ELIGIBLE EMPLOYEES NOT ENROLLED
REPORT DESCRIPTION B0151 | WEB INTELLIGENCE

BOBJ

The purpose of this Report Description is to explains how to generate a report of employees who are eligible for benefits but have not enrolled.

Report Description:

This report shows the employees who are eligible for specified benefit plans but not enrolled as of selected Calendar Month/Year by Personnel Area, Employee Group, Employee Subgroup, Original Hire Date and Plan. This Report is associated with two reporting Views.

The Summary Reporting tab provides the summary of Number of Employees by Plan.
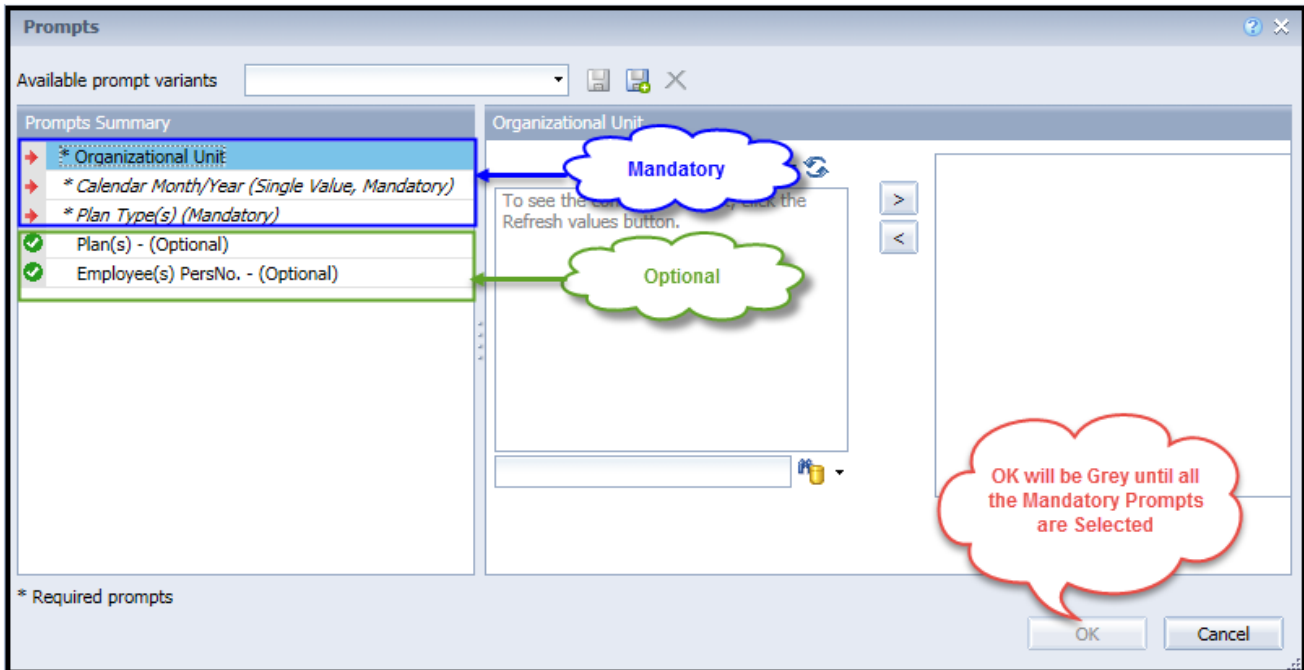
Report Location:

BN: Benefits

Report Uses:

- Analyze employees who are offered a benefit plan.
- Agency could use the Report during open enrollment or anytime to determine Employees who are not enrolled in Current Plans

| Quick Links	

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 in 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 select the desired Org Unit (3).
- Click the right arrow to add it to the selection box (4).
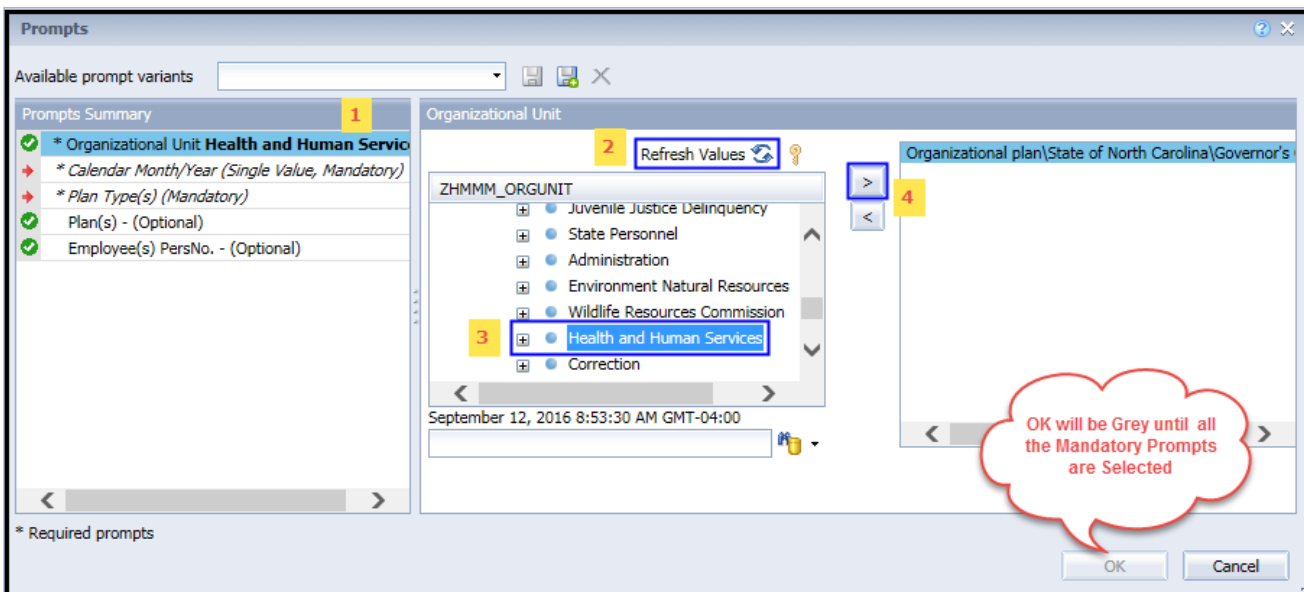
➔ ***Calendar Month/Year (Single Value, Mandatory):** To select data for this prompt:
- Make sure the Calendar Month/Year (Single Value, Mandatory) prompt is selected (1).
- If you don't want to search for a date, enter the date directly in the text box in the MM/YYYY format (2a) and skip steps 2b-4; go straight to step 5.
- Click "Refresh Values" to see the list of dates (2b).
- Narrow down the date selection by using the wildcard *YYYY format in the search box and press the enter key (3).
- Select the date (4).
- Click on the right arrow button (5).
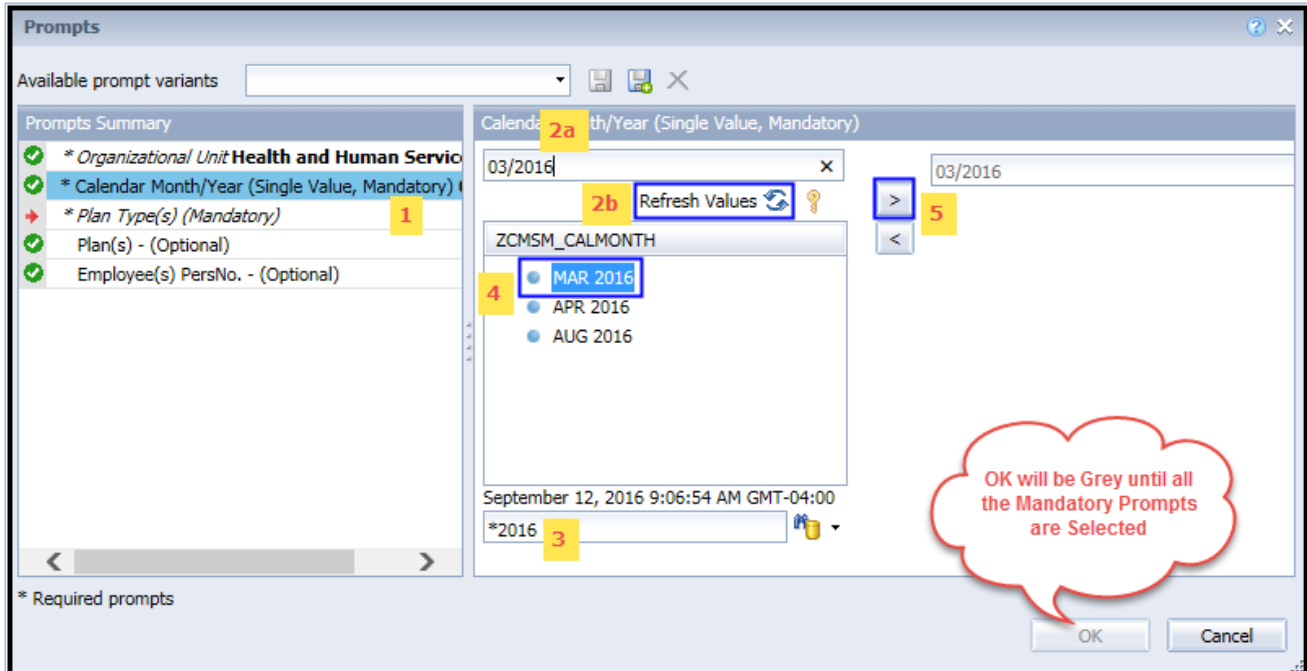
NOTE: Although other historical months may appear when you click 'Refresh Values,' data for this report has been restricted to the previous three years and current year. Selecting a month outside this restriction will render no data.

➔ ***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).
- Click the key icon (3) to see the key value for each Plan Type.
- Select the desired Plan Type (4).
- **OR**, if the Plan Type key or Plan Type name is known, 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.
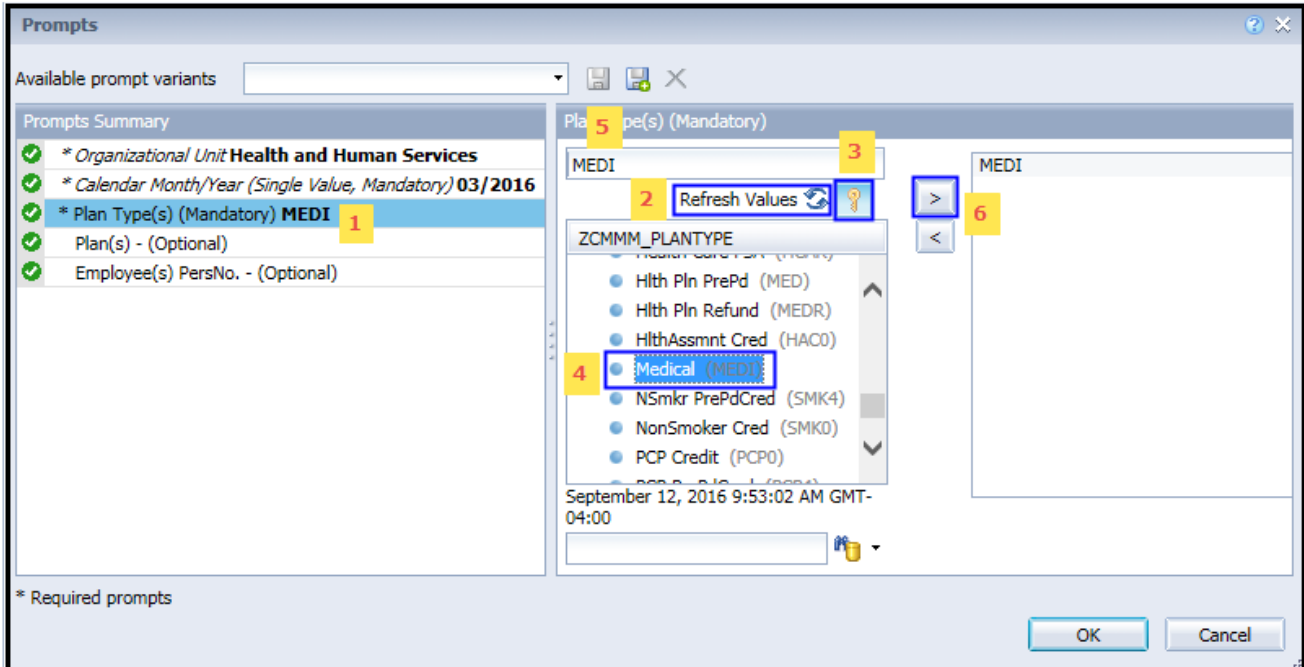
Optional Prompts

Optional prompts are indicated with a green check mark (✔) 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).
- Enter a search text with an asterisk (*) in the search box to view the list of values for Plan (2).
- Click on the search icon (3).
- Click the key icon (4) to see the key value for each Plan.
- Select the desired Plan (5).
- **OR** if the Plan key or Plan name is known, skip steps (2) through (5) and enter it directly in (6).
- Click on the right arrow to add the Plan to the selection box (7).
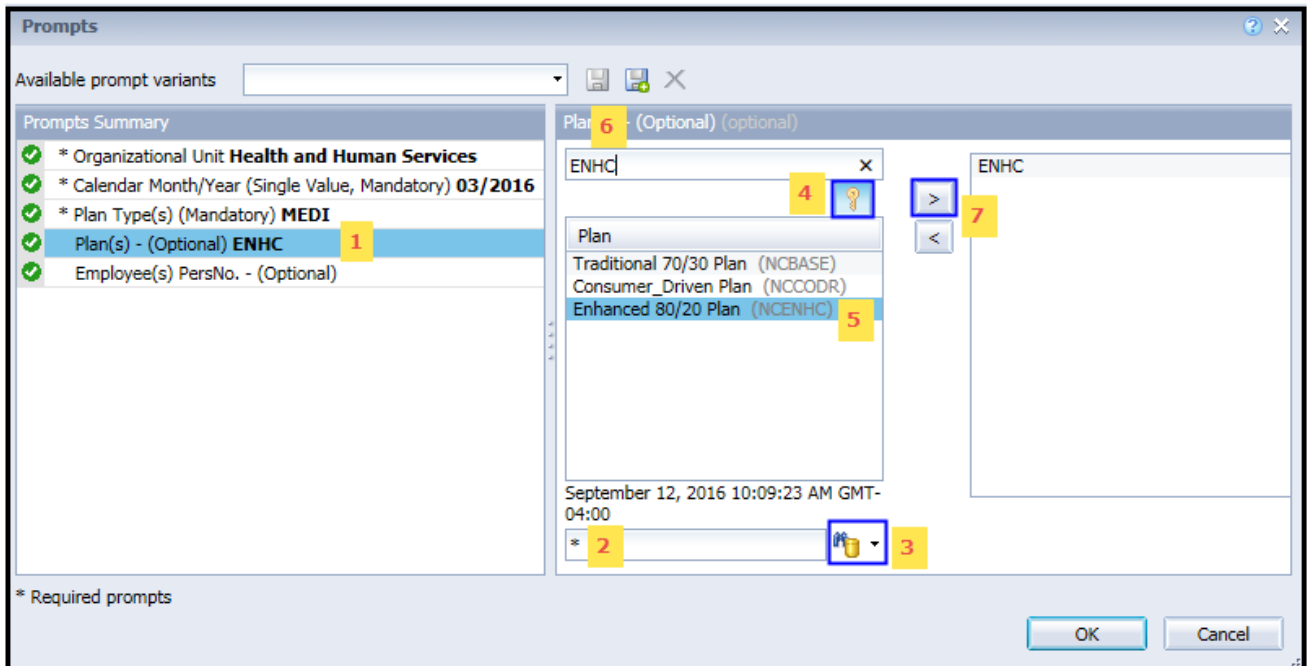
✓ **Employee(s) PersNo. - (Optional):** To select data for this prompt:
- Make sure the "Employee(s) PersNo. - (Optional)" prompt is selected (1).
- Enter an employee number in the search box to verify the employee name (2).
- Click the search icon drop down arrow and select "Search in key" (3).
- Click the search icon (4).
- Click the key icon (5) to see the employee number.
- Select the desired Employee (6).
- **OR** if the employee number is known, skip steps (2) through (6) and enter it directly in (7).
- Click the right arrow to add the Employee to the selection box (8).
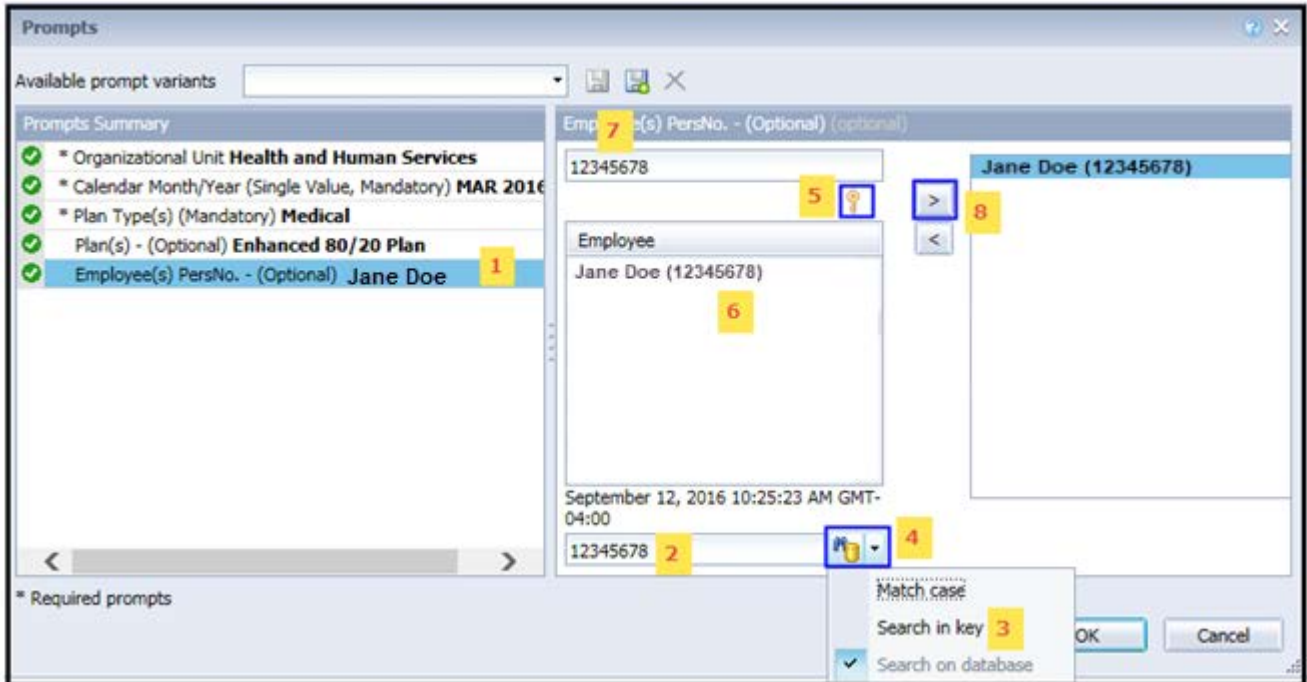
NOTE: Since the system has a large number of employees, using broad wildcard searches can be very slow and may result in an error if the search exceeds the system limit. If the employee number is not known and a name search must be done, narrow down the search by using the wildcard with specific text strings when looking for an employee by name such as:

Jane*Doe*
*Doe

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

Initial Layout

This report has two report tabs as well as the Report Info tab.
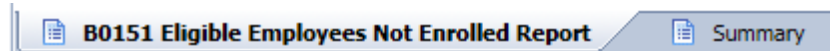
- **B0151 Eligible Employees Not Enrolled Report**: This report tab displays the employees who are eligible for specified benefit plans but not enrolled:

B0151: Eligible Employees Not Enrolled Report as of MAR 2016
Execution Date : 9/14/16

Personnel Area	Employee Name	Employee PersNo.	Employee Group	Employee Subgroup	Original Hire Date	Plan
Health Human Services	BOB, ALICE	12121212	SPA Employees	FT S-FLSAOT Perm	2/11/2002	Consumer_Driven Plan
						Enhanced 80/20 Plan
						Traditional 70/30 Plan
	DOE, JANE	13131313	SPA Employees	FT S-FLSAOT TL Prob	1/15/2008	Consumer_Driven Plan
						Enhanced 80/20 Plan
						Traditional 70/30 Plan
	HANCOCK, JOHN	14141414	SPA Employees	FT N-FLSAOT Perm	4/1/1998	Consumer_Driven Plan
						Traditional 70/30 Plan
	SMITH, JAMES	15151515	SPA Employees	FT S-FLSAOT Perm	3/17/2003	Consumer_Driven Plan
						Enhanced 80/20 Plan
						Traditional 70/30 Plan

- **Summary:** This report tab provides the summary of the Number of Employees who are eligible for but are not enrolled by Plan.

Summary
Execution Date : 9/14/16

Plan	Number of Employees
Consumer_Driven Plan	4
Enhanced 80/20 Plan	3
Traditional 70/30 Plan	4

- **Report Info:** This report tab displays the information about the prompts entered.

Available Objects

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

Special Report Considerations/Features

- Although any single month can be selected at runtime, data is restricted to previous three years through current year. Selecting any month outside this restriction will render no data.

- Only active employees are included on this report.

- No Benefits (NOB) in 1st Program Grouping is excluded from this report.

- Plan Category E (Miscellaneous Plan) is excluded from this report.

- Only Active Plans are included on this report. (Please check the list of Active Plans at the bottom of the document)

- A Default Filter is applied to the Report in both Reporting Tabs to display only employees who are eligible for specified benefit plans but not enrolled.

Please do not change the default Report Filter as the change will affect the Report Results.

- To check the default filter on the first report tab:
  - \> Hover mouse outside the crosstab table (1).
 - \> Right-Mouse click to bring up the context menu; select *Filter* (2), then *Edit Filter* (3).
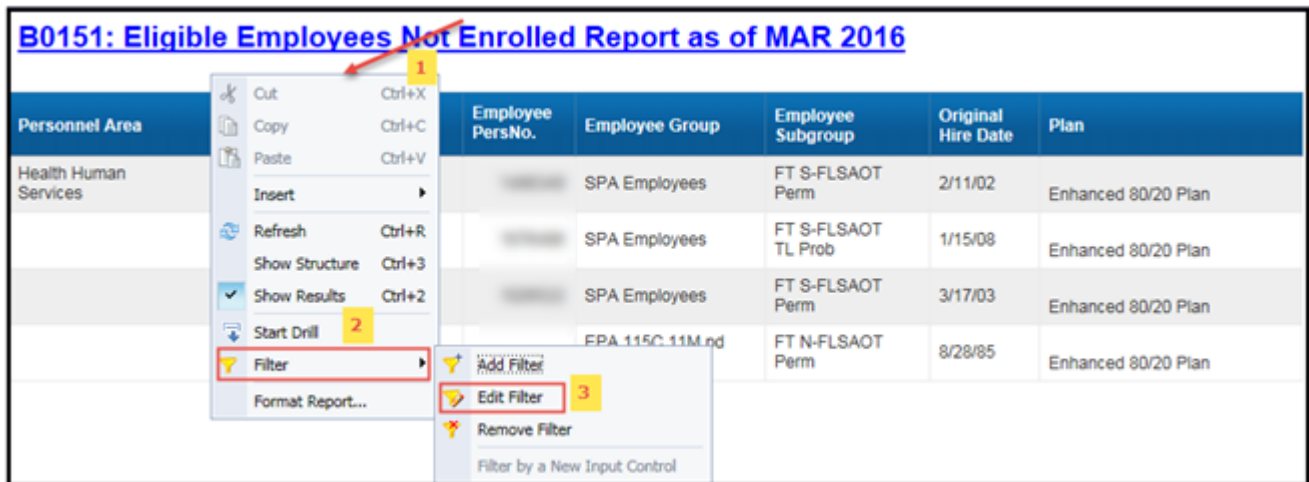
> When the Edit screen pops up, you can see the default filters applied.
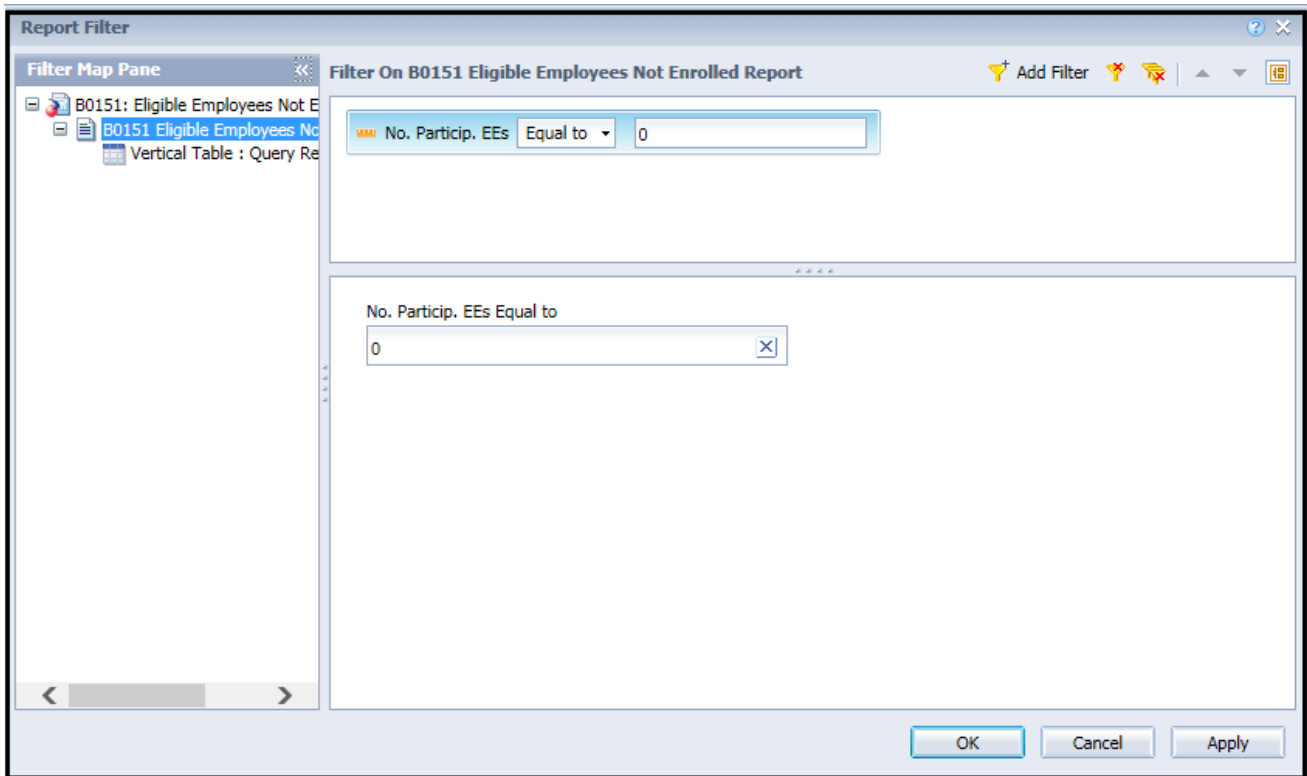
o To check the default filter on the Summary report tab:
 > Hover mouse outside the table (1).
 > Right-Mouse click to bring up the context menu; select *Filter* (2), then *Edit Filter* (3).
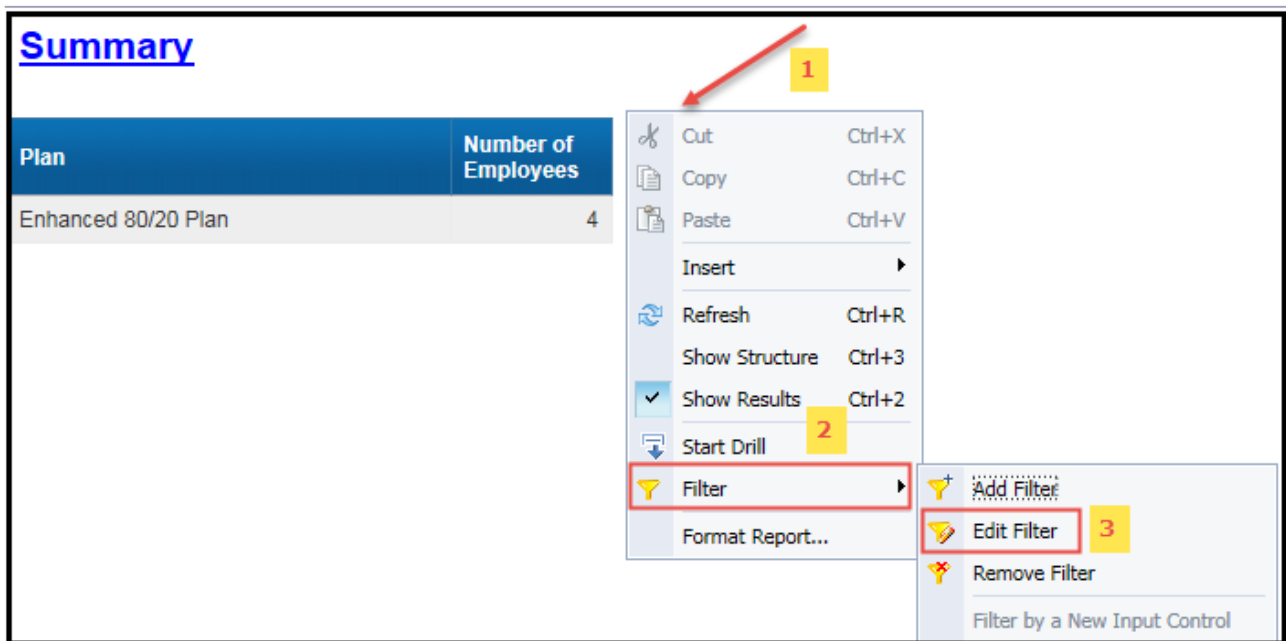
> When the Edit screen pops up, you can see the default filters applied.
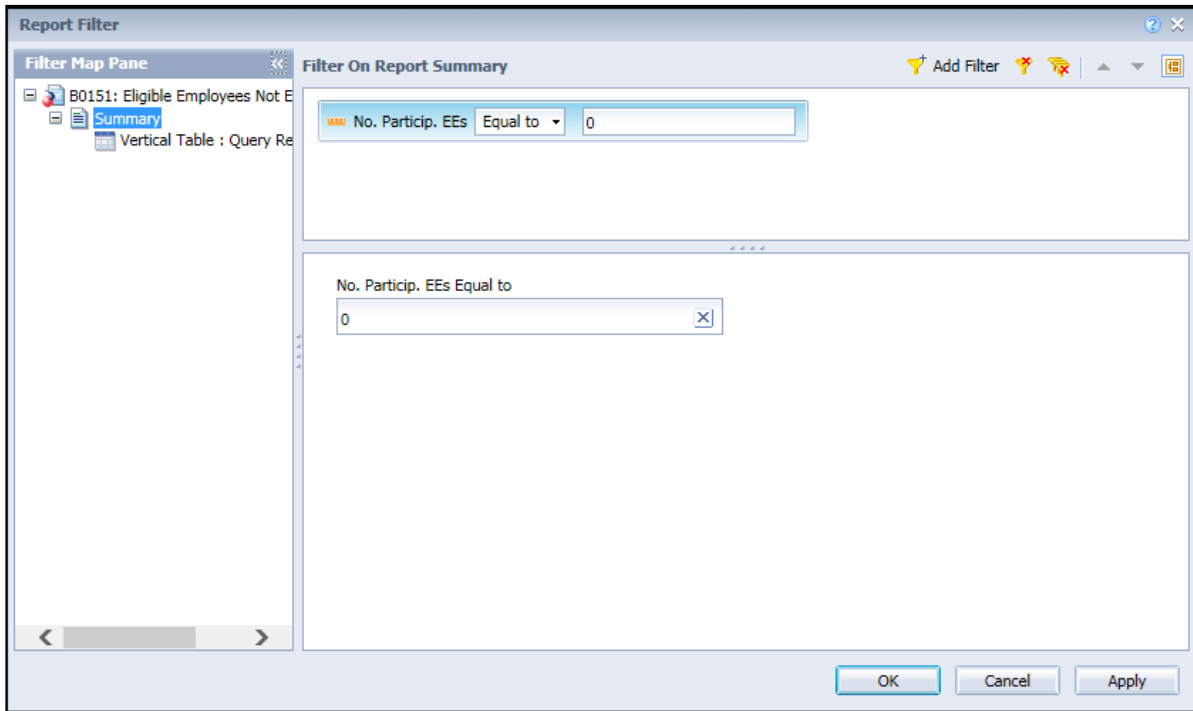
To change the sorting for the desired column:

By default, data is sorted in Ascending Order by Personnel Area, Employee Name, Employee PersNo., and Plan. (This can be changed as needed).

- Select "any column" that has break applied (1).
- Click the "Analysis" tab (2).
- By default, "Display" tab is selected (3).
- Click the Sort "drop down" arrow as shown (4).
- Click "Remove all Sorts" (5).
- Select ascending or descending sort order as needed (6).
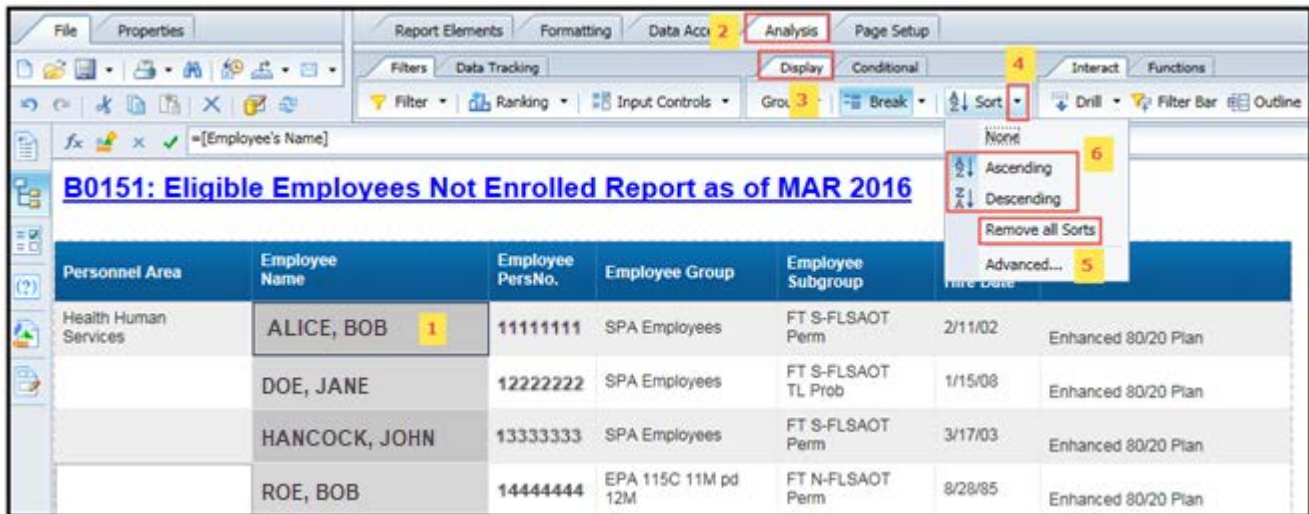
To change the breaks in the Report while exporting the data to Excel:

By default, breaks are applied in the report on Personnel Area, Employee Name, Employee PersNo., Employee Group, Employee Subgroup, and Original Hire Date to avoid repeated values in the Column.

If the repeated values for columns are needed in Excel, remove breaks in the report before exporting the data to Excel.

- Make sure the "desired column" is selected (1).
- Click the "Analysis" tab (2).
- By default, "Display" tab is selected (3).
- Click the Break "drop down" arrow as shown (4).
- Click "Remove all Breaks" (5).
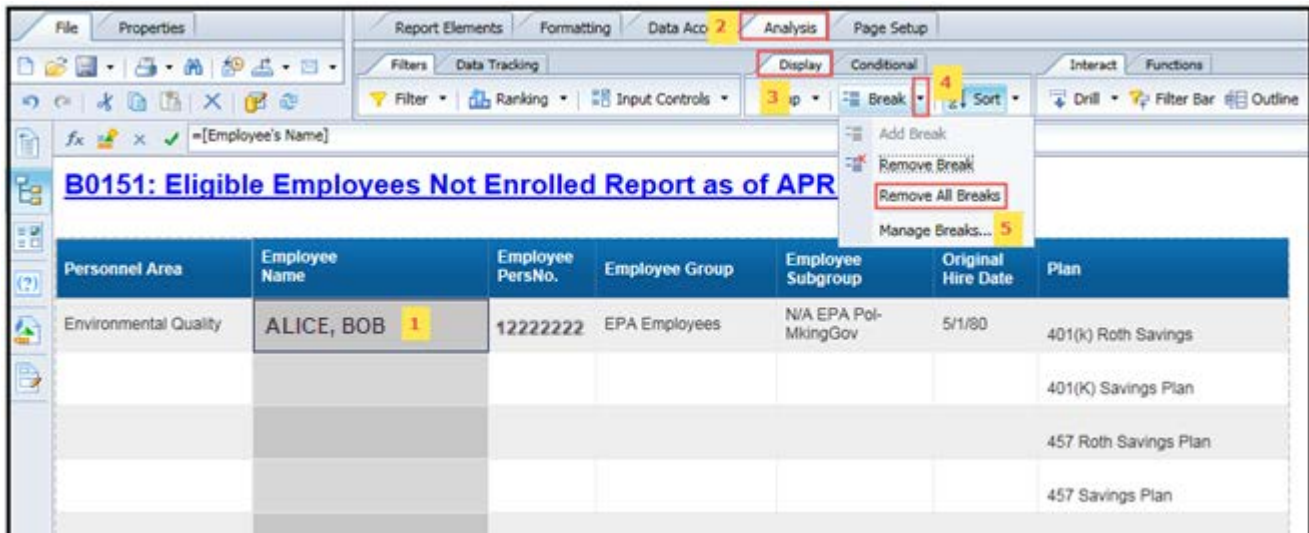
- The repeated values are now reported in all columns and can be export to Excel in the same format.

List of Active Plans Included in the Report:

Benefit Area	Plan	Description
NC	401K	401(K) Savings Plan
NC	401R	401(k) Roth Savings
NC	457	457 Savings Plan
NC	457R	457 Roth Savings Plan
NC	ADD	NC Flex AD&D Insurance
NC	ADDC	NC Flex Core AD&D Insurance
NC	BASE	Traditional 70/30 Plan
NC	CANC	NC Flex Cancer Insurance
NC	CIEL	Critical Illness Member
NC	CIKL	Critical Illness - Child Plan
NC	CISL	Critical Illness - Spouse Plan
NC	CJRS	CJRS - Judicial Retirement
NC	CODR	Consumer_Driven Plan
NC	DENT	NC Flex Dental Plan
NC	ENHC	Enhanced 80/20 Plan
NC	FIDL	NCSSM - Fidelity 403(b)
NC	FIDR	NCSSM - Fidelity 403(b) Roth
NC	HDHP	High Deductible Health Plan
NC	LEOR	LEORS - Law Officer Retirement
NC	LEOS	Supplemental LEORS 401(k)
NC	LIFE	NC Flex Life Insurance
NC	LIFK	Child(ren) Life Insurance
NC	LIFS	Spouse Life Insurance
NC	TIAA	NCSSM - TIAA-CREF 403(b)
NC	TIAR	NCSSM -TIAA-CREF 403(b) Roth
NC	TRIC	TriCare Health Plan
NC	TSER	TSERS - Retirement Plan
NC	VIS	NC Flex Vision Plan

Change Log

- 10/20/2016 – Initial report creation to convert from BI to BOBJ
- 9/17/2020 – Updated format, assigned reference number, and made accessible – C. Ennis and L. Lee
- 11/2/2020- Added Alt Text – L. Lee