

# Guide to On Demand Reporting

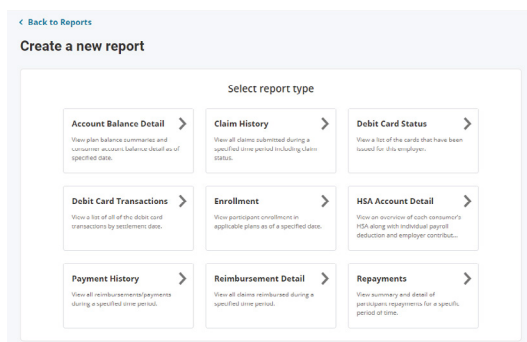
## ACCESS REPORTS IN MOMENTS

Employers have the ability to run updated reports on demand through your online account. This can be done in addition to the regular scheduled reports that are automatically generated. Follow the steps below to run an updated report on demand.

**Step 1:** To access one of these reports, log in to LEAP and select the Reports tab.

**Step 2:** Select Run New Report next to the report you would like to run.

**Step 3:** Select the report type.



The screenshot shows a web interface for creating a new report. At the top, there is a navigation link '< Back to Reports' and a heading 'Create a new report'. Below this is a section titled 'Select report type' containing nine report options, each with a right-pointing arrow and a brief description:

- Account Balance Detail**: View plan balance summaries and consumer account balance detail as of specified date.
- Claim History**: View all claims submitted during a specified time period including claim status.
- Debit Card Status**: View a list of the cards that have been issued for this employee.
- Debit Card Transactions**: View a list of all of this debit card transactions by settlement date.
- Enrollment**: View participant enrollment in applicable plans as of a specified date.
- HSA Account Detail**: View an overview of each consumer's HSA along with individual payroll deduction and employer contribution.
- Payment History**: View all reimbursements/payments during a specified time period.
- Reimbursement Detail**: View all claims reimbursed during a specified time period.
- Repayments**: View summary and detail of participant repayments for a specific period of time.

**Step 4:** Complete the fields on the Report details page and click Request. See the applicable details below to ensure the report is run correctly.

- **Please Note:** Reports may take up to 24 hours to process. Check the "Email me when the report is available" box to receive an email when the report is ready to be viewed.

# Guide to On-Demand Reporting, continued

## Account Balance Detailed Report

### ADDITIONAL DETAILS:

**As Of:** Report will include data from the date entered here and before. Any information after this date will not be included.

**Report Detail Level:** Select “Detail” if you would like participant names included on the report and “De-identified Detail” if you would like them omitted from the report.

**Include Cash Balance Detail:** If checked, the report will include a cash balance column that is calculated by subtracting paid claims and pending repayments from participant deposits.

## Enrollment Report

### ADDITIONAL DETAILS:

**Report Format:** Select the format you prefer the report to be generated in. DataFile is a basic report that only includes the essential information.

**As Of:** Report will include data from the date entered here and before. Any information after this date will not be included. Please note, to see enrollments for a future effective date, the “As Of” date must be on or after the participants’ enrollment effective date. A future date is most commonly used during open enrollment.

**Plan Year:** Commuter plans will appear as “Commuter Plan.”

**Report Detail Level:** Select “Detail” if you would like participant names included on the report and “De-identified Detail” if you would like them omitted from the report.

Additional information includes employer name, participant addresses, payroll frequencies and more.

## Payment History Report

Depending upon the employer’s funding design, the Payment History Report may not be available.

### ADDITIONAL DETAILS:

**Report Format:** Select the format you prefer the report to be generated in. DataFile is a basic report that only includes the essential information.

**Start Date and End Date:** Report will include payments made on and in between the dates provided.

**Payment Type:** Select the participant reimbursement method you would like included on the report.

**Report Detail Level:** Select “Detail” if you would like participant names included on the report and “De-identified Detail” if you would like them omitted from the report.

**Additional reports:** Claims History, Debit Card Status, Debit Card Transactions, Reimbursement Detail and Repayment Reports are also available on demand.

**Step 5:** After you click “Request,” a notification will appear confirming the report was successfully requested.

**Step 6:** To check the status of or view the report, click the Reports tab and click the heading of the report type you are looking for. Next, select the name of the newly created report to open it. If the Date/Time Created column says “In Progress,” the report cannot be opened yet. It will be available within 24 hours of the initial request.