



# Wespath

BENEFITS | INVESTMENTS

## OPEN ENROLLMENT STATUS REPORT

# HealthFlex Job Aid



### What:

On-demand report run during Annual Election to determine whether or not individuals have made their elections and who processed the election in the system. Includes:

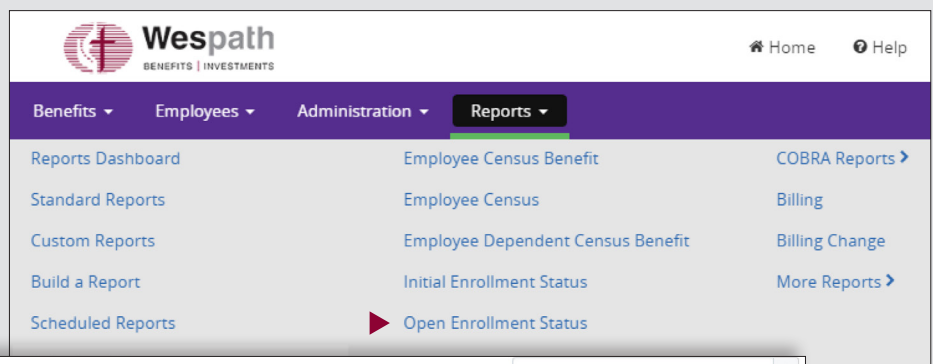
- Participant Details
- Input (who entered the election)
- Status (Approved, Not Started, Pending)
- Effective Date

**This report does not include which elections are made and does not replace the composite reports provided during and after Annual Election by Wespath.**

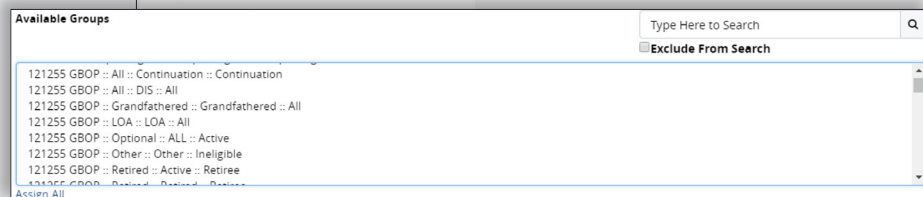


### To Access Reports:

1. Wespath portal > **Benefitsolver**
2. Click **“Reports”** and  
Click **“Open Enrollment Status”**



3. Click **“Assign All”**



4. Enter AE start date in the “From” field.
5. Click “Generate Report”

**From Date**  
Enter the Open/Annual Enrollment start date. The most recent open/annual enrollment transaction status will be reported.

**From:**  (MM/DD/YYYY)

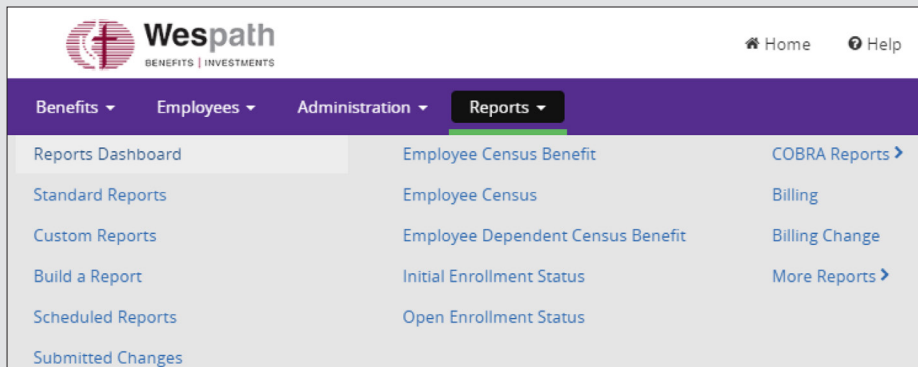
**Format:** Excel View

Generate Report
Save Profile
Save and Schedule

Note: Your report will be generated off-line and you will be notified by e-mail when it has completed. ([edit e-mail](#))  
Completed reports are available via the "Dashboard" link above.

## Retrieve Report

1. Click “Reports” and “Reports Dashboard”



2. Click on “Open\_Enrollment\_Status” report to open/save it.

SAMPLE:

SSN	Last Name	First Name	Middle Name	Suffix	E-Mail	Employee ID	Structure Group
XXX-XX-1989	WASHINGTON	GEORGE	A			P#####	335999 Sample :: Mandatory :: Clergy :: Active
XXX-XX-4905	ADAMS	MARY	B			P#####	335999 Sample :: Mandatory :: Clergy :: Active
XXX-XX-2818	JEFFERSON	THOMAS	C			P#####	335999 Sample :: LOA :: LOA :: All
XXX-XX-3315	MADISON	JANE	D			P#####	335999 Sample :: Mandatory :: Clergy :: Active
XXX-XX-3714	MONROE	JAMES	E			P#####	335999 Sample :: Mandatory :: Clergy :: Active
XXX-XX-3869	ADAMS	JILL	F			P#####	335999 Sample :: Mandatory :: Clergy :: Active
XXX-XX-7455	JACKSON	JOHN	G			P#####	335999 Sample :: Mandatory :: Clergy :: Active
XXX-XX-9048	VAN BUREN	KAREN	H			P#####	335999 Sample :: Optional :: Lay or Deacon :: Active
XXX-XX-7812	HARRISON	GRACE	I			P#####	335999 Sample :: Mandatory :: Clergy :: Active
XXX-XX-6066	TYLER	GREGORY	J			P#####	335999 Sample :: LOA :: LOA :: All
XXX-XX-5583	POLK	STACEY	K			P#####	335999 Sample :: Grandfathered :: Grandfathered :: All

Input	Enrollment Status	Employment Status	DOH	Benefit Status	OE Eff Date
Member	Approved	Full-time	7/1/2005	Active	1/1/2019
	Not Started	Full-time	7/1/1985	Active	
Manual	Approved	Leave of Absence	7/1/1987	Active	1/1/2019
Manual	Approved	Full-time	6/13/1986	Active	1/1/2019
	Not Started	Full-time	7/1/1999	Active	
Member	Approved	Full-time	8/1/2010	Active	1/1/2019
	Not Started	Full-time	7/1/2012	Active	
	Not Started	Full-time	6/1/1998	Active	
	Not Started	Full-time	7/1/2001	Active	
Manual	Approved	Leave of Absence	1/1/2002	Active	1/1/2019
Manual	Approved	Part-time	3/9/2015	Active	1/1/2019