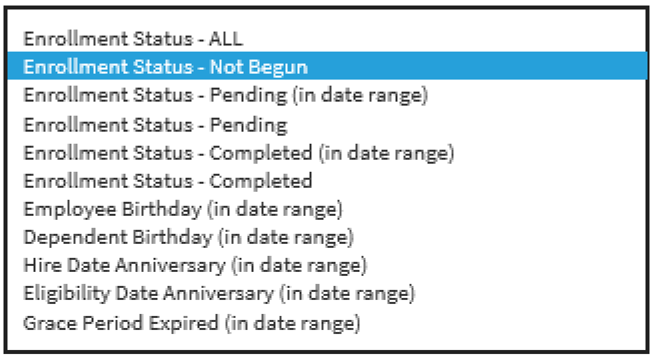
Jscript Tab – Maintenance Reports can be altered using Jscript. Script can be called OnEvent, OnSave or OnSchedule. An example of when you might use a script in a Maintenance Report would be if you were trying to send an email to all employees who have FSA coverage to notify them that they must re-enroll for the new plan year, you would script to skip any employees without FSA coverage.



Actions Tab – This tab is where you tell the report what conditions to check for and what actions to take.



- **Condition –** In this dropdown the user defines which employees will be picked up by the maintenance report. You can use the enrollment status, birthday, anniversary or grace period ending to qualify who is being included. If you want to include all employees then you would use Enrollment Status – ALL.



- **Set Employee Status –** You may want your report to change the employees enrollment status, that is determined by this option. If you do not want the status changed you would leave this as No Change.

- **Action –** This setting is where you determine if the report should be affecting coverage. If you are setting up a report to send an email and do not want to affect coverage you would leave this at Nothing.

If you change the Action setting from Nothing to Recalculate Coverage then a box will appear where you can select which coverages you wish to have the system recalculate.

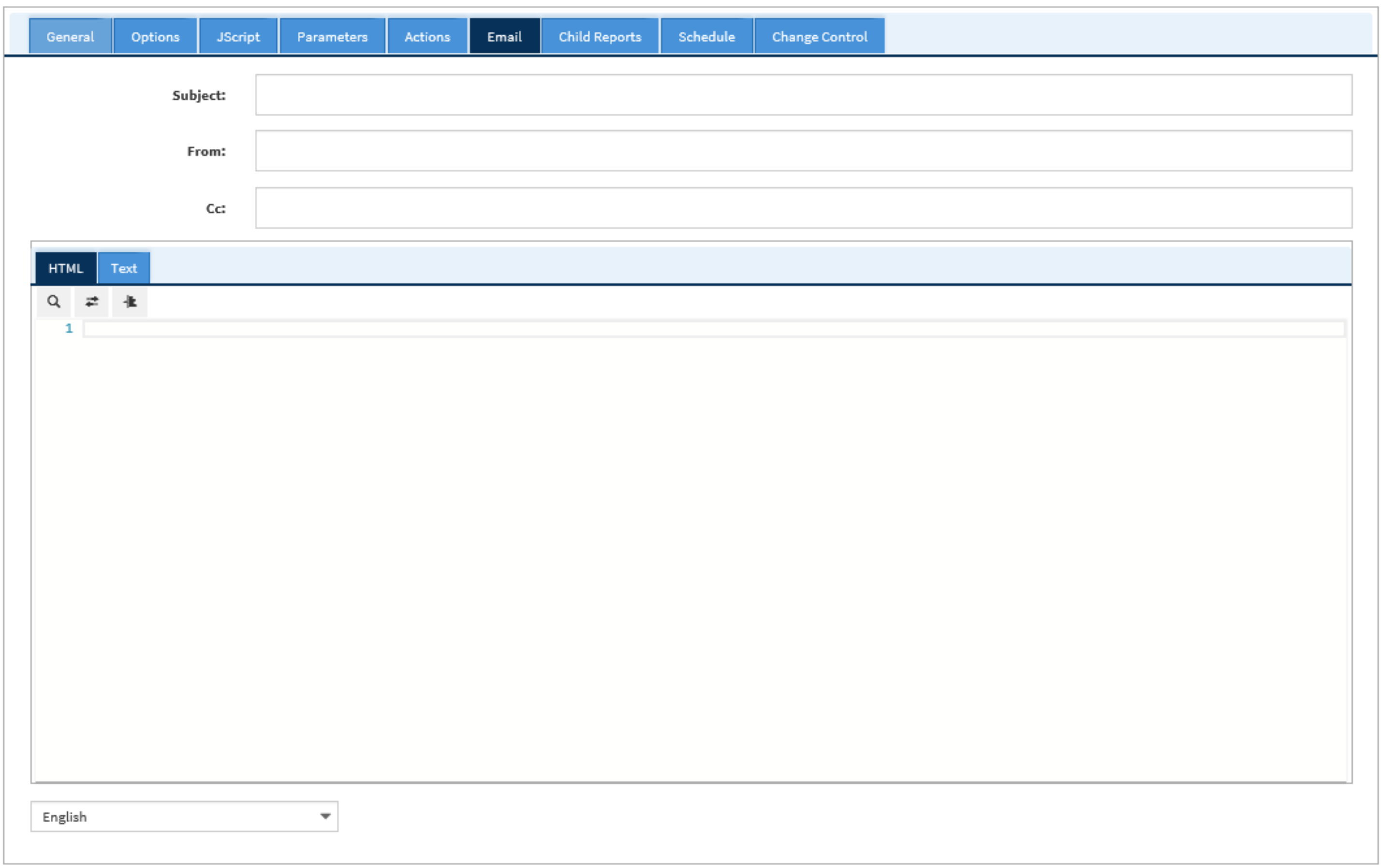
If you change the Action setting from Nothing to Auto-enroll eligible coverages then the system will use your enrollment rules settings to determine what plans are eligible (cannot waive and auto-enroll plans).

- **Allow backdating –** This setting tells the report if you want to allow the effective date to be backdated or if you only want future effective dates.

Email – If your Maintenance Report is being used to send an email to employees then you would need to populate your email information on this tab. If you are not sending an email you would leave this tab blank.

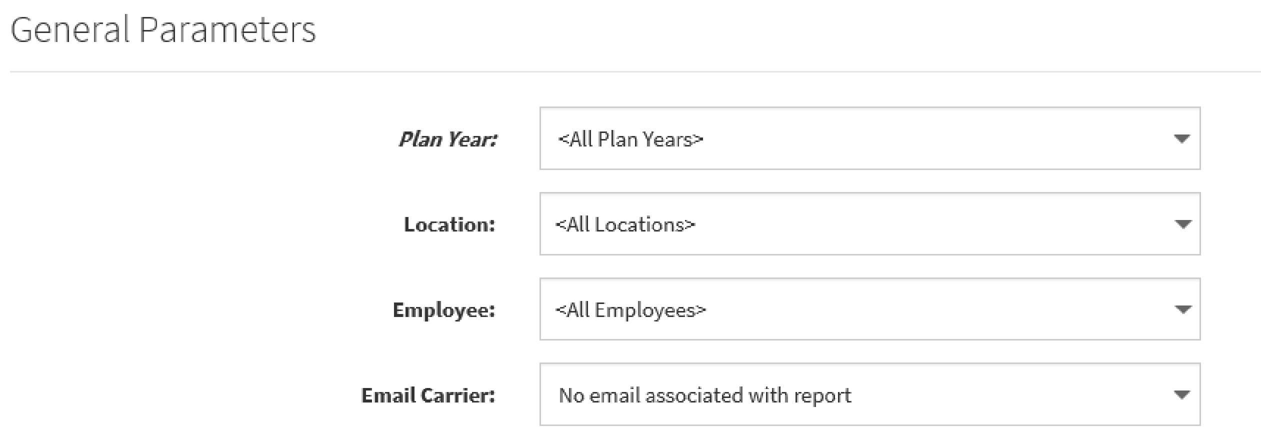
The body of the email can be written using HTML code and you can include Jscript and reference database fields to customize data that is pulled into the report. The Text tab is to edit the email in plain text format.

Note: If you do not specify an email address in the From field of the Email tab the email will come from the email address associated with the user scheduling/sending the report.



Running a Maintenance Report

When running a Maintenance Report you will have fewer parameters than most of the reports we typically run.

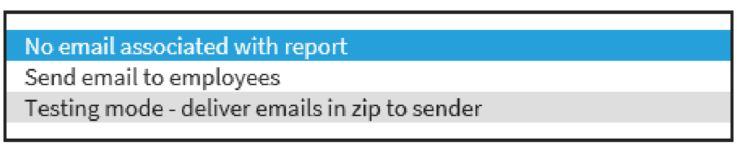


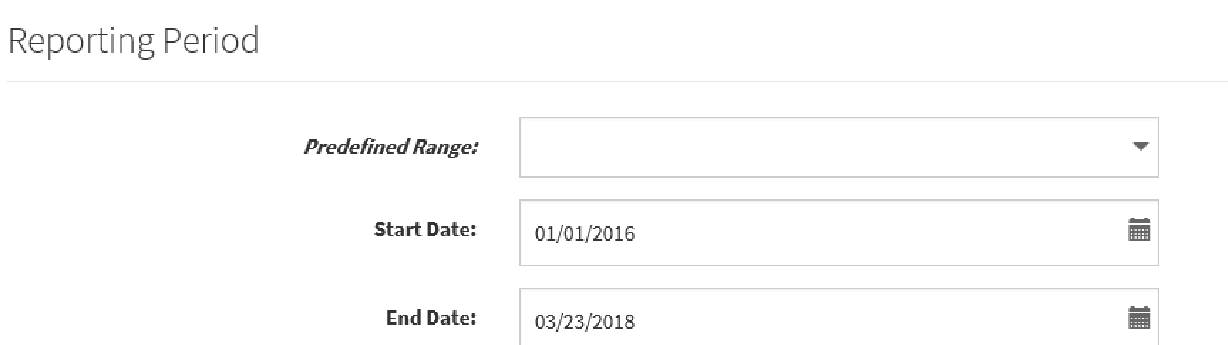
Plan Year – You can specify a Plan Year or leave set to <All Plan Years>

Location – You can specify a Location or leave as <All Locations>

Employee – You can specify an Employee or leave as <All Employees>

Email Carrier – This parameter is unique to Maintenance Reports and is very important. If your Maintenance Report has an email associated with it you want to make sure that while testing you set this to "Testing mode – deliver emails in a zip to sender". This will allow you to view the email output prior to them being delivered to employees. Once you run the report using "Send email to employees" the emails have been sent and cannot be undone. The setting of "No email associated with report" should be used for Maintenance Reports that do not have an email delivery.



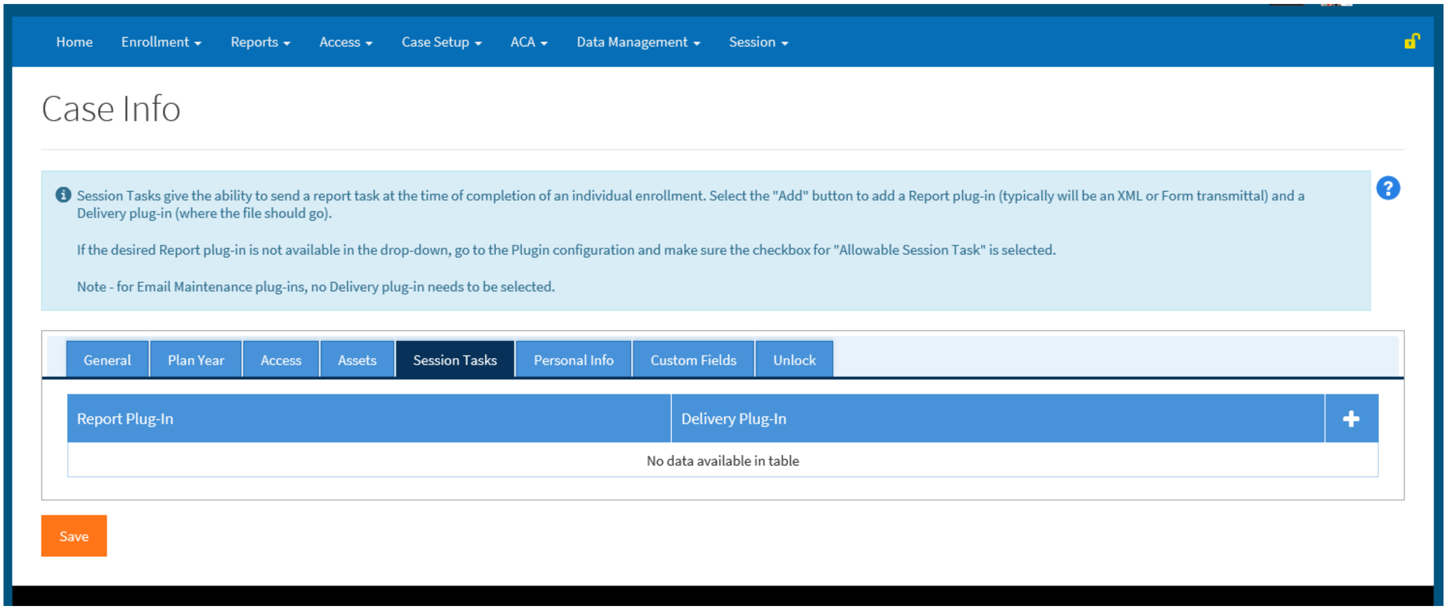


Reporting Period – The Reporting Period is very important if one of the conditions you selected was one of the options with "(in date range)" in the name. For the conditions without "(in date range)" in the name the Reporting Period will not apply and can be left as the default.

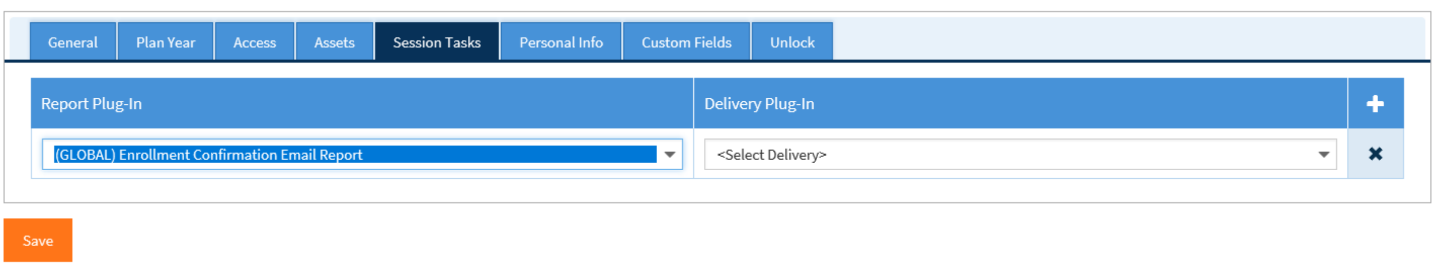
Sessions Tasks

Session Tasks give you the ability to send a report task at the time of completion of an individual enrollment. This is commonly used for Enrollment Confirmation emails so that when an employee completes their enrollment they immediately receive an email confirmation from the Maintenance Report plugin you created.

In order to schedule a Session Task you go to Case Setup>Case Info and there is a tab called Session Tasks.



Scheduling your Maintenance Report as a Session Task is simple. Click the Plus icon on the right side of the table, once you click that icon a row will appear with two drop downs. For email Maintenance Report plug-ins you only need to make a selection in the Report Plug-In drop down, the other drop down will be left as <Select Delivery> since the system is actually emailing the individual employee.



Once you find your report in the Report Plug-In drop down you click Save.

If your Plug-In does not appear in the drop down then you will need to go back to the Plug-In configuration and in the General tab check the "Allowable Session Task" checkbox.

Events History Tracking

When sending emails to employees via maintenance reports the system will record an event in the Events History. This will allow you to see what email address was used at the time the email was sent.

Important reminders

- Maintenance reports are different from other reports in the fact that they can alter data in the system, be very careful when running maintenance reports and be sure to test.
- If using a maintenance report to send emails and you do not specify who the email is from the email will show as coming from the email address tied to the user generating the maintenance report.
- When copying a maintenance report from one case to another or one year to another you must go in and select any plans selected as this does not copy over (due to plans not being the same from case to case/year to year)
- Use the testing mode for emails so you can verify the formatting/scripting of your emails before sending out.
- Email confirmations are sent as session tasks.
- If you are creating a custom enrollment confirmation email the checkbox “Allowable Session Task” must be checked on the general tab of the plugin before it can be set up as a Session Task.

Any Questions? Discussion