

HRIS – Human Resources Information Solution

# RESOURCE GUIDE:

## Agency Benefit View

### *Manage Benefit Plan Reporting*





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## Introduction

Welcome to the Agency Benefit Liaison Training lessons. Benefits Services Division is providing this guide to help manage the health plans for all their employees and dependents by accessing benefit reports in HRIS.



# PLAN PARTICIPANT REPORT (BN230)

Run the Plan Participant report to print a listing of all benefit plan participants. The report sorts by plan type, plan, and plan participant.

	HRIS Field	R/O	Step/Action	Expected Results	Notes/Additional Information
1	<b>Search Box</b>	R	Type <b>BN230</b> in the Search Box. Press Enter on keyboard	The Plan Participant (BN230) form will appear	
2	<b>Job Name</b>	R	Enter unique Job Name		10 characters max, no spaces, no special characters
3	<b>Job Description</b>	R	Enter Job Description		30 characters max



	HRIS Field	R/O	Step/Action	Expected Results	Notes/ Additional Information
4	<b>Enter Company</b>	R	Select Company 1		
5	<b>Flex Plan</b>	O	Select Flex Plan if wanting to see results for Medical or Dependent Care reimbursements accounts		
6	<b>Dates</b>	R	Enter Start and End dates		
7	<b>Process Level</b>	O	Select a Process Level to list only employees associated with that Process Level.		
8	<b>Department</b>	O	Select a Department to list only employees associated with that department .		
9	<b>Location</b>	R	Enter Payroll		This is default value
10	<b>Employee Group</b>	O	Leave blank		
11	<b>Check History</b>	O	Select No		



Menu bn230 Go

BN230 - Plan Participant Report

Special Actions ▾ + Add Change Delete ◀ Previous Inquire ▶ Next Quick Submit Work File Distribution Inquire ▾ Related Forms ▾

Submit
Reports
Job Sched
Print Mgr

Job Name

Job Description

User Name

Data Area/ID **PROD**

Parameters

Main Report

Benefit Type

Health <input checked="" type="checkbox" value="X"/>	Dental <input checked="" type="checkbox" value="X"/>	Disability <input type="checkbox"/>
Employee Life <input checked="" type="checkbox" value="X"/>	Dependent Life <input type="checkbox"/>	Defined Contribution <input type="checkbox"/>
Defined Benefit <input type="checkbox"/>	Spending Account <input type="checkbox"/>	Vacation Buy or Sell <input type="checkbox"/>
Savings Bond <input type="checkbox"/>	Stock Purchase <input type="checkbox"/>	

Plan

Report Option  Employee Benefits

Plan Sort  Employee

Number Option  Employee Nbr

Employee Sequence

Currency

Conversion Date

[ 22:21:58 - BN230 ] Ready

#	HRIS Field	R/O	Step/Action	Expected Results	Notes/Additional Information
1	<b>Report Tab</b>	R	Select the Report tab on BN230		
2	<b>Benefit Type</b>	R	Select the Benefit Types to define the what will appear in report		
3	<b>Report Option</b>	R	Select Employee Benefits		
4	<b>Plan Sort</b>	R	Select Employee or Process Level dependent on how the report will be sorted		
5	<b>Number Option</b>	R	Select Employee Nbr (EIN) or Social Security to denote how the report will be sorted		
6	<b>Employee Sequence</b>	O	Leave blank		



7	<b>Currency</b>	O	Leave blank		
6	<b>Conversion Date</b>		Leave blank		
7	<b>Submit and Review report</b>	R	Click Submit		See How to Submit and Review On-demand Report training guide on how to submit and review report results.

### Example of Plan Participant Report

#### Plan Participant Report

BN230 Date 01/26/20 Time 22:32	Company 1 STATE OF ARIZONA Plan Participant Report - Employee Beginning Date 08/23/19	Page 1						
Benefit Type Health	Plan ATEs AETNA EPO	Plan Currency USD						
Employee Name	Start Date	Stop Date	Opt Nbr	Coverage	Employee Contribution	Company Contribution	Match Up To	Total Contribution
			2	EE + 1 SPOUSE	1,617.92 *	14,292.65 *		15,910.57 *
			1	EMPLOYEE	543.84 *	6,956.60 *		7,500.44 *
<b>Total Plan</b>	ATEs AETNA EPO	2	Employees		2,161.76	21,249.25		23,411.01



# ONE PAGE BENEFIT STATEMENT (BN242)

Run the One Page Benefit Statement to view a report of benefit enrollment for employees within agency. This report also displays benefit premium.

	HRIS Field	R/O	Step/Action	Expected Results	Notes/ Additional Information
1	<b>Search Box</b>	R	Type <b>BN242</b> in the Search Box. Press Enter on keyboard	The One Page Benefit Statement (BN242) form will appear	
2	<b>Job Name</b>	R	Enter unique Job Name		10 characters max, no spaces, no special characters
3	<b>Job Description</b>	R	Enter Job Description		30 characters max





	HRIS Field	R/O	Step/Action	Expected Results	Notes/ Additional Information
4	<b>Enter Company</b>	R	Select Company 1		
5	<b>As of Date</b>	O	Select Flex Plan if wanting to see results for Medical or Dependent Care reimbursements accounts		
6	<b>Process Level</b>	O	Select a Process Level to list only employees associated with that Process Level.		
7	<b>Department</b>	O	Select a Department to list only employees associated with that department .		
8	<b>Location</b>	O	Enter Payroll		This is default value
9	<b>Employee Group</b>	O	Leave blank		
10	<b>Employee</b>	O	Select a Employee EIN to list only a specific employee record .		
11	<b>Exclude or Include</b>	O	Select employee status codes if you want to filter specific status codes. To view all status codes, leave field blank.		
12	<b>Employee Sequence</b>	R	Select Numeric to display employee in sequence of EIN		
13	<b>Social Security Number</b>	R	Select Yes or No to display whether social security number should be displayed on report.		
14	<b>Submit and Review report</b>	R	Click Submit		See How to Submit and Review On-demand Report training guide on how to submit and review report results.

\*\*\* all other tabs (e.g. income protection, retirement, etc. ) should be ignored. NOT USED.



# Example of One Page Benefits Statement

## One Page Benefits Statement

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2015 Benefits Statement

[Redacted] [Redacted]  
 Birthdate [Redacted]  
 Hire Date [Redacted]  
 TUCSON AZ 85745

The following summary statement has been prepared for you to show each benefit cost. Actual values were used when possible while other amounts were estimated.

MEDICAL AND DENTAL BENEFITS:	COMPANY COST	YOUR COST
-----	-----	-----

INCOME PROTECTION BENEFITS:  
 -----

RETIREMENT BENEFITS:  
 -----

ADDITIONAL BENEFITS:  
 -----

VALUE OF YOUR BENEFITS:	COMPANY COST	YOUR COST
-----	-----	-----
Total Estimated Annual Benefit Cost	0.00	0.00
Total Compensation Including Salary And Estimated Benefits	7,800.00	

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# BENEFICIARY LISTING (BN247)

Run the beneficiary listing to determine employee beneficiaries for employee life plans.

[ 22:58:39 - BN247 ] Job has been submitted.

	HRIS Field	R/O	Step/Action	Expected Results	Notes/ Additional Information
1	<b>White Search Box</b>	R	Type <b>BN247</b> in the Search Box. Press Enter on keyboard	The Beneficiary Listing (BN247) form will appear	
2	<b>Job Name</b>	R	Enter unique Job Name		10 characters max, no spaces, no special characters
3	<b>Job Description</b>	R	Enter Job Description		30 characters max
4	<b>Company</b>	R	Select Company 1		
5	<b>Benefit Type</b>	R	Select the EL under Benefit Type to display beneficiaries for employee life plans		
6	<b>Plan</b>	O	Leave blank		



7	<b>Employee Sequence</b>	R	Select Numeric to display employee in sequence of EIN or select Alpha to display employee in sequence of last name.		
8	<b>Detail</b>	R	Select Yes to display dependent address and social security number. Select No to leave address and social security number blank.		
9	<b>Submit and Review report</b>	R	Click Submit		See How to Submit and Review On-demand Report training guide on how to submit and review report results.

### Example of Beneficiary Listing Report

#### Beneficiary Listing

BN247 Date 01/26/20 Company 1 STATE OF ARIZONA Page 2  
 Time 23:00 Beneficiary Report

Benefit Type Employee Life/AD&D  
 Plan HELS THE HARTFORD SUPPLEMENTAL LIFE  
 Start/Stop Date 10/01/09

Employee [REDACTED]

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Primary Beneficiaries		Percent/Amount	Date	Time	User ID
[REDACTED]	Primary	25.00	09/14/10		[REDACTED]
[REDACTED]	Primary	25.00	09/14/10		[REDACTED]
[REDACTED]	Primary	25.00	01/12/15	08:43:09	[REDACTED]
[REDACTED]	Primary	25.00	09/14/10		[REDACTED]

Employee [REDACTED]

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Primary Beneficiaries		Percent/Amount	Date	Time	User ID
[REDACTED]	Primary	25.00	02/04/16	09:10:50	[REDACTED]
[REDACTED]	Primary	25.00	02/04/16	09:10:03	[REDACTED]
[REDACTED]	Primary	25.00	02/04/16	09:11:40	[REDACTED]
[REDACTED]	Primary	25.00	02/04/16	09:09:18	[REDACTED]