

Open Enrollment Reports

In the following pages, you will find instructions on three reports to help you with your open enrollment elections. You'll find the spelled out instructions as well as the corresponding pictures. Through the BenefitsConnect admin portal, you will be able to run your own reports whenever you would like!

System Utilization Report -

This report will help you track which of your staff members have logged in and which have not.

NOTE: This won't track employees who have called the BAC and are complete. Use the Employee Census Complete/Incomplete report for that. Below are the instructions for the System Utilization Report:

1. Log in to the BenefitsConnect admin portal and choose "company reporting."
2. Select "System Utilization Report."



company reporting



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3. Once in the report settings, make sure they are set to look like the screenshot below. Then choose select to run the report. From there, you can download as an excel or PDF file.

System Utilization Report

Report Date Span	May	1	2020	to	May	31	2020
Select Divisions	All Divisions AN101 - Archdiocese of New Orleans Retreat Center AN101 - Archdiocese of NO Chancery FG00 AN101 - Archdiocese of NO Chancery GE00 AN101 - Stella Maris Apostleship of the Sea						
Select Employee Categories	All Employee Categories ArchBishop ArchPriest Bishop Continuation of Benefits						
Detail By	Summary						
Select User Types	All Employees Company Users						
Show Login Status	All users who have logged in						
Display Report Cover	All users who have not logged in All users						
SELECT CANCEL							

Payroll Deduction Changes Report –

The following report will help you know what to deduct from your members, for those sites who need it. This report will show you the changes in deductions for your members.

1. Log in to the BenefitsConnect admin portal and choose “company reporting.”
2. Select “Payroll Deductions Changes.”



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This report can be run in two ways, depending on what dates you would like to see. To run by the effective date, meaning changes effective on July 1st, choose “effective period” in the “date type” field.

Report Date Span June ▼ 30 ▼ 2020 ▼ to
July ▼ 1 ▼ 2020 ▼
Date Type Effective Period ▼

You can also run the report by entry date, meaning changes entered in the last week. You would select “entry date” in the “date type” field.

Report Date Span May ▼ 8 ▼ 2020 ▼ to
May ▼ 15 ▼ 2020 ▼
Date Type Entry date ▼

The rest of the setting can for the most part be left as default. Our only recommended change is to update the ‘Display Subtotals’ to ‘No’ at the bottom of the page.

City _____ |E
Archival Type PDF ▼
Display Report Cover Yes ▼
Report Debugging No ▼
Display Subtotals No ▼
Test Employees Exclude Test Employees ▼

SELECT

CANCEL

Plan Enrollment Report –

The following report will tell you who is enrolled in which plan and what level of coverage they elected.

1. Log in to the BenefitsConnect admin portal and choose “company reporting.”
2. Select “Plan Enrollment.”

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3. Change dates to July to see the elections for the new plan year.

Report Date Span July ▼ 1 ▼ 2020 ▼ to
July ▼ 31 ▼ 2020 ▼

4. You can select all plans if you want to see all elections, and you can also filter by specific plan types if you would just like to see medical, for instance.

Select Benefit Plan Types

All Benefit Plan Types

Health

Group Accident

Employee Critical Illness

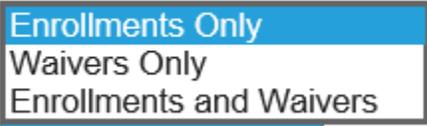
Spouse Critical Illness

5. In “Select Plan Details,” you can choose enrollments only or enrollments and waivers. We recommend that you choose “Enrollments Only,” unless you choose health only in the previous step.

Select Plan Details [dropdown menu]

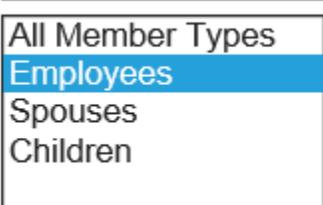
Select Health Tier Label [dropdown menu]

Member Types [dropdown menu]



6. Unless you want to see which dependents are covered, choose ‘Employees’ under ‘Member Types’

Member Types [dropdown menu]



7. Choose “No” for the “Display Subtotals” field.

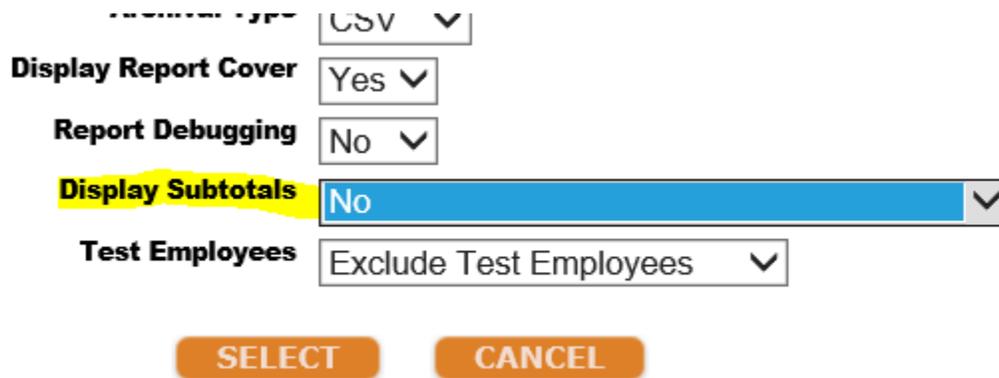
Display Report Cover [Yes]

Report Debugging [No]

Display Subtotals [No]

Test Employees [Exclude Test Employees]

SELECT **CANCEL**



8. For the rest of the settings, leave as the default choices.

Employee Census Complete/Incomplete Report –

This report will track all employees whose OE has been completed either by logging in and making their elections, or by calling the BAC and making their elections.

1. Log in to the BenefitsConnect admin portal and choose “company reporting.”
2. Select “Employee Census.”



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3. Under employee login status, you can choose to filter by complete or incomplete.

PDF Page Type Landscape ▾

Employee Login Status All

New Hires Only Incomplete
Complete

Select Grouping Available Groups _____ Se _____

4. Make sure that “Employee Login Status” is a selected column under “Employee Columns.” If not, select it from the “Available Columns” and move it over using the arrows.

Employee Columns Available Columns Selected Columns

Employee Columns:
You can choose which employee data fields to include on the report.

EEO Job Category >> Employee Name
Gender > Social Security No.
Tobacco User < Employment Status
Street Address << Date of Birth
Street Address 2 << Date of Employment
City << No. of Dependents
Home Phone
Employee Login Status

Move
Move

1. Choose “No” for the “Display Subtotals” field.

Report Debugging No ▾

Display Subtotals No ▾

Test Employees Exclude Test Employees ▾

SELECT

CANCEL

5. You can leave the rest of the choices as default.