



STATEWIDE PERSONNEL  
— S Y S T E M —

# ABC Reports Webinar

January 17, 2019

# Course Audiences and Prerequisites



## Audiences

- This course is intended for the following audiences:
  - Agency Benefit Coordinators and Agency Benefits Liaisons






## Prerequisites

- You should have completed the following prerequisites:
  - SPS-ABC Certification Exam (ABCs only)
  - SPS-BEN 301A-Processing Employee Benefits in Workday (ABCs only)
  - SPS-ABC 101, Introduction to Benefits Fundamentals
  - DBM-EBD HIPAA Certification
  - SPS-HCM 101O, Workday Navigation Basics



# Lesson Objectives

After completing this lesson, you should be able to:

-  Identify custom Benefit reports in SPS Benefits
-  Identify where to find a list of Benefit reports
-  Demonstrate how to run and view Benefit reports in SPS Benefits



# Reporting in SPS Benefits

There are two general types of reports within SPS Benefits.

## Standard Reports...

- Are delivered with the SPS system

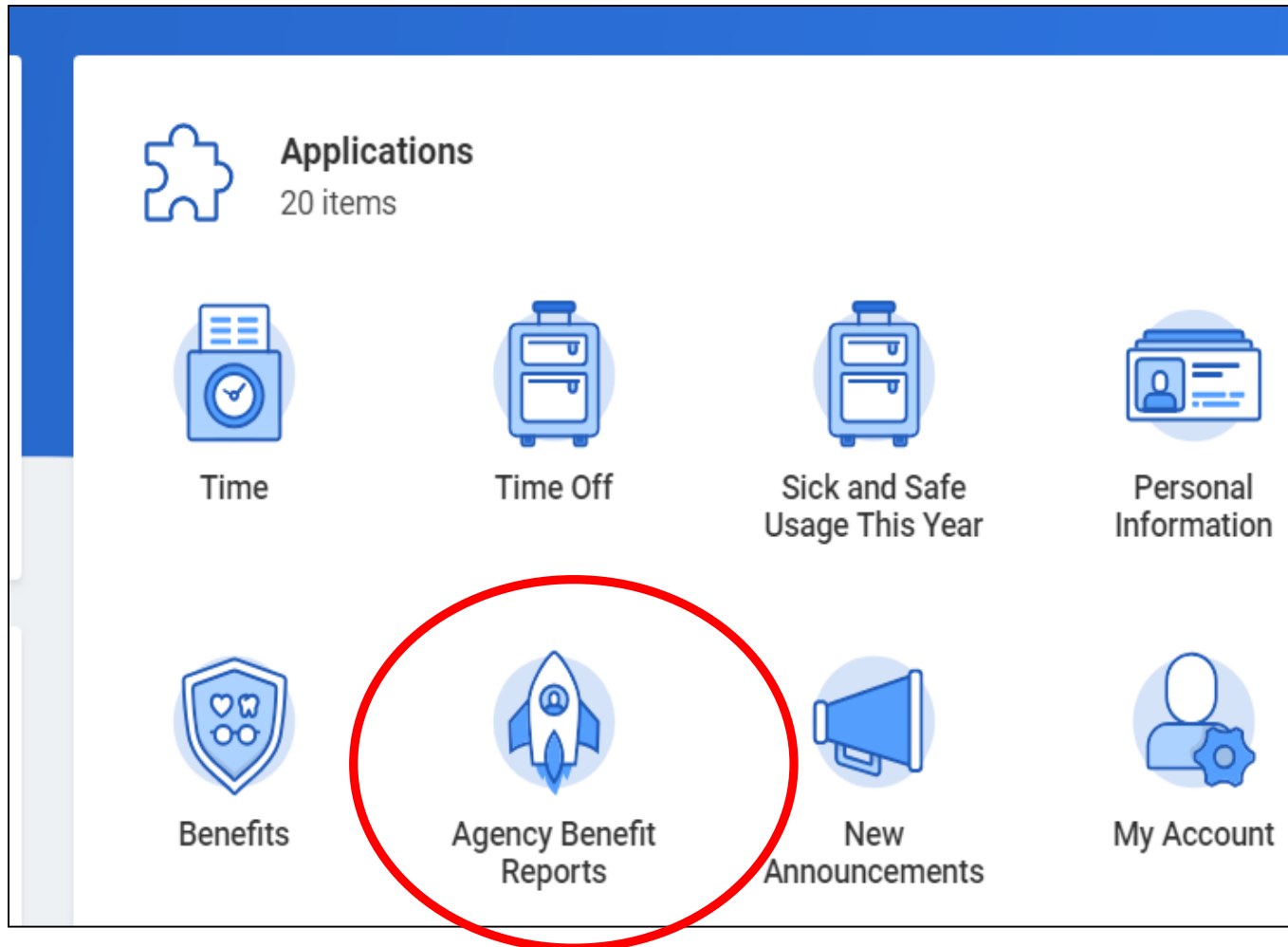
## Custom Reports...

- Are built for specific State requirements
- Begin with the prefix “SPS Benefit”
  - e.g., SPS Benefit Open Election Events  
- Employees



# What Benefit reports are available?

- You can find a list of custom reports on your home page, under **Agency Benefit Reports**.



# What Benefit reports are available? (Cont.)

- The name and description of the reports will display after clicking the **Agency Benefit Reports** worklet.

Custom Report	Comments	Number of Times Executed
<a href="#">SPS Benefit All ABC Reports</a>	This Report will provide a listing of all Benefit Reports available to Agency Benefits Coordinator.	233
<a href="#">SPS Benefit Census Report</a>	The report shows employee/retiree benefit elections (plans, coverage levels, covered dependents) for a user-specified "as of" date. The report has Run Control options to select a specific Supervisory Org and/or Benefit Group.	84
<a href="#">SPS Benefit Expiring Contract Report</a>	This report shows employees with a benefit job contract expiring within the next 30 days. The report indicates if the employee has current benefit elections. ABC's should regularly monitor this report to ensure contracts are extended before they expire.	112
<a href="#">SPS Benefit Finalized Election Events - Employees</a>	The reports shows employee benefit events that were Successfully Completed within the 60 days prior to a user-specified date. The report can be run for a user-specific Benefit Group or a user-specified Worker.	49
<a href="#">SPS Benefit Group by Sup Org</a>	The report shows employees in a user-specified Benefit Group. The report also has options to run for user-specified Worker and/or Supervisory Org.	21
<a href="#">SPS Benefit Leave Monitoring Report</a>	This report shows all employees with an Unpaid Leave of Absence event along with the event details (Leave Start Date, Estimated Return Date, type of Leave, leave duration, etc). There are no run control parameters; the report pulls all Active Unpaid leave events and returned leave events that were returned in the 60 days prior to the report run date. EBD will use this report to monitor and manage unpaid leave of absence events. ABC's should run this report on a weekly basis to monitor there are unpaid leave events in the system for employees out on a unpaid leave, and that the dates are accurate/up-to-date.	44
<a href="#">SPS Benefit Open Election Events - Employees</a>	This report shows employee benefit events that are either 'Not Started' or 'In Progress'. The report identifies where the event is currently in the workstream and who is the next person designated to take action. The report also displays if the employee has a Work and/or Personal Email address in the system. ABC's should regularly run this report and follow-up with employees as required, specifically with employees without and email address in the system.	195
<a href="#">SPS Benefit Worker Leave Snapshot</a>	The reports shows all leave events for a user-specified employee	34



# Running Benefits Reports

- *Choose one of the below options to run a report:*

1) Click the report name from the list to run the report.

Custom Report	Comments	Number of Times Executed
<a href="#">SPS Benefit All ABC Reports</a>	This Report will provide a listing of all Benefit Reports available to Agency Benefits Coordinator.	233
<a href="#">SPS Benefit Census Report</a>	The report shows employee/retiree benefit elections (plans, coverage levels, covered dependents) for a user-specified "as of" date. The report has Run Control options to select a specific Supervisory Org and/or Benefit Group.	84
<a href="#">SPS Benefit Expiring Contract Report</a>	This report shows employees with a benefit job contract expiring within the next 30 days. The report indicates if the employee has current benefit elections. ABC's should regularly monitor this report to ensure contracts are extended before they expire.	112

2) Enter the name of the report in the **Search** field to run the report.



The screenshot shows a search interface with a magnifying glass icon and the text "sps ben" entered into the search field. A red arrow points to the search input area.

# Running Benefits Reports (Cont.)

- Depending on the report, Workday will prompt the user to fill in specific reporting criteria such as Benefit Group, Supervisory Organization, and Effective as of Date.

**SPS Benefit Census Report** Actions

Instructions The report shows employee/retiree benefit elections (plans, coverage levels, c

Benefit Group \*

Supervisory Organization

Include Subordinate Organizations

Effective as of Date \* MM / DD / YYYY

Filter Name

Manage Filters 0 Saved Filters Save

Fields marked with an asterisk are required.

**Reminder!**

Who and what you can see in a report depends on your security.

**Note: Some reports may run immediately upon clicking on the report name.**



# Running Benefits Reports (Cont.)

## SPS Benefit Census Report Actions

Instructions The report shows employee/retiree benefit elections (plans, coverage)

Benefit Group \*

Supervisory Organization

Include Subordinate Organizations

Effective as of Date \*

DVA

Manage Filters  
0 Saved Filters

Save

## SPS Benefit Census Report Actions

Instructions The report shows employee/retiree benefit elections (plans, coverage)

Benefit Group \*

Supervisory Organization

Include Subordinate Organizations

Effective as of Date \*

Filter Name

Manage Filters  
1 Saved Filters

DVA

To save the combination of required fields, enter a name and then click on “**Save**”. You can find it the next time you run the report under “Manage Filters”.  
Once the required fields have been completed, click **OK** to run the report. Your report will display after inputting the search criteria and clicking the Submit button.



# Running Benefits Reports (Cont.)

- There may be times when running a report that you get a message such as the one below. This means the report is running.

Search Results 1 items

Tasks and Reports

SPS Benefit Open Election Events - Employees

Tip: try selecting another category from the left to see o

**Processing your request, please wait.**

**Options**

You can keep working while this runs in the background, and will be notified when it's ready. You can also view your completed requests by searching for the My Reports task or selecting My Reports from the main menu.

**Notify Me Later** **Cancel**

Don't click the **Cancel** button or you will cancel running the report.

Click the **Notify Me Later** button.



# Running Benefits Reports (Cont.)

Search Results 1 items

Tasks and Reports

SPS Benefit Open Election Events - Employees

Tip: try selecting another category from the left to see other results

**Send to My Reports**

Choose a document format and name the file:

Request Name: \* SPS Benefit Open Election Events - Empl

Format: \* Microsoft Excel

You can track the progress in the Process Monitor

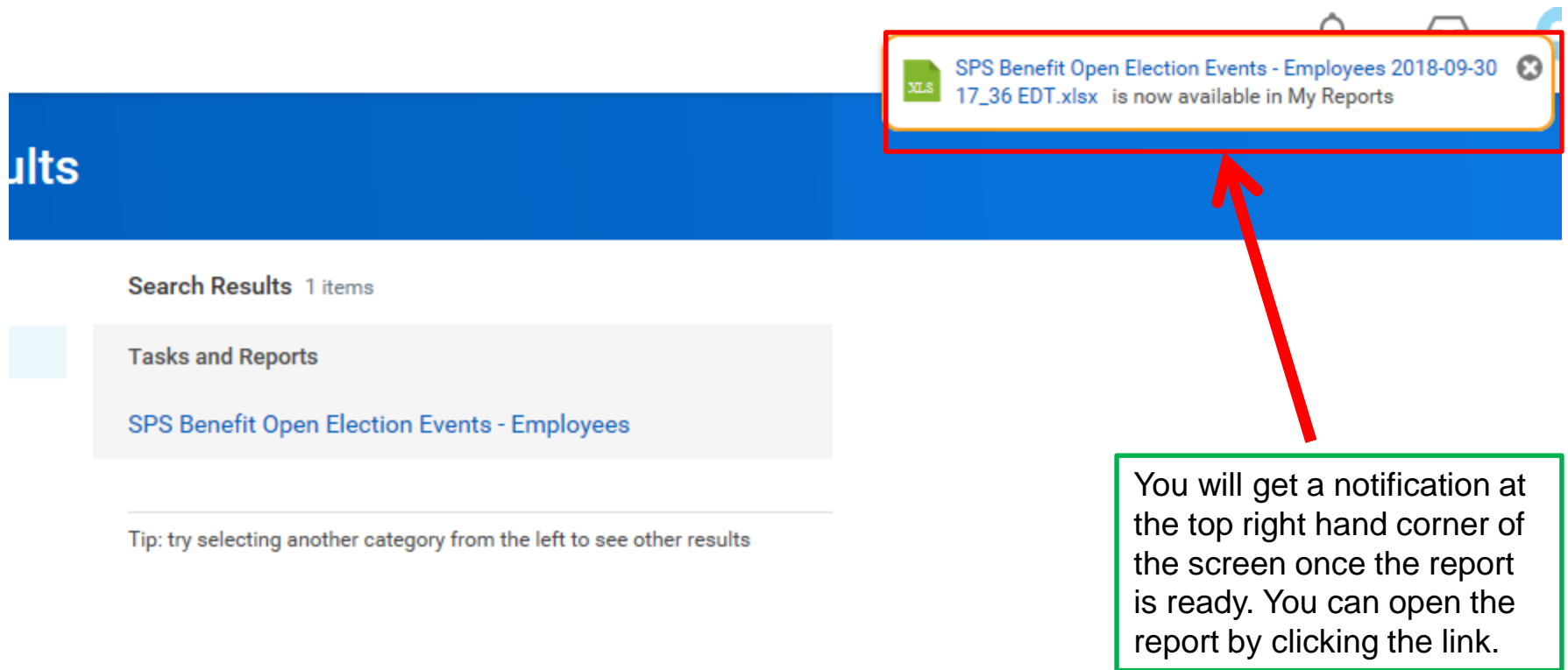
OK Cancel

Edit the Request Name if desired.

Then click the **OK** button.



# Running Benefits Reports (Cont.)



The screenshot shows a web application interface. At the top right, a notification box is highlighted with a red border. The notification text reads: "SPS Benefit Open Election Events - Employees 2018-09-30 17\_36 EDT.xlsx is now available in My Reports". A red arrow points from this notification box to a text box on the right. Below the notification, the main content area has a blue header with the word "ults" partially visible. Underneath, there is a "Search Results 1 items" section. A sidebar on the left contains "Tasks and Reports" and "SPS Benefit Open Election Events - Employees". A tip at the bottom of the search results area says: "Tip: try selecting another category from the left to see other results".

ults

Search Results 1 items

Tasks and Reports

SPS Benefit Open Election Events - Employees

Tip: try selecting another category from the left to see other results

SPS Benefit Open Election Events - Employees 2018-09-30 17\_36 EDT.xlsx is now available in My Reports

You will get a notification at the top right hand corner of the screen once the report is ready. You can open the report by clicking the link.



# Running Benefits Reports (Cont.)

You can access the report at a later date by clicking the profile button at the top right of the screen and then clicking **My Reports**.



The screenshot shows a user interface for a benefits system. At the top right, there is a profile button (a blue circle with a white cloud icon) which is highlighted with a red box. A red arrow points from this button to a dropdown menu. The menu contains several options: Home, Favorites, My Reports (highlighted with a red box), Documentation, and My Account. At the bottom of the menu is a 'Sign Out' button. On the left side of the screen, there is a search results section with one item: 'SPS Benefit Open Election Events - Employees'. A text box with a green border contains the instruction: 'You can access the report at a later date by clicking the profile button at the top right of the screen and then clicking **My Reports**.'



# Running Benefits Reports (Cont.)

## My Reports

1 item

File Name	Type	File	Created by	Date and Time Created	
 SPS Benefit Open Election Events - Employees 2018-09-30 17_36 EDT.xlsx	Excel		Benefits Coordinator - D20	09/30/2018 05:36 PM	<a href="#">Delete</a>

More Reports

Process Monitor

The report file will be displayed here. You can click to open and download.



# Viewing Reports

You can view reports in several ways:

- Online
  - Sort, filter, and view in chart format
- Export to Excel
  - Manipulate the data, as needed

SPS Benefit All ABC Reports Actions



8 items



Custom Report	Comments	Number of Times Executed
<a href="#">SPS Benefit All ABC Reports</a>	This Report will provide a listing of all Benefit Reports available to Agency Benefits Coordinator.	197
<a href="#">SPS Benefit Census Report</a>	The report shows employee/retiree benefit elections (plans, coverage levels, covered dependents) for a user-specified "as of" date. The report has Run Control options to select a specific Supervisory Org and/or Benefit Group.	73
<a href="#">SPS Benefit Expiring Contract Report</a>	This report shows employees with a benefit job contract expiring within the next 30 days. The report indicates if the employee has current benefit elections. ABC's should regularly monitor this report to ensure contracts are	101



**NOTE:** Data in reports real-time. This means data can change as Benefit events are completed in the system.



# Running a Report in SPS

Demonstrate how to:

- Find the list of reports
- Run a report
- Manage filters
- Notify later of a report





# Samples of Reports



The following slides are **SAMPLES ONLY** of what some of the reports may look like in SPS Benefits. Only select fields are shown in the screenshots.

*Note that the information shown in the following reports is for demonstration purposes only and does not reflect real employee data.*

# ABC Benefit Reports

## *SPS Benefit All ABC Reports*

Custom Report	Comments
<a href="#">SPS Benefit All ABC Reports</a>	This Report will provide a listing of all Benefit Reports available to Agency Benefits Coordinator.
<a href="#">SPS Benefit Census Report</a>	The report shows employee/retiree benefit elections (plans, coverage levels, covered dependents) for a user-specified "as of" date. The report has Run Control options to select a specific Supervisory Org and/or Benefit Group.
<a href="#">SPS Benefit Expiring Contract Report</a>	This report shows employees with a benefit job contract expiring within the next 30 days. The report indicates if the employee has current benefit elections. ABC's should regularly monitor this report to ensure contracts are extended before they expire.
<a href="#">SPS Benefit Finalized Election Events - Employees</a>	The reports shows employee benefit events that were Successfully Completed within the 60 days prior to a user-specified date. The report can be run for a user-specific Benefit Group or a user-specified Worker.
<a href="#">SPS Benefit Group by Sup Org</a>	The report shows employees in a user-specified Benefit Group. The report also has options to run for user-specified Worker and/or Supervisory Org.
<a href="#">SPS Benefit Leave Monitoring Report</a>	This report shows all employees with an Unpaid Leave of Absence event along with the event details (Leave Start Date, Estimated Return Date, type of Leave, leave duration, etc). There are no run control parameters; the report pulls all Active Unpaid leave events and returned leave events that were returned in the 60 days prior to the report run date. EBD will use this report to monitor and manage unpaid leave of absence events. ABC's should run this report on a weekly basis to monitor there are unpaid leave events in the system for employees out on a unpaid leave, and that the dates are accurate/up-to-date.
<a href="#">SPS Benefit Open Election Events - Employees</a>	This report shows employee benefit events that are either 'Not Started' or 'In Progress'. The report identifies where the event is currently in the workstream and who is the next person designated to take action. The report also displays if the employee has a Work and/or Personal Email address in the system. ABC's should regularly run this report and follow-up with employees as required, specifically with employees without and email address in the system.
<a href="#">SPS Benefit Worker Leave Snapshot</a>	The reports shows all leave events for a user-specified employee



# ABC Benefit Reports

## SPS Benefit Census Report

### SPS Benefit Census Report

The report shows employee/retiree benefit elections (plans, coverage levels, covered dependents) for a user-specified "as of" date. The report has Run Control options to select a specific Supervisory Org and/or Benefit Group.

#### SPS Benefit Census Report

Benefit Group	Contractual (ACA)										
Supervisory Organization	FT & PT FTE 50% Bi-Weekly DBM - Shared Services Division										
Include Subordinate Orgs	Yes										
Effective as of Date	1/14/2019										
Current Benefit Elections											
W#	SSN	Last Name	First Name	Benefit Group	Supervisory Organization	Benefit Type	Classification	Benefit Provider	Coverage	Coverage Begin Date	Dependents
W1012222	XXX-XX-1234	Doe	Jane	FT & PT FTE 50% Bi-Weekly	DBM - Shared Services Division	Child Life	Child Life - MetLife (Dependent)	MetLife	\$10,000	1/1/2019	John Doe
W1012222	XXX-XX-1234	Doe	Jane	FT & PT FTE 50% Bi-Weekly	DBM - Shared Services Division	Dental	Dental - Delta Dental DHMO (Employee)	Delta Dental	Employee + Child	1/1/2018	John Doe
W1012222	XXX-XX-1234	Doe	Jane	FT & PT FTE 50% Bi-Weekly	DBM - Shared Services Division	Life Ins - Guaranteed	Life Ins - Guaranteed MetLife (Employee)	MetLife	\$40,000	1/1/2019	
W1012222	XXX-XX-1234	Doe	Jane	FT & PT FTE 50% Bi-Weekly	DBM - Shared Services Division	Medical	Medical - CareFirst BCBS EPO (Employee)	CareFirst BCBS	Employee + Child	1/1/2018	John Doe
W1012222	XXX-XX-8450	Doe	Jane	FT & PT FTE 50% Bi-Weekly	DBM - Shared Services Division	Prescription	Prescription - Drug - (Employee)	Drug	Employee + Child	1/1/2018	John Doe



# ABC Benefit Reports

## *SPS Benefit Expiring Contract Report*

### SPS Benefit Expiring Contract Report

This report shows employees with a benefit job contract expiring within the next 30 days. The report indicates if the employee has current benefit elections. ABC's should regularly monitor this report to ensure contracts are extended before they expire.

#### SPS Benefit Expiring Contract Report

W#	SSN	Last Name	First Name	Benefit Job Supervisory Org	Contract Start Date	Contract End Date	Contract Days Remaining	Benefit Group	Has Benefits?
W1234567	xxx-xx-1234	Doe	Jane	University of Maryland - Baltimore County	7/18/2018	1/14/2019	0	Contractual (ACA)	Yes
W7654321	xxx-xx-1461	Smith	John	Motor Vehicle Administration	1/16/2018	1/15/2019	1	Contractual (ACA)	Yes
W3421111	xxx-xx-4321	Anderson	Tammy	University of Maryland - Baltimore	7/16/2018	1/15/2019	1	Contractual (ACA)	Yes

The person who ran this report has security access to all of these agencies.



# ABC Benefit Reports

## *SPS Benefit Finalized Election Event - Employee*

<b>SPS Benefit Finalized Election Events - Employees</b>	The reports shows employee benefit events that were Successfully Completed within the 60 days prior to a user-specified date. The report can be run for a user-specific Benefit Group or a user-specified Worker.
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<i>SPS Benefit Finalized Election Events - Employees</i>								
Benefit Group	FT & PT FTE 50% Bi-Weekly							
Worker								
Date	1/14/2019							
W#	Worker	Last Name	First Name	Supervisory Org	Employee Type	Business Proce	Benefit Event	
N1234567	John Doe (W1234567)	Doe	John	University of Maryland - College Park	State/Regular	Benefit Change - New Hire : John Doe (W1234567) on	Benefit Event: John Doe (W1234567) on 08/05/2018	



# ABC Benefit Reports

## SPS Benefit Group by Sup Org

### SPS Benefit Group by Sup Org

The report shows employees in a user-specified Benefit Group. The report also has options to run for user-specified Worker and/or Supervisory Org.

Worker	Employee ID	Legal Name	Benefit Group	Employee Has Benefits?
John Doe (W1234567)	W1234567	John Doe	FT & PT FTE 50% Bi-Weekly	Yes
Jane Doe (W7654321)	W7654321	Jane Doe	FT & PT FTE 50% Bi-Weekly	Yes
Carla Smith (W1112223)	W1112223	Carla Smith	FT & PT FTE 50% Bi-Weekly	Yes
Ryan Bristol (W3332221)	W3332221	Ryan Bristol	FT & PT FTE 50% Bi-Weekly	No



# ABC Benefit Reports

## SPS Benefit Leave Monitoring Report

<p><b>SPS Benefit Leave Monitoring Report</b></p>	<p>This report shows all employees with an Unpaid Leave of Absence event along with the event details (Leave Start Date, Estimated Return Date, type of Leave, leave duration, etc). There are no run control parameters; the report pulls all Active Unpaid leave events and returned leave events that were returned in the 60 days prior to the report run date. EBD will use this report to monitor and manage unpaid leave of absence events. ABC's should run this report on a weekly basis to monitor there are unpaid leave events in the system for employees out on a unpaid leave, and that the dates are accurate/up-to-date.</p>
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SPS Benefit Leave Monitoring Report								
Supervisory Organization	State of Maryland							
Include Subordinate Orgs	Yes							
Employee Type	Contractual - Contract							
	Contractual - Hourly							
	State/Regular							
W#	Last Name	First Name	Benefit Group	Business Process Event	Benefit Enrollments Transaction Status	Awaiting Persons	Leave Type	First Day of Leave
W1234567	Smith	John	FT & PT FTE 50% Bi-Weekly	Benefit Change - Armed Services Leave 31 Days or More : John Smith (W1234567) on 04/16/2018	Successfully Completed		Unpaid > Armed Services - 31 or More Days - NON SPMS	8/5/2018
W2345678	Schubert	Sue	FT & PT FTE 50% Bi-Weekly	Benefit Change - FMLA (Unpaid) : Sue Schubert (W2345678) on 09/19/2018	Successfully Completed		Unpaid > Medical Leave	1/12/2019
W3456789	Carter	Silvia	FT & PT FTE 50% Bi-Weekly	Benefit Change - Medical Leave : Silvia Carter (W3456789) on 03/14/2018	Successfully Completed		Unpaid > Temporary Total Disability ( Unpaid )	11/26/2018
W1234523	Trichel	Laura	Military Administrative Leave	Benefit Change - Military Administrative Leave : Laura Trichel (On Leave) (W1234523) on 08/01/2018	Successfully Completed		Unpaid > Military Administrative	8/1/2018

# ABC Benefit Reports

## *SPS Benefit Open Election Events - Employees*

<b>SPS Benefit Open Election Events - Employees</b>	This report shows employee benefit events that are either 'Not Started' or 'In Progress'. The report identifies where the event is currently in the workflow and who is the next person designated to take action. The report also displays if the employee has a Work and/or Personal Email address in the system. ABC's should regularly run this report and follow-up with employees as required, specifically with employees without and email address in the system.
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<b>SPS Benefit Open Election Events - Employees</b>									
<b>W#</b>	<b>Last Name</b>	<b>First Name</b>	<b>Supervisory Org</b>	<b>Business Process</b>	<b>Benefit Event</b>	<b>Event Initiation</b>	<b>Event Date</b>	<b>Event</b>	<b>Submit</b>
W1234567	Smith	John	Baltimore City Community College	Benefit Change - New Hire : John Smith (W123467) on 01/03/2019	Benefit Event: John Smith (W1234567) on 01/03/2019	11/29/2018	1/3/2019	Not Started	3/3/2019
W7654321	Martin	Katie	Baltimore City Community College	Benefit Change - New Hire : Katie Martin (W7654321) on 01/02/2019	Benefit Event:Katie Martin (W7654321) on 01/02/2019	12/3/2018	1/2/2019	In Progress	3/2/2019





# ABC Benefit Reports

## *SPS Benefit Worker Leave Snapshot*

<a href="#">SPS Benefit Worker Leave Snapshot</a>	The reports shows all leave events for a user-specified employee
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<i>SPS Benefit Worker Leave Snapshot</i>							
Worker	David Lewis (W2346788)						
	Leave of Absence Requests						
Worker	Leave Type	Last Day of Work	First Day of Leave	Last Day of Leave - Estimated	Last Day of Leave - Actual	Estimated Leave Request Duration in Days	
David Lewis (W2045702)	Unpaid > Armed Services - 31 or More Days - NON SPMS	4/16/2018	4/16/2018	7/7/2018	12/21/2018	82	
David Lewis (W2045702)	Unpaid > Armed Services - 31 or More Days - NON SPMS	8/5/2018	8/5/2018	12/22/2018	12/21/2018	139	
David Lewis (W2045702)	Unpaid > Armed Services - 31 or More Days - NON SPMS	8/3/2018	8/3/2018	12/22/2018	12/21/2018	141	



# Questions?



**Congratulations! You completed the webinar!**



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SYSTEM