B0047 Benefit Health and Insurance Plan Costs

Purpose

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.

How to Generate This Report

This report is generated after selecting values for the mandatory prompts. All mandatory prompts must have values selected before the Run Icon can be used to generate the report. Mandatory prompts can be identified as mandatory by the exclamation mark inside of the yellow-orange triangle, the square with the checkmark, or the display of (Mandatory). Detailed instructions for interaction with each prompt can be found on the Web Intelligence Prompt List on the OSC website.

The Mandatory prompts for this report are:

- Organizational Unit
- CalMonth/Year (Single Value/Interval, Mandatory)
- Plan Type(s) (Mandatory)

This report can also be further limited by utilizing the Optional prompts to further limiting the amount of data that retrieved into the body of the report. Optional prompts are indicated as optional in parentheses beside the prompt.

The Optional prompts are:

- Plan(s) (Optional)
  - 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

Plan Category	Plan Type Key	Plan Type Text	Plan Category	Plan Type Key	Plan Type Text
	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			

- Employee(s) PersNo. - (Optional)

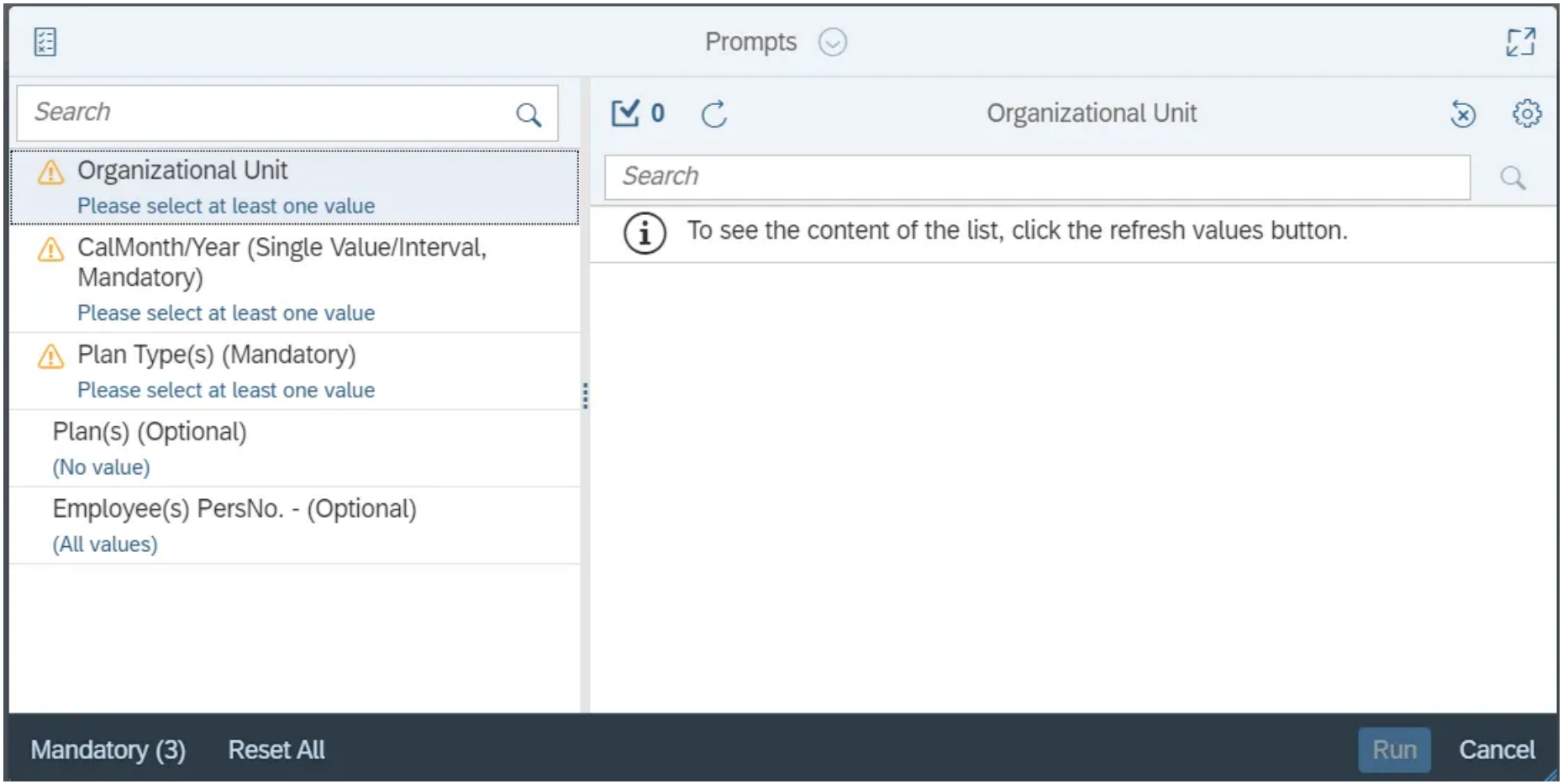
  Note**:** Since the system has a large number of employees, using broad wildcard searches can be very slow and may result in an error if the search exceeds the system limit. If the employee number is not known and a name search must be done, narrow down the search by using the wildcard with specific 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 Employee(s) PersNo. to enter the selection.

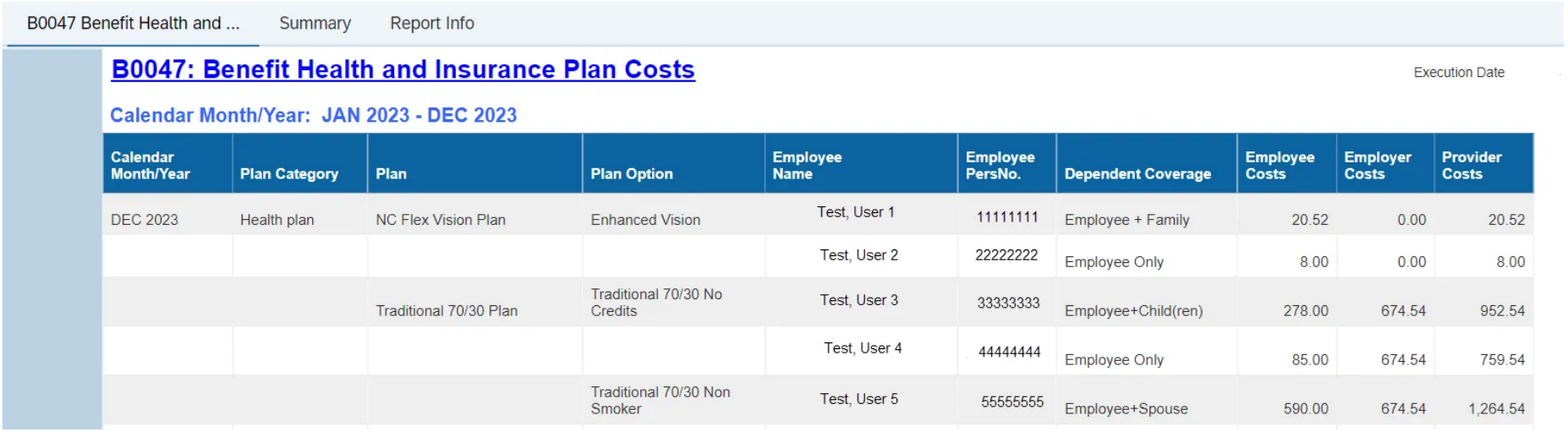
Image



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.

Image



B0047 Benefit Health and ... | Summary | Report Info

B0047: Benefit Health and Insurance Plan Costs

Execution Date

Calendar Month/Year: JAN 2023 - DEC 2023

Calendar Month/Year	Plan Category	Plan	Plan Option	Employee Name	Employee PersNo.	Dependent Coverage	Employee Costs	Employer Costs	Provider Costs
DEC 2023	Health plan	NC Flex Vision Plan	Enhanced Vision	Test, User 1	11111111	Employee + Family	20.52	0.00	20.52
				Test, User 2	22222222	Employee Only	8.00	0.00	8.00
		Traditional 70/30 Plan	Traditional 70/30 No Credits	Test, User 3	33333333	Employee+Child(ren)	278.00	674.54	952.54
				Test, User 4	44444444	Employee Only	85.00	674.54	759.54
			Traditional 70/30 Non Smoker	Test, User 5	55555555	Employee+Spouse	590.00	674.54	1,264.54

- **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.

Image

B0047 Benefit Health and ... | Summary | Report Info

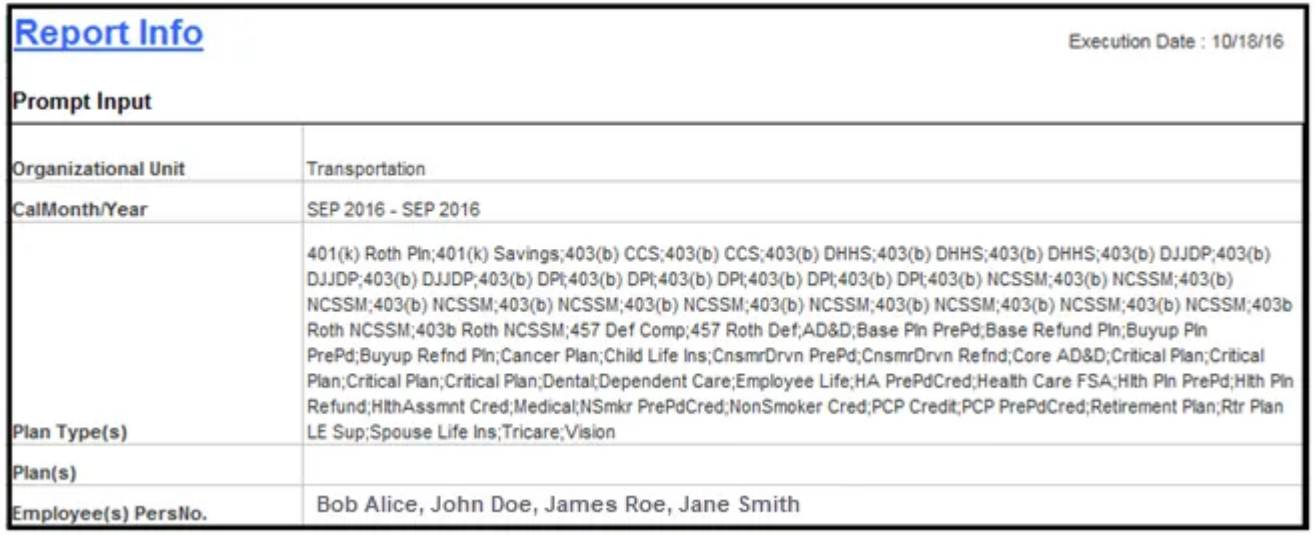
Summary

Calendar Month/Year: JAN 2023 - DEC 2023

Calendar Month/Year	Plan Category	Plan	Plan Option	Employee Costs	Employer Costs	Provider Costs	Number of Employees
JAN 2023	Health plan	Enhanced 80/20 Plan	Enhanced 80/20 Non Smoker	17,735.00	78,969.60	96,704.60	135
		NC Flex Dental Plan	Dental Classic Option	3,473.60	0.00	3,473.60	58
			Dental High Option	4,415.90	0.00	4,415.90	52
			Dental Low Option	1,309.58	0.00	1,309.58	35
		NC Flex Vision Plan	Basic Vision	411.98	0.00	411.98	47
			Core Vision	0.00	0.00	0.00	33
			Enhanced Vision	1,031.60	0.00	1,031.60	82
		Traditional 70/30 Plan	Traditional 70/30 No Credits	363.00	1,169.92	1,532.92	2
			Traditional 70/30 Non Smoker	9,248.00	23,983.36	33,231.36	41
FEB 2023	Health plan	Enhanced 80/20 Plan	Enhanced 80/20 Non Smoker	17,685.00	78,384.64	96,069.64	134
		NC Flex Dental Plan	Dental Classic Option	3,515.70	0.00	3,515.70	58
			Dental High Option	4,415.90	0.00	4,415.90	52
			Dental Low Option	1,309.58	0.00	1,309.58	35
		NC Flex Vision Plan	Basic Vision	423.64	0.00	423.64	48

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

Image



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) DPI;403(b) DPI;403(b) DPI;403(b) DPI;403(b) DPI;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;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.

Dimensions

- 1st Program Grouping
- 2nd Program Grouping
- Age
- Calendar Month/Year
- Dependent Coverage
- Employee
- Employee Group
- Employee Subgroup
- Employee’s Name

- Employment Status
- Ethnic Origin
- Gender
- Job
- Organizational Unit
- Original Hire Date
- Payroll Area
- Personnel Area
- Personnel Subarea
- Plan
- Plan Category
- Plan Option
- Position

Measures

- 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

Image

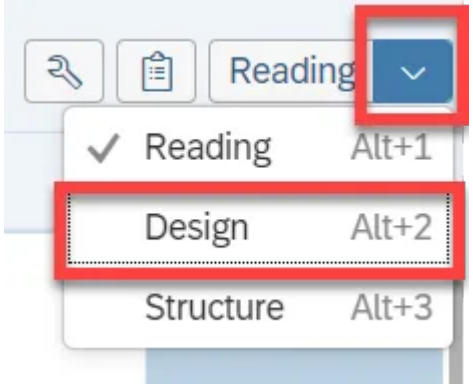

Dimensions
1st Program Grouping
2nd Program Grouping
Age
Calendar Month/Year
Dependent Coverage
Employee
Employee Group
Employee Subgroup
Employee's Name
Employment Status
Ethnic Origin
Gender
Job
Organizational Unit
Original Hire Date
Payroll Area
Personnel Area
Personnel Subarea
Plan
Plan Category
Plan Option
Position
Measures
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).

      Step 1 - Select the Design Mode.

Image



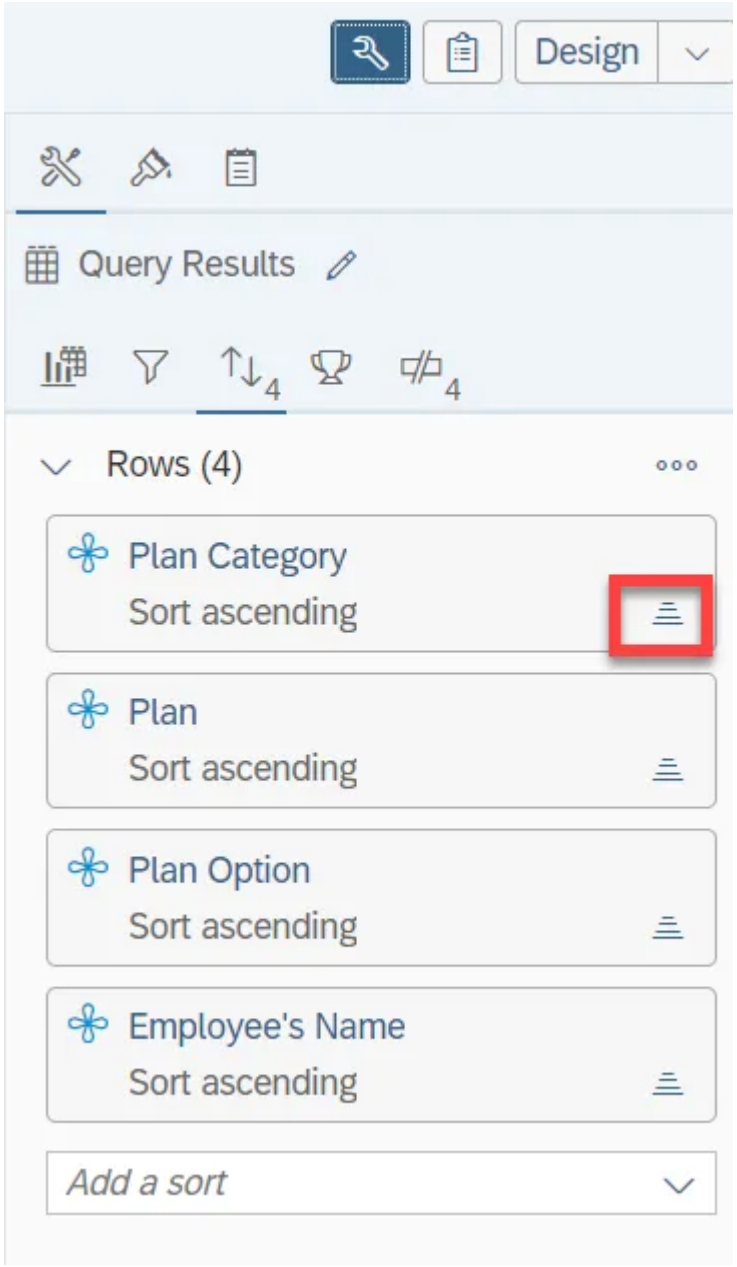
Step 2 - Click on the tool to show the data/format panel.

Image



Step 3 - Select ascending or descending sort order as needed.

Image



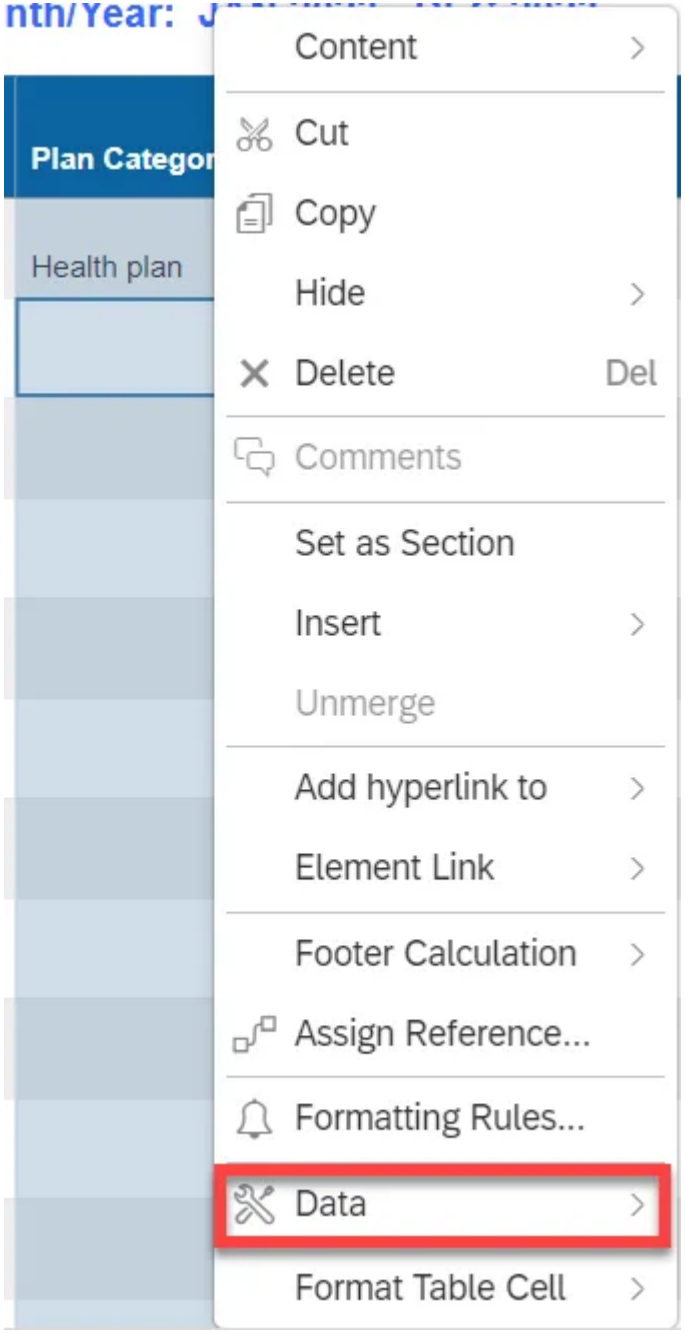
- To change the breaks in the report before exporting the data to Excel

- 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.

  Step 1 - Select "any column" that has break(s) applied.

  Step 2 - Right click.

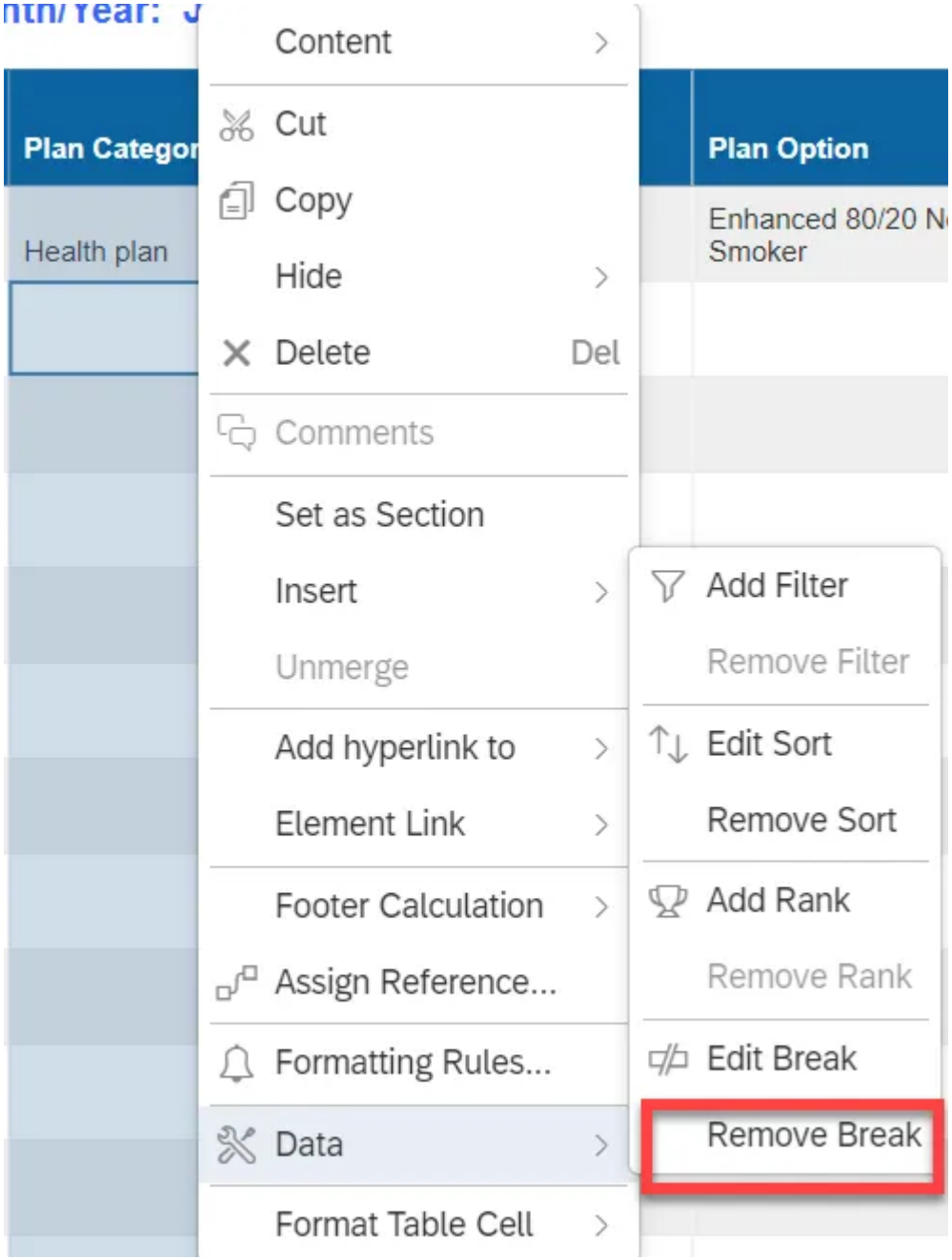
Image


nth/Year:
Plan Categor
Health plan
Content
Cut
Copy
Hide
Delete
Del
Comments
Set as Section
Insert
Unmerge
Add hyperlink to
Element Link
Footer Calculation
Assign Reference...
Formatting Rules...
Data
Format Table Cell

Step 3 - Click “Data”.

Step 4 - Click the "Remove Break".

Image


Plan Categor
Plan Option
Health plan
Enhanced 80/20 N
Smoker
Content
Cut
Copy
Hide
Delete Del
Comments
Set as Section
Insert
Unmerge
Add hyperlink to
Element Link
Footer Calculation
Assign Reference...
Formatting Rules...
Data
Format Table Cell
Add Filter
Remove Filter
Edit Sort
Remove Sort
Add Rank
Remove Rank
Edit Break
Remove Break

Step 5 - Now you can see the Repeated values in all columns, and it can be exported to Excel in the same format.

Image



First Published

Mon, 04/27/2020

Last Updated

Tue, 12/30/2025

Printable PDF