

Benefit Event Status Report Overview

This report lists all participants in a particular process status or set of status levels. In addition, this document includes common error results shown on this report and how to troubleshoot each one.

Events go through four steps: (1) Assign Benefit Program, (2) Prepare Options, (3) Enter Elections, (4) Finalize Enrollment. An event's process status indicates what step the event is on and whether any errors have occurred for that step. For example, a status of "Assigned" indicates that the event has assigned a benefit program to the employee, but has not yet prepared the employee's benefit options, entered elections for the employee, or finalized the employee's enrollment. A status of "Prepare Error" indicates that the event assigned a benefit program to the employee but encountered an error when preparing the employee's benefit options.

This report should be run daily by the Benefit Administrators to check on Open Events and those events with a Processing Error. This report can be used to monitor events opened through Employee-Self Service.

This job aid will walk through an example of an Election Error and the steps of how to troubleshoot according to the error message shown on the report.

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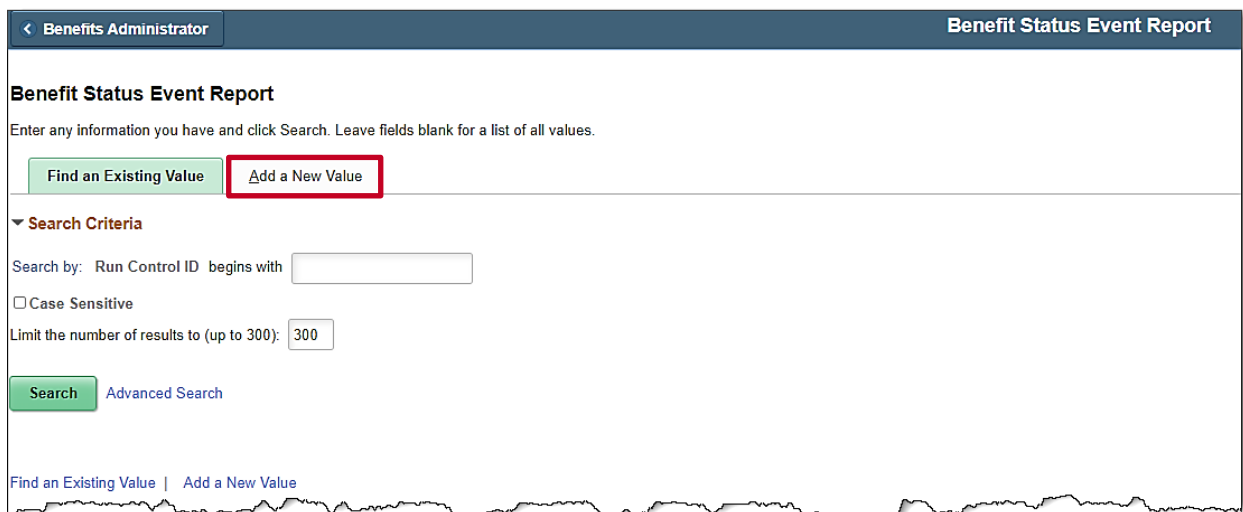
How to Run the Benefit Event Status Report

Run the Benefit Event Status Report to locate employees in the various statuses. Research the event in question and intervene as applicable, so that the event can continue to move through the Ben Admin process during the next run of Ben Admin.

1. Navigate to the Benefit Event Status Report using the following path:

Benefits > Managed Automated Enrollment > Investigate Exceptions > Benefit Event Status Report

The **Benefit Status Event Report** Search Page displays.

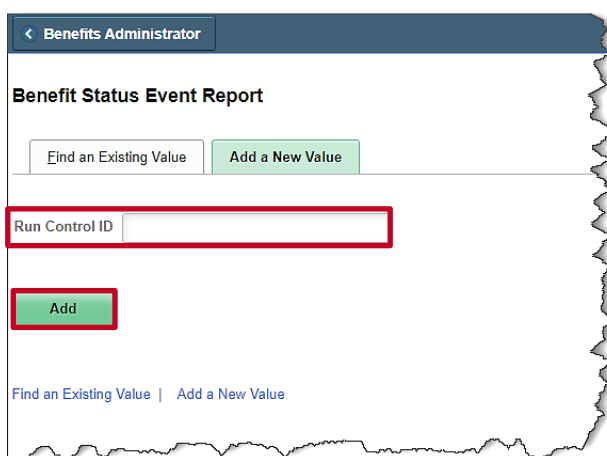


The screenshot shows the 'Benefit Status Event Report' search page. At the top, there is a navigation bar with '< Benefits Administrator' on the left and 'Benefit Status Event Report' on the right. Below the navigation bar, the title 'Benefit Status Event Report' is displayed. A sub-header reads: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two buttons: 'Find an Existing Value' and 'Add a New Value', with the latter highlighted by a red box. Below these buttons is a section titled 'Search Criteria' with a dropdown arrow. Under 'Search Criteria', there is a 'Search by:' field with the text 'Run Control ID begins with' and an empty input box. Below this is a checkbox for 'Case Sensitive' and a text input for 'Limit the number of results to (up to 300):' with the value '300'. At the bottom of the search criteria section are two buttons: 'Search' and 'Advanced Search'. At the very bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'.

Note: If the BA has a saved Run Control ID, skip to Step 5.

2. Click the **Add a New Value** button.

The **Benefit Status Event Report** Search Page refreshes.

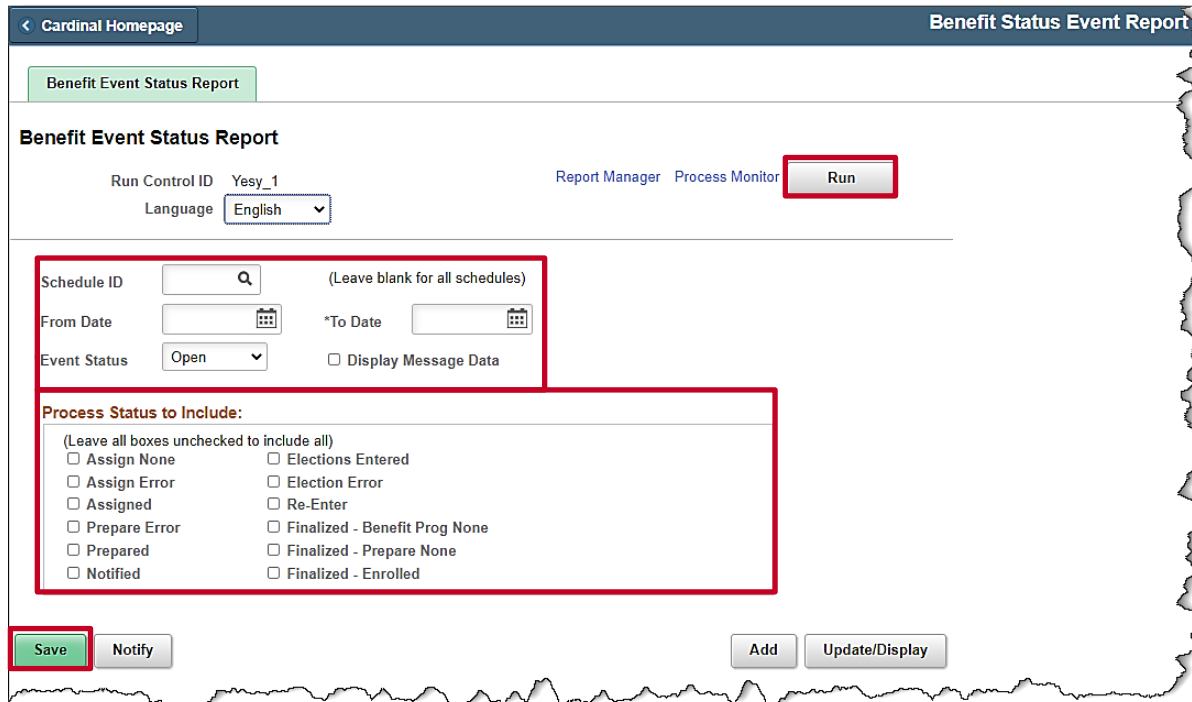


The screenshot shows the 'Benefit Status Event Report' search page after a refresh. The navigation bar and title are the same. The 'Find an Existing Value' button is now disabled (greyed out), and the 'Add a New Value' button is active (green). Below these buttons, there is a 'Run Control ID' label and an empty input box, which is highlighted by a red box. Below the input box is a green 'Add' button, also highlighted by a red box. At the bottom of the page, there are links for 'Find an Existing Value' and 'Add a New Value'.

3. Enter a **Run Control ID** in the search box.

4. Click the **Add** button.

The **Benefit Status Event Report** parameters display.



Cardinal Homepage Benefit Status Event Report

Benefit Event Status Report

Benefit Event Status Report

Run Control ID Yesy_1 Report Manager Process Monitor **Run**

Language English

Schedule ID (Leave blank for all schedules)

From Date *To Date

Event Status Open Display Message Data

Process Status to Include:

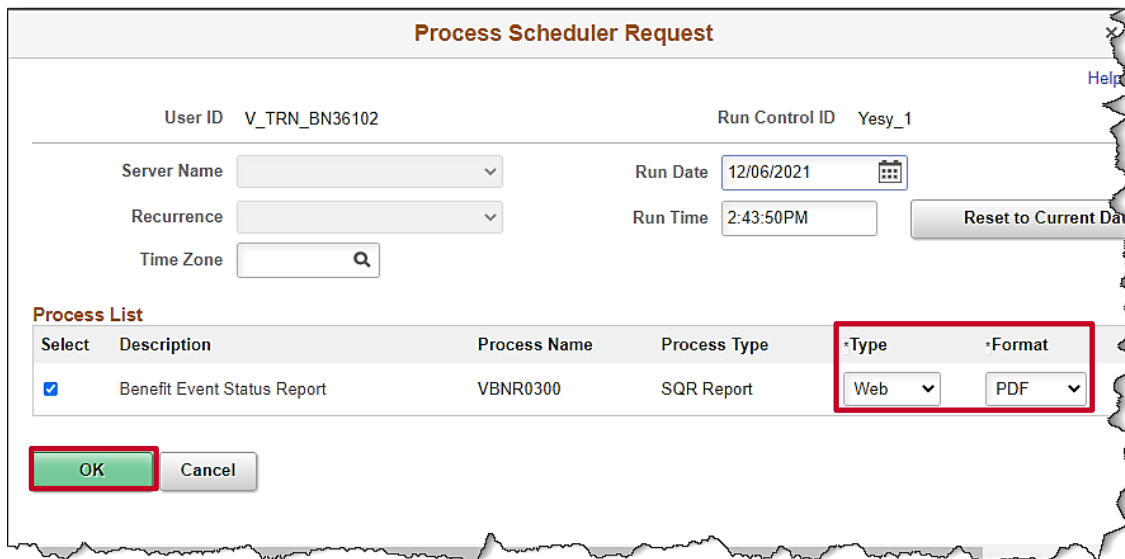
(Leave all boxes unchecked to include all)

<input type="checkbox"/> Assign None	<input type="checkbox"/> Elections Entered
<input type="checkbox"/> Assign Error	<input type="checkbox"/> Election Error
<input type="checkbox"/> Assigned	<input type="checkbox"/> Re-Enter
<input type="checkbox"/> Prepare Error	<input type="checkbox"/> Finalized - Benefit Prog None
<input type="checkbox"/> Prepared	<input type="checkbox"/> Finalized - Prepare None
<input type="checkbox"/> Notified	<input type="checkbox"/> Finalized - Enrolled

Save

5. Click on the magnifying glass next to **Schedule ID** and select the schedule ID you want to work with. Most of the time it will be **EM00** unless you are working with Open Enrollment events.
Note: If the Agency BA is looking for Open Enrollment events, the Schedule ID would be **OE##**.
6. Select a **From Date** and a **To Date** by clicking on the calendar icons or entering it into the text boxes.
7. Select an **Event Status** from the drop-down menu.
8. The BA can also select one or several **Process Statuses** to include in the report.
Note: The **Process Status to Include** section can be left blank as well to include all statuses in the report.
9. Click **Save**.
10. Click **Run**.

The **Process Scheduler Request** page displays.



Process Scheduler Request

User ID V_TRN_BN36102 Run Control ID Yesy_1

Server Name [dropdown] Run Date 12/06/2021 [calendar icon]

Recurrence [dropdown] Run Time 2:43:50PM [button: Reset to Current Date]

Time Zone [input with search icon]

Process List

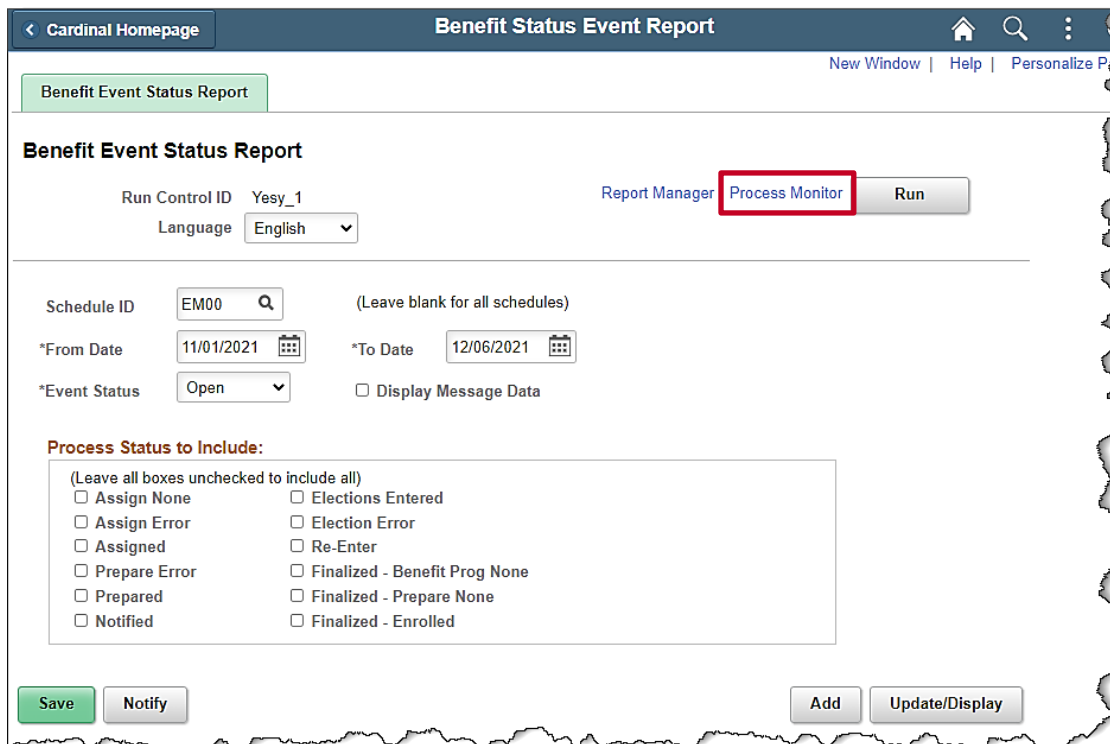
Select	Description	Process Name	Process Type	*Type	*Format
<input checked="" type="checkbox"/>	Benefit Event Status Report	VBNR0300	SQR Report	Web [dropdown]	PDF [dropdown]

[button: OK] [button: Cancel]

12. Select the **Type** and **Format** to run the report in.

13. Click **OK**.

The **Benefit Event Status Report** parameters page returns.



Benefit Status Event Report

Run Control ID Yesy_1 Report Manager **Process Monitor** [button: Run]

Language English [dropdown]

Schedule ID EM00 [input with search icon] (Leave blank for all schedules)

*From Date 11/01/2021 [calendar icon] *To Date 12/06/2021 [calendar icon]

*Event Status Open [dropdown] Display Message Data

Process Status to Include:

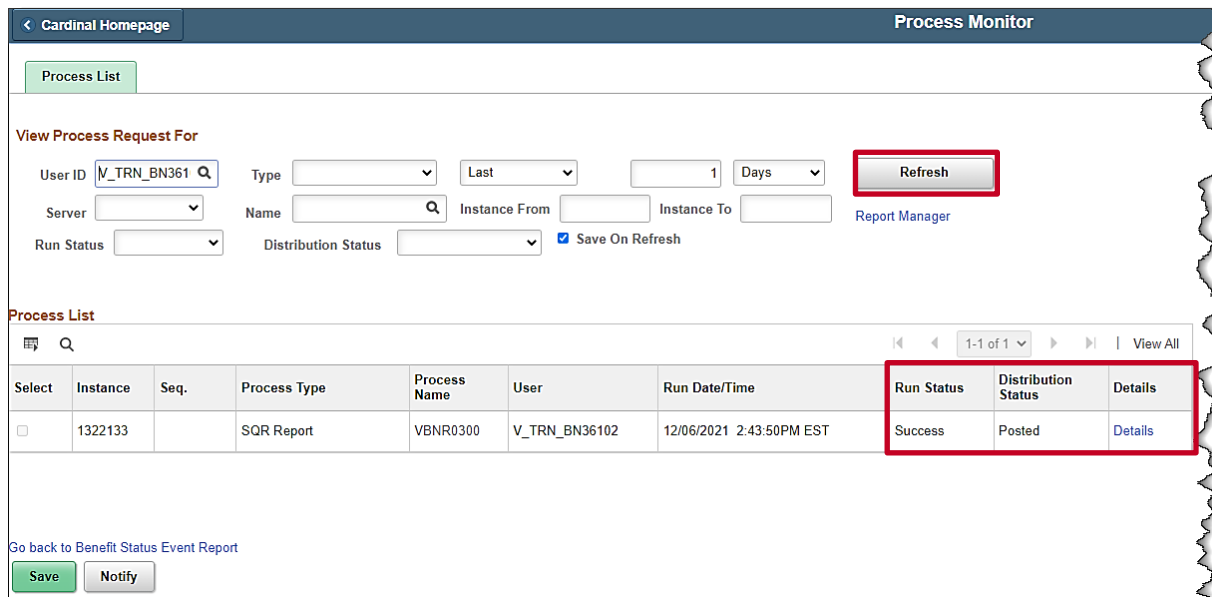
(Leave all boxes unchecked to include all)

- Assign None
- Assign Error
- Assigned
- Prepare Error
- Prepared
- Notified
- Elections Entered
- Election Error
- Re-Enter
- Finalized - Benefit Prog None
- Finalized - Prepare None
- Finalized - Enrolled

[button: Save] [button: Notify] [button: Add] [button: Update/Display]

14. Click the **Process Monitor** hyperlink.

The **Process Monitor** page displays.



Cardinal Homepage Process Monitor

Process List

View Process Request For

User ID Type Last 1 Days

Server Name Instance From Instance To Report Manager

Run Status Distribution Status Save On Refresh

Process List

1-1 of 1 | View All

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1322133		SQR Report	VBNR0300	V_TRN_BN36102	12/06/2021 2:43:50PM EST	Success	Posted	Details

Go back to Benefit Status Event Report

15. Click the **Refresh** button until the Run Status for the report is Success and the Distribution Status is Posted.
16. Click on the **Details** hyperlink next to the report.

The **Process Detail** page displays.

x
Help

Process

Instance	1322133	Type	SQR Report
Name	VBNR0300	Description	Benefit Event Status Report
Run Status	Success	Distribution Status	Posted

<p>Run</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Run Control ID</td> <td>Yesy_1</td> </tr> <tr> <td>Location</td> <td>Server</td> </tr> <tr> <td>Server</td> <td>PSUNX1</td> </tr> <tr> <td>Recurrence</td> <td></td> </tr> </table>	Run Control ID	Yesy_1	Location	Server	Server	PSUNX1	Recurrence		<p>Update Process</p> <p> <input type="radio"/> Hold Request <input type="radio"/> Queue Request <input type="radio"/> Cancel Request <input checked="" type="checkbox"/> Delete Request <input type="radio"/> Re-send Content </p> <p style="text-align: right;"> <input type="radio"/> Restart Request </p>
Run Control ID	Yesy_1								
Location	Server								
Server	PSUNX1								
Recurrence									

<p>Date/Time</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Request Created On</td> <td>12/06/2021 2:45:41PM EST</td> </tr> <tr> <td>Run Anytime After</td> <td>12/06/2021 2:43:50PM EST</td> </tr> <tr> <td>Began Process At</td> <td>12/06/2021 2:45:55PM EST</td> </tr> <tr> <td>Ended Process At</td> <td>12/06/2021 2:46:05PM EST</td> </tr> </table>	Request Created On	12/06/2021 2:45:41PM EST	Run Anytime After	12/06/2021 2:43:50PM EST	Began Process At	12/06/2021 2:45:55PM EST	Ended Process At	12/06/2021 2:46:05PM EST	<p>Actions</p> <p> Parameters Transfer Message Log Batch Timings View Log/Trace </p>
Request Created On	12/06/2021 2:45:41PM EST								
Run Anytime After	12/06/2021 2:43:50PM EST								
Began Process At	12/06/2021 2:45:55PM EST								
Ended Process At	12/06/2021 2:46:05PM EST								

OK

Cancel

18. Click on the **View Log/Trace** hyperlink.

The **View Log/Trace** page displays.

View Log/Trace
×

[Help](#)

Report

Report ID 761478	Process Instance 1322133	Message Log
Name VBNR0300	Process Type SQR Report	
Run Status Success		

Benefit Event Status Report

Distribution Details

Distribution Node hrpytm	Expiration Date <input type="text" value="01/05/2022"/>
--------------------------	---

File List

Name	File Size (bytes)	Datetime Created
SQR_VBNR0300_1322133.log	2,180	12/06/2021 2:46:05.625818PM EST
vbnr0300_1322133.PDF	3,512	12/06/2021 2:46:05.625818PM EST
vbnr0300_1322133.out	139	12/06/2021 2:46:05.625818PM EST

Distribute To

Distribution ID Type	+Distribution ID
User	V_TRN_BN36102

20. Click on the **.PDF** output (if the format chosen was PDF).

The **Report** displays in a separate tab.

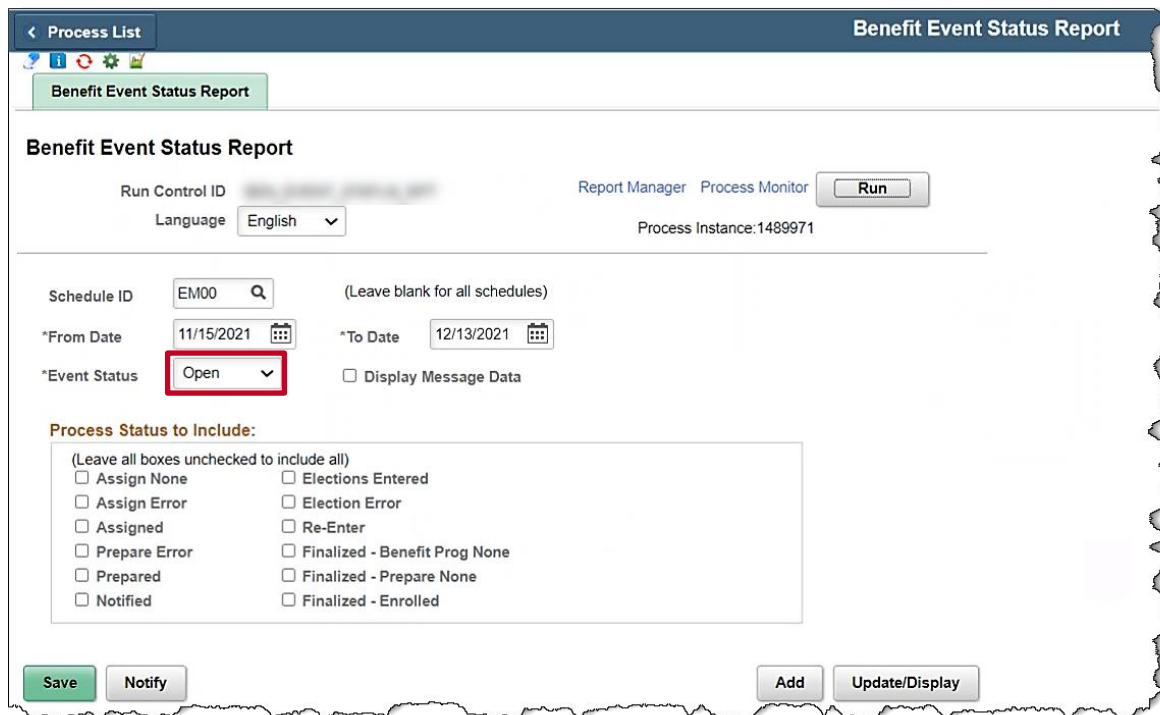
Report ID: VBNR0300	PeopleSoft Benefit Event Status Report	Page No. 1 Run Date 12/06/2021 Run Time 13:00:40
Process Status	Employee ID	Employee Name
Schedule ID	Event ID	Event Date
Event Class	Event Status	Process Indicator
Benefit Program		
FE	00092634600	Lily Pad
EM00	1	12/31/2020
MAR	O	N
SAL	N	

Note: The report displays the **Process Status**, **Process Indicator**, and **Benefit Program** among other sets of data. The BA can use this information to see any open events, and what stage in the process the event is currently in. This is especially helpful for processing New Hires and tracking the status of the open events.

Viewing Open Events

To view **Open** events, follow the steps mentioned in the above section, **How to Run the Benefit Event Status Report** and make sure the **Event Status** is set to **Open** and the **Process Status to include** section is left blank.

The **Benefit Event Status Report** parameters page displays.



Benefit Event Status Report

Run Control ID: [REDACTED] Report Manager Process Monitor **Run**

Language: English Process Instance: 1489971

Schedule ID: EM00 (Leave blank for all schedules)

*From Date: 11/15/2021 *To Date: 12/13/2021

*Event Status: **Open** Display Message Data

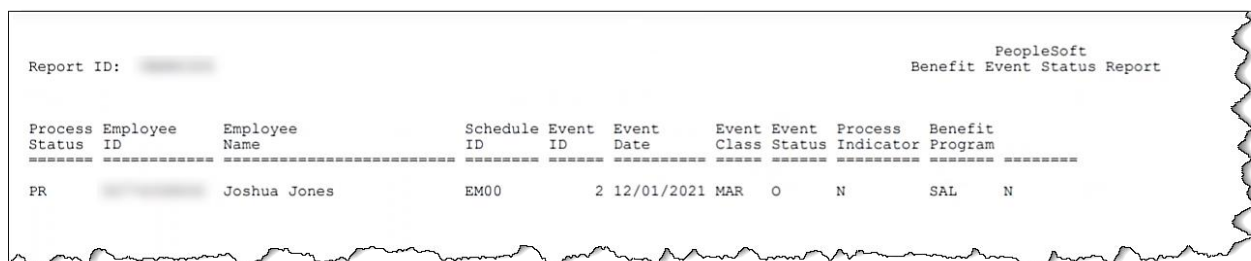
Process Status to Include:
 (Leave all boxes unchecked to include all)

- Assign None
- Assign Error
- Assigned
- Prepare Error
- Prepared
- Notified
- Elections Entered
- Election Error
- Re-Enter
- Finalized - Benefit Prog None
- Finalized - Prepare None
- Finalized - Enrolled

Save **Notify** **Add** **Update/Display**

1. Select **Open** from the Event Status drop down menu.
2. Click **Save**.
3. Click **Run**.
4. Follow the **Steps 11-17** from the How to run the Benefit Event Status Report section above to run the report.

The **Report** displays in a separate tab.



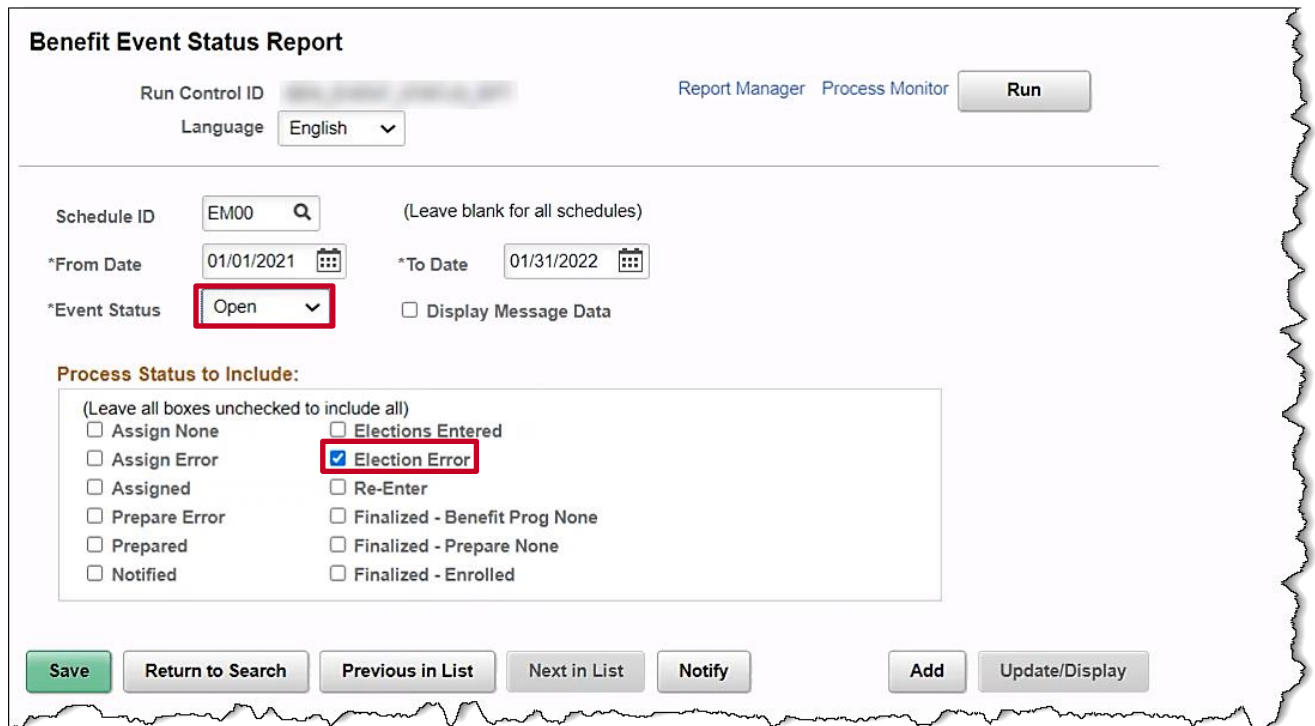
Report ID: [REDACTED] PeopleSoft Benefit Event Status Report

Process Status	Employee ID	Employee Name	Schedule ID	Event ID	Event Date	Event Class	Event Status	Process Indicator	Benefit Program
PR	[REDACTED]	Joshua Jones	EM00	2	12/01/2021	MAR	O	N	SAL N

BN361 Benefit Event Status Report
Viewing and Troubleshooting Open Events with an Election Error

To view **Open** events with an **Election Error**, follow the steps mentioned in the above section, **How to Run the Benefit Event Status Report** and make sure the **Event Status** is set to **Open** and the **Election Error** is checked off in the **Process Status to include** section.

The **Benefit Event Status Report** parameters page displays.



Benefit Event Status Report

Run Control ID [REDACTED] Report Manager Process Monitor **Run**

Language English

Schedule ID EM00 (Leave blank for all schedules)

*From Date 01/01/2021 *To Date 01/31/2022

*Event Status **Open** Display Message Data

Process Status to Include:

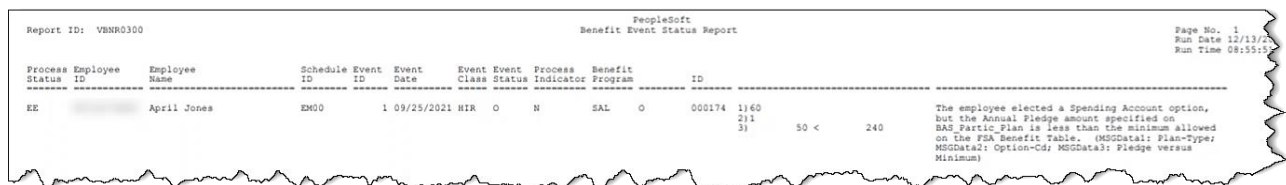
(Leave all boxes unchecked to include all)

Assign None Elections Entered
 Assign Error **Election Error**
 Assigned Re-Enter
 Prepare Error Finalized - Benefit Prog None
 Prepared Finalized - Prepare None
 Notified Finalized - Enrolled

Save **Return to Search** **Previous in List** **Next in List** **Notify** **Add** **Update/Display**

1. Select **Open** from the Event Status drop down menu.
2. Check the box next to **Election Error**.
3. Click **Save**.
4. Click **Run**.
5. Follow the **Steps 11-17** from the **How to run the Benefit Event Status Report** section above to run the report.

The **Report** displays in a separate tab.



Process Status	Employee Name	Schedule ID	Event ID	Event Date	Event Class	Event Status	Indicator	Program	ID
EE	April Jones	EM00	1	09/25/2021	HIR	O	N	SAL	000174 1160 211 31 50 < 240

The employee elected a Spending Account option, but the Annual Pledge amount specified on SAR Partic_Plan is less than the minimum allowed on the FSA Benefit Table. (MSData1: Plan-Type; MSData2: Option-Cd; MSData3: Pledge versus Minimum)

BN361 Benefit Event Status Report

Note: The Error in this screenshot says: “The employee elected a Spending Account option, but the Annual Pledge amount specified on BAS_Partice_Plan is less than the minimum allowed on the FSA Benefit Table.”

- Review the Report output and depending on the Error message different steps to troubleshoot need to take place. For this example, the BA would navigate to the On-Demand Event Maintenance Page using the following path:

Homepage > Benefit Administrator Tile > Benefits Management > On-Demand Event Maintenance

The **On-Demand Event Maintenance** search page displays.

On-Demand Event Maintenance

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

Empl ID	begins with ▼	<input type="text"/>
Empl Record	= ▼	<input type="text"/>
Name	begins with ▼	<input type="text"/>
Last Name	begins with ▼	<input type="text"/>
Second Last Name	begins with ▼	<input type="text"/>
Alternate Character Name	begins with ▼	<input type="text"/>

Case Sensitive

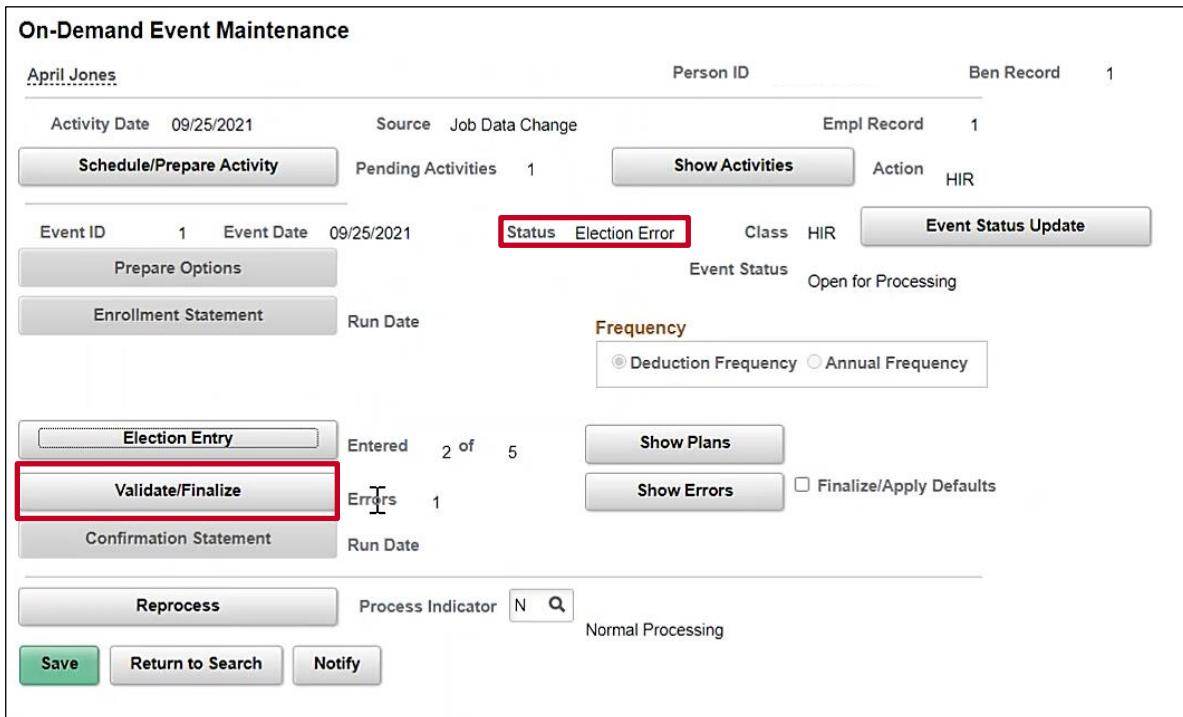
Limit the number of results to (up to 300):

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

- Enter the employee ID of the affected employee into the **Empl ID** field and click **Search**.

BN361 Benefit Event Status Report

The **On-Demand Event Maintenance** page displays.



On-Demand Event Maintenance

April Jones Person ID Ben Record 1

Activity Date 09/25/2021 Source Job Data Change Empl Record 1

Schedule/Prepare Activity Pending Activities 1 **Show Activities** Action HIR

Event ID 1 Event Date 09/25/2021 **Status Election Error** Class HIR **Event Status Update**

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date **Frequency**

Deduction Frequency Annual Frequency

Election Entry Entered 2 of 5 **Show Plans**

Validate/Finalize Errors 1 **Show Errors** Finalize/Apply Defaults

Confirmation Statement Run Date

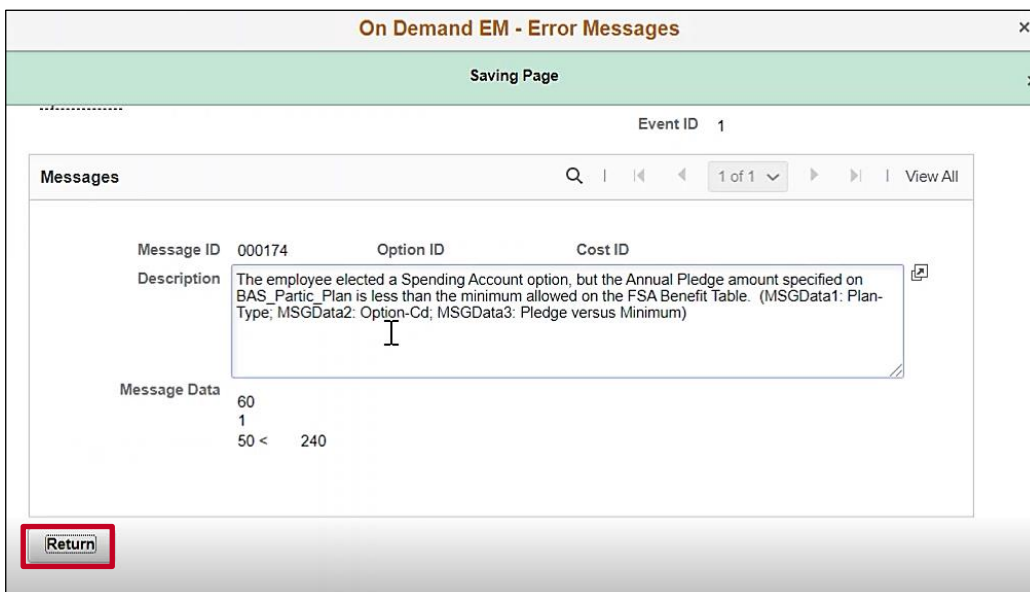
Reprocess Process Indicator N Normal Processing

Save **Return to Search** **Notify**

Note: Notice the Status of the event is **Election Error** just as it appeared in the report.

8. Click the **Validate/Finalize** button to see this employee's errors.

The error displays in a dialog box.



On Demand EM - Error Messages

Saving Page

Event ID 1

Messages 1 of 1 View All

Message ID	Option ID	Cost ID
000174		

Description: The employee elected a Spending Account option, but the Annual Pledge amount specified on BAS_Particip_Plan is less than the minimum allowed on the FSA Benefit Table. (MSGData1: Plan-Type; MSGData2: Option-Cd; MSGData3: Pledge versus Minimum)

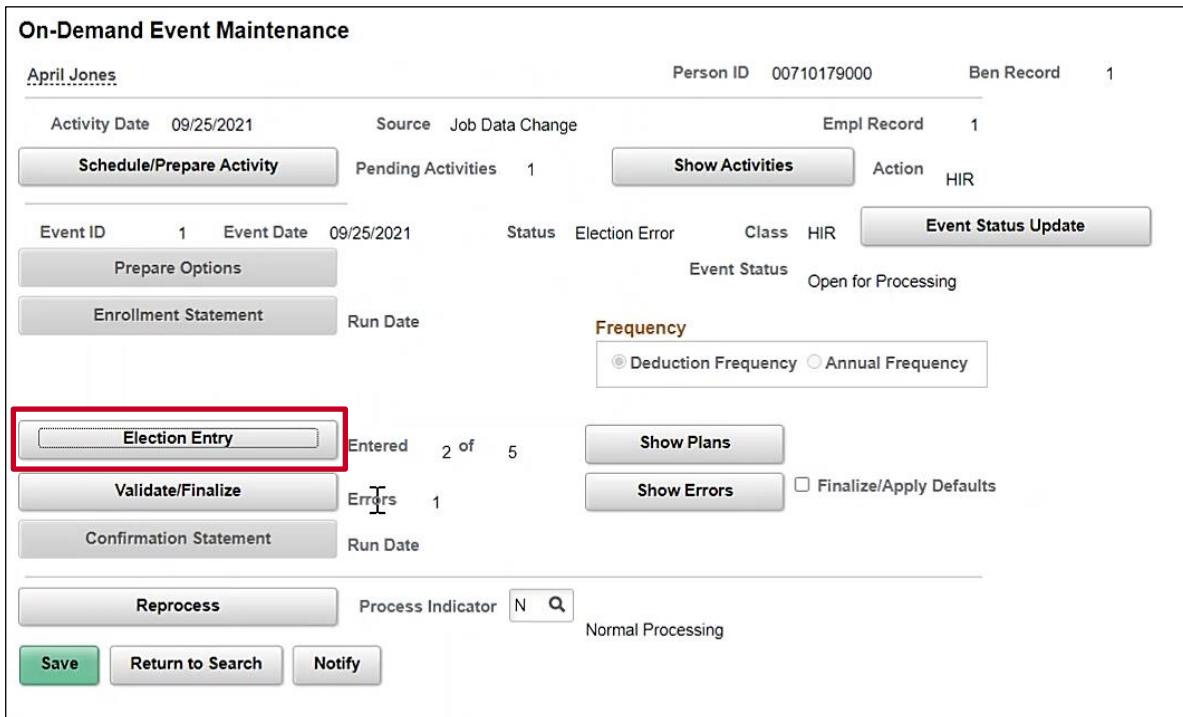
Message Data

```
60
1
50 < 240
```

Return

9. For this example, the employee's spending account annual pledge is less than the minimum allowed. Click the **Return** button.

The **On-Demand Event Maintenance** page displays.



On-Demand Event Maintenance

April Jones Person ID 00710179000 Ben Record 1

Activity Date 09/25/2021 Source Job Data Change Empl Record 1

Schedule/Prepare Activity Pending Activities 1 **Show Activities** Action HIR

Event ID 1 Event Date 09/25/2021 Status Election Error Class HIR **Event Status Update**

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date

Election Entry Entered 2 of 5 **Show Plans**

Validate/Finalize Errors 1 **Show Errors** Finalize/Apply Defaults

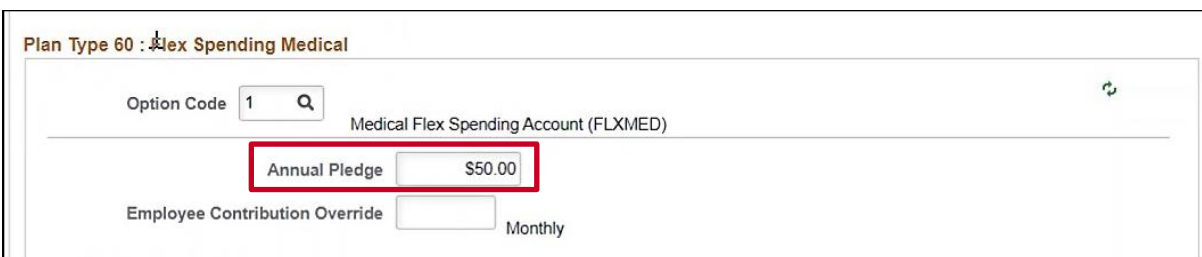
Confirmation Statement Run Date

Reprocess Process Indicator N **Normal Processing**

Save **Return to Search** **Notify**

- Click on **Election Entry** to view the employee's spending account annual pledge. Scroll to **Plan Type 60: Flex Spending Medical**.

The **Plan Type 60** section displays.



Plan Type 60 : Flex Spending Medical

Option Code 1

Medical Flex Spending Account (FLXMED)

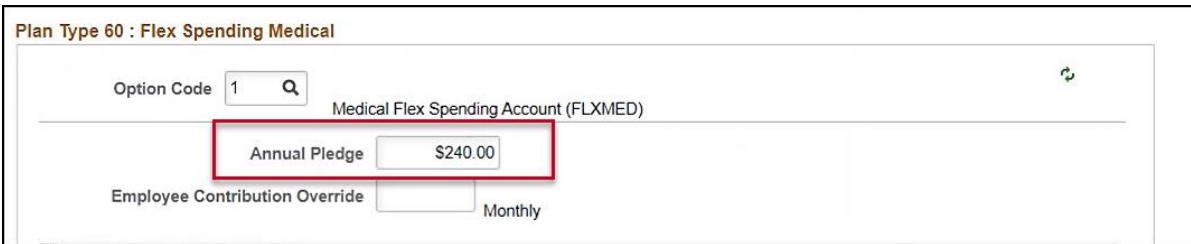
Annual Pledge \$50.00

Employee Contribution Override Monthly

Note: The employee's annual pledge of \$50 is less than the Commonwealth's minimum. At this stage, the **BA** may reach out to the employee to explain the policy and ask for a revised amount before continuing with processing the **New Hire** benefit enrollment. Once the BA has collected the revised amount for the employee, continue to **Step 11**.

BN361 Benefit Event Status Report

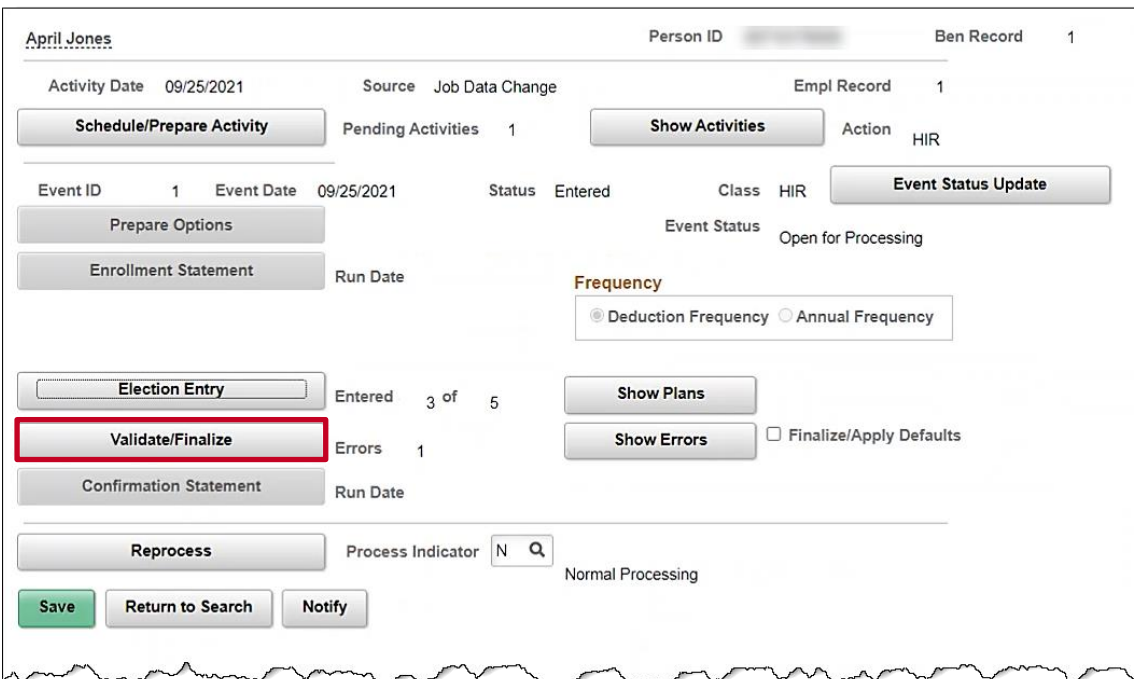
The **Plan Type 60: Flexible Spending Medical** section refreshes.



The screenshot shows a form titled "Plan Type 60 : Flex Spending Medical". It includes a search box for "Option Code" with the value "1". Below this is a section for "Medical Flex Spending Account (FLXMED)" with a "Refresh" icon. The "Annual Pledge" field is highlighted with a red box and contains the value "\$240.00". There is also an "Employee Contribution Override" field with a dropdown menu set to "Monthly".

11. For this example, the employee has chosen to update the Flexible Spending amount to \$240.00. Enter the new amount in the **Annual Pledge** text box under **Plan Type 60: Flexible Spending Medical**.
12. Confirm the **Plan Type AZ: Flex Spending Admin Fee** is elected and click **OK**.

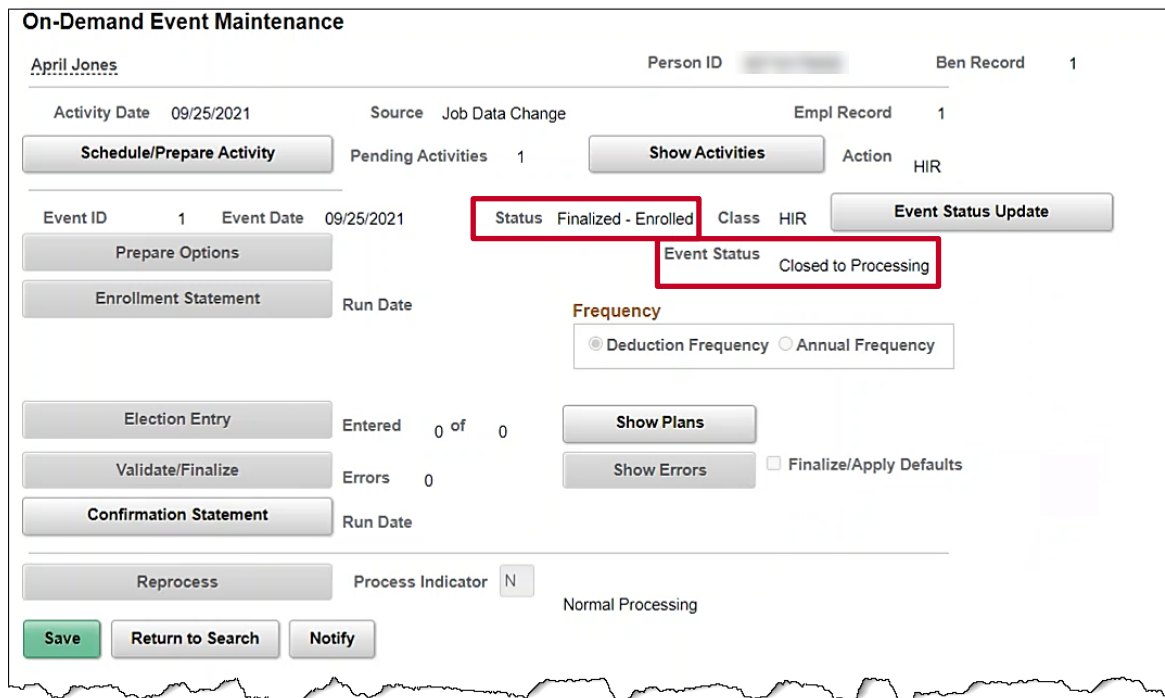
The **On-Demand Event Maintenance Page** returns.



The screenshot shows the "On-Demand Event Maintenance Page" for April Jones. It displays details for an event on 09/25/2021 with status "Entered" and class "HIR". The "Event Status" is "Open for Processing". The "Frequency" section has "Deduction Frequency" selected. The "Validate/Finalize" button is highlighted with a red box. Other buttons include "Schedule/Prepare Activity", "Show Activities", "Event Status Update", "Election Entry", "Show Plans", "Show Errors", "Reprocess", "Save", "Return to Search", and "Notify".

13. Click the **Validate/Finalize** button.

The **On-Demand Event Maintenance** page refreshes.



On-Demand Event Maintenance

April Jones Person ID [REDACTED] Ben Record 1

Activity Date 09/25/2021 Source Job Data Change Empl Record 1

Schedule/Prepare Activity Pending Activities 1 **Show Activities** Action HIR

Event ID 1 Event Date 09/25/2021 **Status Finalized - Enrolled** Class HIR **Event Status Update**

Prepare Options **Event Status Closed to Processing**

Enrollment Statement Run Date

Frequency
 Deduction Frequency Annual Frequency

Election Entry Entered 0 of 0 **Show Plans**

Validate/Finalize Errors 0 **Show Errors** Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save **Return to Search** **Notify**

14. Confirm that the **Status** is “Finalized-Enrolled” and the **Event Status** is “Closed to Processing”.

Note: The BA has fixed the Election Error for this example by updating the Annual Pledge for the employee.