

- ▶ **STEP 1:** Create a Custom Report in Employee Navigator
- ▶ Login to your **Employee Navigator** Portal.
- ▶ Once logged in, select the drop down on **"Pick a company"** and select the company you want to audit.

Pick a Company

-- Select a company -- Active?

Add a company +

Recently Viewed Companies

Previously visited companies will appear here.

- ▶ Once you are in the company's profile, select **"Reports"** on the top tool bar and under **Ad Hoc Reports**, select **"Row-Based Report"**

Home Employees **Reports**

Reports

Ad Hoc Reports

- Row-Based Report**
- Column-Based Report
- Payroll Deductions Report
- Voluntary and Group Life and AD&D Report

- ▶ Once you are in the custom report, Row-Based Report. We are going to start by selecting all the necessary fields under “**Employee**”, select the following “**Profile & Personal**” fields checked below:

Fields

Profile & Personal

Select All

- Social Security Number
- First Name
- Middle Name
- Last Name
- Suffix
- Preferred Name
- Display Name
- Full Name
- Sex
- Gender Identity
- DOB
- Age
- Marital Status
- Date of Marriage
- U.S. Citizen
- Visa Status
- Veteran Status
- Military Reserve Status
- Race/Ethnicity
- Office ▼
- Class ▼
- Payroll Group
- Division ▼
- Department ▼
- Business Unit ▼
- Benefit Work State
- Payroll Work State
- Cost Center
- Is Collectively Bargained
- Job Title
- Manager
- Demographic Change Effective Date

- ▶ Continue to the next set of fields “**Employment**” and select the fields checked below:

Employment

- Select All
- EEO Job Category
 - Employee ID
 - Company Name
 - Payroll ID
 - Primary Payroll Identifier
 - Statutory Class
 - Time Clock ID
 - Employment Status ▼
 - Hire Date
 - Affiliate Hire Date
 - Original Hire Date
 - Hired On
 - Retired
 - Retired Date
 - Termination Date
 - Termination Reason
 - Terminated On
 - Annual Review Date
 - Decision Maker
 - Is Exempt
 - Is Full Time
 - Future Termination Date
 - Future Term Date Entered On
 - Primary Contact
 - Executive Contact
 - Leave Status
 - Leave Start Date
 - Leave End Date

- ▶ Continue to the next set of fields “**Address & Contacts**” and then “**Medical**” and select the fields checked below:

Address & Contact

- Select All
- Address Type
 - Address 1
 - Address 2
 - Address 3
 - City
 - State ▼
 - County
 - Zip
 - Country
 - Phone (Home)
 - Phone (Personal Cell)
 - Phone (Work/Office Number)
 - Phone (Business Cell)
 - Primary Email
 - Work Email
 - Personal Email
 - Primary Email Type

Medical

- Select All
- Tobacco User
 - Tobacco Date
 - On Wellness Program
 - Disabled
 - Medicare Eligible
 - Medicare Eligible Reason
 - Medicare Part A Effective Date
 - Medicare Part B Effective Date
 - Medicare Part D Effective Date
 - Height (feet)
 - Height (inches)
 - Weight
 - Covid Vaccine Status

- ▶ Continue to the next set of fields “**Compensation**” and then “**Account Information**” and select the fields checked below:

Compensation ^

Select All

- Pay Basis
- Salary Effective Date
- Annual Base Salary
- Hourly Rate
- Hours per Week
- Annual Benefit Salary
- Annual Benefit Salary Effective Date
- Reporting Year W2 Earnings
- Salary Review Date
- Next Salary Review Date
- Override Pay Frequency
- Ownership Percentage
- Employee Compensation Billable

Time Off ^

Select All

- Time Off Package

Account Information ^

Select All

- Username
- External Employee Id
- HR User
- Last Updated
- Enrollment Completed
- Dependent Sequence Number

- ▶ Once all your fields are selected, then go to the top right of the page and on under **"Options"**, under Dependents, select **"Include Dependents"** and under What to Exclude, select **"Declined Enrollments"**, **"Ended Enrollments"** and **"Not enrolled"**

Options

Review options and filters

Dependents:

Include dependents

What to exclude:

Declined enrollments

Ended enrollments

Not enrolled

- ▶ Now you have completed the fields for the Employee, you now need to select the fields for **"Enrollment"**. Go back to the top, change it from employee and to **"Enrollment"**

Row-Based Report ¹

Fields

Use "Fields" to add Employee and Enrollment columns to the report. Change column order with "Reorder Selected Fields." Use "Options" to refine the data (rows) returned in the report.

View

Fields

Save

Enrollment ▼

 Reorder

- ▶ The final step, is to select all fields under "**Enrollment**", select the following fields below:





Fields

Enrollment

 Reorder Selected Fields

Enrollment 

Select All

- Enrollment Type
- Plan 
- Carrier 
- Benefit 
- Coverage Level 
- Start Date
- Start Reason
- End Date
- End Reason
- Decline Reason
- Total Monthly EE Cost
- Total Monthly Plan Cost
- EE Monthly Cost
- ER Monthly Cost
- Plan Monthly Cost
- Benefit Amount
- Covered Payroll Amount
- EE Per Pay Cost
- ER Per Pay Cost
- Eligible Date
- Enrolled On
- Ended On
- Last Updated By
- Last Updated Date
- PCP Name
- PCP ID
- PCP Type
- Base ER Cost
- PCP Current Patient
- Defined Contribution
- Pending EE Cost
- Pending Benefit Amount
- Pending Covered Payroll Amount
- Plan Policy Number
- Carrier Tobacco Override

- ▶ You have now selected all the required fields for the Coverage Wizard audit report, and you now need to Save the Report. Save the template, name your report as **"Coverage Wizard Audit Report"**.

Click the green button **"Save Template"**

Row-Based Report ?

Fields

View

> Save

Report Template

Save the definition as a template. The data will be pulled on demand for the company you are working in when accessing the *View* page. Data are not stored in this template.

Template Name

Coverage Wizard Audit Report

Description

Save Template

- ▶ Once the report template is saved, select **“Reports”** tab again, go under **“Saved Report Templates”** and select **“Manage Saved Report Templates”**

Reports

Ad Hoc Reports

- Row-Based Report
- Column-Based Report
- Payroll Deductions Report
- Voluntary and Group Life and AD&D Report
- HSA Report
- Cafeteria Report
- Retirement Report

Saved Report Templates

[Manage Saved Report Templates](#)

Favorites

- ▶ Under **“Manage Saved Report Templates”**, select the **star** under favorites, you will have access to use that report for all clients under the Saved Report Template.

Saved Report Templates

[→ All Saved Templates](#)

My Templates

Shared With Me

Favorites

Manage Report Templates

[← Back To Reports Menu](#)

Use Saved Report Templates to quickly pull a report of data elements defined in the template. When accessing the View page in the template, data will be returned from **this** company. Data are not stored in Saved Report Templates.

All Saved Report Templates

Show hidden templates

Favorite	Report Template		
☆	Column-Based Report	⋮	⌵
★	Coverage Wizard Audit Report	⋮	⌵

- ▶ Now that you marked the Coverage Wizard audit report in your favorites, now you need to share the report so the rest of your team can access it.
- ▶ Select the 3 dots next to the report, select "**Share**" and select everyone from your team and they will have access to the report.

Manage Report Templates

[← Back To Reports Menu](#)

Use Saved Report Templates to quickly pull a report of data elements defined in the template. When accessing the View page in the template, data will be returned from **this** company. Data are not stored in Saved Report Templates.

All Saved Report Templates

 Show hidden templates

Favorite

Report Template



Column-Based Report



Coverage Wizard Audit Report



Share

Delete 

- ▶ **STEP 2:** Run and Save the CW audit report
- ▶ Login to your **Employee Navigator** Portal.
- ▶ Once logged in, select the drop down on **"Pick a company"** and select the company you want to audit.

Pick a Company

-- Select a company -- Active?

[Add a company +](#)

Recently Viewed Companies

Previously visited companies will appear here.

- ▶ Once you are in the company's profile, select **"Reports"** on the top toolbar. Under **"Saved Report Templates"**, under **"Favorites"** select **"Coverage Wizard Audit Reports"**

Ad Hoc Reports

Row-Based Report

Column-Based Report

Payroll Deductions Report

Voluntary and Group Life and AD&D Report

HSA Report

Cafeteria Report

Retirement Report

Saved Report Templates

Manage Saved Report Templates

Favorites

Coverage Wizard Audit Report

▶ Once you are in the report settings, under “**Custom Filters**” and “**Carrier**”, click **show** and only select one carrier you are going to audit.

Note: For Coverage Wizard, you can only run one carrier at a time. Do not check off more than one carrier when you run the report.

- Preferred Name
- Display Name
- Full Name
- Sex
- Gender Identity
- DOB
- Age
- Marital Status
- Date of Marriage
- U.S. Citizen
- Visa Status
- Veteran Status
- Military Reserve Status
- Race/Ethnicity
- Office ▼
- Class ▼
- Payroll Group
- Division ▼
- Department ▼
- Business Unit ▼
- Benefit Work State
- Payroll Work State
- Cost Center
- Is Collectively Bargained
- Job Title
- Manager
- Demographic Change Effective Date

Not enrolled

What type of enrollment:

Default ▼

Limit enrollments based on dates:

Put in the system between:

and

Covered between:

and

Custom Filters

- Class [show](#)
- Division [show](#)
- Department [show](#)
- Employment Status [show](#)
- State [show](#)
- Plan [show](#)
- Carrier** [hide](#)

- Anthem Blue Cross (Blue Cross of CA)
- Kaiser Permanente
- Principal Financial Group

Benefit [show](#)

Coverage Level [show](#)

Employment ▲

- Select All
- EEO Job Category
- Employee ID
- Company Name
- Payroll ID

- ▶ After you selected the carrier, you want to go back to the top of the page and select “**View**” and “**Download**”

Coverage Wizard Audit Report ⁱ[◀ Back to Reports Menu](#)

Fields

Found 9

 [▶ View](#)[Download](#)

Save

Employee SSN	Relationship	Social Security Number	First Name	Middle Name	Last Name	Sex	DOB	Marital Status	U.S. Citizen	Class	Division	Department	Job Title	Employee ID	Company Name	Payroll ID	Employment Status
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- ▶ Open the **AdHocReport** and “Save As” rename as you see fit or as an example: “XYZ Company- EE Nav report_ Carrier Name”
- ▶ Upload the .CSV file to Coverage Wizard and you are ready to run an audit!