

How to monitor your team's Open Enrollment progress



deel.

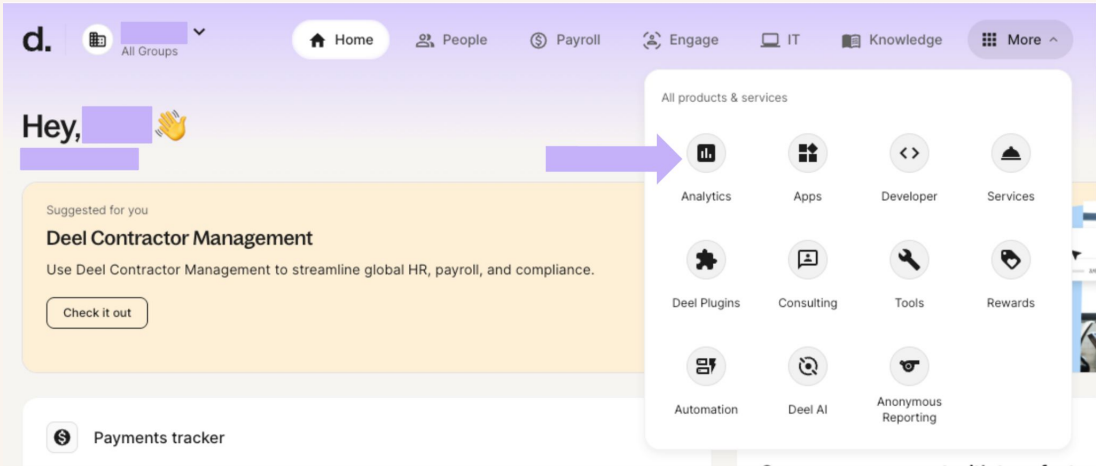
*Disclaimers, legal, special notes.

How to access the “PEO benefits open enrollment” report

Step 1

Log into your Deel admin profile

Visit app.deel.com and login



Step 2

Navigate to “More” and select “Analytics”

A screenshot of the Deel admin dashboard. The top navigation bar includes 'Home', 'People', 'Payroll', 'Engage', 'IT', 'Knowledge', and 'More'. A purple arrow points to the 'More' button. A dropdown menu titled 'All products & services' is open, showing various icons for Analytics, Apps, Developer, Services, Deel Plugins, Consulting, Tools, Rewards, Automation, Deel AI, and Anonymous Reporting. Another purple arrow points to the 'Analytics' icon in this menu.

Step 3

Click “Reports” and either scroll down to “PEO benefits open enrollment” (or type into the search bar), and click “view”

A screenshot of the Deel admin dashboard. The top navigation bar includes 'Home', 'People', 'Payroll', 'Engage', 'IT', 'Knowledge', and 'Analytics'. A purple arrow points to the 'Reports' button in the top navigation bar. Below the navigation bar, there is a 'Dashboards' section with a 'Transform your team into high-performers' suggestion. Below that, there is a 'Reports' section with a search bar containing 'peo benefits'. A purple arrow points to the search bar. Below the search bar, there is a 'Default reports (1)' section. A report titled 'PEO benefits open enrollment' is listed. A purple arrow points to the star icon next to the report title. Another purple arrow points to the 'View' button at the bottom of the report card.

★ Top tip: click on the star icon to “favorite” this report

Your team members will display an enrollment status



PEO benefits open enrollment

Track your PEO employees' benefits enrollment progress to see who has started or completed the process.

The screenshot shows a dashboard with three summary cards and a table below them.

- Enrollments in progress:** 25% (2 of 8 enrollments in progress)
- Enrollments in review:** 38% (3 of 8 enrollments in review)
- Enrollments completed:** 38% (3 of 8 enrollments completed)

Below the cards is a table with the following columns:

Benefits group	Enrollment status	Enrollment sub...	Effective date	Entity
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A purple arrow points from the 'Enrollments in review' card to the 'Enrollment status' column header. A yellow star icon is next to the text: "Top tip: scroll to the right to reach this column".

Status 1



NOT STARTED

They have not yet started open enrollment and may need a reminder to do so.

● NOT STARTED

Status 2



IN PROGRESS

They've either opened or engaged with the open enrollment but haven't yet completed making all of their selections.

- IN PROGRESS

Status 3



UNDER REVIEW

This means they've submitted their open enrollment and made all of their selections. The goal is for all of your team members to achieve this status as the information will now be fed to the carrier.

● UNDER REVIEW

Status 4

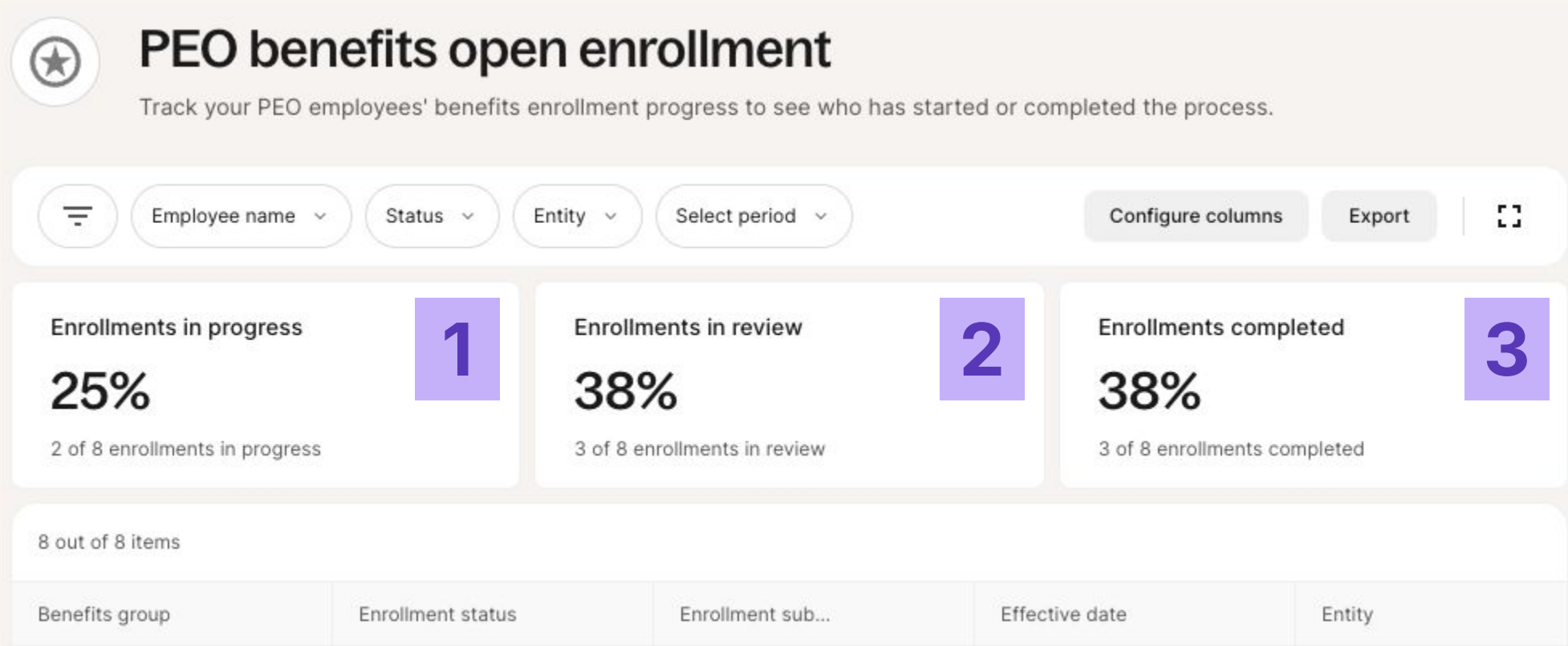


COMPLETED

This means their elections have been submitted to the carrier and they're all set.

● COMPLETED

What the topline metrics mean



Select period

Configure columns

Export

Enrollments in progress

25%

2 of 8 enrollments in progress

1

Enrollments in review

38%

3 of 8 enrollments in review

2

Enrollments completed

38%

3 of 8 enrollments completed

3

8 out of 8 items

Metric 1

Enrollments in progress

This is the one that should be most of interest to you. This tells you how many of the total counts of enrollments are currently in the engaged state, and not submitted state. (the “IN PROGRESS” status).

Metric 2

Enrollments in review

This shows how many of your team have submitted their elections, and are under review.

Metric 3

Enrollments completed

This metric shows how many of you team have completed their full Open Enrollment process and are all set.

