

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
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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

Prompts

Search

Organizational Unit

Please select at least one value

CalMonth/Year (Single Value/Interval, Mandatory)

Please select at least one value

Plan Type(s) (Mandatory)

Please select at least one value

Plan(s) (Optional)

(No value)

Employee(s) PersNo. - (Optional)

(All values)

0

Organizational Unit

Search

To see the content of the list, click the refresh values button.

Mandatory (3)Reset All

RunCancel

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 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

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) DP;403(b) DP;403(b) DP;403(b) DP;403(b) DP;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
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- > ✿ 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

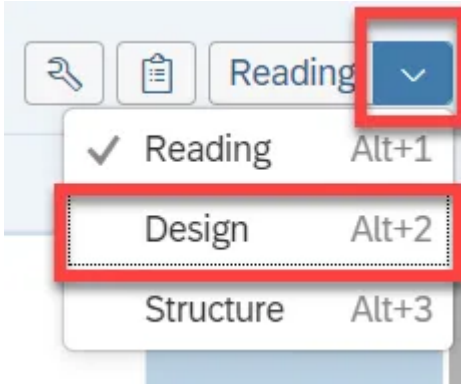
- ✿ Prompt Response Cal Mth/Yr
- ✿ Prompt Response Employee PersNo
- ✿ Prompt Response Organizational Unit
- ✿ Prompt Response Plan
- ✿ Prompt Response Plan Type
- 📊 Number of Employees

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



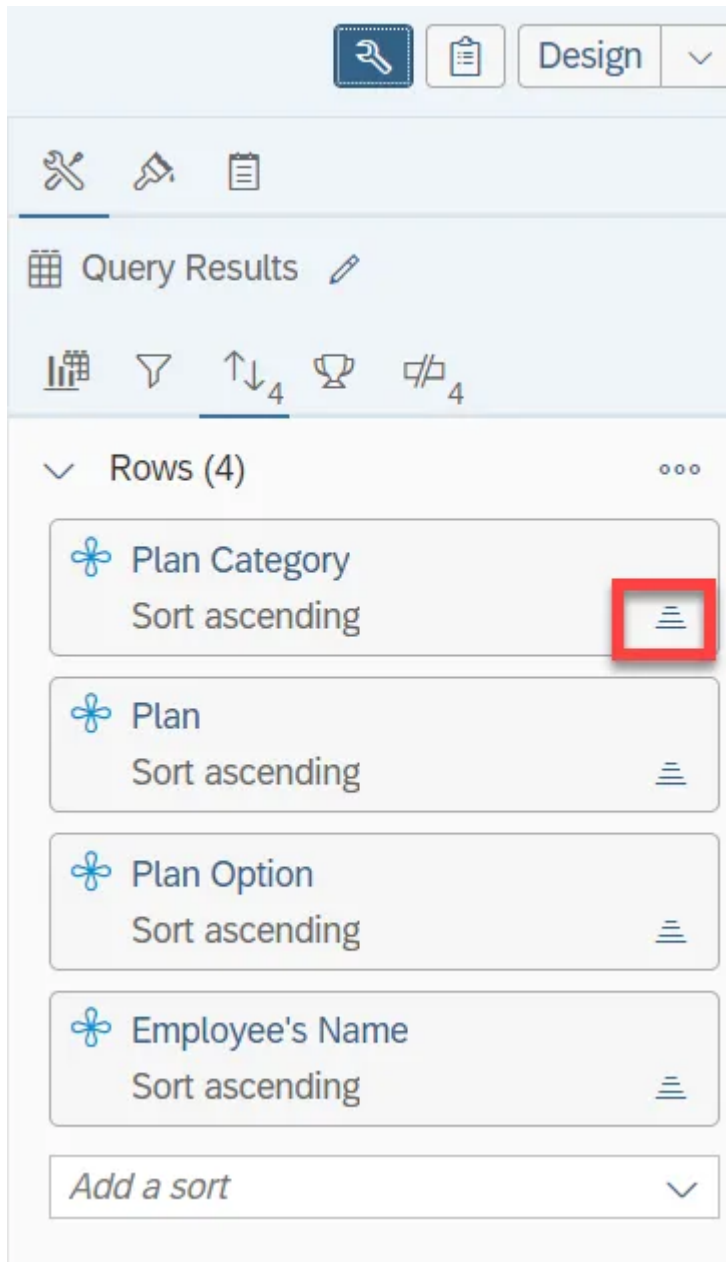
Step 2 - Click on the tool to show the data/format panel.

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

A screenshot of the 'Table' menu in Microsoft Word. The menu is open, showing various options. The 'Data' option, which includes a small icon of a table with a pencil, is highlighted with a red rectangular box. Other visible options include 'Content', 'Cut', 'Copy', 'Hide', 'Delete', 'Comments', 'Set as Section', 'Insert', 'Unmerge', 'Add hyperlink to', 'Element Link', 'Footer Calculation', 'Assign Reference...', 'Formatting Rules...', and 'Format Table Cell'.

Content >

 Cut Copy

Hide >

✕ Delete Del

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

The screenshot shows a right-click context menu over a table cell containing the text "Enhanced 80/20 N Smoker". The menu includes options like Cut, Copy, Hide, Delete, Comments, Set as Section, Insert, Unmerge, Add hyperlink to, Element Link, Footer Calculation, Assign Reference..., Formatting Rules..., Data, and Format Table Cell. A secondary submenu is open from the "Data" option, displaying "Add Filter", "Remove Filter", "Edit Sort", "Remove Sort", "Add Rank", "Remove Rank", "Edit Break", and "Remove Break". The "Remove Break" option at the bottom of this submenu is highlighted with a red rectangular border.

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

Image



The image shows a screenshot of a table with a blue header row and several data rows. The header row is labeled 'Plan Category'. The data rows all contain the text 'Health plan'. The second data row is highlighted with a blue border.

Plan Category
Health plan
Health plan
Health plan
Health plan
Health plan
Health plan
Health plan

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