

B0011 Participating Employees With Benefit Plans

Purpose

The purpose of this Report Description is to explain the Participating Employees with Benefit Plans report and how to generate it in the system.

Report Description

This report shows all employees who are participating in specified benefit plans as of the Selected Date and is associated with Two Reporting Views.

The Summary Reporting tab provides the summary of the Number of Employees by Plan and Plan Option.

Report Location

BN: Benefits

Report Uses

Agency can use the report during open enrollment as a reminder to reenroll for plans that require mandatory reenrollments, to recomplete wellness credits for premium reductions, and continued participation in the next plan year. Allows core users to see the coverage amounts without looking up individual participants benefit options within PA20 IT168.

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
- As of Day (Single Value, Mandatory)
 - This mandatory prompt must be completed first before any other prompt is selected.
- 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)
- Plan Option(s) (Optional)
- Employee(s) PersNo. – (Optional)

Image

Prompts

Search

Organizational Unit

Please select at least one value

☒ As of Day (Single Value, Mandatory) (1)

9/5/2024

Plan Type(s) (Mandatory)

Please select at least one value

Plan(s) (Optional)

(No value)

Plan Option(s) (Optional)

(No value)

Employee(s) PersNo. - (Optional)

(All values)

As of Day (Single Value, Mandatory)

Enter a date manually

Selected value(s)

9/5/2024

Mandatory (3)

Reset All

Run

Cancel

Initial Layout

This report displays all employees who are participating in specified benefit plans.

Image

B0011 Participating Emplo... Summary Report Info						
B0011: Participating Employees with Benefit Plans as of 10/25/2023						
Execution Date :						
Personnel Area	Employee Name	Employee PersNo.	Plan	Plan Option	Insurance Coverage	Valid From
Transportation	Test, User 1	01010101	NC Flex Core AD&D Insurance	\$10,000 EE Only	10,000.00	4/1/23
			Traditional 70/30 Plan	Traditional 70/30 Non Smoker		4/1/23
	Test, User 2	02020202	Enhanced 80/20 Plan	Enhanced 80/20 Non Smoker		1/1/23
			NC Flex Core AD&D Insurance	\$10,000 EE Only	10,000.00	1/1/23
	Test, User 3	03030303	Enhanced 80/20 Plan	Enhanced 80/20 Non Smoker		1/1/23
			NC Flex Core AD&D Insurance	\$10,000 EE Only	10,000.00	1/1/23
	Test, User 4	04040404	Enhanced 80/20 Plan	Enhanced 80/20 Non Smoker		1/1/23
			NC Flex Core AD&D Insurance	\$10,000 EE Only	10,000.00	1/1/23
	Test, User 5	05050505	Enhanced 80/20 Plan	Enhanced 80/20 Non Smoker		1/1/23
			NC Flex Core AD&D Insurance	\$10,000 EE Only	10,000.00	1/1/23

Summary: This Reporting tab summarizes the Number of Employees by Plan and Plan Option.

Image

SummaryExecution Date :

Plan	Plan Option	Insurance Coverage	Number of Employees
Enhanced 80/20 Plan	Direct Bill Employee Full Cost		2
Enhanced 80/20 Plan	Direct Bill Full Employer Cost		32
Enhanced 80/20 Plan	Enhanced 80/20 No Credits		62
Enhanced 80/20 Plan	Enhanced 80/20 Non Smoker		4,856
Enhanced 80/20 Plan	Enhanced 80/20 Non Smoker		1
Enhanced 80/20 Plan	ENHC ESRD EE Only		1

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

Image

[Report Info](#)

Execution Date : 

Prompt Input

Organizational Unit	Transportation
As of Day	10/25/2023
Plan Type(s)	Core AD&D;Medical
Plan(s)	
Plan Option(s)	
Employee(s) PersNo.	

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:

- Changed On
- Dependent Coverage
- Employee
- Employee Group
- Employee Subgroup
- Employee's Name

- Employment Status
- Insurance Coverage Amount
- Job
- Organizational Unit
- Original Hire Date
- Personnel Area
- Personnel Sub Area
- Plan
- Plan Option
- Position
- Valid From
- Valid To

Measures:

- Number of Employees

Variables:

- Employee PersNo.
- Prompt Response As of Day
- Prompt Response Employee PerNo
- Prompt Response Organizational Unit
- Prompt Response Plan
- Prompt Response Plan Option
- Prompt Response Plan Type
- Insurance Coverage

Image

▼ Dimensions

- >  **Changed On**
- >  **Dependent Coverage**
- >  Employee
- >  **Employee Group**
- >  **Employee Subgroup**
- >  Employee's Name
- >  **Employment Status**
- >  Insurance Coverage Amount
- >  **Job**
- >  **Organizational Unit**
- >  **Original Hire Date**
- >  Personnel Area
- >  **Personnel Subarea**

- >  Plan
- >  Plan Option
- >  **Position**
- >  Valid From
- >  **Valid To**

▼ Measures

-  Number of Employees

▼ Variables

-  Employee PersNo.
-  Prompt Response As of Day
-  Prompt Response Employee PersNo
-  Prompt Response Organizational ...
-  Prompt Response Plan
-  Prompt Response Plan Option
-  Prompt Response Plan Type
-  Insurance Coverage

Special Report Considerations/Features

Changing the sort for the desired column.

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

Step 1. **Left click** to select the desired column.

Step 2. **Right click** on the desired column.

Step 3. Select **Data**.

Step 4. Select **Add Sort** or **Edit Sort**.

Image

SAP B0011: Participating Employees with B... 🔍 🔔 ? B

File Query Insert 🔍 📋 Design ▼

B0011 Participating Emplo... ▼ Summary ▼ Report Info ▼ +

✎ /x⁺ ✕ ✓ =[Employee's Name]

B0011: Participating Employees with Benefit Plans as of 10/1/2023

Personnel Area	Employee Name	Plan Option	Insurance Coverage	Valid From
Transportation	User, Test 1	Traditional 70/30 Non Smoker		4/1/23
	User, Test 2	Enhanced 80/20 Non Smoker		1/1/23
	User, Test 3	Enhanced 80/20 Non Smoker		1/1/23
	User, Test 4	Enhanced 80/20 Non Smoker		1/1/23
	User, Test 5	Enhanced 80/20 Non Smoker		1/1/23
	User, Test 6	Traditional 70/30 Non Smoker		1/1/23
	User, Test 7	Enhanced 80/20 Non Smoker		1/1/23
	User, Test 8	Enhanced 80/20 Non Smoker		1/1/23
	User, Test 9	Enhanced 80/20 Non Smoker		1/1/23
	User, Test 10	Traditional 70/30 Non Smoker		1/1/23
	User, Test 11	Traditional 70/30 Non Smoker		1/1/23

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. The Sort menu will display on the right-side panel.

Step 6. **Hover the cursor** in the top right corner of the desired category.

Step 7. Click the **X** to remove the sort.

Image

The screenshot shows the SAP B0011 report interface. The title bar indicates 'B0011: Participating Employees with B...'. The main content area displays a table with the following data:

Personnel Area	Employee Name	Employee PersNo.	Plan	Plan Option
Transportation	User, Test 1	01111111	Traditional 70/30 Plan	Traditional Smoker
	User, Test 2	02222222	Enhanced 80/20 Plan	Enhanced Smoker
	User, Test 3	03333333	Enhanced 80/20 Plan	Enhanced Smoker
	User, Test 4	04444444	Enhanced 80/20 Plan	Enhanced Smoker
	User, Test 5	05555555	Enhanced 80/20 Plan	Enhanced Smoker
	User, Test 6	12345678	Traditional 70/30 Plan	Traditional Smoker
	User, Test 7	87654321	Enhanced 80/20 Plan	Enhanced Smoker

On the right side, a sort menu is open, showing the following categories and their sort orders:

- Personnel Area: Sort ascending
- Employee's Name: Sort ascending
- Plan: Sort ascending
- Employee PersNo.: Sort ascending

A mouse cursor is hovering over the 'X' icon in the top right corner of the 'Personnel Area' category, indicating the action to remove the sort.

Changing the breaks in the Report while exporting the data to Excel.

By default, breaks are applied in the report on Personnel Area, Employee Name and Employee PersNo. to avoid repeated values in the Columns.

If the repeated values of the above columns in Excel are needed, then remove breaks in the report before exporting the data to Excel. To remove the breaks:

Step 1. **Left click** to select the desired column.

Step 2. **Right click** in the desired column.

Image

SAP B0011: Participating Employees with B... z

File Query Insert

B0011 Participating Emplo... Summary Report Info

=[Personnel Area]

B0011: Participating Employees with Benefit Plans as of

Personnel Area	Employee Name	Employee PersNo.	Plan
Psychology	User, Test 1	11111111	Enhanced 80/20 Plan
	User, Test 2	22222222	Enhanced 80/20 Plan
	User, Test 3	33333333	Enhanced 80/20 Plan
	User, Test 4	44444444	Enhanced 80/20 Plan
State Controller	User, Test 5	55555555	High Deductible Health Plan

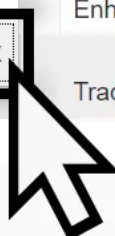
Dimensions

- > Changed On
- > Dependent Coverage
- > Employee
- > Employee Group
- > Employee Subgroup
- > Employee's Name
- > Employment Status
- > Insurance Coverage Amount
- > Job
- > Organizational Unit

Step 3. Select **Data** from the right click menu.

Step 4. Select **Remove Break** from the right click menu.

Image



Step 5. Repeated values in all columns are visible and can be exported to Excel in this format.

Image

B0011: Participating Employees with Benefit Plans as of

Personnel Area	Employee Name	Employee PersNo.	Plan
Transportation	User, Test 1	11111111	Enhanced 80/20 Plan
Transportation	User, Test 2	22222222	Enhanced 80/20 Plan
Transportation	User, Test 3	33333333	Enhanced 80/20 Plan
Transportation	User, Test 4	44444444	Enhanced 80/20 Plan
Transportation	User, Test 5	55555555	High Deductible Health Plan

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