Open Enrollment Reports in the Benefits Administration System

This guide provides an overview of the three Open Enrollment reports. Employers should run Open Enrollment reports regularly throughout Open Enrollment to see if all workers have completed their annual benefit plan elections, what they have elected, and after OE to see what benefits were elected.

Employers that offer the Concordia Retirement Savings Plan 403(b) will be sent email notifications of any changes to deductions directly through CPS (not on a paper form) or can request reports by emailing CRSP@ConcordiaPlans.org.

1. Log in to your Employer Portal via ConcordiaPlans.org. Helpful hint: For an optimal experience use Chrome, Safari or Internet Explore version 10 or higher.
2. Click on Quick Links within the tool bar.
3. Select Benefits Administration System. If this is your first time accessing the BAS, you’ll have to accept the terms and conditions. Helpful hint: Depending on your monitor size, you may need to zoom out of the web page to make it smaller and locate the accept button.
4. Once in the BAS, select Client Menu from the top tool bar.
5. Select Eligibility Reports.
6. Select Run New Report next to the plus sign icon at the top of the page.
7. Choose between three reporting options:
   - INTERMEDIATE – Open Enrollment – Activity Report. 
     > Contains ALL MEMBERS with a pending OPEN ENROLLMENT event and whether elections have been saved or not.
   - INTERMEDIATE – Open Enrollment – All Elections. 
     > Contains ALL MEMBER OPEN ENROLLMENT elections.
   - INTERMEDIATE – Open Enrollment – Change Report.

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Contains **ALL BENEFIT** plan changes which are happening during **OPEN ENROLLMENT**.

8. Once you select the appropriate report, click the **Schedule Report** button.
   
   **Helpful hints:** This report can take a few minutes to run. You’ll receive an email once it’s completed or you can refresh your BAS browser to see the status of the report. For security reasons, the BAS automatically logs out after 10 minutes of inactivity. The report will continue to run even if you’re logged off.

9. Ensure that the report’s status shows **Completed** on the history screen.

10. View the report by clicking on the **magnifying glass icon** next to the appropriate report.

11. You’ll have the option to **Open** or **Save** the report.

12. Once the report is open, filter and sort information as needed.

13. Refer to each of the specific Open Enrollment Report guides to see the fields contained in each report type.

14. The report will be available in your report list until you delete it from your records.

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**QUESTIONS?**

Contact Concordia Plans at 888-927-7526 or info@ConcordiaPlans.org.
Open Enrollment – Activity Report
in the Benefits Administration System

This report allows you to view all workers and their Open Enrollment status. It does not show specific elections, only if an action has been taken. We suggest running this report often during Open Enrollment to see if your workers have completed/confirmed their Open Enrollment event.

1. Log in to the Employer Portal via ConcordiaPlans.org.  
   Helpful hint: For an optimal Employer Portal experience use Chrome, Safari or Internet Explorer version 10 or higher. Some functionality is lost with other browsers.
2. Click on Quick Links within the tool bar.
3. Select Benefits Administration System.  
   Helpful hint: If this is your first time accessing the BAS, you'll have to accept the terms and conditions. Depending on your monitor size, you may need to zoom out of the web page to make it smaller and locate the accept button.
4. Once in the BAS, select Client Menu from the top tool bar.
5. Select Eligibility Reports.
6. Select Run New Report next to the plus sign icon at the top of the page.
7. Choose the report:
   • INTERMEDIATE — Open Enrollment — Activity Report
     > This contains all events based on an event status for each of your workers.
8. Once you select the appropriate report, click the Schedule Report button.  
   Helpful hint: This report can take a few minutes to run. You'll receive an email once it's completed or you can refresh your BAS browser to see the status of the report. Also, for security reasons, the BAS automatically logs out after 10 minutes of inactivity. The report will continue to run even if you're logged off.
9. Ensure that the report's status shows Completed on the history screen.
10. View the report by clicking on the magnifying glass icon next to the appropriate report.
11. You'll have the option to Open or Save the report.
12. Once the report is open, filter and sort information as needed.
13. The report will show you:
   • Fields:
     > Employer ID.
     > Employee ID – the number the employer populates within the BAS.
       1. Currently most records are populated with he CPS employee number, however, this can be changed by the employer.
          a. Pull up the appropriate employee in the BAS.
          b. On the workers information tab, click the Unlock option.
          c. Then click I Accept on the warning message.
d. On the workers information tab, click the **pencil icon** that says “Edit” in the right-hand corner.

e. Then populate the employee ID in the first field.
f. Click **Save** at the bottom of the page.

> CPS ID.
> Employee Social Security Number.
> First Name.
> Last Name.
> Email Address.
> Personal Email Address.
> **Action Taken** – shows one of three different statuses:
  1. No action taken.
  2. Confirmed.
  3. Changes made but not confirmed.
> **Confirmed by role** – will show if the action was taken by the workers or non-workers (CPS). (This will be blank if the Open Enrollment event is not confirmed.)
> **Requested by** – will show the email address of who made the change. (This will be blank if the Open Enrollment event is not confirmed.)
> **Confirmed on** – will show the date and time the event was confirmed. (This will be blank if the Open Enrollment event is not confirmed.)

14. The report will be available in your report list until you delete it from your records.

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**QUESTIONS?**
Contact Concordia Plans at 888-927-7526 or info@ConcordiaPlans.org.
Open Enrollment – All Elections Report
in the Benefits Administration System

This report allows you to view all worker’s Open Enrollment elections for each benefit. We suggest running this report during Open Enrollment to see progress or after Open Enrollment to see what your workers have elected during their Open Enrollment event.

1. Log in to the Employer Portal via ConcordiaPlans.org.
   Helpful hint: For an optimal Employer Portal experience use Chrome, Safari or Internet Explorer version 10 or higher. Some functionality is lost with other browsers.
2. Click on Quick Links within the tool bar.
3. Select Benefits Administration System.
   Helpful hint: If this is your first time accessing the BAS, you’ll have to accept the terms and conditions. Depending on your monitor size, you may need to zoom out of the web page to make it smaller and locate the accept button.
4. Once in the BAS, select Client Menu from the top tool bar.
5. Select Eligibility Reports.
6. Select Run New Report next to the plus sign icon at the top of the page.
7. Choose the report:
   - INTERMEDIATE – Open Enrollment – All Elections
     This contains all events based on an event status for each of your workers.
8. Once you select the appropriate report, click the Schedule Report button.
   Helpful hint: This report can take a few minutes to run. You’ll receive an email once it has completed or you can refresh your BAS browser to see the status of the report. Also, for security reasons, the BAS automatically logs out after 10 minutes of inactivity. The report will continue to run even if you’re logged off.
9. Ensure that the report’s status shows Completed on the history screen.
10. View the report by clicking on the magnifying glass icon next to the appropriate report.
11. You will have the option to Open or Save the report.
12. Once the report is open, filter and sort information as needed.
13. The report will show you:
   - Fields:
     - Employer ID.
     - Employee ID – the number the employer populates within the BAS.
       1. Currently most records are populated with the CPS worker number, however, this can be changed by the employer.
          a. Pull up the appropriate worker in the BAS.
          b. On the worker information tab, click the Unlock option.
          c. Click I Accept on the warning message.
          d. On the worker information tab, click the pencil icon that says “Edit” in the right-hand corner.
          e. Then populate the employee ID in the first field.
          f. Click Save at the bottom of the page.
CPS ID.
Employee Social Security Number.
First Name.
Last Name.
Email Address.
Personal Email Address.
Address.
City.
State.
Zip.
Benefit Name.
Plan Name.
Tier Option Name.
Elected Amount.
Employee Inforce Cost Month.
Employer Inforce Cost Month.
Change reason will show one of the three:
1. No change.
2. Change – Shows “Change” on the line where a benefit was changed. There’s a separate line for every different benefit.
3. Addition – Adding a new benefit such as ER adopted CRSP prior to Open Enrollment.

14. The report will be available in your report list until you delete it from your records.
Open Enrollment – Change Report
in the Benefits Administration System

This report allows you to view all benefit plans available to your worker’s and if they made changes during Open Enrollment. Run this report to view your worker’s elections and benefit change status. Concordia Plans suggests running this report after Open Enrollment to see what your workers have elected during their Open Enrollment event.

1. Log in to the Employer Portal via ConcordiaPlans.org.
   Helpful hint: For an optimal Employer Portal experience use Chrome, Safari or Internet Explorer version 10 or higher. Some functionality is lost with other browsers.

2. Click on Quick Links within the tool bar.

3. Select Benefits Administration System.
   Helpful hint: If this is your first time accessing the BAS, you'll have to accept the terms and conditions. Depending on your monitor size, you may need to zoom out of the web page to make it smaller and locate the accept button.

4. Once in the BAS, select Client Menu from the top tool bar.

5. Select Eligibility Reports.

6. Select Run New Report next to the plus sign icon at the top of the page.

7. Choose the report:
   - INTERMEDIATE — Open Enrollment — Change Report
     > This contains all events based on an event status for each of your employees.

8. Once you select the appropriate report, click the Schedule Report button.
   Helpful hint: This report can take a few minutes to run. You’ll receive an email once it has completed or you can refresh your BAS browser to see the status of the report. Also, for security reasons, the BAS automatically logs out after 10 minutes of inactivity. The report will continue to run even if you are logged off.

9. Ensure that the report’s status shows Completed on the history screen.

10. View the report by clicking on the magnifying glass icon next to the appropriate report.

11. You’ll have the option to Open or Save the report.

12. Once the report is open, filter and sort information as needed.

13. The report will show you:
   - Fields:
     > Employer ID.
     > Employee ID – the number the employer populates within the BAS.
     1. Currently most records are populated with the CPS worker number, however, this can be changed by the employer.
        a. Pull the appropriate employee in the BAS.
        b. On the worker information tab, click the Unlock option.
        c. Click I Accept on the warning message.
        d. On the worker information tab, click the pencil icon that says “Edit” in the right-hand corner.
        e. Then populate the worker ID in the first field.
        f. Click Save at the bottom of the page.
> CPS ID.
> Employee Social Security Number.
> First Name.
> Last Name.
> Email Address.
> Personal Email Address.
> Current Coverage Effective Date.
> Current Benefit Name.
> Current Plan Name.
> Current Tier Option Name.
> Current Elected Amount.
> Current Pending Amount.
> Inforce Benefit Amount.
> Election Cost per month.
> Employer Cost Per Month.
> Open Enrollment Benefit Name.
> Open Enrollment Plan Name.
> Open Enrollment Tier Option Name.
> Open Enrollment Coverage Effective Date.
> Open Enrollment Elected Amount.
> Open Enrollment Amount Pended.
> Open Enrollment Inforce Initial Benefit Amount.
> Open Enrollment Election Cost Per Month.
> Open Enrollment Employer Cost Per Month.
> Change Type will show one of the two:
  1. No Change.
  2. Change – Any change from the “Current” columns to the “Open Enrollment” columns. This will show changing from one health plan to another, changing tier options, electing a benefit that the worker didn’t have last year, as well as show if a worker declined coverage for 2021 that they had in 2020.

14. The report will be available in your report list until you delete it from your records.
### Columns A-S

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Employee Name</th>
<th>Employee Email</th>
<th>Current CBA</th>
<th>Current Benefit Name</th>
<th>Current Plan Name</th>
<th>Current Plan ID</th>
<th>Current Plan Amount</th>
<th>Current Plan Initial</th>
<th>Current Plan Initial Amount</th>
<th>Current Plan Initial Date</th>
<th>Current Plan Initial Date Amount</th>
<th>Change Type</th>
<th>Change Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1234567890</td>
<td>John Doe</td>
<td><a href="mailto:john.doe@company.com">john.doe@company.com</a></td>
<td>ABCD</td>
<td>Health Plan A</td>
<td>Health Plan A</td>
<td>1234567890</td>
<td>10000</td>
<td>10000</td>
<td>10000</td>
<td>01/01/2023</td>
<td>10000</td>
<td>Change Type</td>
<td></td>
</tr>
<tr>
<td>0987654321</td>
<td>Jane Smith</td>
<td><a href="mailto:jane.smith@company.com">jane.smith@company.com</a></td>
<td>ACDF</td>
<td>Health Plan B</td>
<td>Health Plan B</td>
<td>0987654321</td>
<td>20000</td>
<td>20000</td>
<td>20000</td>
<td>01/01/2023</td>
<td>20000</td>
<td>New Benefit</td>
<td></td>
</tr>
</tbody>
</table>

### Columns T-AC

<table>
<thead>
<tr>
<th>Benefit Name</th>
<th>Plan Name</th>
<th>Coverage Type</th>
<th>Initial Amount</th>
<th>Change Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disability</td>
<td>Disability</td>
<td>Disability</td>
<td>5000</td>
<td>01/01/2023</td>
</tr>
<tr>
<td>Life</td>
<td>Basic Life</td>
<td>Basic Life</td>
<td>10000</td>
<td>01/01/2023</td>
</tr>
</tbody>
</table>

**QUESTIONS?**

Contact Concordia Plans at 888-927-7526 or info@ConcordiaPlans.org.