

Go to Reports > Available Reports > Change History

The screenshot shows the 'Available Reports' interface. At the top, there are filter tabs: Recommend (12), ACA (4), Audit (16), Change History (5), Payroll (3), Premium Billing (2), and All (48). A red arrow points from 'Change History (5)' to the 'Benefit Report' in the list below. The 'Benefit Report' is the first item in the list, with a last run date of 08/28/2017. Other reports include Employee Enrollment Roster, Employee Census Report, Payroll Deduction Report, Overage Dependents Report, Life Event Report, EOI Report, Dependent Enrollment Roster, Dependent Census Report, and Employee New Hires Report.

REPORT NAME	LAST RUN
☆ Benefit Report Most popular report that can be easily customized to show what coverages employees are enrolled in.	08/28/2017
☆ Employee Enrollment Roster Most popular standard report to show employee enrollment information by benefit.	-
☆ Employee Census Report Most popular report that can easily be customized to show employee demographic information.	-
☆ Payroll Deduction Report Most popular standard report to show employee payroll deduction information.	-
☆ Overage Dependents Report Most popular standard report to show an employee's dependent(s) that have or will soon exceed the maximum age for a benefit.	08/18/2017
☆ Life Event Report Most popular report that can easily be customized to show employees that have a current life or processed life event during a specific period in time.	-
☆ EOI Report Most popular standard report to show employees with pending coverages awaiting Evidence of Insurability (EOI) or to show historical EOI actions.	08/18/2017
☆ Dependent Enrollment Roster Most popular standard report to show dependent enrollment information by benefit.	-
☆ Dependent Census Report Most popular report that can easily be customized to show a list of all dependents based on employee's employee status.	-
☆ Employee New Hires Report Most popular standard report to show employees a list of all new hires for specific period in time.	-

Click on the first result, Benefit Changes Report

The screenshot shows the 'Available Reports' interface with the 'Change History (5)' filter tab selected. A red arrow points to the 'Benefits Changes Report' in the list. The 'Benefits Changes Report' is the first item in the list, with a last run date of 08/25/2017. Other reports include Data Comparison Report, Dependent Benefit Changes Report, Dependent Demographic Changes Report, and Employee Demographic Changes Report.

REPORT NAME	LAST RUN
☆ Benefits Changes Report Most popular report that can be easily customized to show election changes across employees for a plan year.	08/25/2017
☆ Data Comparison Report An easily customizable report that compares demographic, coverage, and premium data for employees and dependents.	-
☆ Dependent Benefit Changes Report An easily customizable report to show dependent coverage enrollment changes within a plan year.	02/23/2016
☆ Dependent Demographic Changes Report An easily customizable report to show dependent demographic changes within a specified period in time.	-
☆ Employee Demographic Changes Report An easily customizable report to show employee demographic changes within a specified period in time.	08/24/2017

- Fill in the changes from 08/25/2017 to today.
- Select the **CURRENT** plan year
- Select the coverage fields that affect deductions – EE Premium, ER premium, Level, Benefit, Plan, Coverage Termination Date.
- Select whatever employee demographic information you need. In this case Last, First, EE Number, Termination Date.
- Treat new records as changes in order to capture any New Hires.
- Download the report in excel to have a spreadsheet you can filter.

The screenshot shows the 'Create' report interface in PLANSOURCE. At the top, there are navigation tabs: 'Create', 'Saved Reports', 'Next Scheduled', and 'Report History'. Below this is a 'Toggle Time Frame / Time Range' section with 'Changes From' set to 08/25/2017 and 'Changes To' set to 08/28/2017. The 'Demographic Filters' section includes a checkbox for 'Unmask SSN for download' and three columns of field selection: 'Available plan years', 'Selected plan years', 'Available coverage fields', 'Selected coverage fields', and 'Available subscriber fields', 'Selected subscriber fields'. The 'Selected' columns contain: '07/01/2017 to 06/30/2018', 'EE Premium, ER Premium, Level, Benefit, Plan, Coverage Termination Date', and 'Last Name, First Name, Zip, Employee Number, Termination Date'. At the bottom, there are checkboxes for 'Show Test Employees' and 'Treat New Records as Changes' (which is checked). A 'Run Report' section at the very bottom offers options: 'View', 'Download (xls)', and 'Run Report'.