

How to Run a Report that shows my Billable COBRA count in Employee Navigator

1. When you are on you Employee Navigator homepage, click the “Reports” tab at the top.

Home Employees **Reports** Wall ACA PTO Tasks Benefits Payroll Documents Settings

2. Click the “Column-Based Report” link.

Home Employees **Reports** Wall ACA PTO Tasks Benefits Payroll Documents Settings

Ad Hoc Reports

- New Reports
- Row-Based Report
- Column-Based Report**
- Payroll Deductions Report
- Voluntary Life Report
- HSA Report
- Cafeteria Report
- Retirement Report

My Reports [manage my reports](#)

Enrollments

Shared Reports

– none –

Benefit Reports

- Carrier Billing Summary
- Carrier Billing Employees By Plan
- Carrier Billing Employees With Rates and Groups
- Employee Enrollment Forms
- Benefit Confirmation Statements
- Total Compensation Statements
- Fringe Benefit Statements
- COBRA Summary
- COBRA Detail
- Disability Tax Options
- HSA Enrollments
- HSA Funding
- HRA Enrollments
- Surcharge Adjustments
- Declined Enrollments
- W-2 Summary

General Reports

- New Hire
- Certifications
- Education
- Licenses
- Emergency Contacts
- Beneficiaries
- Dependents
- Termination
- Employment Eligibility Verification (I-9) Report

Change History Reports

- Enrollment Changes
- Payroll Deductions Changes
- Benefit Exception Overrides
- Cost Exception Overrides
- Demographic Changes
- Event Reports
- Voluntary Life Events

3. Next, select the boxes of “First Name” and “Last name”

Column-Based Report [Back to Reports Menu](#)

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: Employee [Reorder Selected Fields](#)

Profile & Personal [Close](#)

- Select All
- Social Security Number
- First Name**
- Middle Name
- Last Name**
- Suffix
- Preferred Name
- Display Name
- Full Name
- Gender
- DOB
- Age
- Marital Status
- Date of Marriage
- U.S. Citizen
- Visa Status
- Veteran Status
- Military Reserve Status
- EEOC
- Office ▼
- Class ▼

Options [review options and filters](#)

Dependents:

- include dependents

What to exclude:

- declined enrollments
- ended enrollments
- not enrolled

What type of enrollment:

current

Limit enrollments based on dates:

Put in the system between: and

4. Then select the boxes “declined enrollments”, “ended enrollments” and “not enrolled”

Column-Based Report ◻ [◀ Back to Reports Menu](#)

[➤ 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](#) [Save](#)

Fields: [Reorder Selected Fields](#)

Profile & Personal [Close](#)

- Select All
- Social Security Number
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Options

review options and filters

Dependents:

- include dependents

What to exclude:

- declined enrollments
- ended enrollments
- not enrolled

What type of enrollment:

▼

Limit enrollments based on dates:

Put in the system between: ☰ and ☰

5. Mark the box “Employment Status”. It is further down the page.

Employment [Close](#)

- Select All
- 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

6. After selecting the “Employment Status” box, a new Custom filter will appear in the Options box at the top. Click the “Show button”.

Options

review options and filters

Dependents:

include dependents

What to exclude:

declined enrollments

ended enrollments

not enrolled

What type of enrollment:

Current

Limit enrollments based on dates:

Put in the system between:

and

Custom Filters

Employment Status show

7. After clicking “Show” select the “Active” box.

Options

review options and filters

Dependents:

include dependents

What to exclude:

declined enrollments

ended enrollments

not enrolled

What type of enrollment:

Current

Limit enrollments based on dates:

Put in the system between:

and

Custom Filters

Employment Status hide

Active

Terminated

8. Now click on the drop down box at the top of the page and select “Enrollment”.

Column-Based Report ← Back to Reports Menu

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

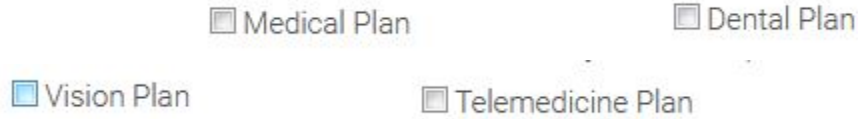
Enrollment ↓ Reorder Selected Fields

Options

review options and filters

Dependents:

9. Select the “Medical”, “Vision”, “Dental” and “Telemedicine”. (If applicable, as all 4 of these plans are COBRA eligible, but you may not have all 4).



10. After you selected the plan types, go up to “view” and click on it. This will bring you a page that previews what the report will look like; Click the blue “Download” button to save the report on your computer.

The screenshot shows the 'Column-Based Report' configuration interface. On the left, there are three tabs: 'Fields', 'View', and 'Save'. The 'View' tab is active. The main area is titled 'Fields' and contains a dropdown menu set to 'Enrollment' and a 'Reorder Selected Fields' button. Below this is a list of fields under the 'Enrollment' section, with checkboxes for each. The 'Medical Plan' and 'Dental Plan' sections are checked. On the right, there is an 'Options' panel with sections for 'Dependents', 'What to exclude', 'What type of enrollment', and 'Limit enrollments based on dates'. The 'Options' panel also includes a 'Custom Filters' section with 'Active' and 'Terminated' checkboxes.

The number of employees on the report should match the number of employee’s on the COBRA invoice. If they don’t, contact Cam at Cameron@bbpadmin.com or 630-775-8536.