



BENEFIT HEALTH AND INSURANCE PLAN COSTS

BOBJ

REPORT DESCRIPTION B0047 | WEB INTELLIGENCE

The purpose of this Report Description is to explain how to show all employees who are participating in specified benefit plans in the Integrated HR-Payroll System.

REPORT DESCRIPTION:

This report shows all employees who are participating in specified benefit plans along with employee, employer, and provider costs by each plan. The report is associated with two reporting views.

The Summary Reporting tab provides the summary of Employee Costs, Employer Costs, Provider Costs, and Number of Employees by Calendar Month/Year, Plan Category, Plan, and Plan Option.

REPORT LOCATION:

BN: BENEFITS

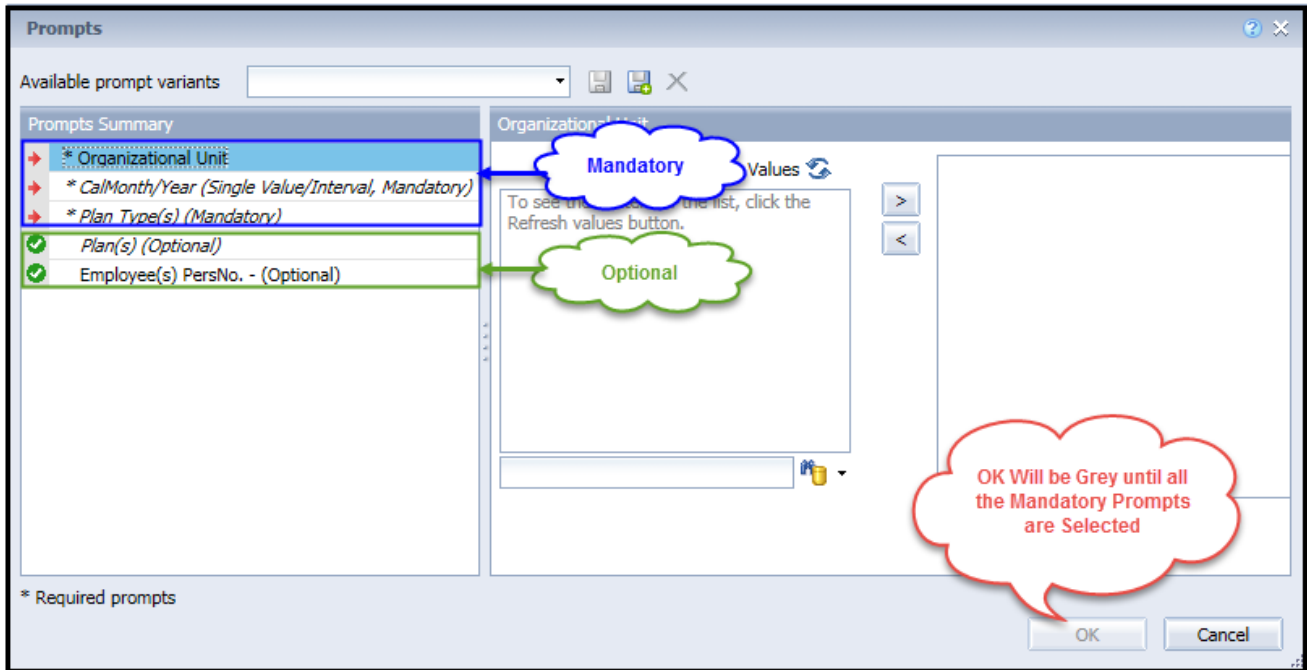
REPORT USES:

Analyze health and insurance plan costs. Agency could use as needed to determine agency costs.

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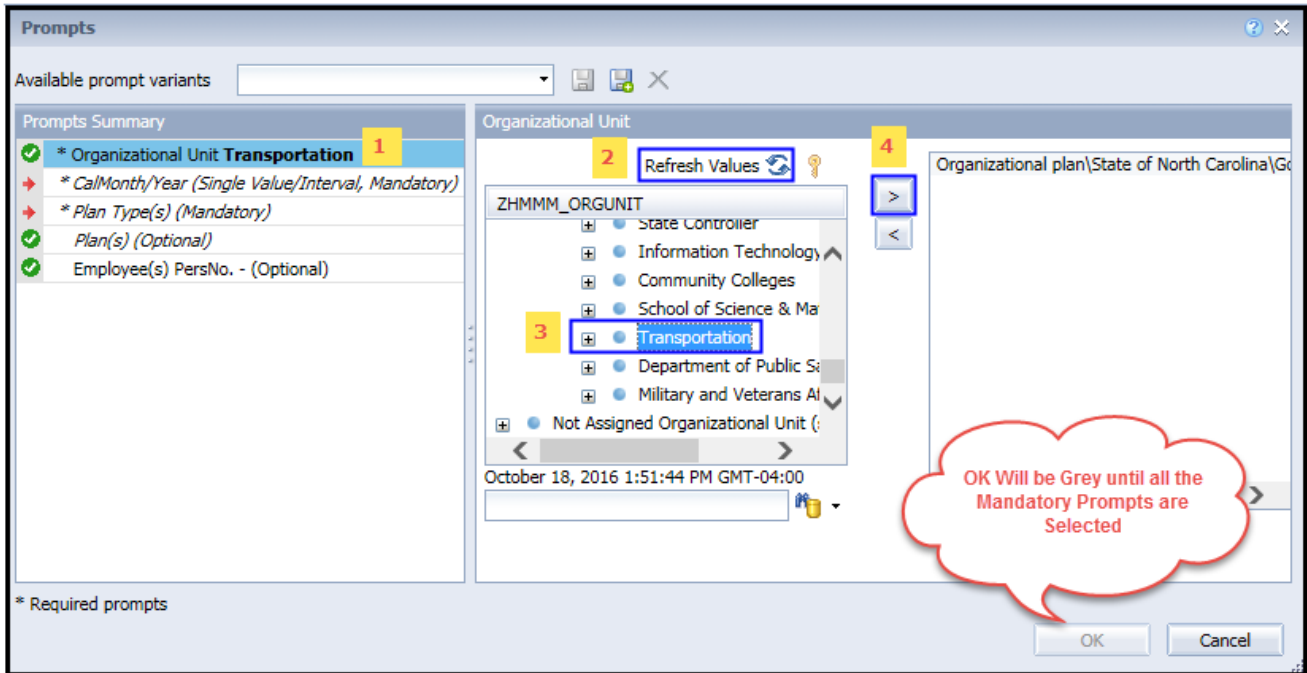
How to generate this report



Mandatory Prompts

Mandatory prompts have a red arrow indicator (➔) followed by an asterisk (*) on the left side of the prompts. When a valid value(s) is entered, this indicator will turn into a green check mark (✓).

- ➔ ***Organizational Unit:** To select data for this prompt:
 - Make sure the “Organizational Unit” prompt is selected (1).
 - Click the “Refresh Values” icon to see the list of Org Units (2).
 - Navigate down to the desired Org Unit (3).
 - Click the right arrow to add it to the selection box (4).

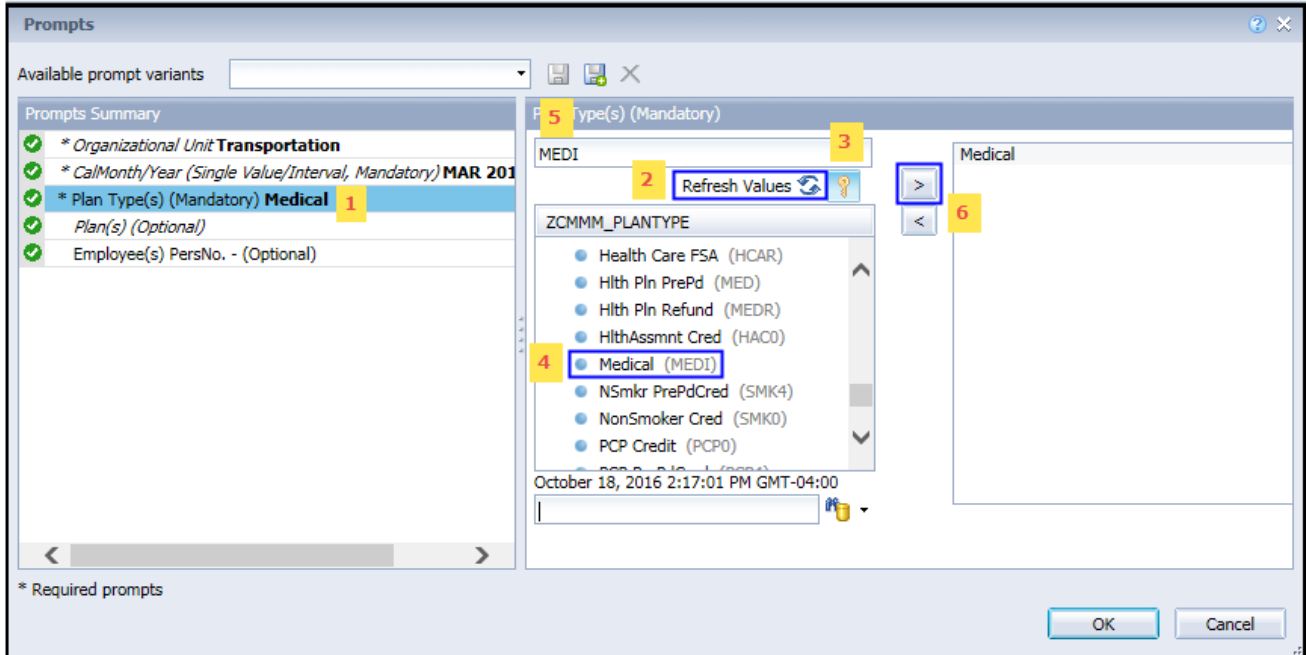


- ***CalMonth/Year (Single Value/Interval, Mandatory):** To select data for this prompt:
- Make sure the "CalMonth/Year (Single Value/Interval, Mandatory)" prompt is selected (1).
 - Enter the wildcard year (*YYYY) to search for available months in a specific year (2).
 - Click the search icon (3).
 - Select the desired date for your low range (4).
 - Click the right arrow to add it to the "Start value" box (5).
 - Select the desired date for your high range (6).
 - Click the right arrow to add it to the "End value" box (7).

The screenshot shows the 'Prompts' dialog box with the following details:

- Prompts Summary:**
 - * Organizational Unit **Transportation**
 - * CalMonth/Year (Single Value/Interval, Mandatory) **MAR 2016;SEP 2016** (1)
 - * Plan Type(s) (Mandatory)
 - Plan(s) (Optional)
 - Employee(s) PersNo. - (Optional)
- CalMonth/Year (Single Value/Interval, Mandatory) Configuration:**
 - Search field: *2016 (2)
 - Search icon: (3)
 - Available months: MAR 2016 (4), APR 2016, AUG 2016, SEP 2016 (6)
 - Start value: MAR 2016 (5)
 - End value: SEP 2016 (7)
- Callout:** OK Will be Grey until all the Mandatory Prompts are Selected

- ***Plan Type(s) (Mandatory):** To select data for this prompt:
 - Make sure the "Plan Type(s) (Mandatory)" prompt is selected (1).
 - Click the "Refresh Values" icon to see the list of Plan Types (2).
 - To see the key value for each Plan Type, click the key icon (3).
 - Select the desired Plan Type (4).
 - **OR**, if you know the Plan Type key or Plan Type name, you can skip steps (2) through (4) and enter it directly in (5).
 - Click the right arrow to add the Plan Type to the selection box (6).
 - If no other prompts are required, click the "OK" button to run the report.



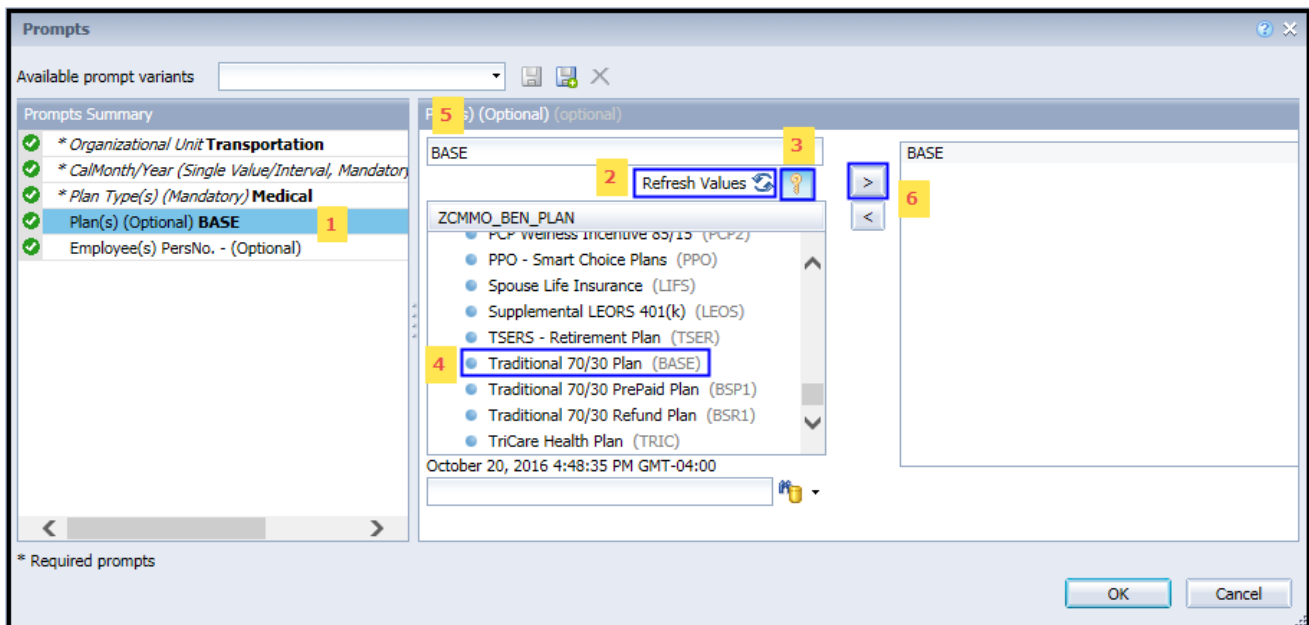
NOTE: Since the Report Shows Employee, Employer and Provider Costs only for Health and Insurance Plans, you can refer to the below table to Select the Plan Types that fall under Health and Insurance Categories.

Plan Category	Plan Type Key	Plan Type Text	Plan Category	Plan Type Key	Plan Type Text
Health Plan	CANC	Cancer Plan	Insurance Plan	AADD	Core AD&D
	CRIT	Critical Plan		AD&D	AD&D
	CRTE	Critical Plan		LIFE	Employee Life
	CRTK	Critical Plan		LIFK	Child Life Ins
	CRTS	Critical Plan		LIFS	Spouse Life Ins
	DENT	Dental			
	MEDI	Medical			
	TRIC	Tricare			
	VIS	Vision			

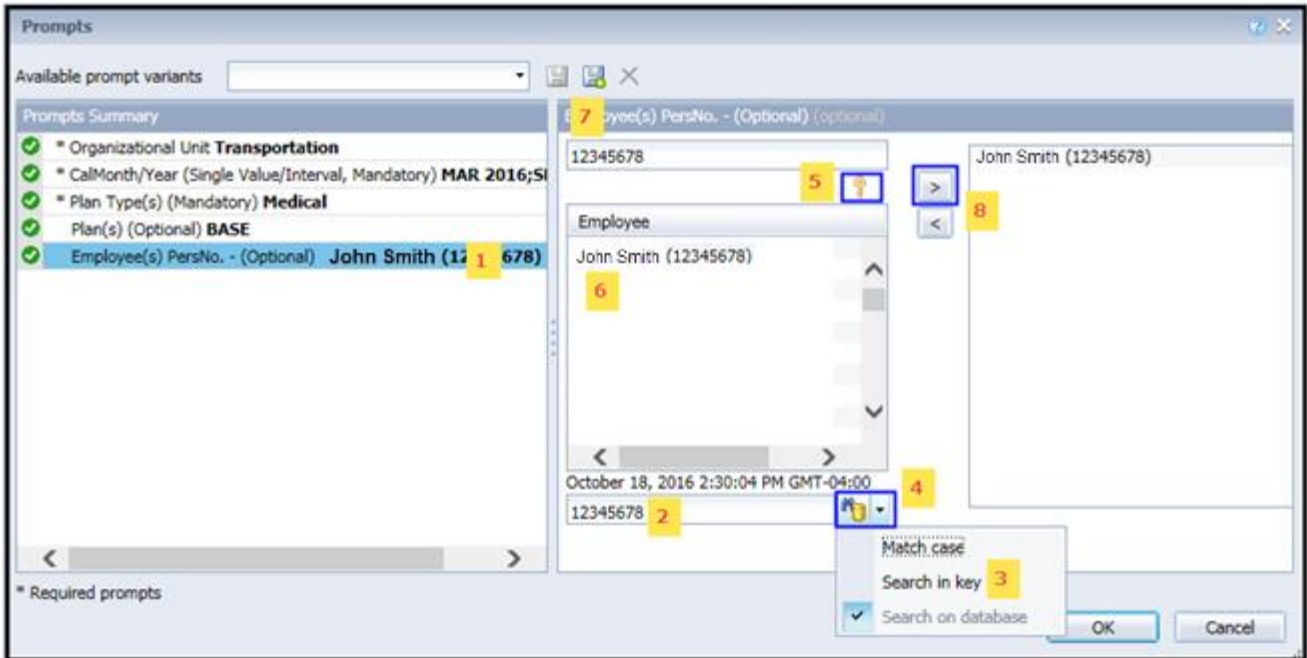
Optional Prompts

Optional prompts are indicated with a green check mark (P) but are not pre-filled or required. They are used to assist in further limiting the amount of data that is retrieved into the body of the report.

- ✓ **Plan(s) (Optional):** To select data for this prompt:
 - Make sure the "Plan(s) (Optional)" prompt is selected (1).
 - Click the "Refresh Values" icon to see the list of Plans (2).
 - To see the key value for each Plan, click the key icon (3).
 - Select the desired Plan (4).
 - **OR**, if you know the Plan key or Plan name, you can skip steps (2) through (4) and enter it directly in (5).
 - Click the right arrow to add the Plan to the selection box (6).



- ✓ **Employee(s) PersNo. - (Optional):** To select data for this prompt:
 - Make sure the "Employee(s) PersNo. - (Optional)" prompt is selected (1).
 - Enter an employee number in the search box to verify the employee name (2).
 - Click the search icon drop-down arrow and select "Search in key" (3).
 - Click the search icon (4).
 - To see the employee number, click the key icon (5).
 - Select the desired Employee (6).
 - **OR**, if you do not need to verify the employee number, you can skip steps (2) through (6) and enter it directly in (7).
 - Click the right arrow to add the Employee to the selection box (8).



NOTE: Since the system has a large number of employees, using broad wildcard searches can be very slow and may result in an error if the search exceeds the system limit. If the employee number is not known and a name search must be done, narrow down the search by using the wildcard with specific text strings when looking for an employee by name such as:

John*Smith*
*Smith

If the employee number is known, it is best to use the manual entry field (in step 7) to enter the selection.

Initial Layout

→ **B0047 Benefit Health and Insurance Plan Costs tab:** This report shows all employees who are participating in specified benefit plans along with employee, employer, and provider costs by each plan

B0047: Benefit Health and Insurance Plan Costs									
Execution Date : 10/18/16									
Calendar Month/Year: SEP 2016 - SEP 2016									
Calendar Month/Year	Plan Category	Plan	Plan Option	Employee Name	Employee PersNo.	Dependent Coverage	Employee Costs	Employer Costs	Provider Costs
SEP 2016	Health plan	Consumer_Driven Plan	Consumer Driven All incentives	ALICE, BOB	12121212	Employee Only	0.00	463.68	463.68
				DOE, JAMES	13131313	Employee Only	0.00	463.68	463.68
		NC Flex Dental Plan	Dental Low Option	DOE, JANE	14141414	Employee+Spouse	42.78	0.00	42.78
		NC Flex Vision Plan	Core Vision	DOE, JOHN	15151515	Employee Only	0.00	0.00	0.00
	Insurance plan	NC Flex AD&D Insurance	\$100k Family	ROE, BOB	16161616	NC/Not assigned	3.00	0.00	3.00
			\$200k EE Only	ROE, JANE	17171717	NC/Not assigned	3.80	0.00	3.80
		NC Flex Core AD&D Insurance	\$10,000 EE Only	ROE, JOE	18181818	NC/Not assigned	0.00	0.00	0.00
		NC Flex Life Insurance	NC Flex Life Insurance	SMITH, JAMES	19191919	NC/Not assigned	1.80	0.00	1.80
		Spouse Life Insurance	Spouse Life Insurance	SMITH, JOHN	19999999	NC/Not assigned	3.00	0.00	3.00

→ **Summary tab:** This Reporting tab provides Employee Costs, Employer Costs, Provider Costs and Number of Employees summarized by Calendar Month/Year, Plan Category, Plan and Plan Option.

Summary							
Execution Date : 10/18/16							
Calendar Month/Year: SEP 2016 - SEP 2016							
Calendar Month/Year	Plan Category	Plan	Plan Option	Employee Costs	Employer Costs	Provider Costs	Number of Employees
SEP 2016	Health plan	Consumer_Driven Plan	Consumer Driven All incentives	0.00	927.36	927.36	2
		NC Flex Dental Plan	Dental Low Option	42.78	0.00	42.78	1
		NC Flex Vision Plan	Core Vision	0.00	0.00	0.00	1
	Insurance plan	NC Flex AD&D Insurance	\$100k Family	3.00	0.00	3.00	1
			\$200k EE Only	3.80	0.00	3.80	1
		NC Flex Core AD&D Insurance	\$10,000 EE Only	0.00	0.00	0.00	1
		NC Flex Life Insurance	NC Flex Life Insurance	1.80	0.00	1.80	1
		Spouse Life Insurance	Spouse Life Insurance	3.00	0.00	3.00	1

→ **Report Info tab:** The Report Info tab displays the information about the prompts entered.

Report Info		Execution Date : 10/18/16
Prompt Input		
Organizational Unit	Transportation	
CalMonth/Year	SEP 2016 - SEP 2016	
Plan Type(s)	401(k) Roth Pln;401(k) Savings;403(b) CCS;403(b) CCS;403(b) DHHS;403(b) DHHS;403(b) DHHS;403(b) DJJDP;403(b) DJJDP;403(b) DJJDP;403(b) DP;403(b) DP;403(b) DP;403(b) DP;403(b) DP;403(b) DP;403(b) NCSSM;403(b) NCSSM;403(b) NCSSM;403(b) NCSSM;403(b) NCSSM;403(b) NCSSM;403(b) NCSSM;403(b) NCSSM;403(b) NCSSM;403b Roth NCSSM;403b Roth NCSSM;457 Def Comp;457 Roth Def;AD&D;Base Pln PrePd;Base Refund Pln;Buyup Pln PrePd;Buyup Refnd Pln;Cancer Plan;Child Life Ins;CnsmrDrvn PrePd;CnsmrDrvn Refnd;Core AD&D;Critical Plan;Critical Plan;Critical Plan;Critical Plan;Dental;Dependent Care;Employee Life;HA PrePdCred;Health Care FSA;Hlth Pln PrePd;Hlth Pln Refund;HlthAssmnt Cred;Medical;NSmkr PrePdCred;NonSmoker Cred;PCP Credit;PCP PrePdCred;Retirement Plan;Rtr Plan LE Sup;Spouse Life Ins;Tricare;Vision	
Plan(s)		
Employee(s) PersNo.	Bob Alice, John Doe, James Roe, Jane Smith	

Available Objects

This is a list of the available objects that can be added to the report, once in Design mode:

B0047: Benefit Health and Insurance Plan Costs

- [-] 1st Program Grouping
 - [*] 1st Program Grouping - Key (Not Compounded)
- [-] 2nd Program Grouping
 - [*] 2nd Program Grouping - Key (Not Compounded)
- [-] Age
 - [*] Age - Key
- [-] Calendar Month/Year
 - [*] Calendar Month/Year - Key
- [-] Dependent Coverage
 - [*] Dependent Coverage - Key (Not Compounded)
- [+] Employee
- [-] Employee's Name
 - [*] Employee's Name - Key
- [-] Employee Group
 - [*] Employee Group - Key
- [-] Employee Subgroup
 - [*] Employee Subgroup - Key
- [-] Employment Status
 - [*] Employment Status - Key
- [-] Ethnic Origin
 - [*] Ethnic Origin - Key (Not Compounded)
- [-] Gender
 - [*] Gender - Key
- [+] Job
- [+] Organizational Unit
- [-] Original Hire Date
 - [*] Original Hire Date - Key
- [+] Payroll Area
- [-] Personnel Area
 - [*] Personnel Area - Key
- [-] Personnel Subarea
 - [*] Personnel Subarea - Key (Not Compounded)
- [-] Plan
 - [*] Plan - Key (Not Compounded)
- [-] Plan Category
 - [*] Plan Category - Key
- [-] Plan Option
 - [*] Plan Option - Key (Not Compounded)
- [+] Position
 - Employee Costs
 - Employer Costs
 - Provider Costs
- [-] Variables
 - Prompt Response Cal Mth/Yr
 - Prompt Response Employee PersNo
 - Prompt Response Organizational Unit
 - Prompt Response Plan
 - Prompt Response Plan Type
 - Number of Employees

Special Report Considerations/Features

- Only Health and Insurance Plan Costs are included on this report.
- Employees with Blank (#) Plan Options are not included in this report.
- To change the sorting for the desired column

By default, data is sorted by Calendar Month/Year, Plan Category, Plan, Plan Option, Employee Name, Employee PersNo. and Plan. (This can be changed as needed).

- Make sure the "desired column" is selected (1).
- Click the "Analysis" tab (2).
- By default, "Display" tab is selected (3).
- Click the "Sort" drop-down icon as shown (4).
- Click "Remove all sorts" (5).
- Select ascending or descending sort order as needed (6).

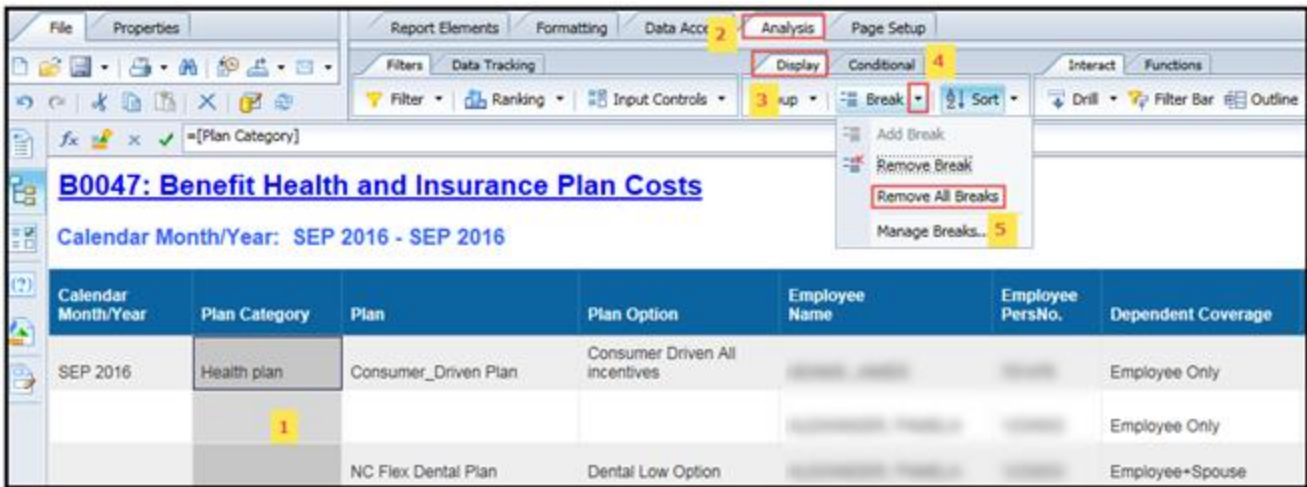
Calendar Month/Year	Plan Category	Plan	Plan Option	Employee Name	Employee PersNo.	Dependent Coverage
SEP 2016	Health plan	Consumer_Driven Plan	Consumer Driven All incentives	ALICE, BOB	12222222	Employee Only
				DOE, JANE	13333333	Employee Only
		NC Flex Dental Plan	Dental Low Option	SMITH, JOHN	14444444	Employee+Spouse

- To change the breaks in the report before exporting the data to Excel

By default, breaks are applied in the report on Calendar Month/Year, Plan Category, Plan and Plan Option to avoid repeated values in the columns.

If you want to see the repeated values of the above columns in Excel, then we need to remove breaks in the report before exporting the data to Excel.

- Select "any column" that has break(s) applied (1).
- Click on "Analysis" Tab (2).
- By default, "Display" tab is selected (3).
- Click the "Break" drop-down icon as shown (4).
- Click on "Remove all Breaks" (5).



Now you can see the Repeated values in all columns, and it can be exported to Excel in the same format.

Change Log

Effective Date	Change Description	Modifier
10/13/2016	Initial report creation to convert from BI to BOBJ	
9/16/2020	Updated screenshots, format, assigned reference number, and made accessible.	C. Ennis & L. Lee
9/21/2020	Added Alt Text	L. Lee