

Running Reports?

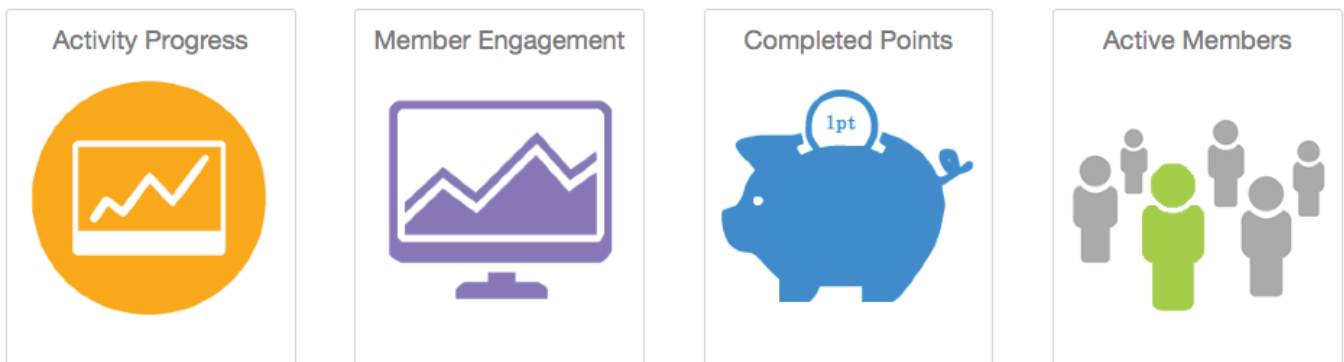
Relax. Wellvibe's got you covered!

Wellvibe makes it easy for anyone to run **Basic OR Advanced reports**, so you can see in seconds where your workforce stands on **compliance, engagement and risk**. Reporting is just another way Wellvibe lightens your workload! You don't have to be nimble with numbers or excellent at Excel. Just follow these simple instructions, and let Wellvibe do the rest.

How to Run a Basic Report

1. Sign in to Wellvibe and go to the Admin Application
2. Click on the Reporting tab in the top navigation bar
3. Click on "Basic Reporting"
4. Choose the report you want to run. (Step 1, shown below)
5. Choose the plan year (Step 2, shown below)

Step 1: Choose Your Report



Step 2: Choose Your Plan Year

Select Plan Year »

Basic Reporting should solve most of your reporting needs. If you need more specific data, please schedule training with Wellvibe Support to become familiar with the Advanced Reporting tool.

Basic Report Types

Here is a list of the Basic Reports in Wellvibe and what each report shows:

Activity Progress

Activity Progress Reports contain the most detail on Activity Reporting. This report contains Status on Activity Completion, date Activity was assigned, date Activity was completed and Activity name for all activities assigned to a Member in the date range selected.

The Activity Progress Report ONLY displays activities with a Display Start Date between Report Start and Report End Dates irrespective of when the activity was completed.



Member Engagement

Member Engagement reports display total number of required and optional activities Wellvibe Members have completed in a Business. Member Engagement reports ONLY display completed and un-completed non-transparent active activities with an Activity Assignment Date between Report Start and Report End Dates, irrespective of when the activity was completed.

Member Engagement Reports EXCLUDE child activities in a merge. Total Optional Activities are derived from setting "How many optional activities are required" from the Business setup.

Completed Points

A **Completed Points** report is used to generate a list of Wellvibe Members with their Total Accumulated points from Activity Completions.

The Completed Points report does not require Report Filters. Client Admins can specify a minimum Total Accumulated Points value in the Total Points field.

Active Members

The Active Members Report simply shows how many members in the current plan year are enrolled in Wellvibe. (The Plan Year drop down menu is removed for running this report)

Advanced Report Types

Advanced Reporting searches can be configured in many different ways.

How to Run an Advanced Report

1. Sign in to Wellvibe and go to the Admin Application
2. Click on the Reporting tab in the top navigation bar
3. Click on "Advanced Reporting"
4. Choose the report you want to run.

Here is a list of the Advanced Report types available in Wellvibe:

Compliance Report

The **Compliance** report is used to generate a list of all Wellvibe Members in a Businesses and their Biometric, Required Activities and Optional Activity Status. This Report is available for Business and Business Group Admins.

The **Compliance** report currently uses the report **Date To** field as a threshold for pulling Biometric Wildcards and Activities Completed. The **Risk Factors** field allows Admins to specify the number of Risk Factors required to make a member fail Biometric Compliance at the Business Level. (Activity Start date is used for counting required activities) The **How many optional activities are required** field in the businesses' Progress Calculation tab is used for minimum Optional Activities needed to be Compliant on Optional Activities.

Client Admins can specify additional Member Wildcards to use as filters for the Risk Factors (for example: Gender). In addition to Biometric Results, admins can also specify Activity Wildcards as Risk Factors. This Report supports Filters and can be scheduled for distribution to Client Admins and Business Group Admins.

NOTE: *If a member doesn't have biometrics then they are automatically a YES in the biometric compliance column, the NO would be picked up in the activity compliance column since they didn't complete all required activities.*

Compliance Aggregate

The **Compliance Aggregate** report is used to generate an aggregate list of Wellvibe Members in a Businesses and their **Biometric, Required Activities** and **Optional Activity Status**. This Report is available for Business and Business Group Admins.

The **Compliance Aggregate** report currently uses the report **Date To** field as a threshold for pulling Biometric Wildcards and Activities Completed.

The **Risk Factors field** allows Admins to specify the number of Risk Factors required to make a member fail Biometric Compliance at the Business Level.

The **How many optional activities are required** field in the businesses' Progress Calculation tab is used for minimum Optional Activities needed to be Compliant on Optional Activities.

Client Admins can also specify additional Member Wildcards to use as filters for the Risk Factors (for example: Gender). In addition to Biometric Results, Admins can also specify Activity Wildcards as Risk Factors.

This Report supports Filters and can be scheduled for distribution to Client Admins and Business Group Admins. This Report does not use Report Data Fields.

Risk Factors

The **Risk Factors** report is used to generate a list of Wellvibe Members who meet a minimum criteria based on Biometric Results you specify.

To build a Risk Factors report, select all the Biometric Results you want to measure then specify a minimum Risk Factor value in the Risk Factors field. The last Column in the Report displays the Risk Factor Count of the Member.

Client Admins can also specify additional Member Wildcards to use as filters for the Risk Factors report (for example: Gender).

In addition to Biometric Results, users can also specify Activity Wildcards as Risk Factors. Client Admins can specify a minimum Risk Factor value of 0 (zero) to display the Risk Factor for all Members in the Business.

The Risk Factors report currently uses the report **Date To** field as a threshold for pulling Biometric Wildcards, this allows Admins to see a members Risk Factors at a point in the past.

Activity Detail

Activity Detail reports contain an additional level of detail on Activity Reporting. This type of report contains Status on Activity Completion, date Activity was assigned, date Activity was completed and Activity name.

Not Completed All Required

A **Not Completed All Required** report is used to generate a list of members who have not completed their Required Activities. The Not Completed All Required report does not require Report Filters.

Custom

Custom reports are used to display any type of data on Wellvibe Members with the exception of Biometric Results.



Scheduling Reports

Report Schedule Notifications allow a Wellvibe Client Admin to schedule Wellvibe Reports to be distributed at any interval to Wellvibe Client Admins and Wellvibe Business Group Admins. This feature is restricted to Wellvibe Client Admins.

To add a new Report Distribution Schedule simply click on the Schedule tab in the Report Detail page, then click on the Add New Schedule button to complete the request.

Report Schedule Notifications can be linked to documents so Client Admins can create links to documents uploaded for their business.

Report Schedule Notifications are scheduled to run from 6 AM EST Daily.

If you have specific reporting needs and need help with the Advanced Reporting setup, please schedule training with Wellvibe Support to become familiar with the Advanced Reporting tool.

Wellvibe Support

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phone: 1-800-499-1286

hours: mon - fri, 8am-5pm EST

