Purpose of Basic Reports Guide

As the benefits administrator for your ministry, you have a lot to manage. That’s why we developed the Basic Reports Guide to help you navigate our Benefits Administration System (BAS) and run the basic reports you need to serve your ministry and workers.

This step-by-step guide includes information to help you run a few commonly used reports including the following:

1. **All Employees Within An Employer Report** - contains contact information for all active employees within your ministry
2. **Employee Contact Information With Benefits Report** - contains contact and benefits information for all employees
3. **Concordia Health Plan (CHP) Review Report** - contains contact and benefits information for employees enrolled in CHP benefits as of a specific date
4. **Billable Benefits with Declines Touched Between Two Dates Report** - contains billable and declined benefits information for all employees between two specific dates

If you have any questions, contact Concordia Plans at 888-927-7526 or info@ConcordiaPlans.org.

Let’s get started!

**QUESTIONS?**

Contact Concordia Plans at 888-927-7526 or info@ConcordiaPlans.org.
All Employees Within An Employer Report in the Benefits Administration System

The All Employees Within an Employer Report contains contact information for all active employees within your ministry. Use this report to pull employee email and mailing addresses.

1. Log into the Employer Portal via ConcordiaPlans.org.
   Helpful hint: For the 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 (BAS).
   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: BASIC - All Employees Within An Employer
   • Contains ALL ACTIVE EMPLOYEE contact information.
   • Report parameters:
     > Report Name - name your report something useful and easy to find, along with the date.
     > Concordia Employer ID - Select your Employer ID number from the dropdown box. Your Employer ID number can be found on your billing invoice from CPS.

8. Once you populate the required information, 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 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 – Always will show CONCORDIA.
  - Concordia Employer ID – Your employer number without the ER.
  - 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 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.
  - Employee Social Security Number (SSN).
  - First Name.
  - Last Name.
  - Email Address.
  - Personal Email Address.
  - Address.
  - City.
  - State.
  - Zip.

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

Questions?

Contact Concordia Plans at 888-927-7526 or info@ConcordiaPlans.org.
The Employee Contact Information with Benefits Report contains contact and benefits information for all employees. Use this report to see which benefits, plans and options your workers have elected or waived on a specific date.

1. Log into the Employer Portal via ConcordiaPlans.org.

*Helpful hint: For the 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 (BAS).

*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: BASIC - Employee Contact Information With Benefits

- Contains ALL ACTIVE EMPLOYEE contact information.
- Report parameters:
  - Report Name – name your report something useful and easy to find, along with the date.
  - Concordia Employer ID – Select your Employer ID number from the dropdown box. Your Employer ID number can be found on your billing invoice from CPS.

8. Once you populate the required information, 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 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 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.
  - Employee Social Security Number (SSN).
  - First Name.
  - Last Name.
  - Email Address.
  - Benefit Name.
  - Plan Name.
  - Option Name.
  - Benefit Amount.
  - Address.

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

Questions?

Contact Concordia Plans at 888-927-7526 or info@ConcordiaPlans.org.
The Concordia Health Plan Review Report contains contact, benefits and premium information for employees in the CHP as of a specific date. Use the CHP Review Report to review benefits, plans, tier options and premium amounts and effective dates for your workers in the CHP.

1. Log into the Employer Portal via ConcordiaPlans.org.

   Helpful hint: For the 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 (BAS).

   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: BASIC – Concordia Health Plan (CHP) Review

   • Contains ALL ACTIVE EMPLOYEE contact information. This report pulls all CHP benefits in effect on a specific date.
   • Report parameters:
     > Report Name - name your report something useful and easy to find along with the date.
     > Concordia Employer ID - Select your Employer ID number from the dropdown box. Your Employer ID number can be found on your billing invoice from CPS.
     > As of Date - the effective date for benefits.

8. Once you populate the required information, 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 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 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.
     - **Employee Social Security Number (SSN).**
     - **First Name.**
     - **Last Name.**
     - **Status.**
     - **Benefit Name.**
     - **Plan Name.**
     - **Tier Option.**
     - **Monthly Premium.**
     - **Yearly Premium.**
     - **Premium From Date** – the effective date of the last rate change (e.g. Open Enrollment’s new CHP rates, or the CRP/CDSP’s latest ACR rate change).
     - **Premium To Date** – the end date of the rate.
     - **Touch Date** – the last time something was changed or confirmed on the contribution rate.
     - **Address.**
     - **City.**
     - **State.**
     - **Zip.**
     - **Date of Birth.**
14. The report will be available in your report list until you delete it from your records.
The Billable Benefits With Declines Report allows you to view all benefits that could appear on your monthly invoice that were touched within a specified date range.

1. Log into the Employer Portal via ConcordiaPlans.org.
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2. Click on Quick Links within the tool bar.
3. Select Benefits Administration System (BAS).
   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: BASIC - Billable Benefits With Declines - Touched Between Two Dates
   - Contains ALL ACTIVE EMPLOYEE information.
   - Report parameters:
     > Report Name - name your report something useful and easy to find, along with the date.
     > Concordia Employer ID - Select your Employer ID number from the dropdown box. Your Employer ID number can be found on your billing invoice from CPS.
     > Start Date.
     > End Date.
8. Once you populate the required information, 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 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 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.
  - Employee Social Security Number (SSN).
  - First Name.
  - Last Name.
  - Email Address.
  - Employment Status.
  - Benefit Name.
  - Plan Name.
  - Tier Option.
  - Monthly Premium.
  - Yearly Premium.
  - Premium From Date – the effective date of the last rate change (e.g. Open Enrollment’s new CHP rates, or the CRP/CDS’s latest ACR rate change).
  - Premium To Date – the end date of the rate.
  - Touch Date – the last time something was changed or confirmed on the contribution rate.

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

Questions?

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