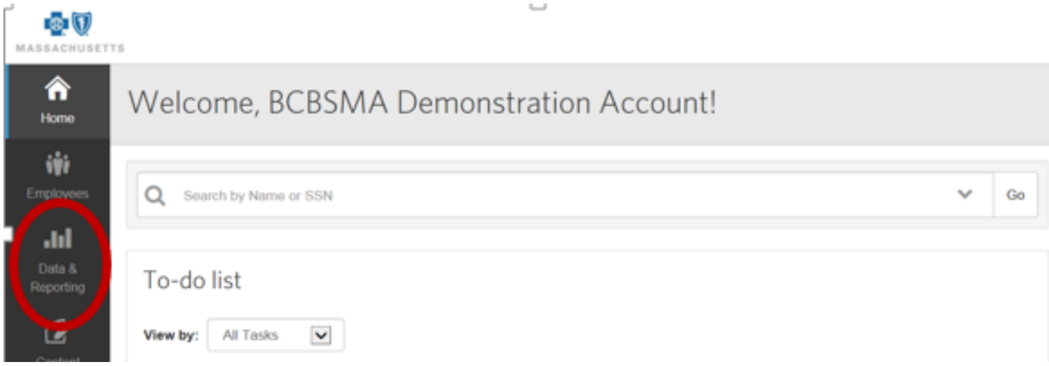
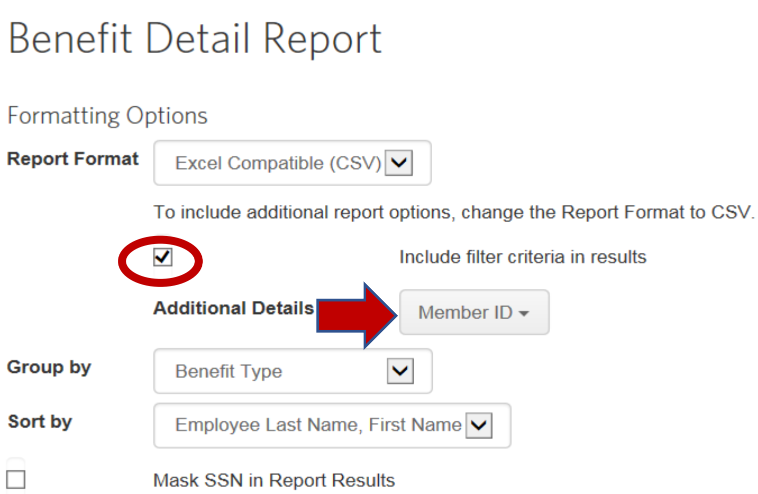
How to Create a Benefit Detail Report

While on your account Home Page Click on **Data and Reporting** on the left hand Column



Click on **Benefit Details** under the Favorites tab (default) or the Benefit Tab

- The format should default to a CSV
- **All of the filters are optional**
- Click the box to check off to include filters
- The additional filters drop down has the filters for you to choose from (Member ID, SSN, PCP, address, categories, Retired etc)
- Group by you can use this drop down to indicate **Group Number**
- You can also choose how to sort and group the report



- The default is to include active Subscribers only. If you want dependents or COBRA members, please check those boxes off. (There is a separate report for terminated members)
- The default chooses the current benefit period but you can select a specific plan for your report including any divisions if your account has them.

Click Create Report

Once a plus sign appears under Actions, your report is ready and you can **click download**

Note: You can leave this page while the report is running and go back and click Data and Reporting then click on "Your reports" to see the status