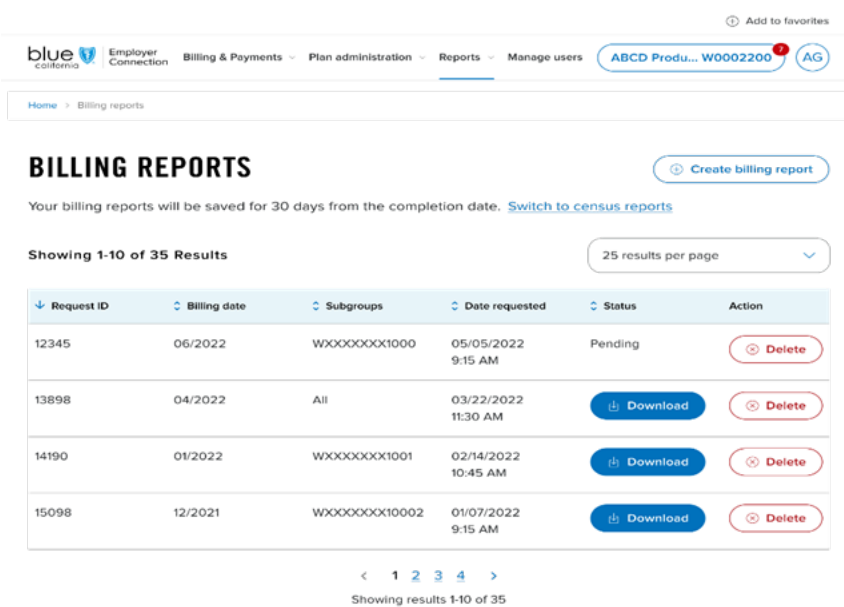
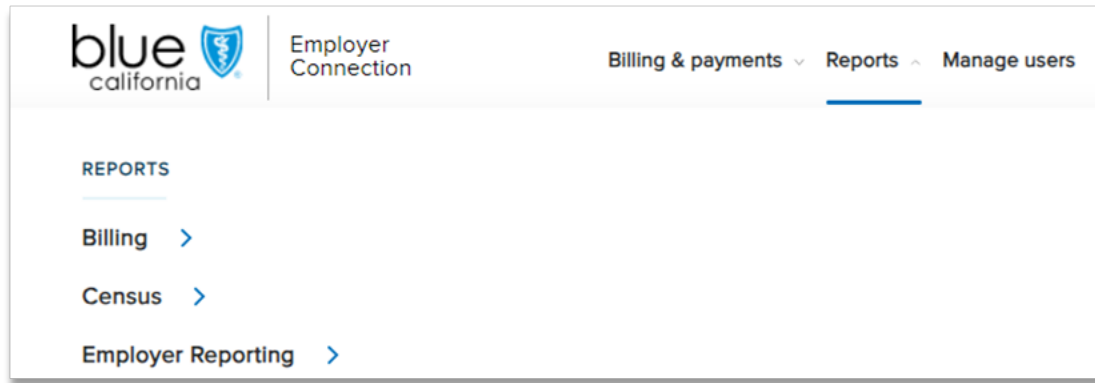


## Reports

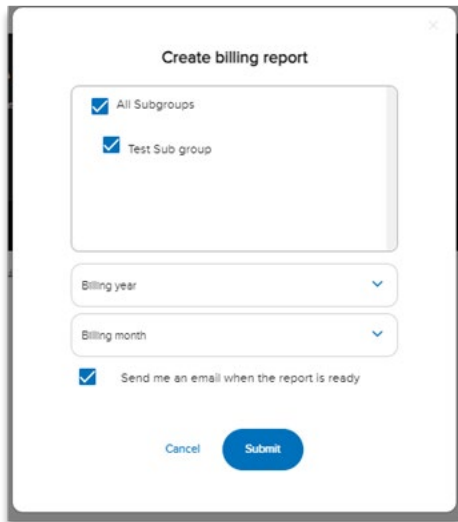
Our "Reports" page allows you to generate and manage customized reports, streamlining your access to crucial account and employee data. This guide will help you efficiently navigate the process.



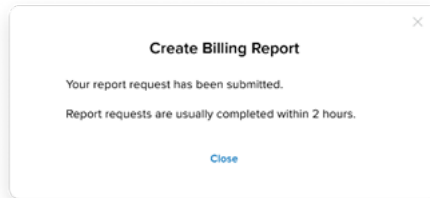
### Locating billing reports:

- On the Reports page, set up billing reports as needed.
- Reports are stored for 30 days after completion.
- Seamlessly switch to census reports when required.
- Customize the number of entries displayed per page between 25, 50, or 100 results.

- Sort reports using headers such as "Billing Date," "Subgroups," "Date Requested," and "Status."
- Download reports upon completion, with clear status indicators "In progress," "Download," "Canceled," or "Error."



The screenshot shows a 'Create billing report' form. It includes a list of subgroups with checkboxes for 'All Subgroups' and 'Test Sub group'. Below this are dropdown menus for 'Billing year' and 'Billing month'. At the bottom, there is a checkbox for 'Send me an email when the report is ready' and two buttons: 'Cancel' and 'Submit'.



### Generating billing reports:

- Click "Create billing report" to open a pop-up window.
- Choose between "All Subgroups" or specific subgroups.
- Select the billing year and month and check the box next to "Send me an email when the report is ready" to receive an alert.

blue california | Employer Connection | Billing & payments - Plan administration - Reports - Manage users | FOX RENT A CA.. W0054351 | SN

Home > Census reports

## CENSUS REPORTS

Your census reports will be saved for 30 days from the completion date. [Switch to billing reports](#)

Showing 1 - 13 of 13 Results | 25 results per page

Request ID	Subgroups	Report type	Date requested	Sort	Status	Action
50949	W00543511000	Employee	07/15/23 10:49 PM	Hire Date	In progress	Delete
50605	W00543511000	Employee	12/30/22 10:54 AM	Last Name	Download Excel	Delete
50449	W0054351	Employee + Dependents	10/12/22 10:00 AM	Last Name	Error	Delete
50066	W00543511000	Employee	07/14/22 2:30 PM	Last Name	Download PDF	Delete

### Generating census reports:

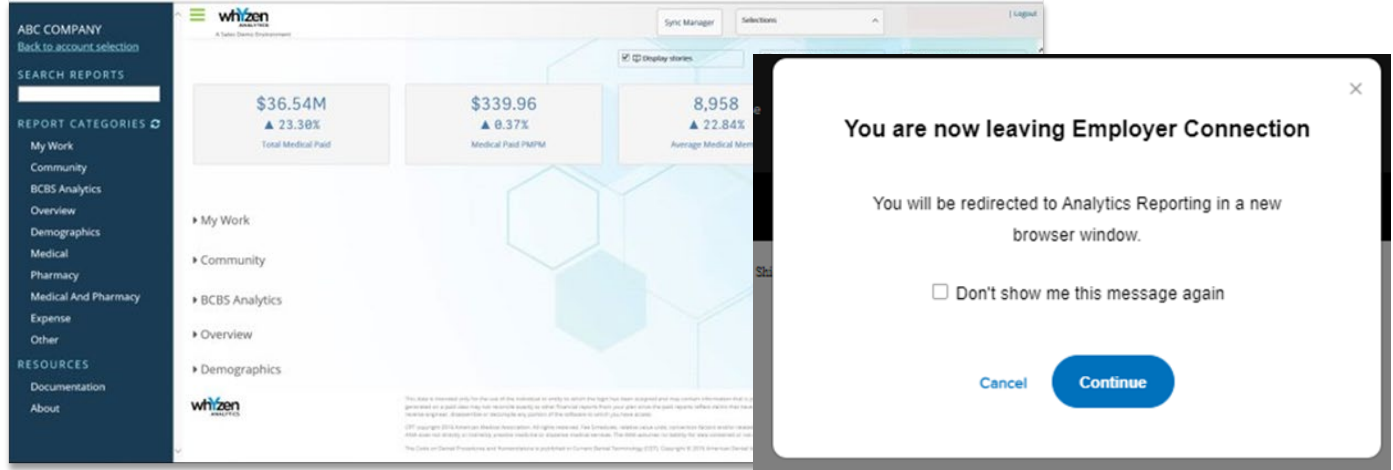
- If census reports are not yet added, a message under the "CENSUS REPORTS" header will help guide you through that process.
- Click "Switch to billing report" to effortlessly switch to billing reports if permitted.
- View and sort reports using headers such as "Subgroups," "Report Type," and "Date Requested."
- Under the "Status" column you can easily view the status of each requested report. Status indicators include: "In progress," "Download Excel," "Download PDF," "Canceled," or "Error."

(Continued)

The image displays three sequential screenshots of the 'Create census report' form. The first screenshot shows the initial form with two radio button options: 'Include employee details only' (selected) and 'Include employees plus dependent(s)'. Below these is a 'Subgroup' dropdown menu. The second screenshot shows the same form with an error message: 'Your report has less than 100 active subscribers. You can go to the Roster page to download instantly or continue to create the Census Report with more options. Download from Roster page | Continue'. The third screenshot shows the form with additional options: 'Output format' set to 'Excel', 'Sort by' set to 'Last name', and a checkbox for 'Send me an email when the report is ready' which is checked. There is also an unchecked checkbox for 'Include inactive members'.

- Click the "Create census report" button at the top right of the page to begin the request process.
- Select whether you want "Employees" or "Employees plus dependents" included in the report. After that, select a subgroup.
- Note: An error message prompts action for subgroups with fewer than 100 subscribers.
- In the dropdown menu choose the "Output format" options of Excel, CSV, or PDF. Select "Sort by" name if you want inactive members included in the report.
- Check the box next to "Include inactive members," and select the email notification box to receive confirmation, then click "Submit."
- 

**Note:** Users who select PDF format will be notified of additional available fields in Excel/CSV formats. Reports will be ready within 90 minutes of submission.



### Employer Reporting:

- Employer reporting is exclusive to Whyzen users, especially Premier clients, and designated delegates.
- You can access employer reporting through Single Sign On (SSO) on the Whyzen platform.
- Then, choose "Continue" or "Cancel" to exit the window. The option to dismiss the window in future clicks is available by selecting "Don't show me this message again."

We hope this guide will help you in all your reporting needs. If you have any questions or need further assistance please contact [Employer Services](#).