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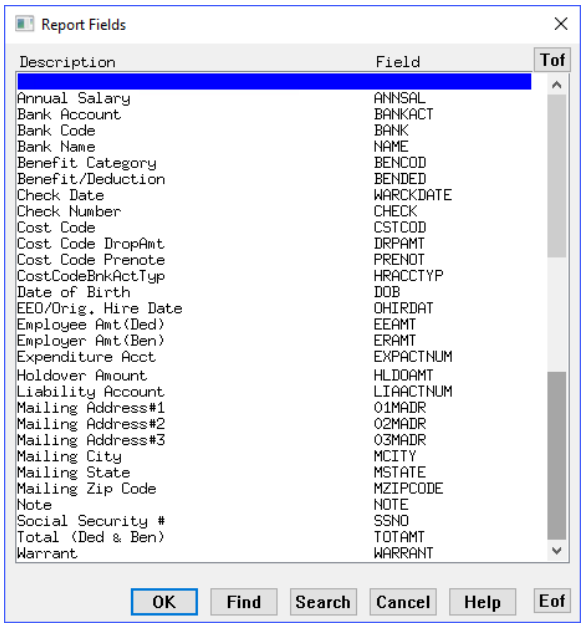
1 # 7225–Benefit Category Report [Enhancement]



The Benefit Category report is customizable and can be run as part of the periodic payroll warrant, on a set schedule, or on demand.

This will report on all category codes that are set up on the Paycheck Category table.

The list of fields is shown via the lookup when adding a field in the Paycheck Category Detail screen. The current list is shown on the left.

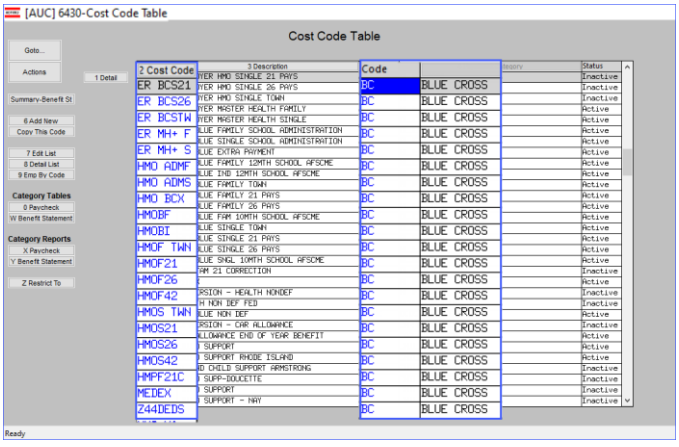
If there are fields not shown here that you want to be included in the report, please contact support@admins.com to request the enhancement.

Our most recent addition to the list was adding the warrant number at the request of one of our user sites.

1.1 Setting up the Benefit Categories Report

Begin by determining the category for the cost code to be reported on. Each **Cost Code** is associated with a **Paycheck Category**. The **Paycheck Category** code highlighted on the Cost Code table in the image is **"BC"**. To access the cost code table to see these codes, from the menu, select:

Human Resources ▸ Tables ▸ Cost Codes



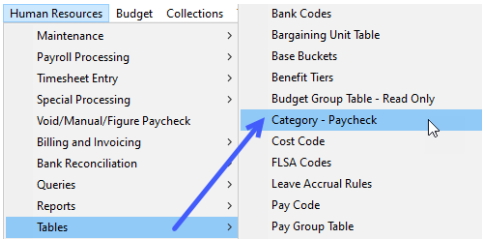
Code	Description	Benefit	Category
BLXF26	BLUE CROSS FAMILY 75/25	BC	BLUE CROSS
BLXS26	BLUE CROSS SINGLE 65/35	BC	BLUE CROSS
ER BC F	EMPLOYER HMO FAMILY	BC	BLUE CROSS
ER BC S	EMPLOYER HMO SINGLE	BC	BLUE CROSS
ER MH+ F	EMPLOYER MASTER HEALTH FAMILY	BC	BLUE CROSS
ER MH+ S	EMPLOYER MASTER HEALTH SINGLE	BC	BLUE CROSS
HMO ADMF	HMO BLUE FAMILY SCHOOL ADMINISTRATION	BC	BLUE CROSS
HMO ADMS	HMO BLUE SINGLE SCHOOL ADMINISTRATION	BC	BLUE CROSS
HMO BCX	HMO BLUE EXTRA PAYMENT	BC	BLUE CROSS
HMOBF	HMO BLUE FAMILY 12MTH SCHOOL AFSCME	BC	BLUE CROSS
HMOBI	HMO BLUE IND 12MTH SCHOOL AFSCME	BC	BLUE CROSS
HMOF TWN	HMO BLUE FAMILY TOWN	BC	BLUE CROSS
HMOF21	HMO BLUE FAMILY 21 PAYS	BC	BLUE CROSS
HMOF26	HMO BLUE FAMILY 26 PAYS	BC	BLUE CROSS
HMOF42	HMO BLUE FAM 10MTH SCHOOL AFSCME	BC	BLUE CROSS
HMOS TWN	HMO BLUE SINGLE TOWN	BC	BLUE CROSS
HMOS21	HMO BLUE SINGLE 21 PAYS	BC	BLUE CROSS
HMOS26	HMO BLUE SINGLE 26 PAYS	BC	BLUE CROSS
HMOS42	HMO BLUE SNGL 10MTH SCHOOL AFSCME	BC	BLUE CROSS
MEDEX	MEDEX	BC	BLUE CROSS

In this case, there are 20 active cost codes in the "BC" paycheck category.

1.2 Select Fields to include in the Report on the Paycheck Category Table

The report columns shown on the report are defined on the detail page for each code on the Paycheck Category table. To select the fields that will be shown on the report, from the menu, select:

Human Resources ▶ Tables ▶ Category – Paycheck



1. Select the **Paycheck Category** & click on **[Detail]**.
2. On the detail screen, set the report frequency options. This report can be run on demand, or with every warrant, or periodically.
3. Choose the order (where this benefit code will be listed on the report – depends on what other codes are set up for the report.)
4. Choose fields for the report. Employee number and name are always included; up to eight additional columns can be specified.

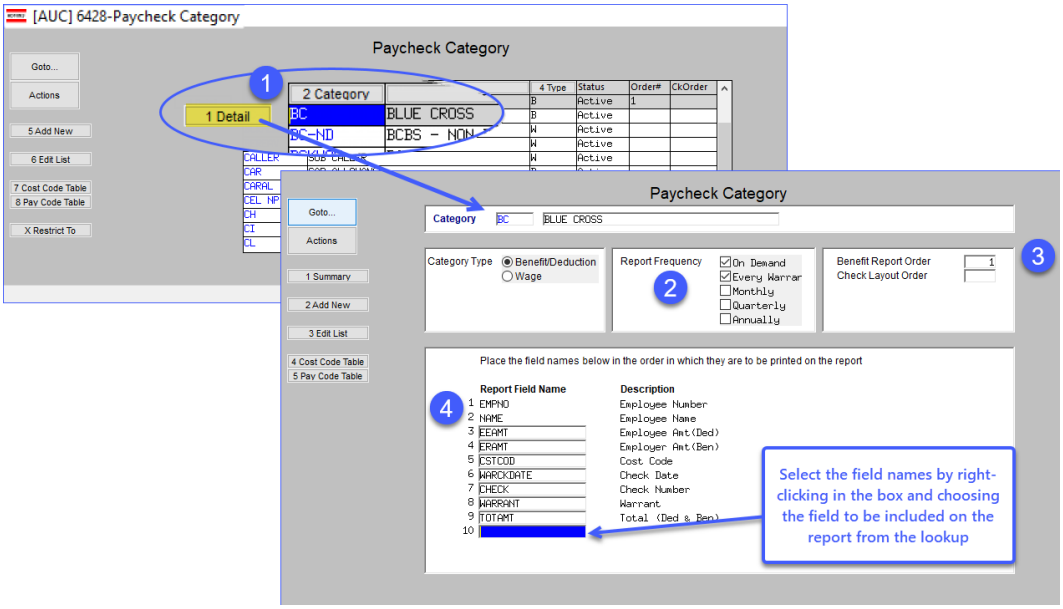
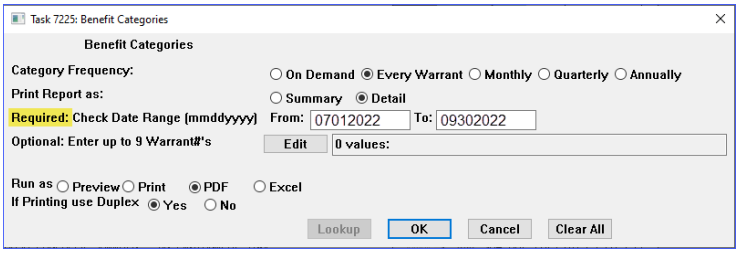


Figure 1 Selecting the options for this code

1.3 Run the Report



To run the report on demand, from the menu, select:

Human Resources ▶ Reports ▶ Report Library ▶ By Paychecks/Other ▶ #7225 Benefit Categories

Enter a required check date range to limit the report to only the desired data.

Samples are shown below.

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Town of Admins
Benefit Categories
Check Date between 07012022 and 09302022

Category: BC BLUE CROSS
Cost Code: ER BC F EMPLOYER HMO FAMILY

Emp#	Employee Name	Prenote	Employee Amt(Ded)	Employer Amt(Ben)	Cost Code	Check Date	Check Number	Warrant	Total (Ded & Ben)
002213	BARTLETT, MICHAEL P		15203.10			06-Jul-2022	0948598	903695	15203.10
071294	CLINTON, LAWRENCE		17019.73			20-Jul-2022	0949734	903700	17019.73
010483	DONAHUE, LYNN R		20566.87			31-Aug-2022	0962969	903717	20566.87
070032	ESPOSITO, KEITH L		14951.11			03-Aug-2022	0961046	903706	14951.11
071640	MCKINNEY, KAREN A		2422.42			03-Aug-2022	0960924	903703	2422.42
010765	MOLLOY, KEITH M		20566.87			31-Aug-2022	0962968	903717	20566.87
070855	O'NEILL, MARIE T		20566.84			14-Sep-2022	0964064	903723	20566.84
000307	PERRY, KEITH JR		9426.70			24-Aug-2022	0962229	903714	9426.70
071314	RANDAZZO, MARIE J		15202.91			06-Jul-2022	0949037	903694	15202.91
071352	SAIYAN, KEITH		20399.04			06-Jul-2022	0949160	903694	20399.04
071517	SCHMIDT, KEITH A		20566.87			24-Aug-2022	0962122	903714	20566.87
006047	SLANEY, KAREN		23162.29			07-Sep-2022	0963296	903721	23162.29
003071	WYNN, LYNN A		19096.09			10-Aug-2022	0961412	903709	19096.09
	Total # Employees: 13		219150.84						219150.84

Selection Legend:

Selected Report Format: In Detail
Selected Check Date: 07012022 to 09302022
Selected Frequency: Every Warrant

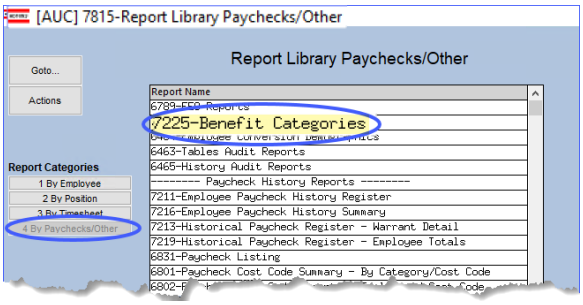
Figure 2 The legend on the last page of the report will show what selections were made – shown is "Run as" PDF

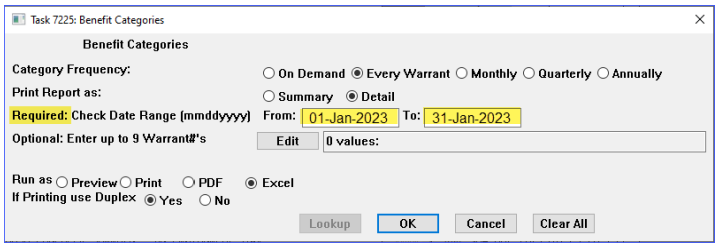
[ADM-AUC-HR-10597]

1.4 Excel® Version

To run the report, from the menu, select:

Human Resources ▸ Reports ▸ Report Library ▸ [4 By Paychecks/Other] ▸ #7225–Benefit Categories





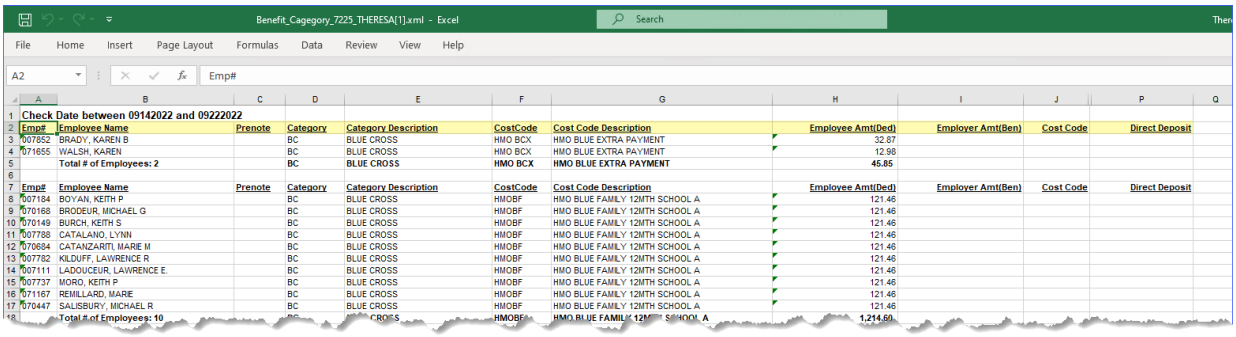


Figure 3 Report #7225Benefit Category run as Excel®