



Wespath

BENEFITS | INVESTMENTS

IDENTIFYING DEPENDENTS
APPROACHING AGE 26

HealthFlex Job Aid



What:

Identify dependents who are approaching Age 26 and will become ineligible for HealthFlex benefits.

When:

Available as needed

Log into BenefitSolver:

1. Portal: <https://portal.wespath.org>
2. Login
3. BenefitSolver

BenefitSolver

1. Click "Reports" and then "Custom Reports"

Wespath
BENEFITS | INVESTMENTS

Home Help

Benefits Employees Administration Reports

Reports Dashboard
Standard Reports
Custom Reports
Build a Report
Scheduled Reports
Submitted Changes

Employee Census Benefit
Employee Census
Employee Dependent Census Benefit
Initial Enrollment Status
COBRA Reports >
Billing
Billing Change
More Reports >

Administration - Reports

Dashboard Standard Reports Custom Reports Build a Report Scheduled Reports

Report Type: Create Documents Report (System) Profile: Please Select One

2. For the Report Type, select "Create Documents Report (System)"

3. Enter date range (the **From Date** is the first of the current month and the **To Date** is today's date)

From Date: 03/01/2022 (MM/DD/YYYY) *

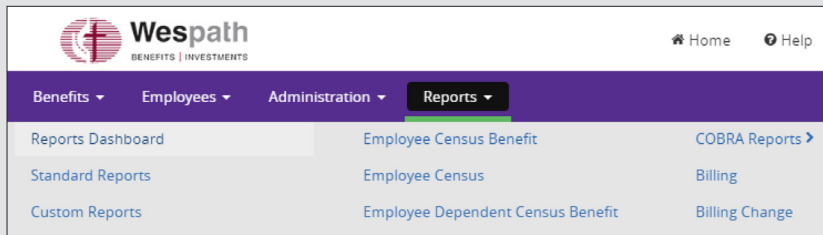
To Date: 03/28/2022 (MM/DD/YYYY) *

Generate Report Save Profile Save and Schedule Edit

4. Click **"Generate Report"**

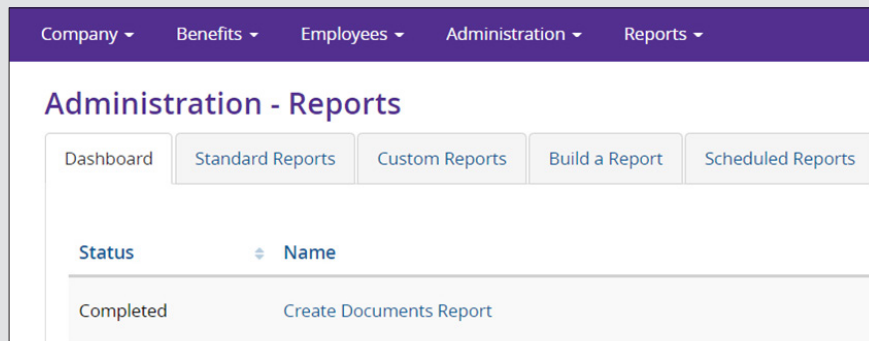
Retrieve Report

1. Click **"Reports"** and **"Reports Dashboard"**



2. Click on **"Create Documents Report"**

Report will download as an Excel file



3. Click to open report

4. Highlight Row 3 and click **"Sort & Filter"** on the Home tab in Excel and then click on **"Filter"** in the dropdown menu.

Filter Column C to show only **"GBOP Max Age Letter."**

This will show the participant who was sent the **Age 26 letter** in the specified period and who has a dependent who will lose coverage 30 days from the date of the letter.

SAMPLE:

	A	B	C	D	E	F	G	H	I
1	Today's Date: 03/28/2022								
2									
3	Social Security Number	GROUPSTRUCTURE	CT_TITLE	ME_CREATE_DATE	ME_PRINT_DATE	FNAME	MNAME	LNAME	EDITOR
4	xxx-xx-xxxx	123456 Sample :: Mandatory :: Clergy :: Active	GBOP Max Age Letter	48:13.0	45:20.0	JOHN		JOHNSON	SYS ADMIN - BSC
5	xxx-xx-xxxx	123456 Sample :: Mandatory :: Clergy :: Active	GBOP Max Age Letter	48:14.0	45:20.0	FRED		FREDRICKSON	SYS ADMIN - BSC
6	xxx-xx-xxxx	123456 Sample :: Mandatory :: Clergy :: Active	GBOP Max Age Letter	48:13.0	45:20.0	JUDY		JONES	SYS ADMIN - BSC
7	xxx-xx-xxxx	123456 Sample :: Mandatory :: Clergy :: Active	GBOP Max Age Letter	48:29.0	45:20.0	MELISSA		MAYS	SYS ADMIN - BSC
8	xxx-xx-xxxx	123455 Sample :: Optional :: ALL :: Active	GBOP Max Age Letter	48:29.0	45:20.0	WILLIAM		WILLIAMSON	SYS ADMIN - BSC

Note: This will include changes made by participants as well as administrative users (plan sponsor, Wespath, or Businessolver). It will also include system generated changes. Please contact the Wespath Health Team at **1-800-851-2201** if you have questions about this report.