CHOICE STRATEGIES
a division of WageWorks
www.choice-strategies.com

On-Demand Reporting System User Guide

1. Accessing the Reporting System

For the best user experience, please turn off your pop-up blocker. Internet Explorer is the recommended browser. Firefox is supported; Google Chrome is not supported.

- Go to www.choice-strategies.com and click the "Login/Register" button on the top of page
- Click the "Access Reports" link and select "Employer Login"
- Enter your User ID: ____________________ and Password: ________________________
- Click on "Download Reports" on the home page
- Click on the small 3 bar icon at the top of the page (between the magnifying glass & "Admin")
- Click the "Reports" drop down on the left hand side
- Click the "Request" drop down to view the selection of reports available

2. Choose Your Report Type

Enrollee Account Balance Report

This report is ideal for tracking overall plan utilization, providing details all employee elections, disbursements, account balances, and balances due.

- On the left side, click on "Enrollees"
- Click the "Enrollee Account Balance" link – 3rd from the top
- Manipulate the fields to fit your needs, such as plan year, divisions, and account type
- Click "Generate"

Employer Funding Report

Sorts transactions by date the transaction was settled and is good for seeing account activity and reconciling bank account.

- On the left side, click on "Settlement"
- Click the "Employer Funding" link – 4th from the bottom
- Manipulate the fields to fit your needs, such as plan year, divisions, and account type
- Click "Generate"

Transactions Report

Gives overall employee transaction history.

- On the left side, click on "Transactions"
- Click the "Transactions" - about halfway down
- Manipulate the fields to fit your needs, such as plan year, divisions, and account type
- Click the check boxes for: "Approved", "New", "Pending", "Ineligible", "Denied", and "Insufficient Documentation" to capture all employee activity
- Change "Template" to be "Transaction CSV Template"
- Click "Generate"

3. Retrieving the Reports

- On the left side, under "Reports" drop down, click on "Result"
- Click the "View Reports" link under "Result" drop down
- If the top report is listed as "Generated," you can click on the report name to open and save the document to your computer
- If it is in "queued" or "processing" status, please click your F5 or click the green "Search" button to refresh the system until it states "generated"

Admin Guide Access Instructions - Invoices and Plan Documents

- Go to www.choice-strategies.com and click the "Login/Register" button on top of page
- Click the "Admin Guide" link
- Enter your Admin Guide password in all lowercase letters
- PASSWORD:
- Please save this password. Your monthly invoices will be posted here, as well as plan documents and other useful information.

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