Benefit Enrollment by Plan - R083493

Overview

This report provides a list of employees enrolled in a specific benefit plan ID. This work instruction will show how to run the Benefit Enrollment by Plan report.

NIS Policies

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website: www.das.state.ne.us.

Navigation

Click Roles, HR_PR.
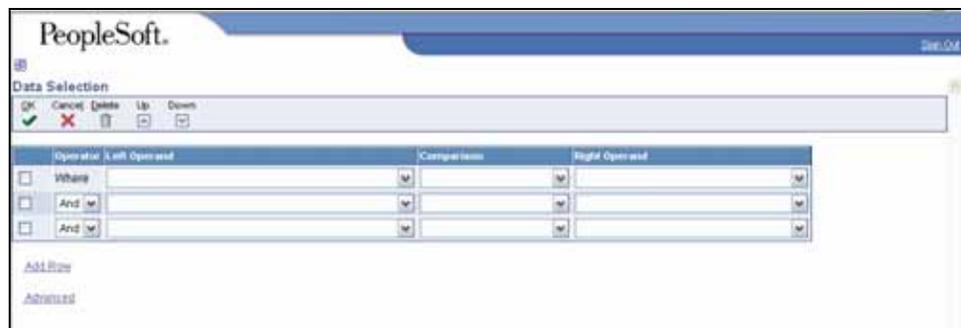(Citrix users – right click on the menu, choose Apply Roles, choose HR_PR.)

Human Resources and Payroll – Agencies > Inquiries and Reports > HR/Payroll Reports > Benefits Reports > Benefit Enrollment by Plan

Steps

Start this instruction from the Version Prompting window.

1. Choose **Data Selection**, click **Submit**. The Data Selection window appears.

2. Insert appropriate data selection for the report.

   This report will bring up all current and previous enrollments in the plan ID's. To exclude the previous enrollment history in the plan ID so that you only see current enrollment information, complete the following information:

- Left Operand = Status – Ending Enrollment (F08330)

- Comparison = 'is equal to'

- Right Operand = 'null'

✏️ To run it on a specific plan ID, enter the following information:

- Left Operand = PLAN ID (F08320)

- Comparison = 'is equal to'

- Right Operand = enter a single plan ID, a range of plan ID's or a list of plan ID's. The visual assist can be used to search for the plans you want to run the report on.

    ✏️ To change the information in the Right Operand field, click the drop-down arrow in the corresponding row and choose Literal. Enter the appropriate information, and click **OK** to return to the Data Selection window.

✏️ To run this report on specific plan options (i.e. single coverage, family coverage, etc), enter the following information:

- Left Operand = Plan Additional Option (F08330)

- Comparison = 'is equal to'

- Right Operand = enter the plan options you want to run the report on (user visual assist, if needed).

An example of the Data Selection:

3. Click **OK**. The Printer Selection window will appear.

✐ This report automatically runs in PDF format. To run a spreadsheet version of the report, click on the Document Setup tab and put a checkmark in the CSV box.

4. Click **OK** to run the report and return to the menu.

✐ View the Report via Submit Job or View Job Status. For step-by-step instructions, please refer to the Working with Submitted Reports work instructions. Choose the Job Details to view (R083493 _…) once the Description is "Done".


✐   **The information contained on this report can also be found using the Employee by Benefit Plan Inquiry under the Reports and Inquiries menu.**

Employee by Benefit Plan Inquiry

Navigation: Human Resources and Payroll - Agencies > Inquires & Reports > HR/Payroll Inquiries > Benefits Inquiries > Employee by Benefit Plan Inquiry

Start this instruction from the Employee by Benefit Plan Inquiry - work with Employees by Benefit Plan window.
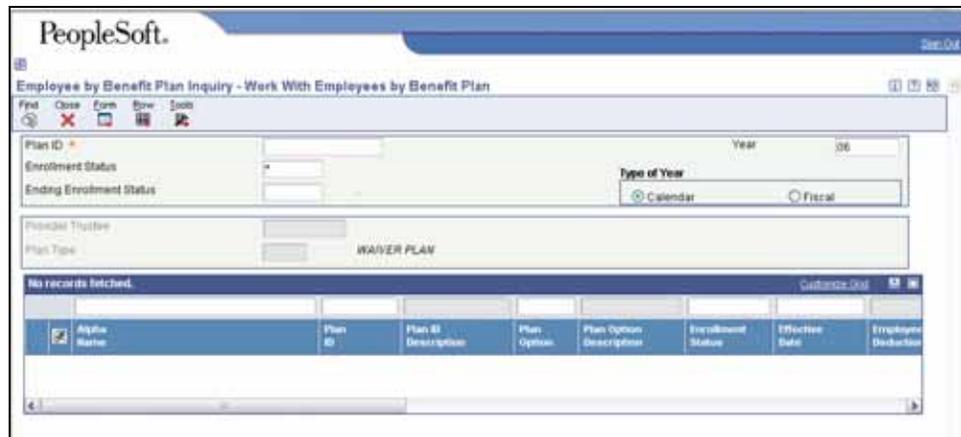
1. Enter the **Plan ID** in the Plan ID field in the Header. (Use the Visual Assist, if needed.)

2. Click **Find**.

3. All the employees enrolled in that Plan will appear.

    Narrow the search by Plan Option.

4. Click **Close**.