

Self-service employer report guide

How to access reports on the employer portal



Working to provide easier plan administration and reporting

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Anthem provides you with access to a variety of reports designed to help you evaluate, manage, and maximize your company's healthcare plan. We want to make sure you can use these reports to your company's advantage. You'll find the following information in this guide:



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How to access reports

Follow these steps to access and run a report:

- 1 Log into EmployerAccess at **anthem.com**.
If you don't already have a log in, select **Register Now**.
- 2 Choose **Support & Resources** tab from the top left menu drop down.
- 3 Select **Reports & Tools**.
- 4 Choose **Tools & Resources**, then **Anthem CDHP and FSA Reports**.
A new window will open; select the **Menu** icon.
- 5 Select **Reports** and then **Request**.
- 6 Once you've run a report, go to the menu, select **Reports, Results**, and then **View Results** to see your report.



Types of reports

Enrollment reports

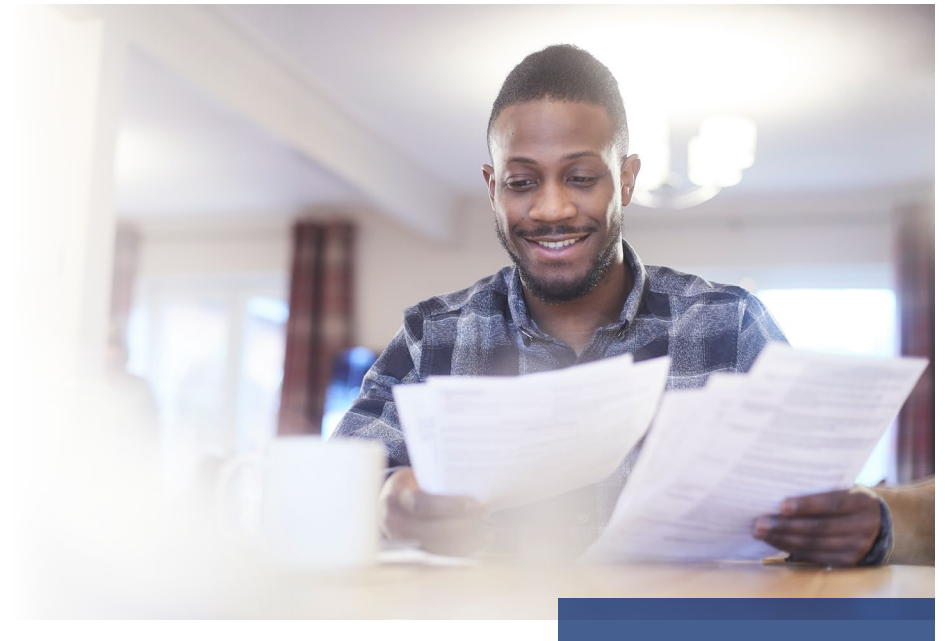
Enrolled participant report

Plan types:

- All plans

What the report does:

- Provides an overview of employees, including general information for demographics, account balances, and year-to-date (YTD) disbursements.*
- Includes or excludes dependents.
- Includes sub-accounting and divisions (if applicable).



ER name	Division	Class	EE ID	Last name	First name	Status	Elig. date	Term. date	Email	Card status	Plan type	Acct. status	Acct. eff. date	EE per pay period amt.	ER per pay period amt.	Annual election / family amt.	EE cont. YTD	ER cont. YTD	Disbursed YTD*	Bal.*
ER 1	Milwaukee	Marketing	XXX-XX-3452	Ali	Muhammad	New			email@email.com	New	DCA	New	01/01/2018	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
ER 1	Milwaukee	Marketing	XXX-XX-3452	Ali	Muhammad	New			email@email.com	New	HRA	New	01/01/2018	\$0.00	\$0.00	\$1,500.00	\$0.00	\$0.00	\$0.00	\$1,500.00
ER 1	Waltham	Operations	XXX-XX-3453	Angelou	Angela	New			email@email.com	New	HRA	New	01/01/2018	\$0.00	\$0.00	\$750.00	\$0.00	\$0.00	\$0.00	\$750.00
ER 1	Maitland	Sales	XXX-XX-3454	Baggins	Bilboa	New			email@email.com	New	FSA	New	01/01/2018	\$0.00	\$0.00	\$0.00	\$20.00	v\$0.00	\$150.00	\$350.00

* Amounts will appear as \$0.00 for HSAs.

Employee account details report

Plan types:

- All plans

What the report does:

- Provides an overview of enrollment and YTD fund utilization on plans.
- Shows information for reimbursement accounts.
- Provides transparency and visibility (shows which employees owe money back to the plan for ineligible expenses).



ER name	Division	Class	Plan ID	EE ID	EE name	Eff. date / term date	EE status	Annual election*	Rollover amt.*	EE deposits*	ER deposits*	Other deposits*	Total disbursed*	Forfeiture balance*	Avail. bal.*	Bal. due*
ER 1	Milwaukee	Marketing	DCA	XXXX3452	Ali, Muhammad		New	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
ER 1	Maitland	Operations	DCA	XXXX1212	Brady, Shelley		New	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
ER 1	Milwaukee	Sales	DCA	XXXX3467	Davis, Bette		New	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
ER 1	Milwaukee	Marketing	DCA	XXXX3470	Jackson, Miss		New	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

* Amounts will appear as \$0.00 for HSAs.

Settlement reports

Employer disbursements report

Plan types:

- Flexible Spending Account (FSA)
- Health Reimbursement Account (HRA) with debit card option (member-pay HRA)
- Dependent Care Account (DCA)
- Parking and transit commuter accounts

What the report does:

- Reconciles all claim activity for a time frame, except for HRA provider-pay claims.
- Gives a consolidated, accurate report of spending activity for relevant plan types.

Employer account reconciliation

Plan types:

- FSA
- HRA with debit card option (member-pay HRA)
- DCA
- Parking and transit commuter accounts

What the report does:

- Reconciles employer bank accounts.
- Provides a daily overview of all debits and credits to your account.
- Offers the capability to show a specific time period and display totals of your deposits, manual claims, and point-of-sale (POS) debit card transactions against an employer account during that time period.
- Displays a beginning and ending employer account balance.

Claims-based funding report

Plan types:

- FSA
- All HRAs (member or provider pay HRA)
- DCA
- Parking and transit commuter accounts

What the report does:

- Reconciles a list of transactions that were included in claims-based funding.

ER name	Division	Settlement date	EE name	EE ID	Service date	Claim type	Amount	Check number	Plan ID
ER 1	Maitland	07/13/2018	Baggins, Bilboa	XXX-XX-3454	07/01/2018	Check	\$150.00	4	HEALTHFSA
ER 1	Milwaukee	05/22/2018	Davis, Bette	XXX-XX-3467	02/01/2018	Check	\$500.00	1	HEALTHFSA
ER 1	Milwaukee	05/22/2018	Davis, Bette	XXX-XX-3467	02/01/2018	Manual refund	(\$150.00)		HEALTHFSA
ER 1	Milwaukee	05/22/2018	Davis, Bette	XXX-XX-3467	05/01/2018	Check	\$100.00	5	HEALTHFSA

Health Savings Account (HSA) reports

HSA detail report

Plan type: HSA

What the report does:

- Provides an overview of HSA enrollment status, including accounts still in CIP review.

HSA-funded contribution report

Plan type: HSA

What the report does:

- Confirms the status of payroll contributions submitted within a specific date range.
- Helps you easily confirm if contributions were posted successfully.
- Provides failure reasons for unsuccessful file uploads.

HSA payroll reconciliation report

Plan type: HSA

What the report does:

- Reconciles payroll files.
- Provides a list of payroll-funded HSA credits within a specified date range.
- Reconciles employee and employer contributions.

Employer HSA summary report

Plan type: HSA

What the report does:

- Provides YTD summary of contributions and transactions.
- Provides account status.
- Displays YTD summary of account usage and investment activity.
- Determines plan efficiency and opportunities for additional education.

FPO

A variety of reports to answer common questions

Anthem offers an assortment of reports to answer specific questions about your business's healthcare plan. Below is a list of often-asked questions and which of Anthem's reports will provide you with the information you need.

Account type	Question	Report that addresses the question
FSA	What are my employees' card statuses?	Enrolled participant
	What is each employee's total contribution YTD?	Employee account details
	Which employees receive reimbursements via check vs. debit card?	Employer disbursements
DCA	What check number was issued for an employee's date of service?	Employer disbursements
	What is the total amount of claims funded for a given date range?	Claims-based funding
	How many employees are enrolled in a DCA?	Enrolled participant
HRA	What is the total amount of claims funded for a given date range?	Claims-based funding
	What is the total utilization of the HRA plan for a given plan year?	Employee account details
	How many employees are enrolled in the HRA per division?	Enrolled participant
HSA	What account numbers do you use to set up ACH direct deposit?	HSA account details
	What is the status of an employee's HSA application?	HSA account details
	What are the total contributions posted on a specific date?	HSA payroll reconciliation



Our reports are designed to help position your organization to capitalize on data analytics for the health of your employees and business.



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