ADMINISTRATOR REFERENCE GUIDE

For questions and assistance with the KCARES system
please contact KCARES Support using the information listed below:

(855) 585-4330 | Phone
(310) 212-0355 | Fax

Keenan & Associates
Corporate Office:
2355 Crenshaw Blvd, Suite 200
Torrance, CA 90501
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A – Eligibility Services Overview

Keenan & Associates provides valuable eligibility services in addition to facilitating the reporting of eligibility data, helping our Clients improve the administration of their plans. Following is an overview of the services provided:

KCARES Overview

KCARES is Keenan's proprietary Web-based employee benefits administrative services system which allows Benefits Administrators to easily enter and manage employee benefits. Keenan provides a dedicated Eligibility Coordinator as a key contact for KCARES system support.

Electronic Transmission to Carriers

Eligibility updates are electronically transmitted to the Clients’ carriers on the 1st, 8th, 15th and 22nd of each month. (Please see Transmittal Schedule Example in Section E, page 1).

Reporting of Over Age Dependent Children

On the 2nd of each month, the Client will receive a courtesy dental Over Age Dependent Report (dependent tracking is not necessary for vision eligibility,) which captures all dependents who will be reaching the plan’s overage limit in the upcoming month (refer to sample Over Age Dependent Report in Section G). This report will be e-mailed to the Client from the following e-mail address: benefitbridge@keenan.com.

Note: It is the Client’s responsibility to:

- Notify the Employee of the dependent’s termination of coverage
- Send notice of COBRA eligibility

Carrier Notification of Dependent COBRA Benefits

When a dependent is enrolling in COBRA without the subscriber, the Client should notify Keenan once the COBRA enrollment has been entered. Keenan will then request that Delta Dental transfer the history from the previous record to the COBRA record. The Client does not need to contact the carrier.

Carrier Billing Report (CBR) Summary

On the 20th of each month, the Client will receive a Carrier Billing Report (CBR) Summary, which captures the following month’s eligibility. The CBR is intended to assist the Client in reconciling monthly enrollment totals. This report will be e-mailed to the Client from the following e-mail address: benefitbridge@keenan.com (refer to sample CBR in Section G).

Eligibility List

On the 23rd of each month, the Client will receive an Eligibility List reflecting the following month’s eligibility. This report will be e-mailed to the Client from the following e-mail address: benefitbridge@keenan.com (refer to sample Eligibility List in Section G).

Special Note: All new enrollments, changes, and terminations must be entered by the Client by the 15th of each month in order to be included on the following month's Eligibility List.
B – CLIENT ADMINISTRATION DUTIES

COBRA

It will remain the Client’s responsibility, as the employer, to comply with the continuation coverage requirements under COBRA.

A new record must be created for all dependent COBRA enrollments when the subscriber is not enrolling in COBRA. When a dependent is enrolling in COBRA without the subscriber, the Client should notify Keenan after the COBRA enrollment has been entered. Keenan will then request the carrier to transfer the history from the previous record to the COBRA record; the Client does not need to contact the carrier.

AB528

The Client should communicate directly with Delta Dental for AB528 coverage, provided the AB528 retirees are covered through the Delta Dental statewide pool. In this case, the AB528 enrollment forms, eligibility statements, and premiums should be sent directly to Delta Dental and not to Keenan & Associates.

Eligibility Verification

There will be instances when employees or their dependents seek treatment before the carrier has been notified of their eligibility. In these cases, the Client can ask the provider to accept their verification of eligibility. If a provider will not accept the Client’s verification, please contact Keenan’s Coalition Department to assist in resolving the situation. Please do not direct employees or providers to call Keenan & Associates’ Coalition Department to verify eligibility. In order to minimize the number of eligibility issues, prompt entry of all enrollments is recommended.

Benefit Information

Please contact your Keenan Service Representative Keith Brown kbrown@keenan.com, or 408-441-0754 ext 6167.

ID Cards and Claim Forms

Please provide the employee with Delta Dental’s website: www.deltadentalins.com if they would like to print an ID card or claim form. Instructions on how to fill out the claim form are also posted on the website. VSP does not issue ID cards. VSP providers submit electronic claims; therefore, no claim forms are provided.

Claims Information and Incentive Levels

Please instruct the employee to contact the Delta Dental Customer Service Department at 1-866-499-3001. Please provide employee with VSP’s telephone number, 1-800-877-7195 for claim questions.
C – MONTHLY BILLING CYCLE

Wire Transfer Information

For any questions, call Marcia Gudmundsson of Keenan & Associates’ Finance Client Services Department at 800-444-9995, extension 1624.

1. The Client will receive one invoice monthly from Keenan & Associates. The invoice will be mailed by the 5th day of each month and will be for the next month’s estimated cost of the program (e.g., claims, eligibility/administration fees, etc.)

2. The Client is required to pay the full invoice amount on a monthly basis, which is due by the first Tuesday of the month.

3. The Client amount represents the average monthly claims that we expect to be paid for the district. This amount is calculated by taking the total annual expected claims and administration costs divided by 12 months to develop an average monthly funding level.

4. If the Client account balance is not sufficient to cover costs, the district will receive an additional deficit billing and will be required to advance the amount requested within 10 business days.

5. If the Client is currently receiving a monthly invoice from the Keenan & Associates Accounting Department for dental consulting fees, this amount will be shown on the monthly invoice (sample invoice on page 4 of this section) for claims and administration fees.

6. Keenan & Associates will provide the Client with a monthly accounting statement (sample statement on page 5 of this section) mailed by the 15th day of each month, summarizing the prior month’s beginning cash balance, contributions, paid claims, fees, interest allocation and ending case balance. Accompanying this statement will be the Delta Dental claims report.

7. The Client can pay their contribution invoice amount with a warrant or by wire transfer. All warrants should be made payable to “California Schools Dental Coalition” and mailed with one copy of the monthly contribution invoice to (remittance envelope provided):

   Keenan & Associates
   Finance Client Services
   P.O. Box 4328
   Torrance, CA  90510
The following information applies to wire transfers:

Bank of America
333 South Hope Street
Los Angeles, CA 90071

A.B.A. 026009593
A.B.A. for ACH 121000358
Contact: Robert Louk
Tele: 213.621.7178
Fax: 213.621.3610

A/C Name: California Schools Dental Coalition
A/C Number: 14594-26385
Accounting Statement Cover Letter

April 1, 2014

Ms. Jane Doe
XYZ Benefits Joint Powers Authority
1234 Yellow Brick Road
Anytown, CA 94523

Re: California Schools Dental Coalition

Dear Ms. Doe:

Enclosed is the March 2014 statement of your participation in the Dental Coalition. The statement reflects the following:

a) Actual contributions received, irrespective of which month they apply to, to enable you to reconcile this figure back to your records.

b) Paid claims and the Delta Dental administration fee as billed by Delta Dental and detailed on the enclosed Delta Dental monthly activity report.

c) The Coalition eligibility/administration fee, based on the enclosed eligibility report included in this packet and/or via BenefitBridge. This report summarizes the District eligibility listing(s) received approximately the 25th of last month.

d) Keenan consulting fees, if initially built into your monthly funding levels.

e) An allocation of the interest income earned on the Coalition account during the period, based on the ratio of your daily balances to the total daily balances.

Please do not hesitate to call me if you have any questions or need additional information.

Sincerely,

Marcia Gudmundsson
TPA Supervisor
## Sample Invoice

### California Schools Dental Coalition

Keenan & Associates Administrators  
P.O. Box 4328  
Torrance, CA 90510

XYZ School District  
Jane Doe  
1234 Yellow Brick Road  
Anytown, CA 94523

<table>
<thead>
<tr>
<th>GROUP NO.</th>
<th>DUE DATE</th>
<th>CONTRACT PERIOD</th>
</tr>
</thead>
<tbody>
<tr>
<td>XXXXX</td>
<td>5/3/2014</td>
<td>1/1/2014-12/31/2014</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>DESCRIPTION</th>
<th>AMOUNT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly Contribution - Expected Paid Claims &amp; Expenses May 2014</td>
<td>$50,000.00</td>
</tr>
</tbody>
</table>

Please make payable to: California Schools Dental Coalition  
For your convenience, please use the enclosed envelope.  

Total $850,000.00
### Sample Statement

#### California Schools Dental Coalition
- **XYZ Benefits**
- **March 2014**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opening Balance</td>
<td>$29,653.79</td>
</tr>
<tr>
<td>Contributions</td>
<td>136,000.00</td>
</tr>
<tr>
<td>Paid Claims</td>
<td>(130,010.80)</td>
</tr>
<tr>
<td>Delta Dental Administration Fee</td>
<td>(8,320.69)</td>
</tr>
<tr>
<td>CSDC Eligibility/Administration Fee (2,793 employees @ $0.48)</td>
<td>(1,340.64)</td>
</tr>
<tr>
<td>Consulting fees (2,793 employees @ $x)</td>
<td>if applicable</td>
</tr>
<tr>
<td>Interest Income Allocation</td>
<td>83.73</td>
</tr>
<tr>
<td><strong>Closing Balance</strong></td>
<td><strong>$26,065.39</strong></td>
</tr>
</tbody>
</table>
D – SIGN-ON (BENEFITS ADMINISTRATORS)

Keenan will set up all Benefits Administrators and provide each with their own unique Username and Password.

Administrative User Login

1. Access Keenan’s **KCARES** system via your web browser at **www.KCARES.com**.

2. On the **KCARES** login page, under the **User Login** heading (figure 1), enter your **Username** and **Password**.

*Note*: In addition to Internet Explorer, supportability is available on portable devices, Apple Safari, Google Chrome and Mozilla Firefox.

The **KCARES** Administration – “Admin Home” screen appears (figure 2).

Forgotten Username and Password

If you need assistance or forget your username and/or password, please call **KCARES** Support (figure 3):

- **Call KCARES Support at (855) 585-4330**
- **Monday thru Friday 8:00 am – 5:00 pm (PST)**

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Password Requirements

If you are prompted to change your password, it must meet the following requirements:

- Must be 8 – 16 characters in length
- Must contain at least one character from each of the following four categories:
  - Uppercase letter
  - Lowercase letter
  - Number (0 – 9)
  - Non-Alphanumeric character (e.g., @, #, %)
- Expires every 90 days (users will be prompted to create new password)
- May not reuse any of the previous 9 passwords
Session Time-Out

A Session Time-Out warning message will appear as an alert to users when a KCARES session is about to expire (figure 4).

- Select the Continue Session button to keep your KCARES session “active.”

![Figure 4 – Session Time-Out warning](image)

- The system will log you off if you do not click the Continue Session button shortly after it is presented.

  **Note:** You will know if you have been logged off if the popup “Log In” window appears following your attempt to access a screen or enter data (figure 5).

![Figure 5 – Log In window](image)

- If you are logged off, do the following:
  - Close the Log In popup window by clicking on the X in the top right corner. *(This is **NOT** the correct login window. You must login from the KCARES Admin Home web page.)*
  - Log into the KCARES website using your username and password
  - Click on the KCARES Administration button in the middle of the Admin Home page (figure 6).

![Figure 6 – KCARES Administration button](image)
E - NAVIGATION AND HELPFUL HINTS

Transmittal Dates

The transmittal of data files contains eligibility information which is electronically sent to carriers. These transmittals are processed and transmitted at approximately 5:00 p.m. on the 1st, 8th, 15th and 22nd of every month, even if this is a weekend or holiday.

Carrier Transmittal/Billing Schedule

The term “Carrier Transmittal” refers to the electronic reporting of eligibility information from Keenan’s KCARES System. Transmittals will occur automatically and clients do not need to take any action.

Understanding when the data is entered, when it is effective and when it is transmitted to the carrier is important and will help Clients effectively manage benefits and avoid eligibility issues.

Eligibility: Eligibility is “captured and transmitted” on the 1st, 8th, 15th, and 22nd of each month starting at approximately 5:00 p.m. PST regardless of whether the date falls on a weekend or holiday.

Billing: Billing data is captured on the 15th of each month at approximately 5:00 p.m. PST. Eligibility effective the first of the following month and entered on or before the 15th of the current month will be reflected on the following month’s bill.

Future Effective/Termination Dates: Future effective or termination dates are not transmitted to the carriers until the 15th of the month for the 1st of the following month (see example #5 below).

Transmittal/Billing Schedule Examples

<table>
<thead>
<tr>
<th>#</th>
<th>Entry Date</th>
<th>Effective Date</th>
<th>Transmittal Dates (1st, 8th, 15th, 22nd)</th>
<th>Billing Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>3/16</td>
<td>4/1</td>
<td>3/22</td>
<td>May*</td>
</tr>
<tr>
<td>2</td>
<td>3/14</td>
<td>4/1</td>
<td>3/15</td>
<td>April</td>
</tr>
<tr>
<td>3</td>
<td>3/4</td>
<td>3/1</td>
<td>3/8</td>
<td>April*</td>
</tr>
<tr>
<td>4</td>
<td>2/23</td>
<td>3/1</td>
<td>3/1</td>
<td>April*</td>
</tr>
<tr>
<td>5</td>
<td>2/14</td>
<td>4/1</td>
<td>3/15</td>
<td>April</td>
</tr>
</tbody>
</table>

*Note: Retroactive debits and credits will be reflected accordingly.
Benefits Administration - Main Toolbar (figure 1)

Add: Use this tab to enter new employees into the database.

Reports: Use this tab to open the reports section.

K CARES History: Use this tab to access the history of active or terminated employees, if you have been utilizing the K CARES system prior to 3/22/11.

Search: Use this tab to search for employees’ records in the database.

Reports Toolbar (figure 2)

My Reports: Use this tab to access all scheduled reports and to access previously run reports.

Financial: This tab contains all Financially based reports.

Status: This tab contains all Status based reports.

Employee Record Toolbar (figure 3)

Personal: Employee’s Personal information.

Employment: Employee’s Employment information.

Dependents: Employee’s Dependents and their personal information.

Benefits: Employee’s Benefit information.

History: Any changes made to an employee’s record after 3/22/11 appear on this tab.

Summary: Summarizes the Employee's information, as entered on the Personal, Employment, Dependents and Benefits tabs.
Show Sensitive Information

This link appears in the bottom left corner of each tab in the Employee Record. The employee’s SSN and Annual Income are considered sensitive information and are not fully displayed. Only the last four digits of the SSN are displayed. Asterisks appear in place of the Annual Income. Click on the Show Sensitive Information link to display the complete information (figure 4).

<table>
<thead>
<tr>
<th>Employee Name: USER, TEST</th>
<th>SSN: ****-1113</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sensitive Information is partially displayed</td>
<td></td>
</tr>
<tr>
<td>Employee Name: USER, TEST</td>
<td>SSN: 111-11-1113</td>
</tr>
<tr>
<td>Sensitive Information is partially displayed</td>
<td></td>
</tr>
</tbody>
</table>

Figure 4 – Sensitive information

Edit Record

Edit Record - This icon appears on the Personal and Employment tabs in the Employee Record and is used when changes need to be made to existing information.

Add or View Comments/Enrollment Summary Archive

This link appears in the bottom right corner of each tab in the Employee Record and is used to post comments specific to an employee’s record.

Add Comments

1. Click on the Add or View Comments/Enrollment Summary Archive link to open the Comments section (figure 5).
2. Enter a short description in the Subject field.
3. In the Comment: field, enter an expanded description of the subject.
4. When complete, click on Save Comment.

View Comments

1. Click on the Add or View Comments/Enrollment Summary Archive link to open the Comments section. All comments appear in a table below the Subject and Comment fields. Each comment will be date stamped and include the user’s name.
**K CARES Tabs**

Each tab is described in detail in the Administrative Guide. Following are a few tips to remember when working in **K CARES**:

**Personal Tab**

Override Coverage Area Validation
- This option is currently inactive and cannot be used.

**Employment Tab**

Proper use of Status Start and Effective dates
- For New Hires, the Status Start Date (date benefits are effective) is calculated automatically to be the first of the month following date of hire. If this is incorrect, this date can be manually overwritten.

Benefits Status Change
- The **only** two choices available to **K CARES** clients are “Active” and “Terminated.”

**Benefits Tab**

Employee Enrollment Benefits Screen
- When adding a new dependent or changing an existing dependent's coverage, the “Eff From” column reflects the date the change becomes effective for all members under that record. See the “Orig Eff Date” column to determine when the specific coverage originally became effective (figure 6).

<table>
<thead>
<tr>
<th>Benefit Type</th>
<th>Benefit Description</th>
<th>Coverage</th>
<th>Eff From</th>
<th>Eff To</th>
<th>Orig Eff Date</th>
<th>F &amp; P</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dental</td>
<td>CLASS/MD/CONF FULL-TIME</td>
<td>Employee + Family</td>
<td>02/01/2011</td>
<td>09/01/2010</td>
<td>Present</td>
<td></td>
</tr>
</tbody>
</table>

Figure 6 – Eff From/Orig Eff Date
History Tab

Employee History

- The History tab for each employee contains detailed information regarding all completed changes made to an employee’s record after 3/22/11.
  - History Export: The “Export All to Excel” button will export the history information to an Excel worksheet, making viewing history data easier. This removes the need to scroll left and right and through multiple pages when trying to review historical changes, and allows for easier data manipulation and printing.
- The “View KCARES History” button allows you to access history from the old KCARES system prior to 3/22/11 (figure 7).

Summary Tab

- The Summary tab is a “static” compilation of the information contained in the four benefit management tabs. This is a view only page. If changes need to be made to any of the information, those changes must be made on the Personal, Employment, Dependents or Benefits tabs.
**Search for Employees/Groups**

There are several ways to find Employees in the Administration section of *KCARES*. Search for one Employee or a group list of Employees. To access the Search function, click on the Search tab from the main toolbar. Each search function is described below.

A. **Individual Employee Search** – Use this function to search for a specific Employee using the Last Name (default,) Social Security Number (you can search by using hyphens or you can omit the hyphens), EIN, last 4 digits of the SSN or First Name (figure 8).

1. Click on the drop-down arrow in the “Last Name” field to choose the search criteria.
2. Enter the data in the **Search For:** field that matches your search criteria.
3. Click Search. Any employee(s) with matching information will appear in a listing below the **Search For:** section.
4. To access the Employee record, click on the employee’s name or the SSN.

![Figure 8 – Individual employee search options](image)

B. **Group List Search (expanded)** – Use this function to search for a list of employees who meet specific criteria (e.g., determining how many employees you have with “Active” status that are Certificated Full-Time.) This is an excellent way to filter for counts.

1. Click on the **Show Search Criteria** link above the **Search For:** section. The Search Criteria expands to reveal several criteria selection fields (figure 9).

   In the expanded Search Criteria section, there are five main fields; you can use **Status** and **Group** to filter a group list of employees.

   - **Status:** a multi-select field containing a list of status types. Note that *KCARES* clients only use “Active” and “Terminated.” *(To make multi-selections: hold the Ctrl key down, point & click on the desired choices.)*
   - **Classification:** the default is “All;” there is only one option, “Employee,” so leave as is
   - **Sub-Class:** the default is “All;” there are no other options
   - **Group:** a single-select drop-down menu field containing classifications, e.g., Certificated, Classified
   - **Location:** the default is “All;” *(“Main” is another option, but “All” is the preferred location.)*
Example: To filter a group list containing all your employees who are Active and Certificated Full Time:
   a. Click on “Active” in the Status drop-down menu  
   b. Click on CERTIFICATED FULL TIME in the Group drop-down menu

   ![Figure 9 – Group list search options]

2. When selections are complete, click the Search button. All employees matching the search criteria will appear in a listing below the Subscriber(s) found for specified criteria: section. In this example, 8 employees match the Group List criteria (figure 10).

   ![Figure 10 – Search criteria results]

Additional Search Screen Features

From the Search Screen, each user can make their own choices regarding the order of the data displayed, as well as enabling a text box to appear when you hover over an employee’s name. The Display Columns Selection screen will appear on the search screen when you initially access the KCARES database (figure 11).

   ![Figure 11 – Display Columns Selection]
You can select up to three values in the **Hidden Columns** section for display in your search results. By highlighting the value and clicking on the “Show Column” arrows, your values are moved to the **Visible Columns** section. To remove the values, highlight a value in the **Visible Columns** section and click on the “Hide Column” arrows. Additionally, you can arrange the order of appearance in the **Visible Columns** section by highlighting a value and using the “Move Up” or “Move Down” arrows. Once your elections have been made, click the **Save** button. The completed list will display on your screen (figure 12).

In our example below (figure 12,) we selected SSN, Classification and Status as our **Visible Columns** values. The Name column is mandatory and will always appear first:

![Figure 12 – Column Selection Results](image)

After your initial selection, you can click on the **Select Display Columns** button on the search screen to further display, change and manage column selections (figure 13).

![Figure 13 – Select Display Columns Button](image)

A text box on the search screen provides you with data at a glance for each employee. When you hover over an employee’s name, a text box appears displaying the employee’s name, full SSN, EIN (if applicable,) Classification and Status (figure 14).

![Figure 14 – Text Box Display](image)
F – EMPLOYEE ADMINISTRATION DUTIES

Add an Employee

The Personal tab and Employment tab must be completed to fully add an Employee’s record.

1. From the Administration main toolbar click the Add tab to open a new Employee record.

2. The Employee record defaults to the Personal tab (figure 1). Use the tab key to move from field to field, enter all required personal information, (\* denotes a required field). Once all required information is entered and the cursor is in the Gender field, hitting the Tab key will Save all information and moves to the Employment tab (or you can click on Next Step).

3. The Employment tab (figure 2) – Using the tab key to move from field to field, enter all required employment information, (\* denotes a required field). Once all required information has been entered and the cursor is in the Work Email field, hitting the Tab key will Save all information and moves to the Dependents tab (or you can click on Next Step).
Add Dependents

Dependents can be added during the “Adding New Employee” process or added to an existing Employee record. The following procedures apply to both.

BEFORE ADDING A DEPENDENT – Check the “All Dependents” section (figure 1) to make sure the Dependent has not already been created. Choose “ALL” in the drop-down menu.

1. To add a dependent(s) to an employee record, click on the Dependents tab from the Employee record toolbar.

2. On the Dependents page, using the tab key to move from field to field, enter the required dependent information (figure 2). (* denotes a required field).

3. Once all information has been entered, click the Add button located in the lower right corner of the page; or, hit the tab key at the State field to save the information.

   **Note:**
   1. The Employee’s last name and address carry over to each dependent’s screen. If this information is not correct, click in the appropriate field and enter the correct information.
   2. Once saved, a newly added dependent will be displayed in the All Dependents section (shown at top of page).

4. Repeat the above steps to add additional dependents, if applicable.
Dependent Type

The Dependents screen identifies and stores “Dependent Type” information for each dependent within an employee record (figure 3). The Dependent Type list options vary based on the dependent Relation (Spouse, Child, Grandchild, etc.) and Birth Date (age calculation). See examples below for specific Dependent Types.

<table>
<thead>
<tr>
<th>Relation/Age</th>
<th>Dependent Type List Choice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spouse, Domestic Partner, Ex-spouse, Same Sex Spouse</td>
<td>No Dependent Type field</td>
</tr>
<tr>
<td>Child, Grandchild, Other, Dependent of Domestic Partner</td>
<td>* Dependent Type: N/A</td>
</tr>
<tr>
<td>Age 0 - 18</td>
<td></td>
</tr>
<tr>
<td>Child, Grandchild, Other, Dependent of Domestic Partner</td>
<td>* Dependent Type: N/A, Child, Disabled</td>
</tr>
<tr>
<td>Age 19 - 24</td>
<td></td>
</tr>
<tr>
<td>Child, Grandchild, Other, Dependent of Domestic Partner</td>
<td>* Dependent Type: N/A, Child, Disabled</td>
</tr>
<tr>
<td>Age 25</td>
<td></td>
</tr>
<tr>
<td>Child, Grandchild, Other, Dependent of Domestic Partner</td>
<td>* Dependent Type: N/A, Child, Disabled</td>
</tr>
<tr>
<td>Age 26 or greater</td>
<td></td>
</tr>
</tbody>
</table>

Figure 3 – Dependent type options

The Dependent Type field does not initially display on the “blank” (new record) Dependent screen. For a Spouse (Domestic Partner, Ex-Spouse, or Same Sex Spouse), the Dependent Type field is not necessary and, therefore, will not be present. For any “child” relation (Child, Grandchild, Other, Dependent of Domestic Partner,) after entry of the Birth Date, the Dependent Type field will be present and display the appropriate list choice based on the dependent’s age.

Note: Dependent Type is a required field; however, “N/A” is pre-selected as the default option. (figure 4)

Prior to entry of Birth Date:

After entry of Birth Date:

Figure 4 – Dependent type field
Add Coverage for an Employee and/or Dependent(s)

Benefit elections can be selected during the “Adding a New Employee” process or added to an existing Employee record. The following procedures apply to both. **Note:** If dependents will be covered, make sure all dependents are added before the Benefit selections are made.

1. To add coverage for an Employee and/or Dependent(s), **click** on the Benefits tab from the Employee record toolbar.

2. **Enrollment Package** – the system defaults to Employee.

3. On the Manage Enrollment drop-down menu, **highlight & click** on Add New Enrollment (figure 1).

4. **Select Benefit to Manage** – a grid appears. The Select Benefit to Manage field defaults with a line of coverage for a single plan type. If this coverage is correct, proceed to Select Plan. If different coverage is needed, **click** on the drop-down arrow, **highlight & click** on the appropriate coverage. Once the correct coverage is selected, proceed to Select Plan.

5. **Select Plan** – **click** on drop-down arrow to view all of the plans available for this Employee for a single plan type. **Highlight & click** on the correct plan (figure 2).

![Figure 1 – Manage Enrollment drop-down menu](image1)

![Figure 2 – Select Plan drop-down menu](image2)
6. **Select Family Members** – select the member(s) to be covered.
   - The system automatically defaults to select employee and all dependents.
   - To de-select a **dependent**, click in the box to the left of the Dependent’s name.
   - Enter **Effective Date**: date the Employee/Dependants are eligible for coverage.

7. When all information has been entered, **click** Add. The newly added coverage will appear in the Employee Enrollment Benefits section (figure 3).

![Figure 3 – Newly added coverage](https://example.com/figure3.png)

**Note:** Repeat steps 3 – 7 of this section to enroll the Employee/dependent(s) in all available benefits.
Change Subscriber’s Personal Information

1. Locate the Employee’s record (refer to Search for Employees/Groups section) if needed.
2. In the Employee record, click on the Personal tab (figure 1).
3. To edit any of the fields on the Personal tab, click on the Edit Record icon or type the letter “E.”
4. Enter the correct information in the appropriate field(s).

5. Once corrections have been made enter a date in the Effective Date: field (this date reflects when the corrections take effect) and click on Save.
Change Dependent Information

1. Locate the Employee’s record (refer to Search for Employees/Groups section) if needed.
2. In the Employee record, click on the Dependents tab (figure 1).

![Figure 1 – Dependents tab](image)

3. In the All Dependents section click on the name of the dependent to be modified.
4. The dependent’s information appears in the lower section of the page in “edit mode.” Enter the correct information in the appropriate field(s) (figure 2).

![Figure 2 – Dependent screen](image)

5. After all edits are complete, a date must be entered in the Effective Date: field (this date reflects when the change takes effect) and click Update.
Change Employment Details

1. Locate the Employee’s record (refer to the Search for Employees/Groups section.)
2. In the Employee record, click on the Employment tab (figure 1).
3. To edit any of the fields on the Employment tab, click on the Edit Record icon or type the letter “E.”
4. Edit the necessary field(s).

![Figure 1 – Employment tab]

5. After all edits are complete, a date must be entered in the Effective Date: field (this date reflects when the change takes effect.) Changes to the Status field affect the Employee’s eligibility. If a change is made to this field a Confirm or Deny section appears and a Reason code must be selected; follow step 6 (figure 2).

6. Click on the reason code: drop-down arrow, highlight & click on the appropriate reason then click Ok.

![Figure 2 – Confirm or Deny drop-down menu]
Create a New Record for a Dependent with COBRA

Step 1 - Terminate Dependent from Employee coverage

a. Locate the correct Employee record (refer to Search for Employees/Groups section.)

b. Click on the Summary tab and print a copy of the Employee Summary screen (figure 1).

c. Click on the Dependents tab. In the All Dependents grid, click on the appropriate Dependent’s name (figure 2). **Note: You will need to capture the dependent information to create a new record.** From your web browser toolbar, click on File → Print. Or, write down the following information:

- First, middle, and last names and suffix
- Birth date
- Gender
- Social security number
- Address, city, state, and zip code

Now, you need to terminate the Dependent from the Employee’s coverage.
d. Locate the correct Employee record (Refer to the Search for Employees/Groups section.)

e. In the Employee record, click on the Benefits tab (figure 3).

f. To terminate a benefit for the dependent, at the Manage Enrollment field, click the drop-down arrow. Highlight & click on Terminate Existing Enrollment.

g. At the Select Benefit to Manage field, click on the drop-down arrow and select the benefit being terminated.

h. Click on the box next to the dependent’s name to deselect the coverage.

i. At the Reason: field, click the drop-down arrow, highlight & click on appropriate reason.

j. In the Effective Date: field, enter date the termination takes effect and click Terminate.

k. Click on Add or View Comments/Enrollment Summary Archive to add a Comment referencing the new record for the Dependent (figure 4).

Now, you are ready to create a NEW record for the Dependent.
Step 2 – Create a New Employee Record for the Dependent

a. From the Main Toolbar, click the Add tab to open a new Employee record. The Employee record defaults to the Personal tab.

b. Complete all required fields on the Personal tab and click Next Step (refer to your printout from Step 1b) (figure 5)

c. On the Employment tab complete the following fields:
   - Hire Date – enter the effective date of the Benefits.
   - Classification – Select Employee.
   - Benefit Status – Select Active.
   - Status Start Date – Change the Status Start Date to “match” the Effective Date of the Benefits (if a change is necessary.)
   - Sub Class – Leave as FTE.
   - Location - Leave as Main.
   - Occupation – Leave as n/a, unless you have specific Occupation Codes you use.

d. Click Next Step to save your selections; you will be moved to the Dependents tab.

Step 3 – Add COBRA Coverage for the Dependent

1. Go to the Benefits tab.
2. In the Manage Enrollment section, select Add New Enrollment from the drop-down menu.
3. Refer to the Add Coverage for an Employee/Dependent(s) section in this guide to enroll Dependent in appropriate COBRA coverage.

   **Important Note:** It is recommended that you enter a comment in the new Dependent record to explain why the new, non-employee record was created, referencing sufficient information to associate the dependent record to the employee record.

4. Select Add or View Comments/Enrollment Summary Archive, enter a comment for the new record and click on Save Comment (figure 6).
**Terminate Coverage for a Single Benefit for a Subscriber/Dependent**

*Note:* The termination effective date must be the first of the month. If benefits end on 2/28/14 you must use 3/1/14 as the effective date.

1. Locate the correct Employee record (Refer to the Search for Employees/Groups section.)
2. In the Employee record, click on the Benefits tab (figure 1).
3. To terminate a benefit for the subscriber (and associated dependents), at the Manage Enrollment field, click the drop-down arrow. **Highlight & click** on Terminate Existing Enrollment.
4. At the Select Benefit to Manage field, click on the drop-down arrow and select the benefit being terminated.
5. At the Reason: field, click the drop-down arrow, highlight & click on appropriate reason.
6. In the Effective Date: field, enter the date the termination takes effect and click Terminate.

![Figure 1 – Benefits tab - terminate](image)

7. To terminate a dependent(s) only, at the Manage Enrollment field, click the drop-down arrow. **Highlight & click** on Edit Existing Enrollment.

8. In the Select Family Members section, uncheck the box next to the dependent(s) being terminated from coverage.
9. At the **Reason:** field, **click** the drop-down arrow, **highlight & click** on appropriate reason.

10. In the **Effective Date:** field, enter the date the termination takes effect and **click Update** (figure 2).

![Figure 2 – Benefits tab - Update](Image)
**Terminate All Coverage for a Subscriber**

1. Locate the correct Employee record (Refer to the Search for Employees/Groups section.)
2. In the Employee record, click on the Employment tab.
3. To edit any of the fields on the Employment tab, click on the Edit Record icon or type the letter “E.”
4. Click on the Benefit Status drop-down arrow. Highlight & click on Terminated.
5. In the Effective Date: field, enter the effective date of the status change then click Save. (figure 1)

   **Note:** The termination effective date must be the first of the month. If benefits end on 1/31/14 you must use 2/1/14 as the effective date.

6. The page will refresh and require you to confirm or deny the change and identify a Reason code. Click on the drop-down arrow, highlight & click on Termination of Employment, then click Ok (figure 2).
Change a Benefit Termination Date using Undo function

The “Undo” function gives Benefits Administrators direct ability to undo benefit enrollments or terminations entered in error. Below are instructions that will guide you through the use of the undo function and features.

Corrections or changes using the Undo function may be made up until the affected records are transmitted to a carrier (on the evenings of the 1st, 8th, 15th, and 22nd of each month), or are placed into an invoice (on the evening of the 15th of each month.) Changes needed after a transmittal occurs or after an invoice of a given record has been generated must continue to be referred to KCARES Support for correction, if applicable. The “Undo” icon is a red arrow and is displayed next to the benefit(s) where a change occurred.

1. On the Benefits tab, click on the Undo icon next to the plan with the incorrect termination date (figure 1).

2. The Edit Subscriber popup window opens. Select Remove Termination Date and click Ok (figure 2).

3. A warning popup window opens with the question “Are you sure you would like to remove the Termination date?” click OK (figure 3).
On the Benefits tab select Terminate Existing Enrollment from the Manage Enrollment drop-down. Enter the correct date in the Effective Date: field and click Terminate (figure 4).

![Figure 4 – Benefits tab – Terminate Existing Enrollment](image)

4. In the Benefits grid the correct termination date is displayed and the plan is highlighted in yellow indicating that the Undo function was used (figure 5).

![Figure 5 – Benefits grid](image)
Correct Term / Effective Date using the Undo function - Examples
I changed an employee's coverage from one plan to another using the wrong Eff To/Eff From date

1. On the Benefits tab, click on the Undo icon next to the new plan (figure 1).

![Figure 1 – Undo icon – New Plan]

2. The Edit Subscriber popup window opens. Select Remove Enrollment and click Ok (figure 2).

![Figure 2 – Edit Subscriber popup window]

3. A warning popup window opens with the question “Are you sure you would like to remove the Enrollment entirely?” Click OK (figure 3).

![Figure 3 – Warning popup window]

4. If the original benefit plan is in the Past, change Benefits grid to display “All” (default is “F&P”). Otherwise, go to Step 5.

5. Now, click on the Undo icon next to the original benefit plan.

![Figure 4 – Undo icon – Old Plan]
6. The **Edit Subscriber** popup window opens (figure 5). Select **Remove Termination Date** and **click Ok** (figure 5).

![Figure 5 - Edit Subscriber popup window](image)

7. A warning popup window opens with the question **“Are you sure you would like to remove the Termination date?” Click OK** (figure 6).

![Figure 6 – Warning popup window](image)

8. Still on the **Benefits** tab, select **Terminate Existing Enrollment** from the **Manage Enrollment** drop-down (figure 7).

![Figure 7 – Terminate Existing Enrollment](image)

9. Enter the correct date in the **Effective Date** field then **click Terminate**. (The plan will now be highlighted in yellow in the Benefits grid indicating the Undo function was used.)

10. Now, select **Add New Enrollment** from the **Manage Enrollment** drop-down.

11. Select the appropriate **new** benefit plan from the **Select Plan** drop-down. Verify the member(s) to be selected, enter the correct date in the **Effective Date** field and **click Add**.
I enrolled an employee in a new plan using the wrong effective date. (This differs from the item above as there is no “old” plan involved.)

1. On the **Benefits** tab, **click on the Undo icon** next to the appropriate benefit plan (figure 1).

![Figure 1 – Undo icon](image)

2. The **Edit Subscriber** popup window opens. Select **Remove Enrollment** and **click Ok** (figure 2).

![Figure 2 – Edit Subscriber popup window](image)

3. A warning popup window opens with the question “**Are you sure you would like to remove the Enrollment entirely?**” **click OK** (figure 3).

![Figure 3 – Warning popup window](image)

4. Now, select **Add New Enrollment** from the **Manage Enrollment** drop-down.
5. Select the appropriate benefit plan from the **Select Plan** drop-down.
6. Verify the member(s) to be selected, enter the correct date in the **Effective Date:** field and **click Add.**
Change Benefit Status – From Terminated to Active (Re-Hire)

**Note:** You cannot change the Hire Date UNTIL the Status Start Date is updated because the Hire Date must be PRIOR to the Status Start Date. Entry of the Effective Date triggers the change of the Status Start Date. Once the Status Start Date is updated and saved, you may update the Hire Date.

Locate the correct Employee record (refer to the Search for Employees/Groups section.)

1. In the Employee record, click on the Employment tab.
2. To edit any of the fields on the Employment tab, click on the Edit Record icon or type the letter “E.”
3. Click on the Benefit Status drop-down arrow. Highlight & click on Active (figure 1).
4. Effective Date: enter the effective date for when benefits will become effective and click the Save button.

![Figure 1 – Benefit Status drop-down menu](image)

5. The page will refresh and require you to confirm or deny the change and identify a Reason code. Click on the drop-down arrow, highlight & click on Re-Hire, then click Ok (figure 2).

![Figure 2 – Confirm or Deny](image)

6. Hire Date: After you “Save” the Effective Date, go to the Hire Date and enter the actual “re-hire” date.
7. Enter a Comment to indicate the original Hire Date for reference purposes (if desired).
**G – REPORTS**

The Reports Tab links you to all the KCARES standard Reports. All the reports on the Reports Tab have similar setup features. They all contain Filters to isolate information; most require some type of Date Parameter; they have a variety of Output Types; they can all be exported to PDF or Excel formats; and they can all be managed by using the “Save & Schedule” feature.

**Reporting – Expanded Search**

While the Reports Tab links you to all the KCARES standard Reports, sometimes a client can find the information they need by simply using the Expanded Search feature on the Search page (“Show/Hide Search Criteria”) which allows selection of specific search criteria from drop-down list choices (figure 1). The results can then be exported into a report.

1. From the Search page click Show Search Criteria to display the available filter options.

2. Select specific search criteria: Status (choices are Active or Terminated) and/or Group from the list choices based on the information you wish to find (figure 2).

3. Click the Search button to find the list of employees that “match” the search criteria (figure 3).

Example: Find all CERTIFICATED FULL TIME, Active employees. (This is a GREAT tool for simply finding COUNTS!)
4. **To create the Report**, select the **Export Results** type desired (e.g., selection of **Mailing Labels** as an export to Excel will create a **data source document** for use with a mail merge using Word.)

Choose the **File Type** from the drop-down list (figure 4); then

![Figure 4 – File type](image)

5. **Click** the **Export** button to open and view the report (figure 5).

![Figure 5 – Export button](image)
**Employee & Dependent Census**

The Employee & Dependent Census, located on the Search tab, provides the option to export results with masked or unmasked social security numbers. By exporting unmasked social security numbers, you can more efficiently manipulate your data using the Excel numeric sorting feature.

1. Click on the **Employee & Dependent Census** radio button on the **Search** tab. A second selection will appear: **Export with full SSNs** (figure 1).

2. Click in the **Export with full SSNs** checkbox and select your Export Result Type (Excel is recommended.) (figure 2)

The report lists all subscribers and dependents in the system, regardless of plan enrollment or employee status. It includes complete census information (e.g., address, date of birth, gender, classification, etc). Using the Excel export type, you can group families together by sorting on the Subscriber social security number (even when last names differ,) and you can filter the data based upon your needs (figure 3).

Note: This report includes Terminated employees unless you employ the Expanded Search feature to exclude them.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subscriber SSN</td>
<td>Subscriber Last</td>
<td>Subscriber First</td>
<td>SSN</td>
<td>Last Name</td>
<td>First Name</td>
</tr>
<tr>
<td>222-22-2222</td>
<td>BROWN</td>
<td>DAVID</td>
<td>222-22-2222</td>
<td>BROWN</td>
<td>DAVID</td>
</tr>
<tr>
<td>222-22-2222</td>
<td>BROWN</td>
<td>DAVID</td>
<td>006-00-0000</td>
<td>JONES</td>
<td>ELIZABETH</td>
</tr>
<tr>
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<td>DAVID</td>
<td>111-23-4567</td>
<td>BROWN</td>
<td>SUSIE</td>
</tr>
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<td>218-18-1818</td>
<td>BROWN</td>
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</tr>
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<td>ROSE</td>
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<td>ROSE</td>
</tr>
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<td>ROSE</td>
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<td>JOHNSON</td>
<td>BARRY</td>
</tr>
<tr>
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<td>CLARK</td>
<td>ROSE</td>
<td>555-54-6666</td>
<td>JOHNSON</td>
<td>MARY</td>
</tr>
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<td>JOHNSON</td>
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<td>SPOUSE</td>
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<td>SPOUSE</td>
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<td>JOHN</td>
<td>000-00-0000</td>
<td>SMITH</td>
<td>JOHNNY</td>
</tr>
</tbody>
</table>

Figure 3 – Employee & Dependent Census report
Comments Report

This report is used to extract comments entered for each employee in the KCARES database into one source file.

1. From the Search page, click on the Comments radio-button (figure 1). (A criteria search does not need to be completed prior to creating this report.)

   ![Comments radio button](image)

   **Figure 1 – Comments radio button**

2. Ensure the Export field is listed as Excel, click Export.

3. The page will refresh and a popup window will appear, allowing you to open or save the report (figure 2).

   ![Comments report](image)

   **Figure 2 – Comments report**
Save & Schedule

The Save & Schedule feature allows criteria for reports run on a regular basis to be saved, reports scheduled to run for a specified period of time and the option to have notification emailed to one or several people in a secure manner. This feature is accessible on every report on the Reports tab and is divided into three processes: Save to My Reports; Notify Settings; and Date/Time Parameters Settings. To use this feature follow the steps below:

1. Select the report to be scheduled (report procedures follow this section). Enter the search criteria and **click on Save & Schedule** (Figure 1).

![Figure 1 – Save & Schedule button](image)

2. A popup window will appear displaying the following fields (figure 2):
   - **Report Title**: Enter a short descriptive report title
   - **Description**: Enter a more detailed description to help you remember report content
   - **Output Type**: PDF or Excel; the output format of the saved report
   - **Attachment**: Marking the box enables a PDF or Excel report to be attached to an email, even for a system Non-User (a person without login credentials)
   - **Password**: Password protects the file if delivered by email. **Note**: A separate email containing the report password must be sent to any other person(s) you scheduled to receive the report.

![Figure 2 – Save to MyReports popup window](image)

3. Once all entries are complete, **click Save**. The Report Notify and Schedule page appears.
Report Notify and Schedule
This page is divided into two sections: Notify Settings and Date/Time Parameters Settings. Each section and its function are described below.

Notify Settings:
Use this feature to assign the person(s) who will receive the saved report notification via email.

1. In the Notify Settings section, click on Add New.
2. Click on the User Name drop-down arrow and select a user. This will populate the Email Address field with that user’s email address. If you cannot locate a user in the User Name drop-down menu, you can manually add a recipient’s email address.
3. Click on Insert (figure 1).

![Figure 1 – Insert link](image)

Figure 1 – Insert link

4. The screen refreshes and the added user appears in the grid.
5. To add another user, click on Add New and repeat Steps 2 & 3 as many times as necessary (figure 2).

![Figure 2 – Add New link](image)

Figure 2 – Add New link
Date/Time Parameters Settings

Use this section to schedule when a report will be run. A report can be scheduled to run only one time or it can be scheduled to run more than once over a specified period of time.

Make your selections based on the definitions supplied below and click Update (figure 1).

**Figure 1 – Schedule Date/Time Parameter Settings**

**PeriodStart:** Choose a Shift Type (see definitions below) and enter a Date

**PeriodEnd:** Choose a Shift Type (see definitions below) and enter a Date. This field only appears for reports needing a Start and End date.

- **Fixed Date:** Enter a specific date; each time the report is run it will use this date.
- **Report Run Date:** The system uses the date the report parameters are created. (i.e.: if the date is 12/12/yyyy when you are creating the parameters, 12/12/yyyy will be the date reflected in the report heading.)
- **1st of Month: Run-Date:** Uses the first of the month of the run date (i.e.: if the run-date is 12/12/yyyy, the report date will be 12/01/yyyy.)
- **1st of Month: Following:** Uses the first of the month following the run-date (i.e.: if the run-date is 12/12/yyyy, the report date will be 01/01/yyyy.)
- **1st of Month: 2nd Following:** Uses the first of the month two months ahead (i.e.: if the run-date is 12/12/yyyy, the report date will be 02/01/yyyy.)
- **Last of Month: Run-Date:** Uses the last day of the month for the run-date (i.e.: if the run-date is 12/12/yyyy, the data contained in the report will be 12/01/yyyy – 12/31/yyyy.)
- **Last of Month: Following:** Uses the last day of the month following the run-date (i.e.: if the run-date is 12/12/yyyy, the data contained in the report will be 01/01/yyyy – 01/31/yyyy.)
- **Last of Month: 2nd Following:** Uses the last day of the month two months ahead of the run-date (i.e.: if the run-date is 12/12/yyyy, the data contained in the report will be 02/01/yyyy – 02/28/yyyy.)
Report Run Date -1 Day: Uses run date and subtracts 1 day (report run on 12/16 will include data as of 12/15)

Report Run Date -7 Days: Uses run date and subtracts 7 days (report run on 12/16 will include data as of 12/9)

Date of the Prior Month: Uses any day of the prior month

End of Prior Month: Uses the last day of the prior month, regardless of how many days are in that month.

Next Run: Enter a date for the next report run. This date will be reflected in the report heading.

Frequency: Select a frequency from the drop-down menu (Once, Daily, Weekly, Bi-weekly, Monthly, Quarterly, Semi-Annual, Annual)

Schedule From: Enter the date the reports will begin to run.

Schedule Thru: Enter the date the report will stop running.
**My Reports Tab**

The drop-down menu for this tab contains two items: *My Reports* and *Saved Reports Folder* (figure 1).

![Figure 1 – My Reports main tab](image)

**My Reports**

To access all saved report parameters *highlight & click* on *My Reports* from the My Report drop-down menu. The *My Reports* page appears displaying a table with all saved report parameters (figure 2).

![Figure 2 – My Reports sub-tab](image)

Only the report creator can make the following changes:

- Clicking on **Execute** to the left of the appropriate report allows you to run a report before the “Next Run” date; **the system will still run a report on the scheduled run date**. If you do use the **Execute** link, the report will be run in the background. When completed, the report will appear in the **Saved Reports Folder**.

- To delete a specific saved and scheduled report, **click** on **Delete** to the left of the appropriate report. The report will be removed.

- To change the report criteria, **click** on **Options**. This will open the report parameters to be edited. When all changes have been completed, **click Update**.
Saved Reports Folder

This folder contains all final Saved & Scheduled reports (figure 3).

![Saved Reports Table](image)

**Figure 3 – Saved Reports**

1. To view the report, **click** on the title of the appropriate report.
2. A popup window will appear, **click Open** (figure 4).

![Popup Window](image)

**Figure 4 – Popup window**

3. The report will download and then open in the application format in which it was saved (figure 5). From here you can print, save or email the report.

![Report Download](image)

**Figure 5 – Report download**
Financial Reports – Carrier Billing

The Carrier Billing Report (CBR) produces a complete billing record of premiums for each carrier plan. It is important to note that CBRs are generated after the Carrier transmission on the 15th of the month and reflect billing for the first of the following month.

On the 20th of each month, the Client will receive a Carrier Billing Report (CBR) Summary (figures 1, 2 and 3), which captures the following month’s eligibility. The CBR is intended to assist the Client in reconciling monthly enrollment totals. This report will be e-mailed to the Client from the following e-mail address: benefitbridge@keenan.com.

Figure 1 – Carrier billing report

Figure 2 – Carrier billing report
1. To access the Carrier Billing report, hover over the Financial tab to reveal the drop-down menu. Highlight & click on Carrier Billing.

2. The required input fields are displayed (figure 4). A selection can be made for each field (except as noted below,) but the default is “All,” except for Display SSN, Billing Month and Output Type; see field descriptions below.

   Carrier: select which Carrier(s) bills to be produced*
   Status: select which Employment Status(es) to search*; Active and Terminated are the only choices
   Classification: default is “All”—leave as is
   Location: default is “All”—leave as is
   Benefit Type: select which Benefit Type to be run*
   Display SSN: select No to remove SSN; Mask to display the last four digits only; and Full to display the entire SSN (SSNs are never listed in the Summary output type)
   Billing Month: select which month/year’s invoice to be used to generate this report
   Output Type: select a report format to display the content

Summary (Recommended Output Type): provides the enrolled subscriber count by Coverage Tier/Family Indicator for each plan along with premium and totals for each Coverage Tier.
Details: provides a line item for each individual subscriber enrollment in given plan along with the Coverage Tier and the premium.
Unformatted: provides an unformatted version of the results that includes all of the header and selection criteria in a columnar format.
This version should be used for more detailed history reporting, analysis and data manipulation.
Once selections have been made, click Create Report. The screen will begin generating the report. The completed report will display on the screen. To Save & Schedule this report, refer to the Save & Schedule section in this guide. To export this report, refer to the How to Export Reports section in this guide.

*Note: to make multiple selections, hold the Ctrl key down while clicking on selections.
Financial Reports – Eligibility Billing (Eligibility List)

The Eligibility List is a report of all eligible and enrolled members for the following month. This report is used by the Client to reconcile upcoming eligibility.

On the 23rd of each month, the Client will receive the Eligibility List reflecting the following month’s eligibility (figures 1 and 2). This report will be e-mailed to the Client from the following e-mail address: benefitbridge@keenan.com.

The Eligibility List is intended to help the Client verify that all changes entered in KCARES from the 16th of the last month to the 15th of the current month are reflected and correct. The Eligibility List will be produced for each sub-location number and will show the names of all covered employees. Employees appearing on the list will be sorted by sub-location number, employee class and last name. A report that summarizes the sub-location totals will also be included (figures 1 and 2).

a. Termination Effective Dates:

Terminated enrollees are eligible through the last day of the month in which the termination occurs, unless otherwise specified in the Client’s carrier contract (the termination effective date should always be the 1st of the month). If an enrollee is terminated retroactively to a prior month and a claim was paid before the carrier was notified of the termination, eligibility must continue through the month in which the claim was incurred, and dues will be owed for that enrollee until the end of that month. **A 90-day limitation on retroactive terminations is standard.**
## Eligibility List

<table>
<thead>
<tr>
<th>SOCIAL SECURITY #</th>
<th>EMPLOYEE NAME</th>
<th>SEX</th>
<th>EMPLOYEE CLASS</th>
<th>COVERAGE TYPE</th>
<th>EFFECTIVE DATE</th>
<th>RATE</th>
<th>TERMINATION DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>4321</td>
<td>ADMIN, DEMO</td>
<td>F</td>
<td></td>
<td>Employee</td>
<td>02-01-14</td>
<td>98.73</td>
<td></td>
</tr>
<tr>
<td>9999</td>
<td>DEMO COUNSELOR</td>
<td>M</td>
<td></td>
<td>Employee</td>
<td>01-01-99</td>
<td>141.90</td>
<td></td>
</tr>
<tr>
<td>1111</td>
<td>DEMO DENTALONLY</td>
<td>M</td>
<td></td>
<td>Employee</td>
<td>11-01-10</td>
<td>54.53</td>
<td></td>
</tr>
<tr>
<td>5454</td>
<td>DEMO LANDSCAPER</td>
<td>M</td>
<td></td>
<td>Employee</td>
<td>06-01-99</td>
<td>54.53</td>
<td></td>
</tr>
<tr>
<td>9999</td>
<td>DEMO NURSE</td>
<td>F</td>
<td></td>
<td>Employee + Child</td>
<td>09-01-99</td>
<td>141.90</td>
<td></td>
</tr>
<tr>
<td>4444</td>
<td>DEMO PRINCIPAL</td>
<td>M</td>
<td></td>
<td>Employee + Spouse</td>
<td>08-01-10</td>
<td>90.73</td>
<td></td>
</tr>
<tr>
<td>8338</td>
<td>DEMO SECRETARY F</td>
<td>M</td>
<td></td>
<td>Employee + Child</td>
<td>09-01-99</td>
<td>141.90</td>
<td></td>
</tr>
<tr>
<td>7676</td>
<td>DEMO SPEECHLANG</td>
<td>F</td>
<td></td>
<td>Employee + One Child</td>
<td>07-01-99</td>
<td>90.73</td>
<td></td>
</tr>
<tr>
<td>8989</td>
<td>DEMO SUPERINTENDENT</td>
<td>M</td>
<td></td>
<td>Employee + Spouse</td>
<td>01-01-99</td>
<td>90.73</td>
<td></td>
</tr>
<tr>
<td>1234</td>
<td>EMPLOYEE, CHANCE</td>
<td>M</td>
<td></td>
<td>Employee + Spouse</td>
<td>03-01-11</td>
<td>90.73</td>
<td></td>
</tr>
<tr>
<td>4567</td>
<td>EMPLOYEE, TERMALL</td>
<td>M</td>
<td></td>
<td>Employee + Family</td>
<td>01-01-11</td>
<td>141.90</td>
<td></td>
</tr>
<tr>
<td>2345</td>
<td>EMPLOYEE, T E M D E P</td>
<td>M</td>
<td></td>
<td>Employee + Spouse</td>
<td>04-01-11</td>
<td>90.73</td>
<td></td>
</tr>
<tr>
<td>3333</td>
<td>EXAMPLE, CHANGE</td>
<td>M</td>
<td></td>
<td>Employee + Family</td>
<td>04-01-11</td>
<td>141.90</td>
<td></td>
</tr>
<tr>
<td>4444</td>
<td>EXAMPLE, T E M D E P</td>
<td>M</td>
<td></td>
<td>Employee + Spouse</td>
<td>05-01-11</td>
<td>90.73</td>
<td></td>
</tr>
<tr>
<td>3333</td>
<td>USER, CHANGE</td>
<td>M</td>
<td></td>
<td>Employee + Spouse</td>
<td>04-01-11</td>
<td>90.73</td>
<td></td>
</tr>
<tr>
<td>4455</td>
<td>USER, TERMALL</td>
<td>M</td>
<td></td>
<td>Employee + Family</td>
<td>01-01-11</td>
<td>141.90</td>
<td></td>
</tr>
<tr>
<td>3333</td>
<td>USER, TERM E D E P</td>
<td>M</td>
<td></td>
<td>Employee + Spouse</td>
<td>04-01-11</td>
<td>90.73</td>
<td></td>
</tr>
</tbody>
</table>
# Eligibility List

**Employer:** Demo KCARES COA  
**Benefit Plan:** Delta Dental/CSDC  
**Reporting Period:** 3/1/2014 to 3/31/2014  
**Group:** 007101-0064  
**Department:** Dental Class/Management/Conf Full-Time  

<table>
<thead>
<tr>
<th>Coverage Type</th>
<th>Count</th>
<th>Rate</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>2</td>
<td>$54.53</td>
<td>$109.06</td>
</tr>
<tr>
<td>Employee + Spouse</td>
<td>7</td>
<td>$98.73</td>
<td>$691.11</td>
</tr>
<tr>
<td>Employee + Family</td>
<td>4</td>
<td>$141.96</td>
<td>$567.84</td>
</tr>
<tr>
<td>Employee + One Child</td>
<td>2</td>
<td>$98.73</td>
<td>$197.46</td>
</tr>
<tr>
<td>Employee + Children</td>
<td>2</td>
<td>$141.96</td>
<td>$283.92</td>
</tr>
</tbody>
</table>

**Total Employee For This Month:** 17  
**Total Amount:** $1,849.39

<table>
<thead>
<tr>
<th>Summary of Changes</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coverage Cancelled</td>
<td>1</td>
</tr>
<tr>
<td>Dependent Cancelled</td>
<td>1</td>
</tr>
<tr>
<td>Employee New Enrollment</td>
<td>1</td>
</tr>
</tbody>
</table>

***Total Changes for this Month: 3***

**Group Total:** 17  
**Total Changes:** 3  
**Amount:** $1,849.39

---

Figure 2 – Eligibility List
1. To access the Eligibility Billing Report, hover over the Financial tab to reveal the drop-down menu. **Highlight & click on Eligibility Billing.**

2. The required input fields are displayed (figure 3). A selection can be made for each field (except as noted below,) but the default is “All,” except for Billing Month and Output Type; see field descriptions below.

   - **Carrier:** select which Carrier(s) to be included in the bill*
   - **Status:** select the Employment Status(es)*; Active and Terminated are the only choices
   - **Classification:** default is “All”—leave as is
   - **Location:** default is “All”—leave as is
   - **Insurance Type:** select a type(s) to include*
   - **Billing Month:** select a month and year
   - **Output Type:** select a report format to display the content

   **Summary:** provides the enrolled subscriber count by Coverage Tier/Family Indicator for each plan along with premium and totals for each Coverage Tier.

   **Details with Summary (Recommended Output Type):** provides a line item for each individual subscriber enrollment in given plan along with the Coverage Tier and premium, as well as a summary of the Coverage Tier and premium amounts.

   **Details with Summary Unformatted:** provides an unformatted version of the results that includes all of the header and selection criteria in a columnar format. This version should be used for more detailed history reporting, analysis and data manipulation.

   **Changes Only:** provides a list of changes made and includes the employee’s name, change description (e.g., change of address, name change) and effective date.

   **Details without Summary:** provides a line item for each individual subscriber enrollment in given plan along with the Coverage Tier and the premium. Each Group ID number is listed on a separate tab.

3. Once all selections have been made, **click Create Report.** The screen will change and begin generating the report and the report navigation heading is displayed. The completed report will be displayed on the screen. To **Save & Schedule** this report, refer to the **Save & Schedule** section in this guide. To **export** this report, refer to the **How to Export Reports** section in this guide.

*Note: to make multiple selections, hold the **Ctrl key down while clicking on selections.*
Status Reports – Carrier Enrollment Census

This report lists all subscribers and dependents enrolled in a given carrier’s plan. It includes complete census information required by a carrier to be used for the enrollment of the subscriber and their dependents in lieu of an electronic transmittal. The search requirements to produce this report include Carrier, Date and Output Type.

A truncated sample of the report is shown below (figure 1); other column headings include Employee Classification, FI/Coverage, Group, etc.

Figure 1 – Carrier Enrollment Census report

1. From the Reports home page hover over the Status tab to reveal the drop-down menu. Highlight & click on Carrier Enrollment Census report.

2. The required input fields are displayed (figure 2). A selection can be made for each field, but the default is “All;” see field descriptions below.

   Carrier: select the Carrier(s) to be included in the report.*

   Date: enter a date or use the Calendar icon to select a date.

   Output Type: Normal: provides a fully formatted report with the selection criteria in the header, grouped and sorted by Classification and Status.

   Simple: provides a simple formatted report grouped and sorted by Classification and Status without header information.

   Unformatted: provides an unformatted version of the results that includes all of the header and selection criteria in a columnar format. This version should be used for more detailed history reporting, analysis and data manipulation.

Figure 2 – Census By Carrier Report input fields
3. Once all selections have been made, **click** Create Report. The screen will change and begin generating the report and the report navigation heading is displayed. The completed report will be displayed on the screen. To **Save & Schedule** this report, refer to the **Save & Schedule** section in this guide. To **export** this report, refer to the **How to Export Reports** section in this guide.

*Note: to make multiple selections, hold the **Ctrl** key down while clicking on selections.*
Status Reports – Complete Census

This report provides the ability to tailor a report through filters, selection and ordering of data elements and selecting the type of data to be included. The search requirements to produce this report are broken into three sections: **General Filters** – Carrier, Status, Classification, Location and Benefit Type; **Report Data** – Select Demographic Data and Select Dependent Data; and **Benefits Data** – Select Benefits Data and Select Sort Fields.

1. It is important to note that to run this report, the “Download” features in your security settings must be enabled. To do this, follow these steps: From the Internet Explorer toolbar, **click on Tools → Internet Options** (figure 1).

   ![Figure 1 – Tools → Internet Options](image)

2. **Click** on the **Security** tab (figure 2).

3. **Click** on the **Internet** icon and then **click on Custom level** . . .

   ![Figure 2 – Security tab](image)
4. In the **Settings** box (figure 3), scroll down to the **Downloads** section
   a. **Click** the **Enable** radio button for **Automatic prompting for file downloads**; **File download**; and **Font download**
   b. **Click** the **OK** button
   c. You will be returned to the **Security** tab; click **OK**

![Figure 3 – Security Settings box](image)

To create the **Complete Census** Report:

1. From the **Reports** home page hover over the **Status** tab to reveal the drop-down menu. **Highlight & click** on **Complete Census** report.

2. The required input fields are displayed for Part I – **General Filters** (figure 4). A selection can be made for each field, but the default is “All;” see field descriptions below.

   - **Carrier:** Select the Carrier(s) to be included in the report
   - **Status:** Select which Employment Status(es) to search
   - **Classification:** Select which Employment Classification(s) to be included
   - **Location:** Select which Locations(s) to search
   - **Benefit Type:** Select which Benefit Type to be run

![Figure 4 – Complete Census input fields – Part I](image)
3. The required input fields are displayed for Part II – **Report Data** (figures 5 and 6). Selections can be added to the “Selected” fields, but at least one data element must be selected and added. See field descriptions below. (Click on the **Add Field(s)** double arrow to finalize your selection.)

**Select Demographic Data:** Select at least one Demographic element to be included in the report (you can choose as many elements as are available in the list)*

**Select Dependent Data:** Select at least one Dependent Data element to be included in the report (you can choose as many elements as are available in the list)* You can also click on the **Include Dependent Data** box if you want to omit dependent data.

---

![Figure 5 – Complete Census input fields – Part II](image-url)

![Figure 6 – Complete Census input fields – Part II](image-url)

---

a. To change the order of your **Selected Demographic Data**, highlight a line of data and use the **Move Up** or **Move Down** double arrows to change the order in which your data will appear in the final report (figure 7).

![Figure 7 – Move Up and Move Down double arrows](image-url)
4. The required input fields are displayed for Part III – Benefits Data (figure 8). Selections can be added to the “Selected” fields, but at least one data element must be selected and added. See field descriptions below. (Click on the Add Field(s) double arrow to finalize your selection and/or the Move Up or Move Down double arrows to change the order in which your data will appear in the final report.)

Select Benefits Data: Select at least one Benefits element to be included in the report (you can choose as many elements as are available in the list)*. You can also click on the Include Benefit Data box if you want to omit benefit data. We recommend that you keep the Exclude Terminated Records box checked.

Select Sort Field: Select the sort element to be used to format the report output

![Figure 8 – Benefit Data input fields – Part III](image)

5. Once all selections have been made, click Save Report Fields to save these selections for future use (this is not required).

6. Click Create Report. A popup window will appear and begin generating the report (figure 9). A File Download box will appear, allowing you to Open or Save this report.

![Figure 9 – Complete Census popup window](image)

*Note: to make multiple selections, hold the Ctrl key down while clicking on selections.
Save & Schedule Feature (for Complete Census only)

1. Select the Complete Census Report and enter the report criteria.

2. Click on Save & Schedule.

3. A **Complete Census Report Save & Schedule** popup window will appear displaying the following fields (figure 1):
   - **Report Title:** Enter a short descriptive report title
   - **Report Description:** Enter a more detailed description to help you remember
   - **Password:** Password protects the file when delivered to your email inbox
   - **Notify:** Enter your email address to be notified when the report has been run
   - **Next Run:** Enter a date for the next report run.
   - **Recurring Report:** Checkbox is checked
   - **Frequency:** Select a frequency from the drop-down menu (Monthly, Quarterly, Semi-Annual, Annual)
   - **Schedule Start:** Enter the date the reports will begin to run
   - **Schedule Thru:** Enter the date the report will stop running

![Figure 1 – Complete Census Save & Schedule popup window](image)

4. Once all entries are complete, **click Save**.

5. A popup box appears (figure 2), notifying that the report schedule is saved.

![Figure 2 – Saved popup box](image)

6. **Click OK.**
Status Reports – Enrolled Subscribers by Plan

This report provides a count of subscribers by Group for dental and/or vision benefits (figure 1). This report can be used for budgeting, bargaining and negotiation purposes. The search requirements to produce this report include Date and Status.

Figure 1 – Enrolled Subscribers By Plan report

1. From the Reports home page hover over the Status tab to reveal the drop-down menu. Highlight & click on Enrolled Subscribers By Plan.

2. The required input fields are displayed (figure 2). A selection can be made for each field, but the default is “All;” see field descriptions below.

   Date: enter a current or future date
   Status: select the Status(es) to be included in the report*; Active and Terminated are the only options which should be used

Figure 2 – Enrolled Subscribers By Plan input fields

3. Once all selections have been made, click Create Report. The screen will change and begin generating the report and the report navigation heading is displayed. The completed report will be displayed on the screen. To Save & Schedule this report, refer to the Save & Schedule section in this guide. To export this report, refer to the How to Export Reports section in this guide.

   *Note: to make multiple selections, hold the Ctrl key down while clicking on selections.
Status Reports – Over Age Dependents

This report lists all dependent children (non-spouses) who have exceeded the age limits for all plans in which they are currently enrolled.

On the 2nd of each month, the Client will receive a courtesy dental Over Age Dependent Report (dependent tracking is not necessary for vision eligibility), which captures all dependents who will be reaching the plan’s overage limit in the upcoming month (figure 1). This report will be e-mailed to the Client from the following e-mail address: benefitbridge@keenan.com.

Note: It is the Client’s responsibility to:

- Notify the Employee of the dependent’s termination of coverage
- Send notice of COBRA eligibility

---

<table>
<thead>
<tr>
<th>Subscriber SSN</th>
<th>Benefit Type</th>
<th>EIN</th>
<th>Relationship Carrier</th>
<th>Dependent Name: Last First MI Group Name/Group Number</th>
<th>Date of Birth</th>
<th>Age</th>
</tr>
</thead>
<tbody>
<tr>
<td>999-99-0999</td>
<td>Dental</td>
<td>35</td>
<td>CHILD</td>
<td>DEMO, CHILDFIRST</td>
<td>1/1/1985</td>
<td>26</td>
</tr>
<tr>
<td>333-33-3333</td>
<td>Dental</td>
<td>35</td>
<td>CHILD</td>
<td>DEMO, DAUGHTER</td>
<td>11/12/1984</td>
<td>25</td>
</tr>
<tr>
<td>111-12-0123</td>
<td>Dental</td>
<td>111</td>
<td>CHILD</td>
<td>EMPLOYEE, SON</td>
<td>3/1/1985</td>
<td>26</td>
</tr>
<tr>
<td>111-12-0124</td>
<td>Dental</td>
<td>111</td>
<td>CHILD</td>
<td>EMPLOYEE, SON</td>
<td>3/1/1985</td>
<td>25</td>
</tr>
</tbody>
</table>

Figure 1 – Over Age Dependents report

1. From the Reports home page hover over the Status tab to reveal the drop-down menu. **Highlight & click** on Over Age Dependents.

2. The required input fields are displayed (figure 2). A selection can be made for each field (except as noted below,) but the default is “All,” see field descriptions below.
Carrier: select the Carrier,*
Location: default is “All”—leave as is
Group: select the Group in which the subscriber is a member
Sub-Groups: default is “All”—leave as is
Date: enter a current or future date
Output Type: Details: provides a fully formatted report with the selection criteria in the header, grouped and sorted by Last Name.

Normal: provides a simple formatted report in line item fashion grouped and sorted by Last Name.

Unformatted: provides an unformatted version of the results that includes all of the header and selection criteria in a columnar format. This version should be used for more detailed history reporting, analysis and data manipulation.

3. Once all selections have been made, click Create Report. The screen will change and begin generating the report and the report navigation heading is displayed. The completed report will be displayed on the screen. To Save & Schedule this report, refer to the Save & Schedule section in this guide. To export this report, refer to the How to Export Reports section in this guide.

*Note: to make multiple selections, hold the Ctrl key down while clicking on selections.
Status Reports – Dependent Age Changes

This report lists all dependents (non-spouses) who will become a certain age in an upcoming period (age range includes 18 through 26) (figure 1). The search requirements to produce this report include Classification, Mask SSN, Start Date, End Date, Age and Output Type.

1. From the Reports home page hover over the Status tab to reveal the drop-down menu. Highlight & click on Dependent Age Changes.

2. The required input fields are displayed (figure 2). A selection can be made for each field (except as noted below,) but the default is “All;” see field descriptions below.

   Classification: default is “All”—leaves as is

   Mask SSN: Yes displays only the last 4 digits of the subscriber’s SSN
               No displays the subscriber’s entire SSN (recommended)

   Start Date: enter a start date
   End Date: enter an end date
   Age: select All or choose ages to be included in the report

   Output Type: Normal: provides a fully formatted report with the selection criteria in the header, grouped and sorted by Age and Last Name.
               Unformatted: provides an unformatted version of the results that includes all of the header and selection criteria in a columnar format. This version should be used for more detailed history reporting, analysis and data manipulation

3. Once all selections have been made, click Create Report. The screen will change and begin generating the report and the report navigation heading is displayed. The completed report will be displayed on the screen. To Save & Schedule this report, refer to the Save & Schedule section in this guide. To export this report, refer to the How to Export Reports section in this guide.
Status Reports – Changes

This report lists the event history for a group of employees/dependents for a specified date range (figure 1). This report shows all changes performed on a record. The search requirements to produce this report are broken into three sections. “Current Subscriber Information Filters,” which includes Classification, Status, Location and Carrier; “Changes Filter,” which includes Change Type, Carrier, Service, Search By, Date Range, masking of SSN and Changed By; and “Report Display Options,” which includes Sort By, Sort Direction, Group By and Report Options.

1. From the Reports home page hover over the Status tab to reveal the drop-down menu. Highlight & click on Changes Report.

2. The required input fields are displayed (figure 2). A selection can be made for each field (except as noted below,) but the default is “All,” see field descriptions below.

Current Subscriber Information Filters
Classification: default is “All”—leave as is
Status: choose a Status to be included in the report; *Active and Terminated are the only choices
Location: default is “All”—leave as is
Carrier: choose a Carrier to be included in the report; or keep -All- as default

Changes Filter
Change Type: select Add, Change or Term; or keep -All- as default
Carrier: choose a Carrier to be included in the report; or keep -All- as default
Service: select single or multiple services; or keep -All- as default*
Search By: select either Entry Date or Effective Date
From/To: enter a specified date range

Figure 1 – Changes report

Figure 2 – Changes report input fields
**Changed By:** select a User(s) from the list or keep -All- as default*

☐ **Subscriber data only:** selecting this option removes dependent data for the report results.

**Mask SSN:**  Yes displays the last 4 digits of subscriber’s SSN; No displays subscriber’s entire SSN (recommended)

**Report Display Options**

- **Sort By:** select how you want the report data sorted; defaults to Subscriber Code (SSN)
- **Sort Direction:** select either Ascending or Descending
- **Group By:** select how you want the report data grouped; defaults to Subscriber Code (SSN)

**Report Options:** select either Details or Unformatted

3. Once selections have been made, **click Create Report.** The screen will begin generating the report. The completed report will display on the screen. To **Save & Schedule** this report, refer to the **Save & Schedule** section in this guide. To **export** this report, refer to the How to Export Reports section in this guide.

* **Note:** to make multiple selections, hold the Ctrl key down while clicking on selections.
How to Export Reports

All reports available in the Reports tab section of KCARES are exportable. There are various data formats available for selection.

1. Once the report has been generated, the results will appear on the screen. In the navigation heading click the drop-down arrow to the left of Export. Highlight & click on the desired format. Acrobat (PDF) and Excel are the two recommended options for report export (figure 1).

2. Click Export.

3. A File Download popup window appears (figure 2). Click Save to save the report to your PC or click Open to open the data into the desired format. Remember to save the report once it has been exported.
## H – Glossary of Terms

### Personal Tab:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>Employee's address. <strong>Required field.</strong></td>
<td></td>
</tr>
<tr>
<td>Birth Date</td>
<td>Employee's birth date, entered without slashes. The month and date must be entered as two digits; the year entered as four digits. You can also use the built-in calendar. <strong>Required field.</strong></td>
<td></td>
</tr>
<tr>
<td>City/State/Zip</td>
<td>Tabbing out of the address field will place the cursor on the zip code field. Once entered, it will automatically populate the City and State. <strong>Required fields.</strong> (For cities that share the same zip code, you may type-over the City for correction as needed.)</td>
<td></td>
</tr>
<tr>
<td>Edit Record</td>
<td>On the Personal and Employment tabs, clicking on this link will allow you to make necessary changes to all the fields. <strong>Note:</strong> typing the letter “E” while on the Personal or Employment tab will also allow you to edit all the information on these tabs.</td>
<td></td>
</tr>
<tr>
<td>Effective Date</td>
<td>Throughout the system, this is the current date upon which a change becomes effective, such as when a benefit becomes effective, when a change of address becomes effective and when a newborn's benefits become effective.</td>
<td></td>
</tr>
<tr>
<td>First Name/Last Name</td>
<td>Employee's first and last name. <strong>Required fields.</strong></td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td>Employee's gender. <strong>Required field.</strong></td>
<td></td>
</tr>
<tr>
<td>Home Email</td>
<td>Employee's home email address. This is not a required field.</td>
<td></td>
</tr>
<tr>
<td>Home Phone</td>
<td>Employee's home phone number, entered without hyphens. This is not a required field.</td>
<td></td>
</tr>
<tr>
<td>SSN</td>
<td>Social Security Number to be entered without hyphens. <strong>Required field.</strong></td>
<td></td>
</tr>
</tbody>
</table>

### Employment Tab:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Income</td>
<td>Can be left blank. This is not a required field.</td>
<td></td>
</tr>
<tr>
<td>Benefit Status</td>
<td>Employee's status information–Active or Terminated</td>
<td></td>
</tr>
<tr>
<td>Classification</td>
<td>“Employee” is the default classification.</td>
<td></td>
</tr>
<tr>
<td>Department</td>
<td>Can be left blank. This is not a required field.</td>
<td></td>
</tr>
<tr>
<td>Division</td>
<td>Can be left blank. This is not a required field.</td>
<td></td>
</tr>
<tr>
<td>Employee ID:</td>
<td>Can be left blank. This is not a required field.</td>
<td></td>
</tr>
<tr>
<td>Hire Date</td>
<td>Employee’s original date of hire. If this date is unknown, use the Status Start Date (the date that benefits are effective). <strong>Required field.</strong></td>
<td></td>
</tr>
<tr>
<td>Location</td>
<td>Can be left blank. This is not a required field.</td>
<td></td>
</tr>
<tr>
<td>Occupation</td>
<td>The Occupational Code is listed here. If utilized, this helps identify codes for other plans, such as COBRA or Surviving Spouse plans.</td>
<td></td>
</tr>
<tr>
<td>Status Start Date</td>
<td>The Status Start Date is automatically calculated to be the 1st of the month following Date of Hire. You can manually adjust the Status Start Date; for instance, if an employee is hired on 8/20/14 and eligibility is met on the first of the month following 30 days of employment, the Status Start Date should be changed to read 10/01/14.</td>
<td></td>
</tr>
<tr>
<td>-------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Sub-Class</td>
<td>The default is “FTE.” This is not a required field.</td>
<td></td>
</tr>
<tr>
<td>Work Email</td>
<td>Can be left blank. This is not a required field.</td>
<td></td>
</tr>
<tr>
<td>Work Phone Number</td>
<td>Can be left blank. This is not a required field.</td>
<td></td>
</tr>
<tr>
<td><strong>Dependents Tab:</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Benefit Status</td>
<td>This denotes dependent(s) status for benefits, e.g., “Active, Ineligible.” <strong>Required field.</strong></td>
<td></td>
</tr>
<tr>
<td>Dependent Type</td>
<td>This list identifies and stores Dependent Type information for each dependent within an Employee’s record. The list options vary based on a dependent’s Relation (Spouse, Child, Grandchild, etc.) and Birth Date. This field does not initially display on a “blank” (new) record and will not display on a Spouse’s record. For any child relation, this field appears after the Birth Date has been entered and will display the appropriate list choice based on the dependent’s age. <strong>Required Field</strong> (except for Spouse).</td>
<td></td>
</tr>
<tr>
<td>Documentation</td>
<td>The options are Yes or No, designating whether documentation was provided with regard to the dependent. Defaults to No. <strong>Required field.</strong></td>
<td></td>
</tr>
<tr>
<td>First Name/Last Name</td>
<td>Dependent's first and last name. <strong>Note:</strong> Dependent's last name will default to Employee's last name but may be changed. <strong>Required fields.</strong></td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td>Dependent’s gender. <strong>Required field.</strong></td>
<td></td>
</tr>
<tr>
<td>Relation</td>
<td>Identifies the relationship of the dependent to the Employee (Subscriber). <strong>Required field.</strong></td>
<td></td>
</tr>
<tr>
<td>SSN</td>
<td>Social Security Number to be entered without hyphens. <strong>Required field. Note:</strong> System will allow entry of “000-00-0000” for an unknown Dependent SSN.</td>
<td></td>
</tr>
<tr>
<td>Use Subscriber’s (checkbox)</td>
<td>Checkbox is marked as default to show address to be the same as Subscriber’s. Uncheck the box and enter an address for dependent if different.</td>
<td></td>
</tr>
<tr>
<td>Validation</td>
<td>This list contains validation documentation items such as adoption papers, birth certificates, court orders and marriage certificates, etc., if an employer requires that dependent validation documentation be collected or viewed.</td>
<td></td>
</tr>
<tr>
<td>Validation Date</td>
<td>This date field can be used to track when a dependent’s paperwork was validated/verified or when this information must next be validated/verified.</td>
<td></td>
</tr>
</tbody>
</table>
### Benefits Tab:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coverage Details</td>
<td>In the Manage Enrollment Section: In some instances, e.g., some vision plans, a drop-down menu may appear when selecting plan coverage. This drop-down contains added information such as tier levels for a vision plan.</td>
</tr>
<tr>
<td>Effective From</td>
<td>This date represents the start date of the plan in question.</td>
</tr>
<tr>
<td>Effective To</td>
<td>This date represents the termination date of the plan in question. If this field is blank, the plan is still active.</td>
</tr>
<tr>
<td>Enrollment Package</td>
<td>The default is “Employee” and denotes the benefits package containing the appropriate dental and/or vision plans.</td>
</tr>
<tr>
<td>F&amp;P (and others in drop-down menu)</td>
<td>This drop-down menu presents benefit selections of Future &amp; Present (the default), Present, Past, Future, Pending and All. You may make a selection from the drop-down menu to view benefits in the future, past, present, pending or you can choose All.</td>
</tr>
<tr>
<td>Manage Enrollment</td>
<td>This drop-down menu allows you to select the option of adding a new enrollment, editing an existing enrollment, terminating an existing enrollment or viewing an existing enrollment.</td>
</tr>
<tr>
<td>Reason</td>
<td>In the Manage Enrollment section: This drop-down menu offers a selection of reasons for changing benefits, e.g., termination, deceased, reduced hours, etc.</td>
</tr>
<tr>
<td>Select Benefit To Manage</td>
<td>In the Manage Enrollment section: This drop-down menu displays the types of plans which need to be edited, added or changed in some fashion, e.g., dental or vision.</td>
</tr>
<tr>
<td>Select Plan</td>
<td>In the Manage Enrollment section: This drop-down menu displays the individual plans which need to be edited, added or changed in some fashion, e.g., for dental, an HMO Dental Plan or a PPO Dental Plan.</td>
</tr>
<tr>
<td>Update (or Change)</td>
<td>In the Manage Enrollment section: This button processes the changes in selection that have been made to an employee’s plans.</td>
</tr>
</tbody>
</table>

### All Tabs – Employee Record Toolbar:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add or View Comments/ Enrollment Summary Archive</td>
<td>The Comments feature allows you to add and save information about an employee and/or dependent to help clarify specific activity within the record. Comments saved identify the entry Date and User and become part of the employee’s record. Comments for one or more employees can be exported and printed from the Search screen.</td>
</tr>
<tr>
<td>Show Sensitive Information</td>
<td>When accessed, this will reveal hidden information in its entirety, such as the social security number or salary, where applicable.</td>
</tr>
</tbody>
</table>

(Note: this link is found on each tab of the Employee Record Toolbar.)