

Dependents/Beneficiaries Missing Tax ID, Gender or DOB - R5808773

Overview

This report shows any dependents or beneficiaries that do not have a social security number, gender or date-of-birth listed in NIS. Dependents or beneficiaries missing this information may be rejected from the vendor file, which causes problems for State Benefits and for the insurance vendors.

 This report cannot be run by Home Business Unit.

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

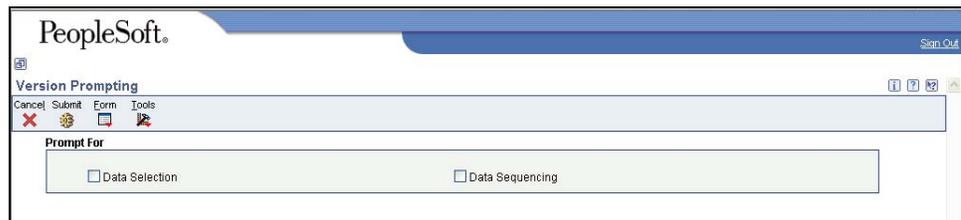
Click Roles, HR_PR.

(Citrix users – right click on the menu, choose View by Role, choose HR_PR.)

Human Resources and Payroll - Agencies > Inquiries and Reports > HR/Payroll Reports > Benefits Reports > Dependents & Beneficiaries > Dependents/Beneficiaries Missing Tax ID, Gender or DOB

Steps

Start this instruction from the Version Prompting window.



1. Choose **Data Selection** and **Data Sequencing**.
2. Click **Submit**. The Data Selection window appears.

Operator	Left Operand	Comparison	Right Operand
Where	Business Unit (F060116) (MCU) [BC]	is equal to	Business Unit (F060116) (MCU) [BC]
And			
And			

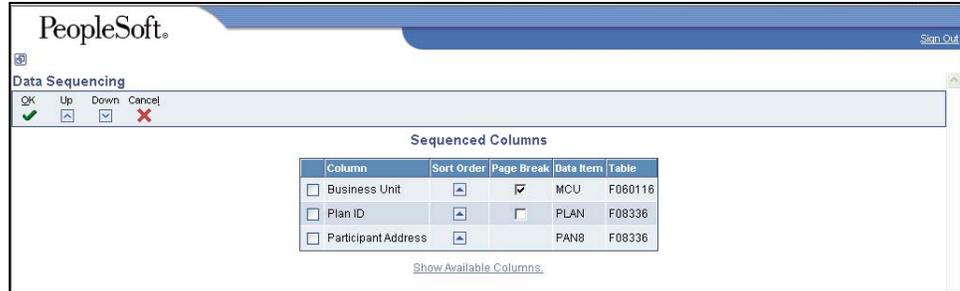
3. The first line of the data selection is already completed. It can be left as is to run on your full range of security business units.

-  The Data Selection field titled “Business Unit (F060116)” is the security business unit not the home business unit.
-  To run the report on specific security business units, click the Right Operand field and choose Literal. Enter a single value, a range of values, or a list of values by choosing the appropriate tab. Enter the appropriate security business unit(s) and click OK to return to the Data Selection window.

-  Add additional lines in the Data Selection if desired. One possibility is to choose "Dependent/Beneficiary" from the Left Operand drop down menu, choose “is equal to” from the Comparison drop down menu, and choose “literal” from the Right Operand drop down menu. On the Single Value tab, enter "D" to run the report on dependents only. Click **OK**. The report will not show beneficiaries with missing information. The report can then be run separately for beneficiaries if desired.

Operator	Left Operand	Comparison	Right Operand
Where	Business Unit (F060116) (MCU) [BC]	is equal to	Business Unit (F060116) (MCU) [BC]
And	Dependent/Beneficiary (F06336) (DBEN) [BC]	is equal to	"D"
And			

4. Click **OK**. The Data Sequencing window appears.



5. Click **Show Available Columns**.



6. Review Available Columns to determine what fields to use for sorting the report.

7. To add a column to the Sequenced Columns, choose the row in Available Columns and click **Add**. Use the arrows under the Sort Order column to move the fields into whichever order to sort the data by.

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



9. Click the Document Setup tab. The view PDF option is already checked and grayed out. This report automatically generates a PDF document. You can also checkmark the CSV field to generate the report in a spreadsheet format if you wish.

10. Click **OK**. You will 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 (R5808773...) once the Description is "Done".
-  Please see an example of the report at the end of this work instruction.
-  This report does NOT show which employee the dependent/beneficiary is attached to. You will have to run a separate report, Dependents/Beneficiaries by Plan ID and Employee, and search the report by dependent/beneficiary ID number to determine whom they are attached to.

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STATE OF NEBRASKA
Dependents/Beneficiaries missing Tax ID, Gender or DOB

R5808773
NIS0001
Security Business Unit S201003000

Plan ID LIF0031M BASIC LIFE MNTHLY

<u>Dep/Ben Number</u>	<u>Name</u>	<u>Tax ID</u>	<u>Gender</u>	<u>Date of Birth</u>
3153556	SMITH, JOHN	UNAVAILABLE	M	

Plan ID LIF0033M OPTIONAL LIFE INSURANCE

<u>Dep/Ben Number</u>	<u>Name</u>	<u>Tax ID</u>	<u>Gender</u>	<u>Date of Birth</u>
3153556	SMITH, JOHN	UNAVAILABLE	M	

Plan ID LIF0036M MNTHLY ACC DEATH & DISMEMBER

<u>Dep/Ben Number</u>	<u>Name</u>	<u>Tax ID</u>	<u>Gender</u>	<u>Date of Birth</u>
3153556	SMITH, JOHN	UNAVAILABLE	M	