

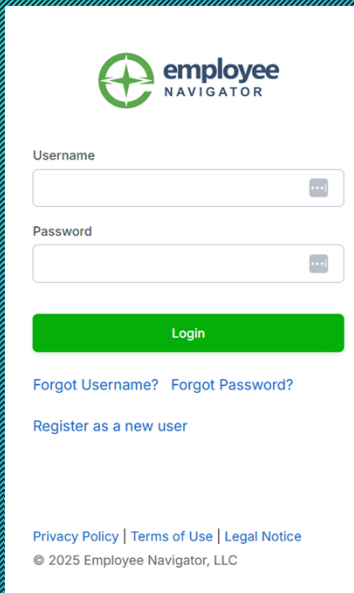


Reports in Employee Navigator



Run Reports with Confidence!

Logging In

The image shows a login page for Employee Navigator. At the top left is the logo, which consists of a green circular icon with a white crosshair and the text "employee NAVIGATOR" to its right. Below the logo are two input fields: "Username" and "Password". Each field has a small eye icon on the right side to toggle visibility. Below the password field is a green "Login" button. Underneath the button are two links: "Forgot Username?" and "Forgot Password?". Below these links is a link that says "Register as a new user". At the bottom of the page, there are three links: "Privacy Policy", "Terms of Use", and "Legal Notice", followed by a copyright notice: "© 2025 Employee Navigator, LLC".

 employee NAVIGATOR

Username

Password

Login

[Forgot Username?](#) [Forgot Password?](#)

[Register as a new user](#)

[Privacy Policy](#) | [Terms of Use](#) | [Legal Notice](#)

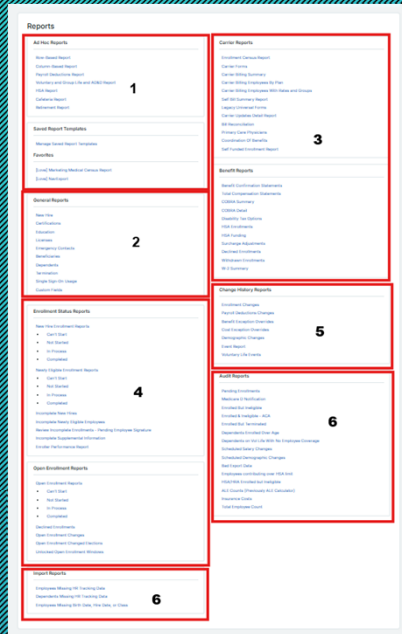
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Go to www.EmployeeNavigator.com and click **Login**

- **Returning Users:** Login with the username and password you selected previously.
- **If you forgot your password,** contact your Inszone Insurance Account Manager to have it reset!

Tip:

- **Static Reports Defined:** Users cannot add, change or remove fields from the output of any other report types.



Employee Navigator Report Types:

1. **Ad-Hoc:** Build, save and share reports with others that have access to the Reports menu.
2. **General Reports AKA Static | Demographic:** Static Employee Demographic reports.
3. **Carrier & Benefit Reports AKA Static | Benefits:** Static Benefit Enrollment reports.
4. **Enrollment Status:** Static reports monitoring the status of each type of enrollment event: New Hire, Newly Eligible and Open Enrollment.
5. **Change History:** Static change reports identifying changes made to Navigator.
6. **Audit Reports:** Static audit reports monitoring data validity impacting Demographic Data and Benefit Data.

Running Reports in Employee Navigator

Ad Hoc Reports

- [Row-Based Report](#)
- [Column-Based Report](#)
- [Payroll Deductions Report](#)
- [Voluntary and Group Life and AD&D Report](#)
- [HSA Report](#)
- [Cafeteria Report](#)
- [Retirement Report](#)

Ad-Hoc Reports that can be designed, each allowing for different output

Saved Report Templates

- [Manage Saved Report Templates](#)

Saved reports are available via this hyperlink, and this takes you to the ability to share specific reports

Favorites

- [\[Love\] Marketing Medical Census Report](#)
- [\[Love\] NavExport](#)

Ad-Hoc Reports that have been marked 'favorite'

Ad Hoc Reports

With Ad-Hoc Reports, you can:

1. Design Report Output
2. Save Designed Reports
3. Manage Saved Reports
4. Favorite Saved Reports

Running Reports in Employee Navigator

Row-Based Report

Column-Based Report

Row-Based Report

Found 20

Social Security Number	Last Name	First Name	Class	Benefit	Start Date	End Date	Decline Reason	Plan	Center	Coverage Level	EE Per Pay Cost	EB Per Pay Cost
contact 901-00-0000	ZZ	Erica	Full Time Benefits Eligible	Vision	08/01/2025			Principal Life Vision Plan (VSP)	Principal Financial Group	Employee	\$0.71	\$2.13
contact 901-00-0000	ZZ	Erica	Full Time Benefits Eligible	Dental	08/01/2025			Principal Life Dental Low Plan	Principal Financial Group	Employee	\$2.12	\$6.36
contact 901-00-0000	ZZ	Erica	Full Time Benefits Eligible	Group Life	08/01/2025			Group Life Insurance	Principal Financial Group	Employee	\$0.00	\$2.07
contact 901-00-0000	ZZ	Erica	Full Time Benefits Eligible	Medical	08/01/2025			Anderson HSA Medical Plan	Anderson Blue Cross Blue Shield	Employee	\$201.62	\$201.62
contact 901-00-0000	ZZ	Erica	Full Time Benefits Eligible	Accident	10/06/2025		Not Interested					
contact 901-00-0000	ZZ	Erica	Full Time Benefits Eligible	Voluntary Life	10/06/2025		Not Interested					
contact 054-00-0004	ZZ	Lisa	Full Time Benefits Eligible	Dental	08/01/2025			Principal Life Dental High Plan	Principal Financial Group	Employee	\$16.55	\$6.36
contact 054-00-0004	ZZ	Lisa	Full Time Benefits Eligible	Voluntary Term Life Insurance	08/01/2025			Principal Life Voluntary Term Life Insurance	Principal Financial Group	Employee	\$0.21	\$0.00
contact 054-00-0004	ZZ	Lisa	Full Time Benefits Eligible	Accident	08/01/2025			Principal Life Accident Coverage	Principal Financial Group	Employee	\$4.00	\$0.00
contact 054-00-0004	ZZ	Lisa	Full Time Benefits Eligible	Medical	08/01/2025			Anderson Platinum PPO 10/250/70/10	Anderson Blue Cross Blue Cross of CA	Employee	\$206.01	\$206.09
contact 054-00-0004	ZZ	Lisa	Full Time Benefits Eligible	Group Life	08/01/2025			Group Life Insurance	Principal Financial Group	Employee	\$0.00	\$2.07
contact 054-00-0004	ZZ	Lisa	Full Time Benefits Eligible	Vision	08/01/2025			Principal Life Vision Plan (VSP)	Principal Financial Group	Employee	\$0.71	\$2.13

Designing Ad Hoc Reports Row-Based

There are fundamentally 2 different types of Ad Hoc Reports:

Row-Based Report: One row per employee, per benefit. If dependents are added they will also have one row per dependent, per benefit.

Tip:

- Ad Hoc Reports allow you to filter the output focus on only those positive elections OR enter selections that result in output which include declines and those that never enrolled.
- Filters also allow you to focus on only specific benefits, employment status, Departments, Divisions, Offices, Business Units or Job Classifications (as well as several other available criteria)

Running Reports in Employee Navigator

Row-Based Report

Column-Based Report

Found 3

Download Search table

Employee SSN	Relationship	Last Name	First Name	Medical Plan	Medical Plan Coverage	Medical Plan Start Date	Dental Plan	Dental Plan Coverage	Dental Plan Start Date	Vision Plan	Vision Plan Coverage	Vision Plan Start Date
contact 881-55-0005	Employee	ZZ	Erica	Anthem HSA Medical Plan	Employee	08/01/2025	Principal Life Dental Low Plan	Employee	08/01/2025	Principal Life Vision Plan (VSP)	Employee	08/01/2025
contact 554-55-0004	Employee	ZZ	Lisa	Anthem Platinum PPO 15/250/10%	Employee	08/01/2025	Principal Life Dental High Plan	Employee	08/01/2025	Principal Life Vision Plan (VSP)	Employee	08/01/2025
contact 554-55-0005	Employee	ZZ	Susan	Anthem Platinum HMO 0/30 Copy	Employee	10/01/2025	Principal Life Dental Low Plan	Employee	10/01/2025	Principal Life Vision Plan (VSP)	Employee	10/01/2025

AI Assistant

Designing Ad Hoc Reports Column-Based

There are fundamentally 2 different types of Ad Hoc Reports:

Column-Based Report: One row per employee with columns across for each benefit. If dependents are added they will also have one row per dependent with a column for each benefit.

Tip:

- Available Columns include any benefits offered EXCEPT Cafeteria or HSA Plans.
- Column-Based reports also allow similar but not the same filtering as the Row-Based report.

Running Reports in Employee Navigator

Row-Based Report 

Use "Fields" to add Employee and Enrollment columns to the report. Change column order with "Reorder Selected Fields." Use "Options" to refine the data (rows) returned in the report.

View  **Run Report**

Save  **Save the Report**

Fields

Employee  **Reorder Selected Fields**

Profile & Personal

☐ Select All

☐ Social Security Number

☒ First Name

☐ Middle Name

☒ Last Name

☐ Suffix

☐ Preferred Name

☐ Display Name

☐ Full Name

☐ Sex

☐ Gender Identity

☐ DOB

☐ Age

☐ Marital Status

☐ Date of Marriage

☐ U.S. Citizen

☐ Visa Status

☐ Veteran Status

☐ Military Reserve Status

☐ Race/Ethnicity

☐ Language

☐ Driver's License Number

☐ Office 

☐ Class 

☐ Payroll Group

☐ Division 

☐ Department 

☐ Business Unit 

Options

Review options and filters

Dependents:

☐ Include dependents

What to exclude:

☐ Declined enrollments

☐ Ended enrollments

☐ Not enrolled

What type of enrollment:

Default

Limit enrollments based on dates:

Put in the system between: and

Covered between: and **OR** and

Custom Filters

Class  **show**

1 - Fields Dropdown allows you to pick Employee Demographic Data OR Enrollment Data OR both!

2 - The boxes you check will appear on the output from left to right in the order you select each field.

3 - Checking this box includes dependents in the output.

4 - Each checkbox here will EXCLUDE from the output Declined, Ended or those Not Enrolled

5 - Select if your output should be Current enrollments (Default also = Current) or Open Enrollments.

6 - Records put into Navigator between these two dates

7 - Enrollments covered between these two dates.

8 - Any Filterable fields will appear here and clicking SHOW will give you the opportunity to restrict the output as needed.

FILTERABLE FIELDS 

How to Run an Ad Hoc Report

FIELDS: Select from Employee (Demographic) and Enrollments (Benefit Elections) in the drop down.

FIELD LIST: Click the checkbox to Pick the fields for your output. The order in which you pick them is the order of the output from left to right.

FIELDS WITH FILTERS: Selected fields with a 'filter image' to the right of the field name, will allow you to filter the output by the various values available in each field.

DEPENDENTS: Check box if you wish to have Dependents added to the output.

Tip:

- Records put into Navigator between two dates will extract only those records that were entered into Employee Navigator on/after the From date and up to the To date.
- Employees **COVERED** between two dates will select everyone with an election record that is in effect during the time-period chosen.
NOTE: If an employee has a qualified family status change during this time period you will see multiple records for the individual - not only the last/most current record. If you want only the last/most current record, do not use this date criteria.

Running Reports in Employee Navigator

Row-Based Report Back to Reports Menu

Use "Fields" to add Employee and Enrollment columns to the report. Change column order with "Reorder Selected Fields." Use "Options" to refine the data (rows) returned in the report.

Fields

Employee 1 - Fields Dropdown allows you to pick Employee Demographic Data OR Enrollment Data OR both! Reorder Selected Fields

Options

Review options and filters

Dependents:

☐ Include dependents 3 - Checking this box includes dependents in the output.

What to exclude:

☐ Declined enrollments ☐ Ended enrollments ☐ Not enrolled 4 - Each checkbox here will EXCLUDE from the output Declined, Ended or those Not Enrolled

What type of enrollment:

Default 5 - Select if your output should be Current enrollments (Default also = Current) or Open Enrollments.

Limit enrollments based on dates:

Put in the system between: and

Covered between: and OR

Custom Filters

Class show

Filterable Fields

☐ Social Security Number

☒ First Name

☐ Middle Name

☒ Last Name

☐ Suffix

☐ Preferred Name

☐ Display Name

☐ Full Name

☐ Sex

☐ Gender Identity

☐ DOB

☐ Age

☐ Marital Status

☐ Date of Marriage

☐ U.S. Citizen

☐ Visa Status

☐ Veteran Status

☐ Military Reserve Status

☐ Race/Ethnicity

☐ Language

☐ Driver's License Number

☐ Office

☒ Class

☐ Payroll Group

☐ Division

☐ Department

☐ Business Unit

2 - The boxes you check will appear on the output from left to right in the order you select each field.

6 - Records put into Navigator between these two dates

7 - Enrollments covered between these two dates.

8 - Any Filterable fields will appear here and clicking SHOW will give you the opportunity to restrict the output as needed.

How to Run an Ad Hoc Report

WHAT TO EXCLUDE:

Declined Enrollments: Employees that declined coverage

Ended Enrollments: Employees whose coverage ended prior to today

Not Enrolled: Employees that do not have an election record

WHAT TYPE OF ENROLLMENT:

Current Year Enrollments: Enrollment data in the Current Table

Open Enrollments: Available during the Open Enrollment Period

LESS USED BUT AVAILABLE:

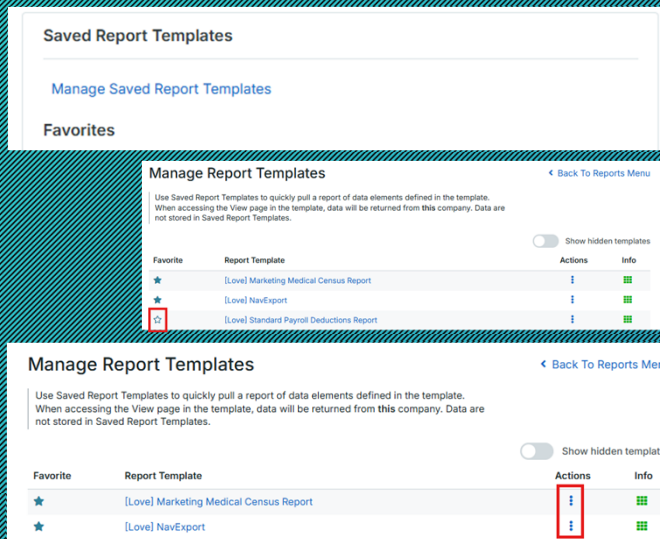
Records put into Navigator between specific dates

Enrollments covered between two dates

Tip:

- Records put into Navigator between two dates will extract only those records that were entered into Employee Navigator on/after the From date and up to the To date.
- Employees **COVERED** between two dates will select everyone with an election record that is in effect during the time-period chosen.
NOTE: If an employee has a qualified family status change during this time period you will see multiple records for the individual - not only the last/most current record. If you want only the last/most current record, do not use this date criteria.

Running Reports in Employee Navigator



How to Save and Share an Ad-Hoc Report

1. For saved reports, click on Manage Saved Report Templates and you will be taken to a page listing all of your saved reports along with reports that have been shared with you.
2. Clicking on the star will result in your report appearing in your Favorites List!
3. Clicking on the 3 vertical dots to the right of the report name gives you the ability to share the report with others that have HR level access.
 - If you are running a report that has been shared with you, you cannot change the report. Only the original owner can change the report.
 - You can save the shared report with a different name and make any changes to the newly saved report which now belongs to you!

Running Reports in Employee Navigator

Ad-Hoc

The screenshot shows the 'Payroll Deductions Report' configuration screen. On the left, there are tabs for 'Fields', 'View', and 'Save'. The 'Fields' tab is active, showing a list of fields under the 'Profile & Personal' section, including Social Security Number, First Name, Middle Name, Last Name, Suffix, Preferred Name, Display Name, Full Name, Sex, Gender Identity, DOB, Age, and Marital Status. A dropdown menu is set to 'Employee'. On the right, the 'Options' section is visible, with a sub-section 'Effective Date' containing a date input field set to '01/01/2020'. Below this, the 'Costs' section has a checkbox for 'Sum dependent costs' which is currently unchecked. Red boxes highlight the 'Effective Date' field and the 'Sum dependent costs' checkbox.

Payroll Deduction Report

1. Reports 'Everyone's Everything' as of the effective date used when running the report.
2. 'Roll up' the dependent Critical Illness and Voluntary Life elections into the single total at the employee level by clicking 'Sum dependent costs'.
3. If the 'Sum dependent costs' is not checked, Critical Illness and Voluntary Life dependent costs will appear on the report in their own rows.
4. Functionality is the same as the Row-Based report!

Running Reports in Employee Navigator

General

The screenshot shows the 'General Reports' section of the Employee Navigator interface. A list of report categories is on the left, with 'New Hire' highlighted. To the right, the 'New Hire Report' is configured with the date '11/22/2025' in the 'Employees Hired After' field. A blue 'Generate' button is at the bottom.

General Reports AKA: Static | Demographic Reports

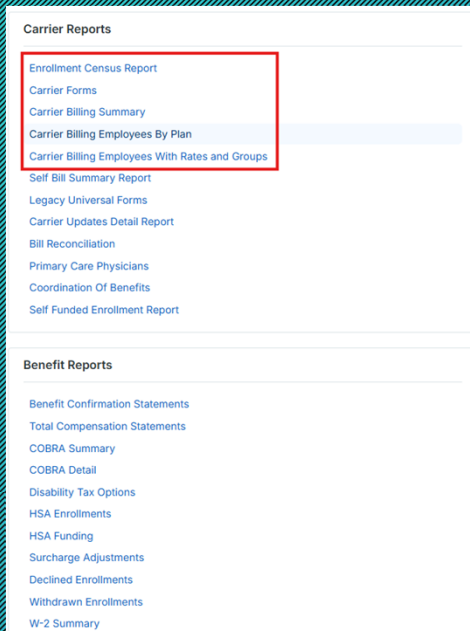
- These reports output exactly the type of information the name implies.
- Users cannot add or remove columns from the output of these reports.
- Several reports default to a look-back period of 30 days which can be overridden by changing the date prior to clicking Generate.
- Use the run-time prompts to focus in on the specific data that is needed.

Tip:

- Most Static Demographic Reports have RUN TIME prompts that allow users to extract only the data desired..
- If custom fields are required, users will need to design an Ad-Hoc report that fits their needs.

Running Reports in Employee Navigator

Benefit Reports



Carrier & Benefit Reports AKA: Static | Benefits Reports

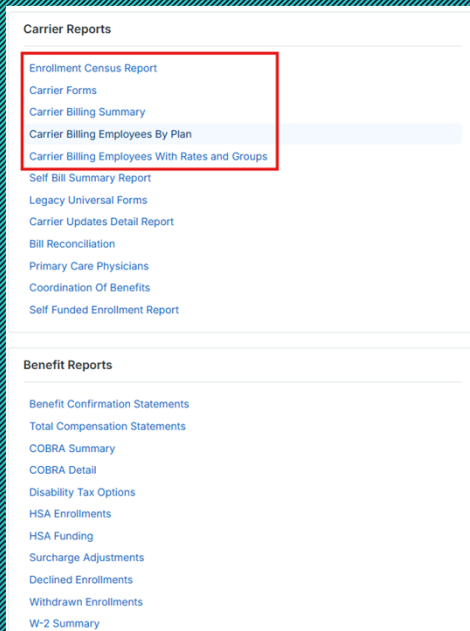
The most frequently used reports in these two boxes are highlighted.

- **Enrollment Census Report:** Reports identifying who is covered. This report includes all of the fields necessary to notify a vendor that coverage needs to be established.
- **Carrier Forms:** If setup, you can print out the specific vendor forms that a carrier would require for establishing, changing or terminating coverage.
- **Carrier Billing Summary / Carrier Billing Employees By Plan and Carrier Billing Employees with Rates and Groups:** work together to output the total monthly premium costs required by the vendor. Particularly helpful when groups are self-billed.

Tip:

- If custom fields are required, users will need to design an Ad-Hoc report that fits their needs.

Running Reports in Employee Navigator



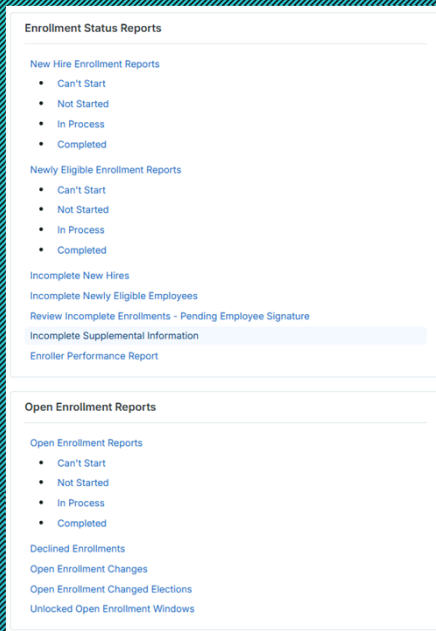
Carrier Billing Reports:

These reports work together to provide users with the numbers they need to pay their monthly premiums for Self-Billed plans.

- **Carrier Billing Summary:** Provides monthly premium values summarized BY PLAN
- **Carrier Billing Employees By Plan:** Provides details with one row per employee with a column for each plan.
- **Carrier Billing Employees with Rates and Groups:** Provides premium values NOT summarized. Provides details with one row per employee PER plan. Employees with multiple plans will appear multiple times on the report.

Running Reports in Employee Navigator

Enrollment Status



Enrollment Status Reports:

Static reports to monitor each type of enrollment event: New Hire, Newly Eligible and Open Enrollment. The same type of report(s) are available for each enrollment event:

- **Can't Start:** Employees who can't start enrollment because they are missing HRIS required profile fields.
- **Not Started:** Employees who are eligible for enrollment plans but have not started the plan selection process. Employees who save their Personal Information page in the flow but have not selected plans remain in this category.
- **In Process:** Employees who have started their enrollment process by selecting plans, but have not yet signed their enrollment summary.
- **Completed:** Employees who have completed their enrollment by signing their enrollment summary.

Tip:

- Are you looking for a report that provides a listing of employees that haven't completed their Beneficiary Data? Navigator has it! This is located in the Incomplete Supplemental Information report.

Running Reports in Employee Navigator

Change History

Change History Reports

- Enrollment Changes
- Payroll Deductions Changes
- Benefit Exception Overrides
- Cost Exception Overrides
- Demographic Changes
- Event Report
- Voluntary Life Events

Change History Reports:

1. **Changes to Enrollments:** Enrollment changes within a specified date range.
2. **Payroll Deduction Changes:** Output includes the 'old' deduction to be disabled and the 'new' deduction to be started.
3. **Benefit Exception Overrides:** Overrides added via the Enrollment Editor.
4. **Cost Exception Overrides:** Active enrollments with cost exception overrides.
5. **Demographic Changes:** Changes to demographic data. What changed, who changed the record, when the record changed along with the old and new values.
6. **Event Report:** Employee changes in defined events.
7. **Voluntary Life Events:** Changes to Voluntary Life benefits including the date the change was processed.

Tip:

- Benefit Exception Overrides are typically used for grandfathered employees where coverage does not meet the current plan design. Overrides are locked from scheduled updates, such as age reduction, for the duration of the enrollment.

Running Reports in Employee Navigator

Audit

Import Reports

- [Employees Missing HR Tracking Data](#)
- [Dependents Missing HR Tracking Data](#)
- [Employees Missing Birth Date, Hire Date, or Class](#)

Audit Reports

- [Pending Enrollments](#)
- [Medicare D Notification](#)
- [Enrolled But Ineligible](#)
- [Enrolled & Ineligible - ACA](#)
- [Enrolled But Terminated](#)
- [Dependents Enrolled Over Age](#)
- [Dependents on Vol Life With No Employee Coverage](#)
- [Scheduled Salary Changes](#)
- [Scheduled Demographic Changes](#)
- [Bad Export Data](#)
- [Employees contributing over HSA limit](#)
- [HSA/HRA Enrolled but Ineligible](#)
- [ALE Counts \(Previously ALE Calculator\)](#)
- [Insurance Costs](#)
- [Total Employee Count](#)

Audit Reports:

These are reports that allow users to identify potentially inaccurate records.