B0151 Eligible Employees Not Enrolled Report

Purpose

The purpose of this Report Description is to explain 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 a summary of the 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.

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
- Calendar Month/Year (Single Value, Mandatory)
- Plan Type(s) (Mandatory)

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.

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)
- Employee(s) PersNo. - (Optional)

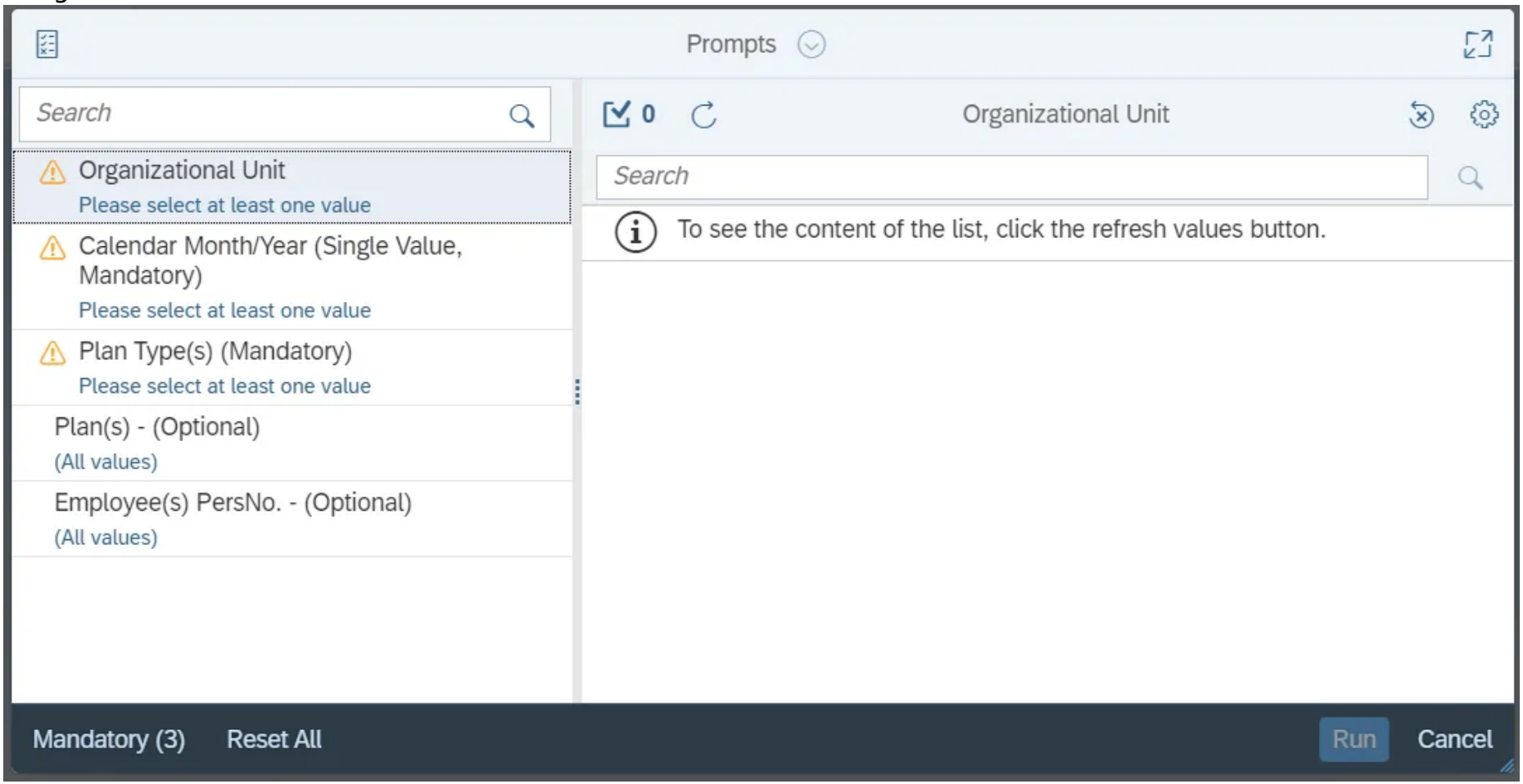
Note**:** Since the system has a large number of employees, using broad wildcard searches can be very slow and may result in an error if the search exceeds the system limit. If the employee number is not known and a name search must be done, narrow down the search by using the wildcard with specific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

employee by name such as:

Jane*Doe*
*Doe

If the employee number is known, it is best to use the manual entry field in Employee(s) PersNo. - (Optional) to enter the selection.

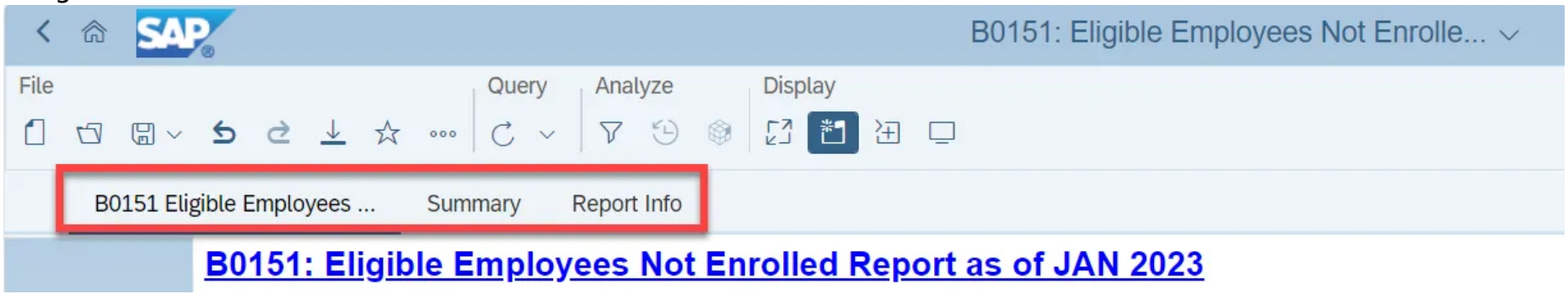
Image



Initial Layout

This report has two report tabs as well as the Report Info tab.

Image



- B0151 Eligible Employees Not Enrolled Report: **This report tab displays the employees who are eligible for specified benefit plans but not enrolled:**

Image

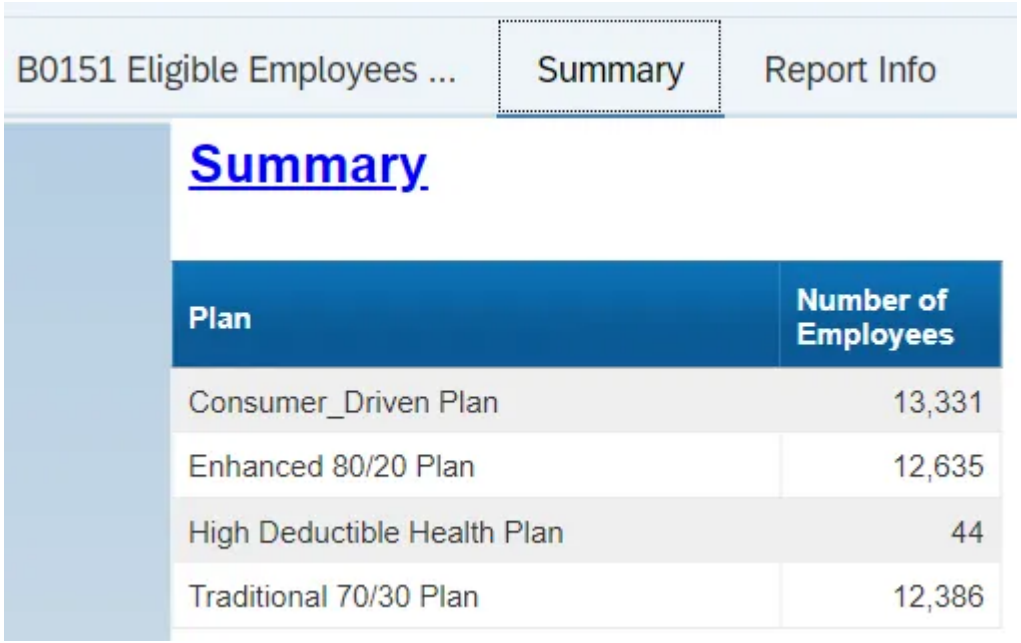
B0151 Eligible Employees ... | Summary | Report Info

B0151: Eligible Employees Not Enrolled Report as of JAN 2023

Personnel Area	Employee Name	Employee PersNo.	Employee Group	Employee Subgroup	Original Hire Date	Plan
Transportation	Test, User1	11111111	SPA Bi-Weekly	FT N-FLSAOT Perm	9/4/99	Enhanced 80/20 Plan
						Traditional 70/30 Plan
	Test, User2	22222222	SPA Bi-Weekly	FT S-FLSAOT Prob	6/12/21	Consumer_Driven Plan
						Enhanced 80/20 Plan
	Test, User3	33333333	SPA Bi-Weekly	FT S-FLSAOT Perm	7/1/83	Consumer_Driven Plan
						Enhanced 80/20 Plan
						Traditional 70/30 Plan
	Test, User4	44444444	SPA Bi-Weekly	FT S-FLSAOT Perm	11/28/87	Consumer_Driven Plan
						Enhanced 80/20 Plan

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

Image



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

Image



Available Objects

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

Dimensions

- 1st Program Grouping
- 2nd Program Grouping
- Age
- Employee
- Employee Group
- Employee Subgroup
- Employee’s Name

- Employment Status
- Ethnic Origin
- Gender
- Organizational Unit
- Original Hire Date
- Personnel Area
- Personnel Subarea
- Plan
- Plan Option
- Plan Type

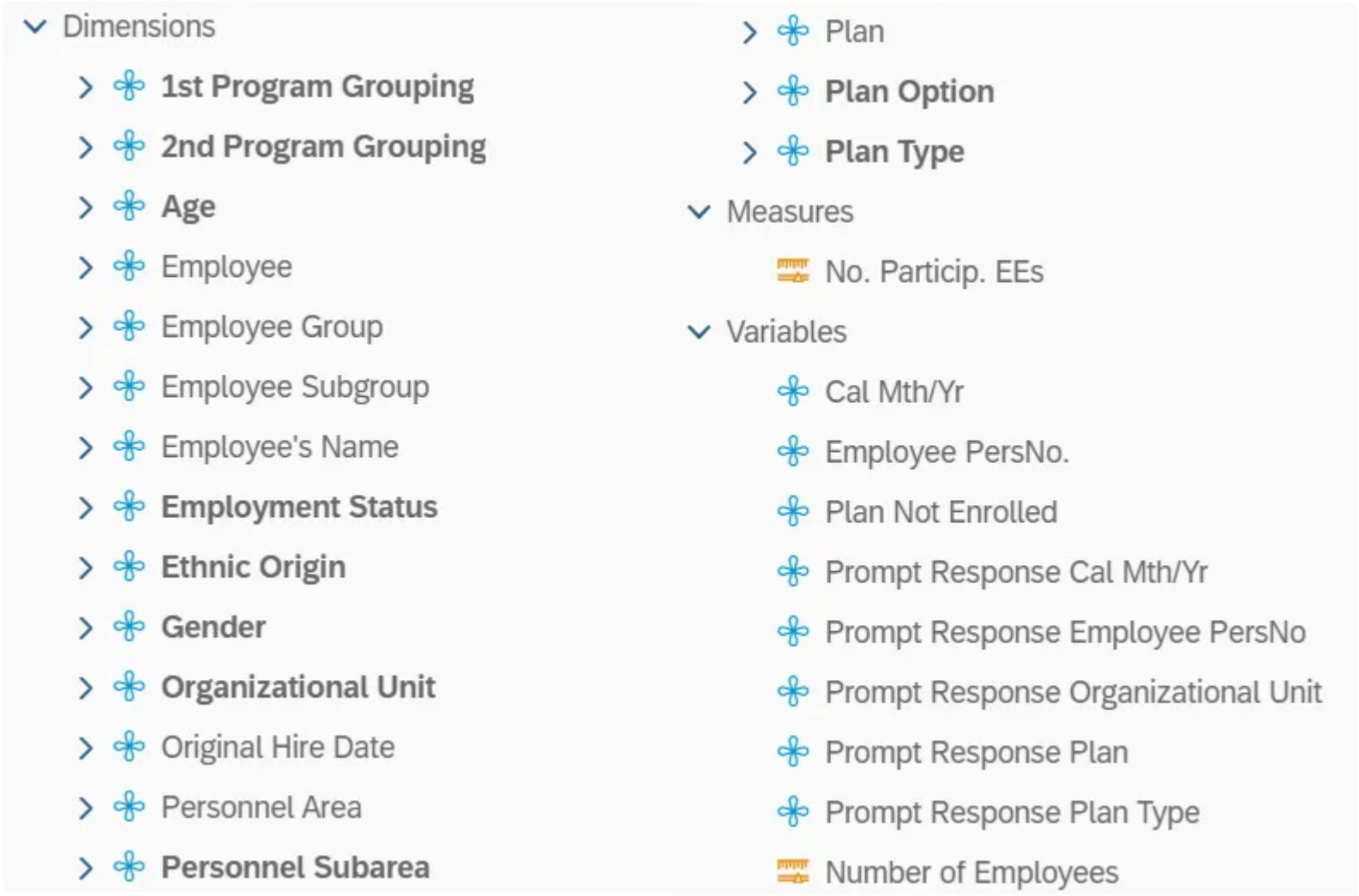
Measures

- No. Particip. EEs

Variables

- Cal Mth/Yr
- Employee PersNo.
- Plan Not Enrolled
- Prompt Response Cal Mth/Yr
- Prompt Response Employee PersNo
- Prompt Response Organizational Unit
- Prompt Response Plan
- Prompt Response Plan Type
- Number of Employees

Image



Special Report Considerations/Features

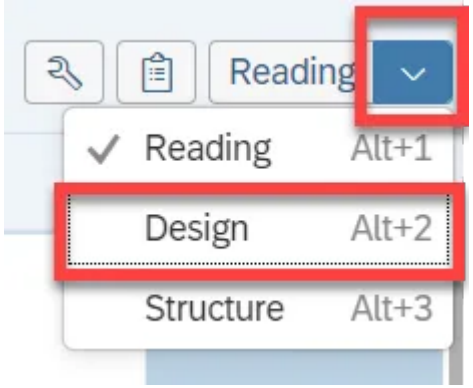
- Although any single month can be selected at runtime, data is restricted to the previous three years through current year. Selecting any month outside this restriction will render no data.
- Only active employees are included in this report.

- 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 in 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:

1. Choose the Design Mode.

Image



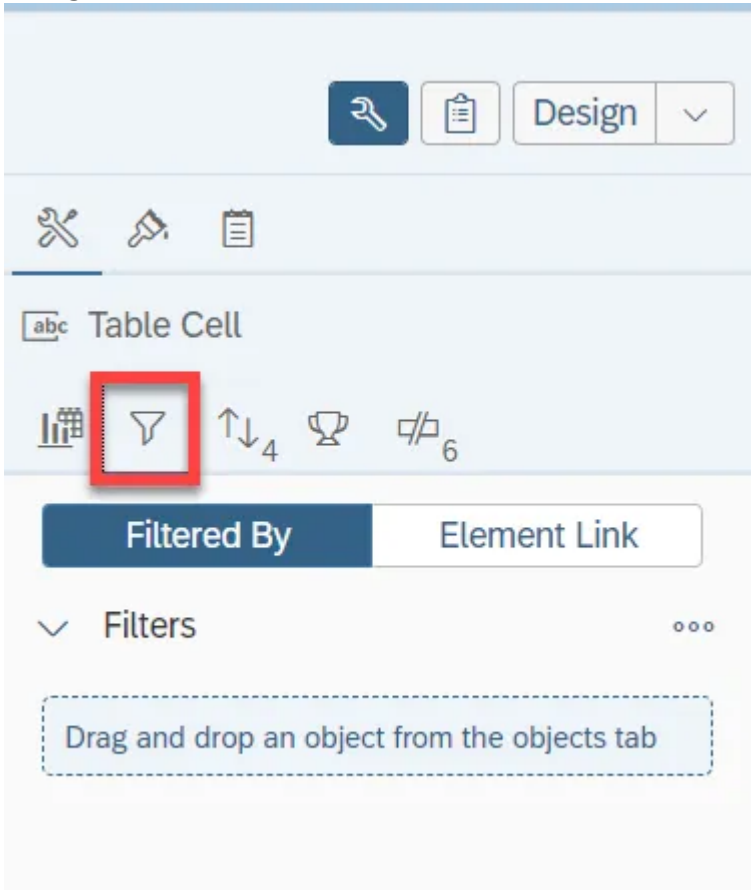
2. Click on the tool to show the data/format panel.

Image



3. Select the Funnel icon.

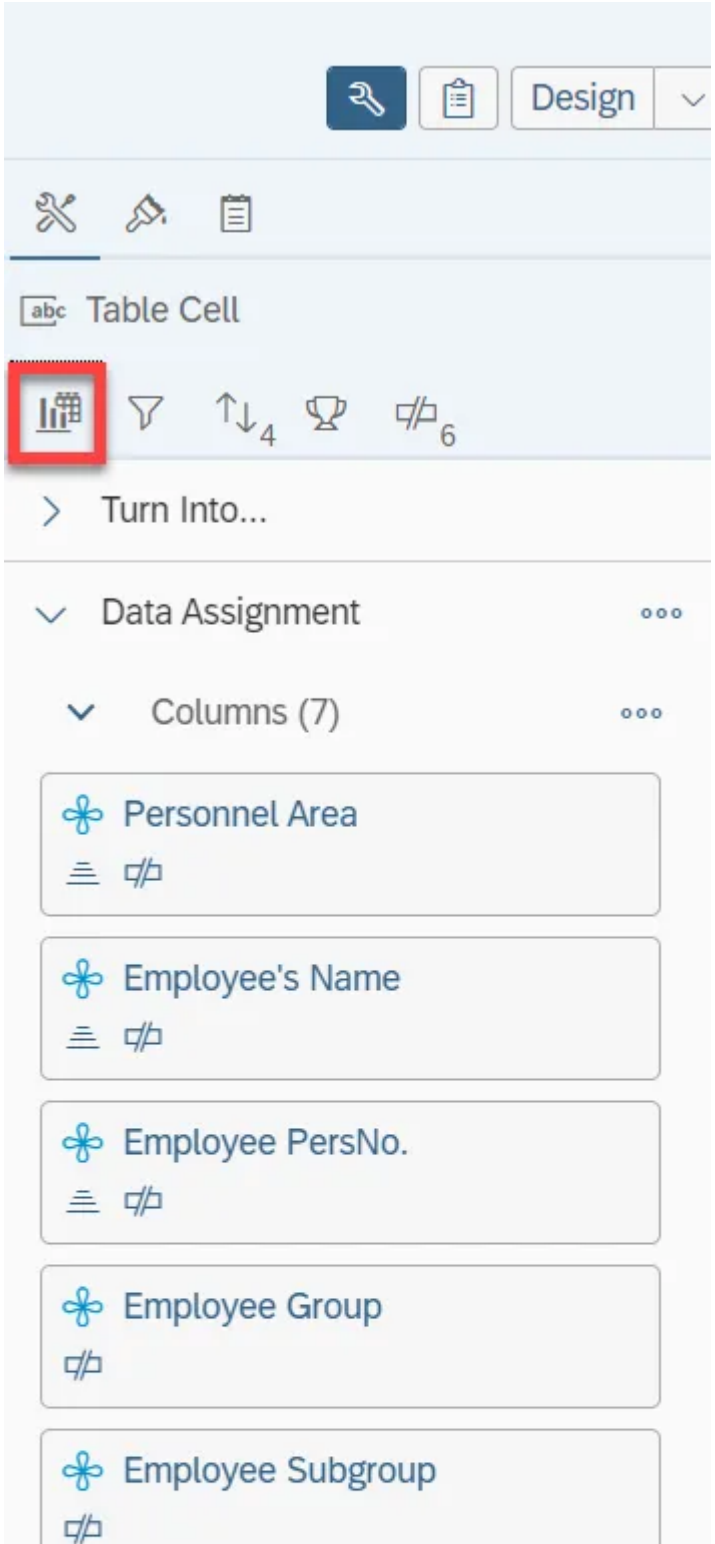
Image



To change the sort:

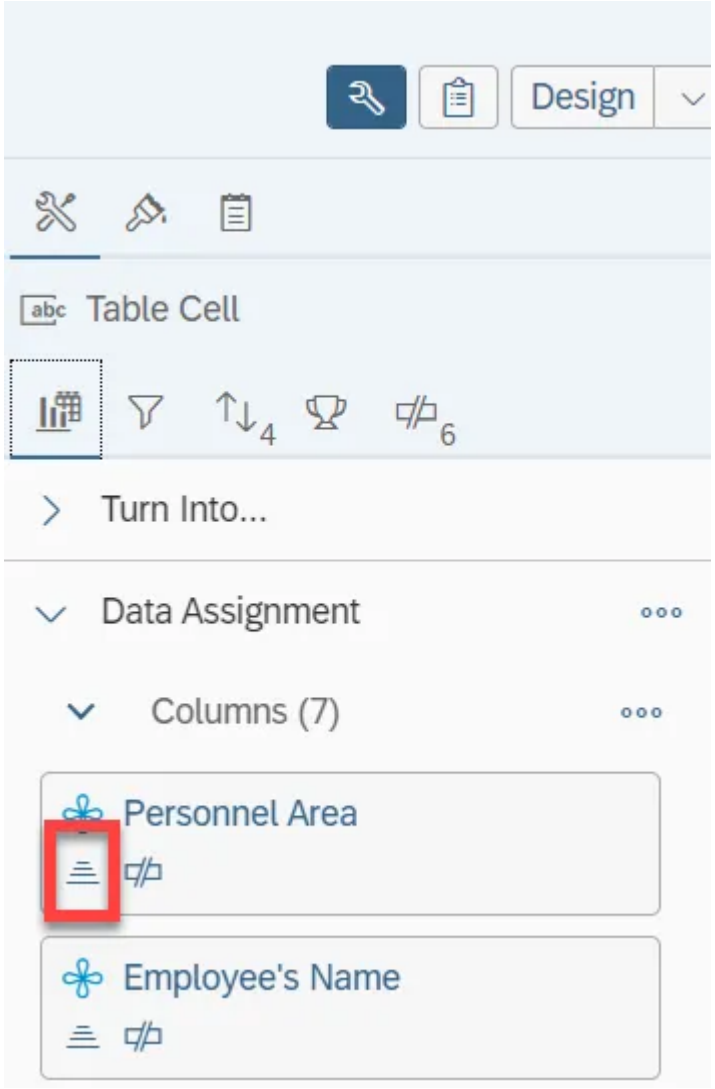
1. Click the "Display feeding panel" icon.

Image


Design
Table Cell
4
6
Turn Into...
Data Assignment
Columns (7)
Personnel Area
Employee's Name
Employee PersNo.
Employee Group
Employee Subgroup

2. Select ascending or descending sort order as needed.

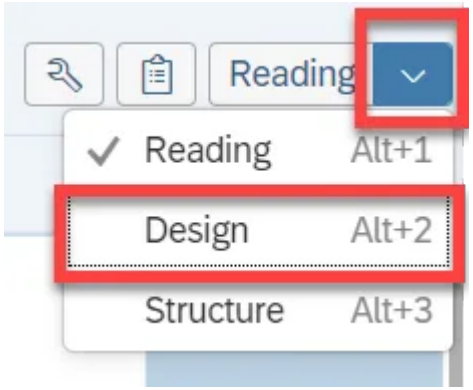
Image



To check the default filter on the Summary report tab:

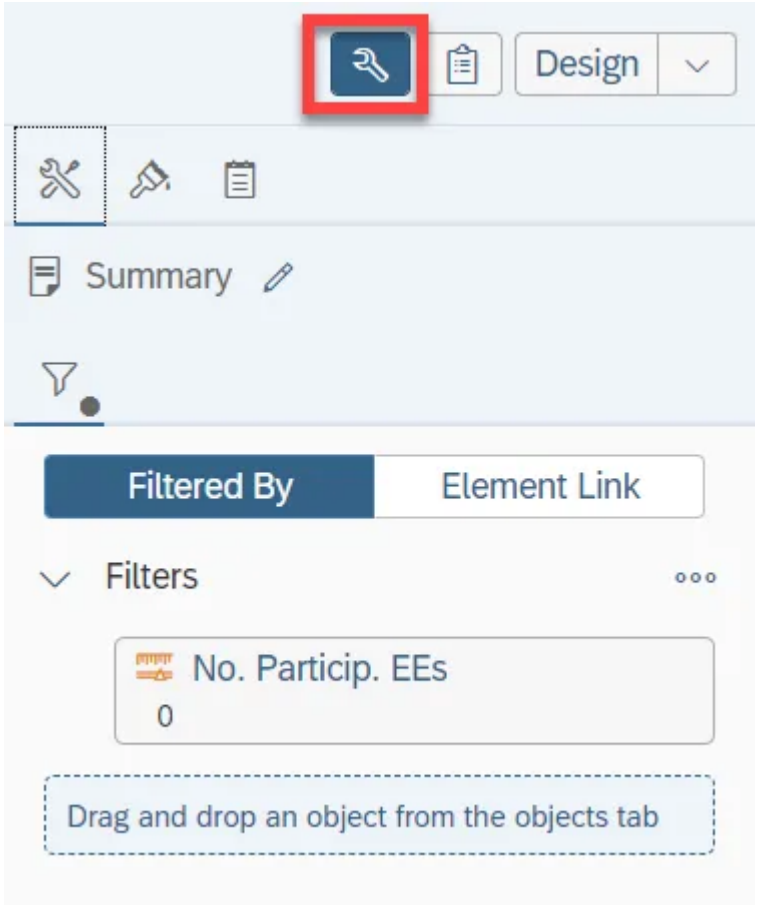
1. Choose the Design Mode.

   Image

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

Image



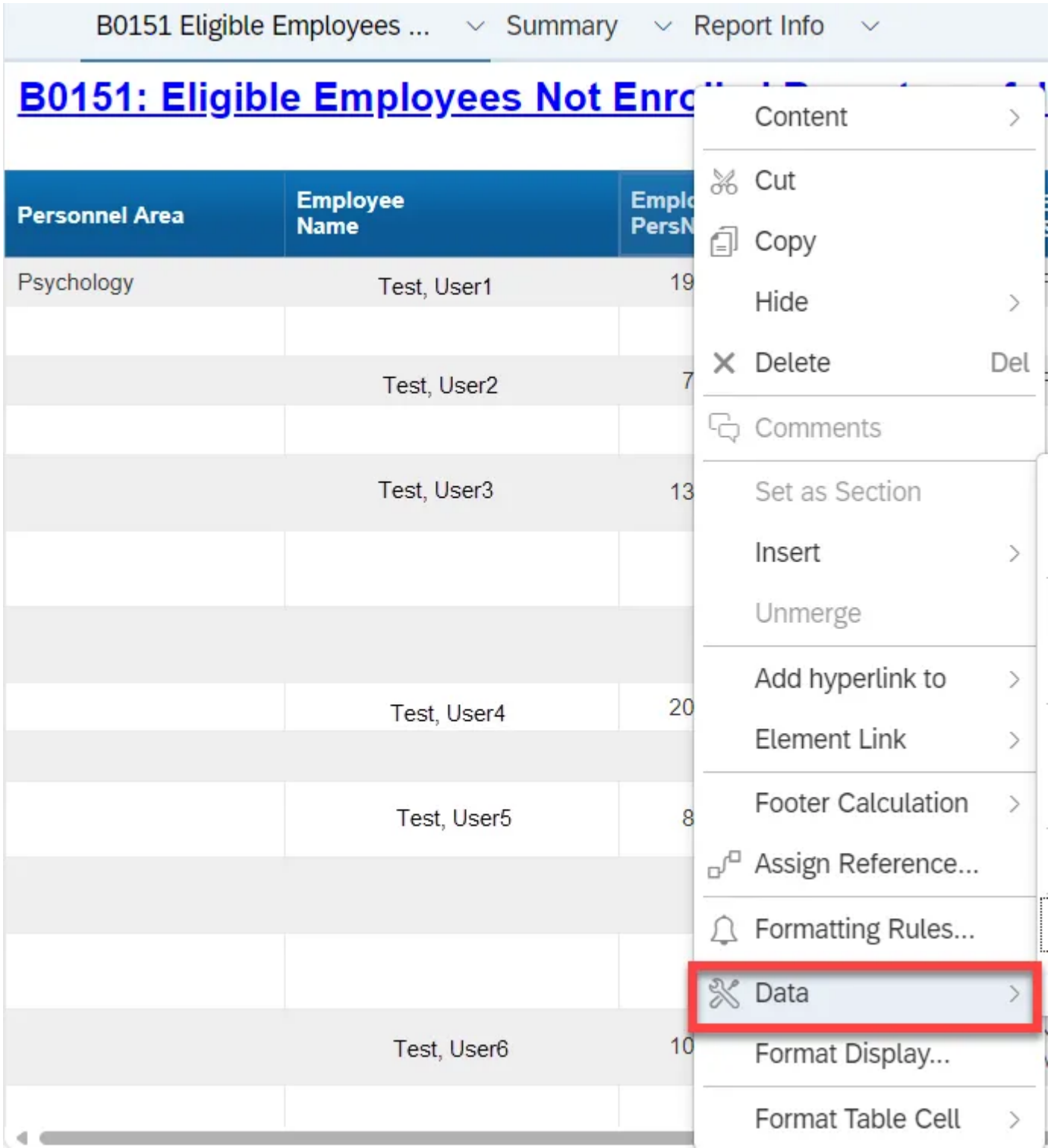
To change the sorting for the desired column:

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

1. Right click on “any column” that has break applied.

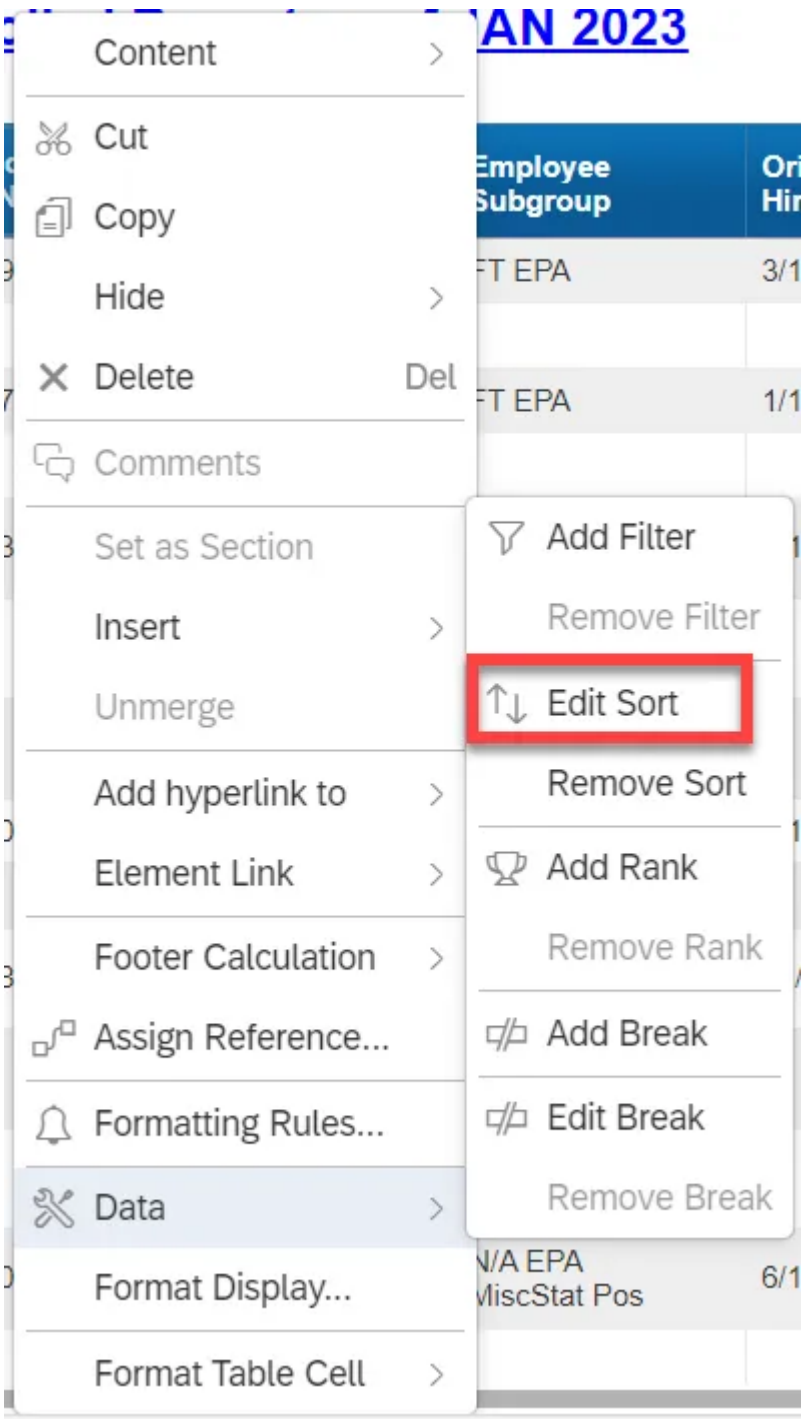
2. Click “Data”

Image


B0151 Eligible Employees ...
Summary
Report Info
B0151: Eligible Employees Not Enrc
Personnel Area
Employee Name
Psychology
Test, User1
Test, User2
Test, User3
Test, User4
Test, User5
Test, User6
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 Display...
Format Table Cell

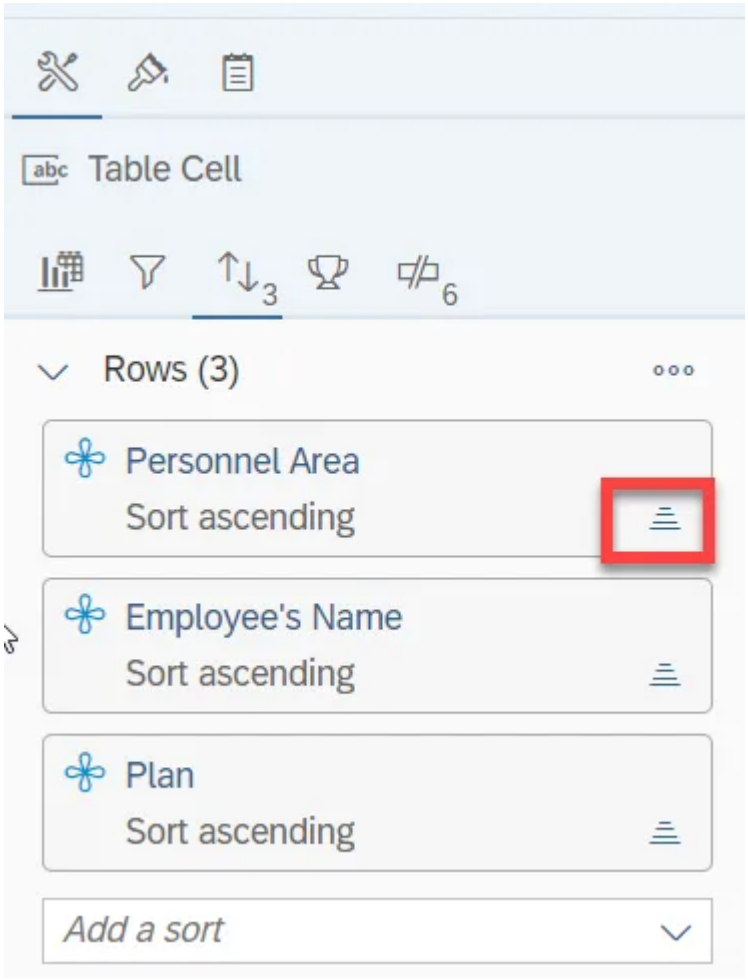
3. Click "Edit Sort.

Image


AN 2023
Employee Subgroup
Ori Hir
FT EPA
3/1
FT EPA
1/1
N/A EPA
MiscStat Pos
6/1
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 Display...
Format Table Cell
Add Filter
Remove Filter
Edit Sort
Remove Sort
Add Rank
Remove Rank
Add Break
Edit Break
Remove Break

4. Select ascending or descending sort order as needed.

Image



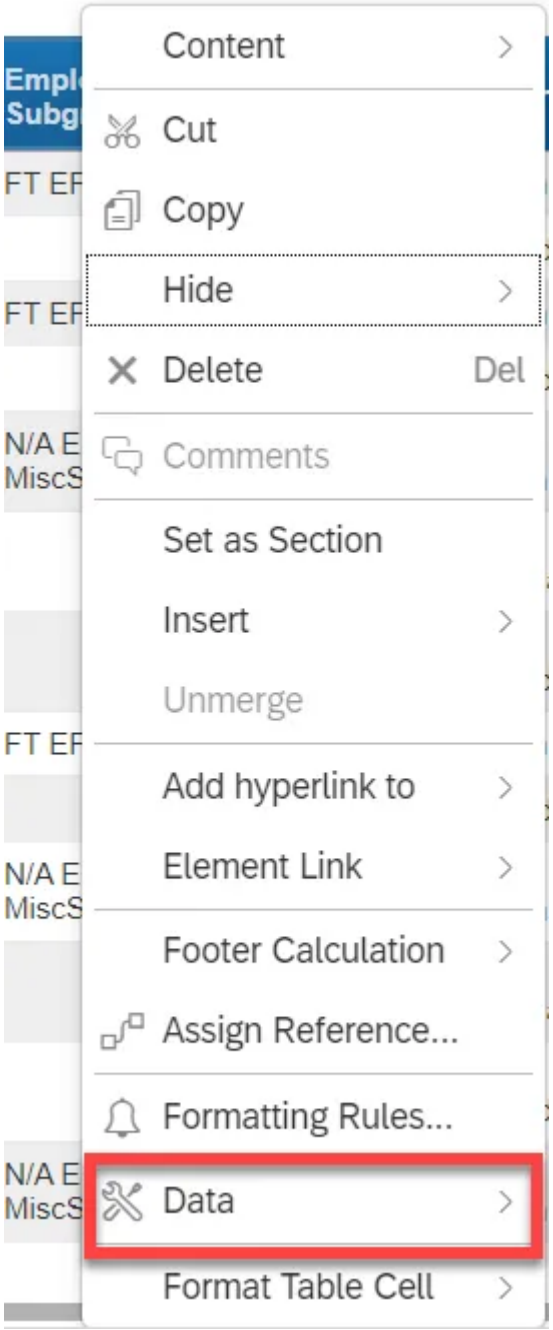
To change the breaks in the Report while exporting the data to Excel:

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.

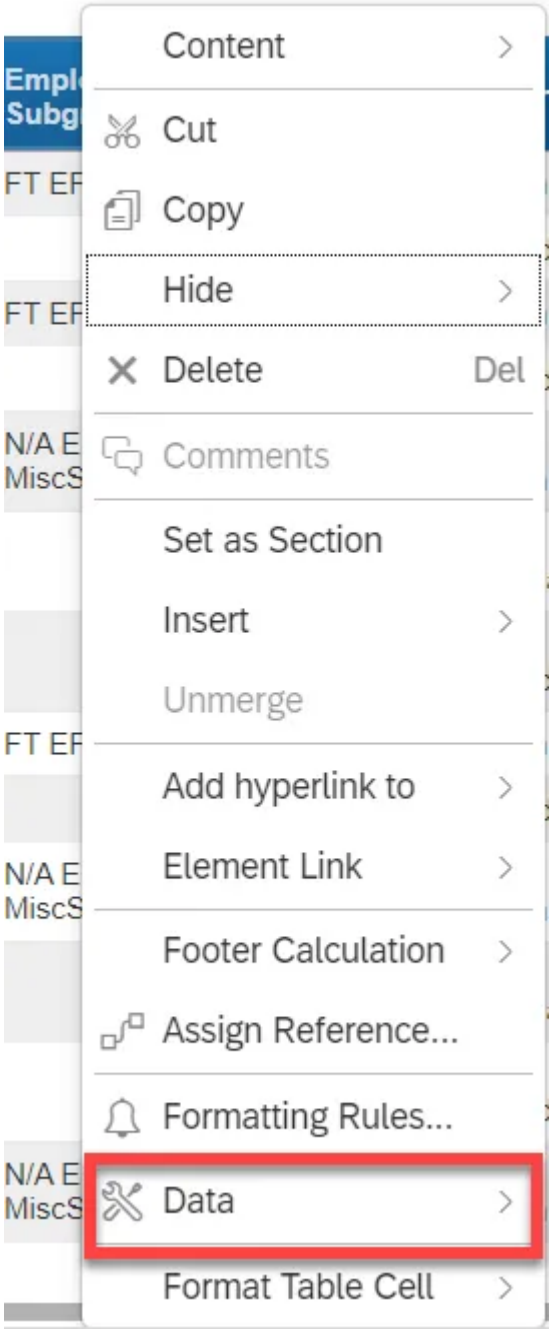
1. Right Click on the “desired column”.

Image


Empl
Subg
FT EF
FT EF
N/A E
MiscS
FT EF
N/A E
MiscS
N/A E
MiscS
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

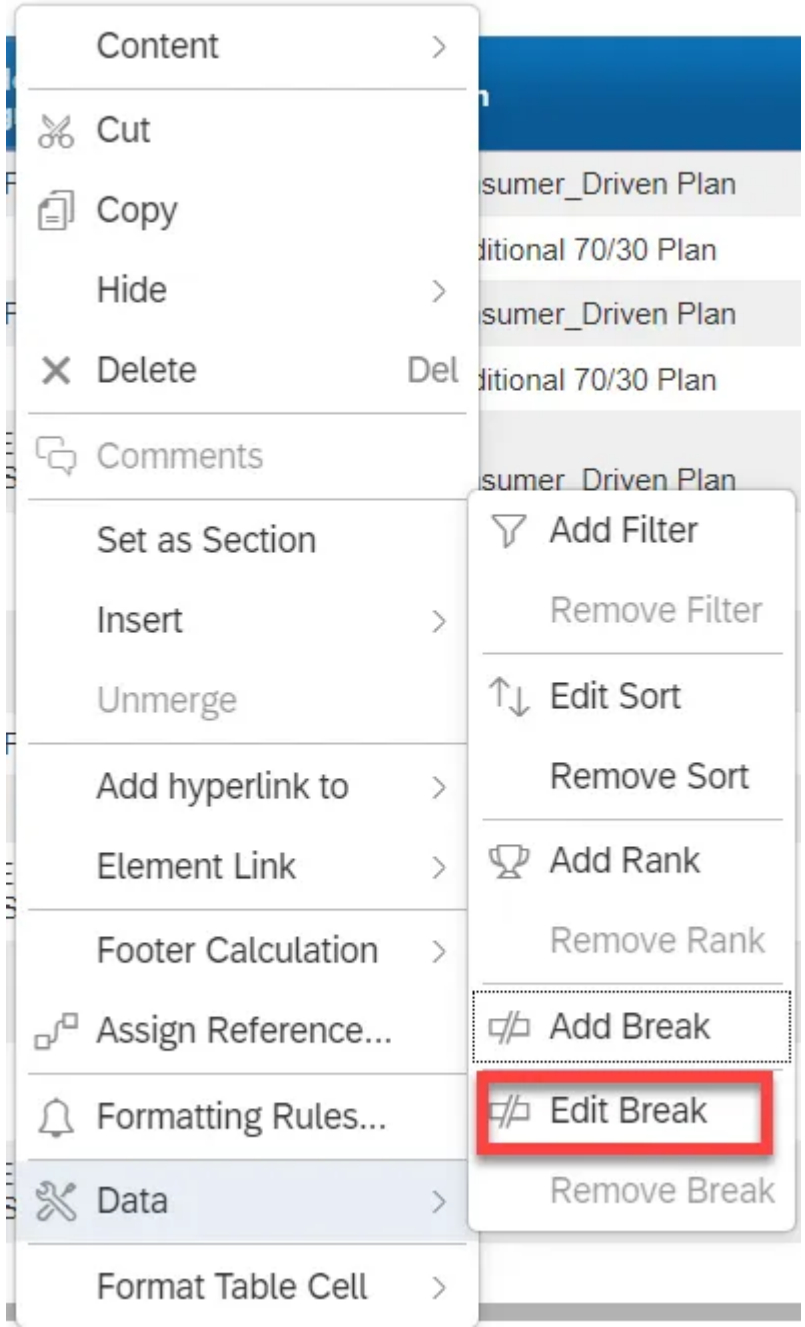
2. Click the Break "Data".

Image


Empl
Subg
FT EF
FT EF
N/A E
MiscS
FT EF
N/A E
MiscS
N/A E
MiscS
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

3. Click "Edit Break".

Image


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
Add Break
Edit Break
Remove Break
sumer_Driven Plan
ditional 70/30 Plan
sumer_Driven Plan
ditional 70/30 Plan
sumer_Driven Plan

4. The repeated values are now reported in all columns and can be exported to Excel in the same format.

Image



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

Benefit Area	Plan	Description
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

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