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

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

Filter			+ New Local
onent	License		+ New Global
	N/A		Copy
Feature Plugin	Valid		Edit
	N/A		
	N/A		Delete
	N/A		Import
ayer Extract	N/A		Export
t	N/A		Run Report
ML Index	N/A		
mployer Extract	N/A		
ML Index	N/A		

‹	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

ℹ 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 in 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: Copy of: QA Report   ⟵ Rename Here

Default Report Title: QA Report: [CASE] - [ENDDATE]

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)

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

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