'How to' in Edison

PARTNERS FOR HEALTH
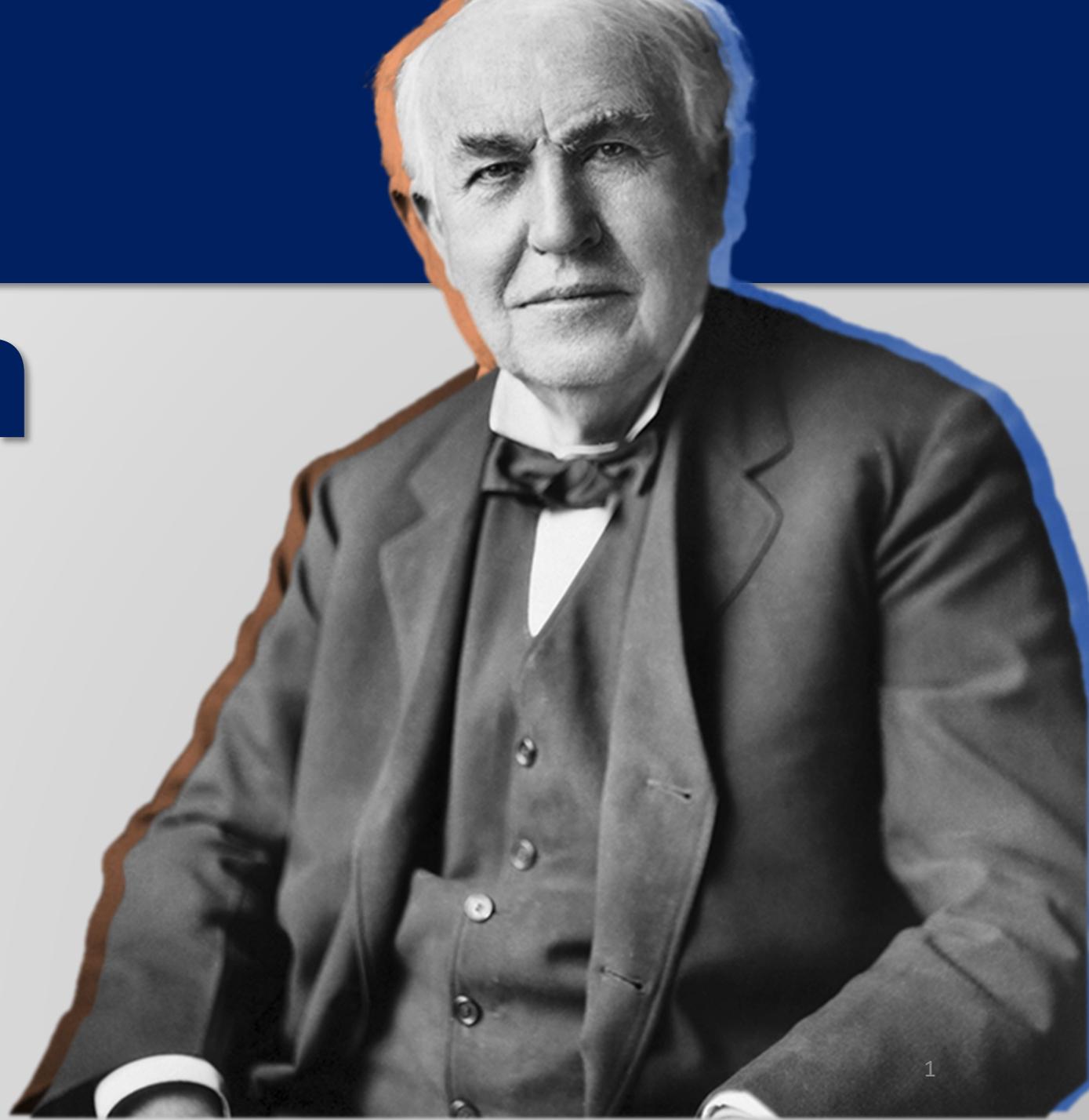
'How to'
automate the collections applied report

PARTNERS FOR HEALTH
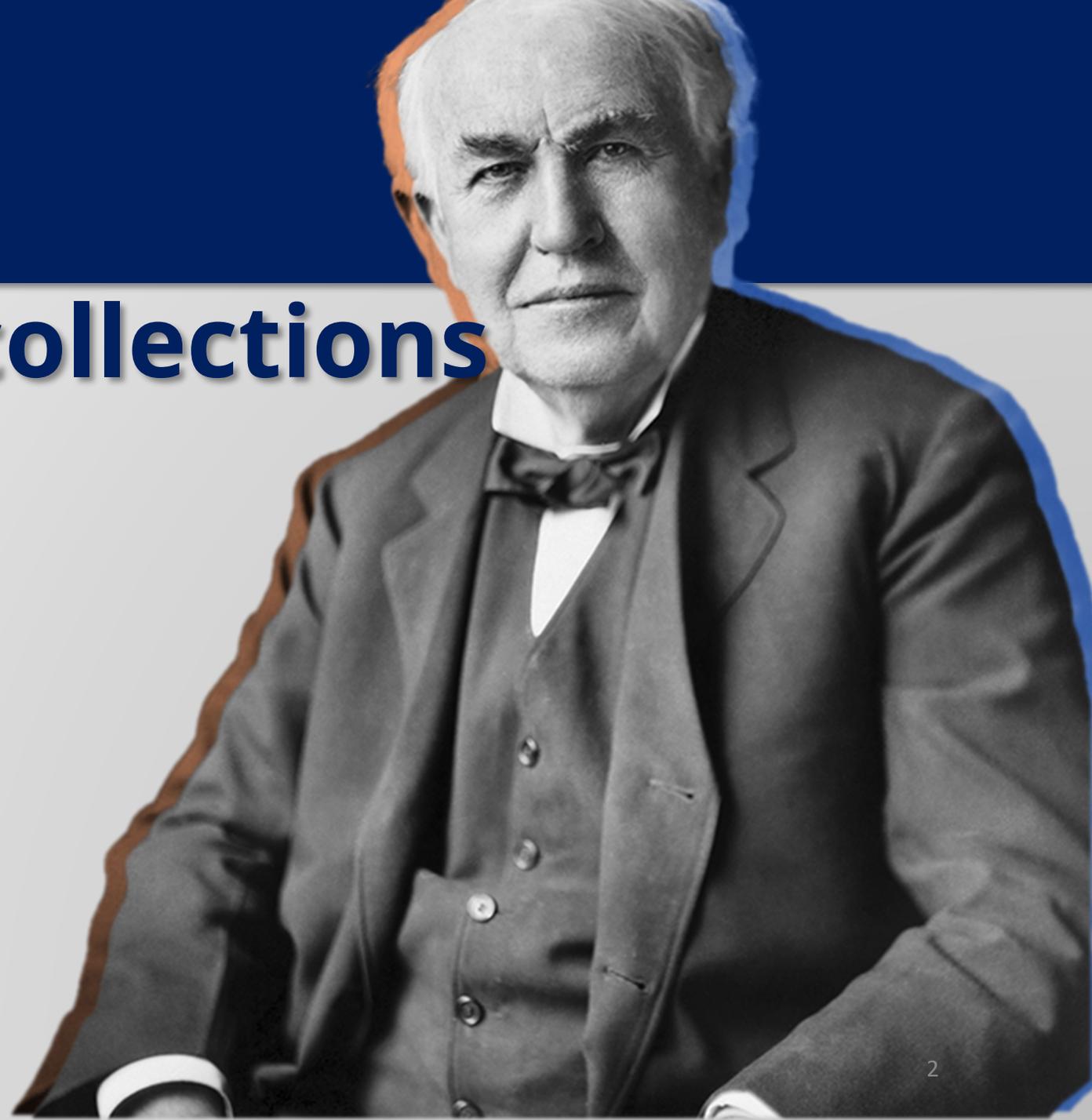
From the Edison homepage click the navigation icon at the top, right-hand side of the page.
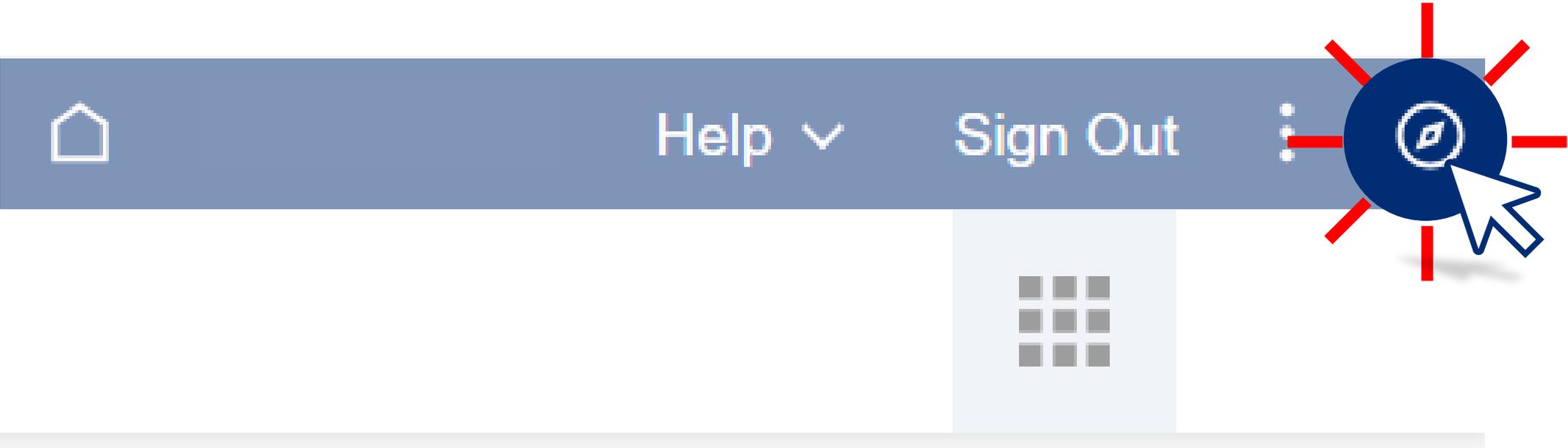
Click on "Menu."
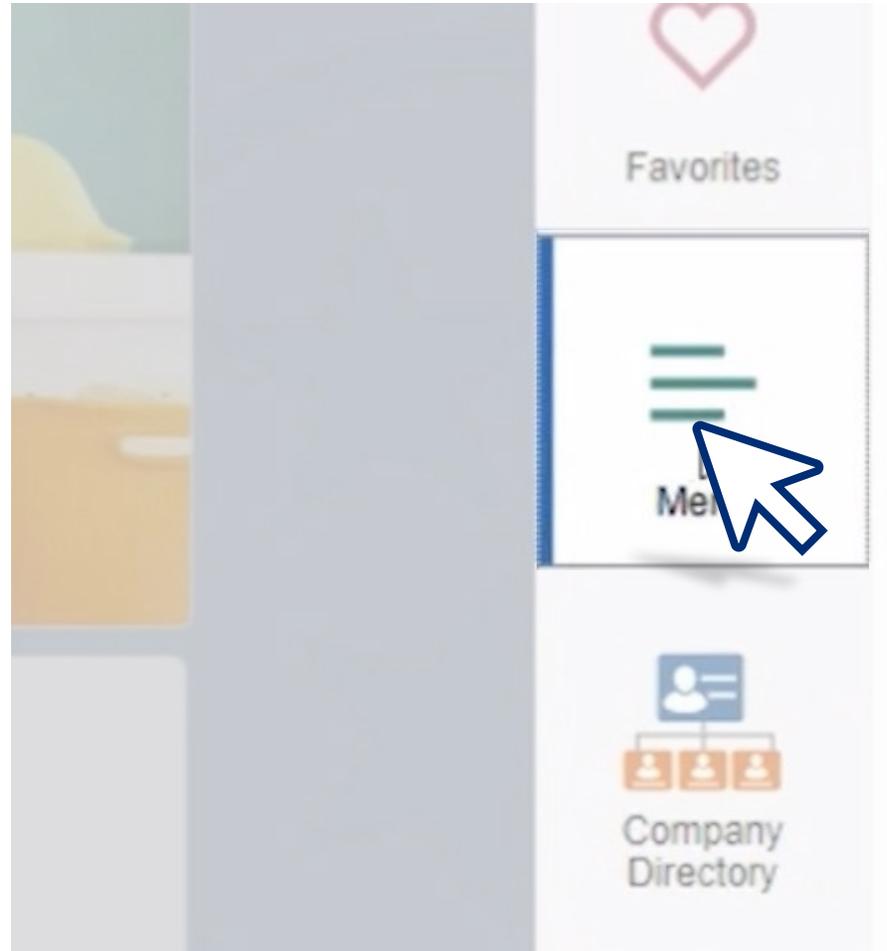
Click on "HCM."
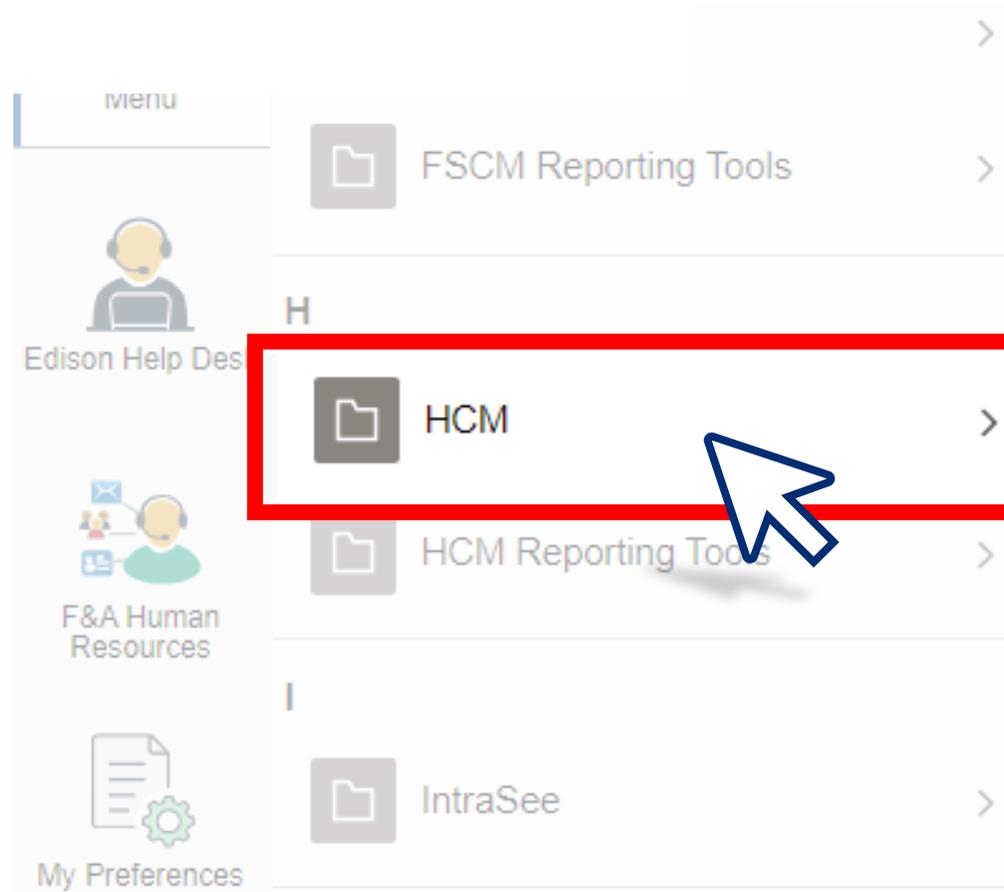
Click on "Benefits."
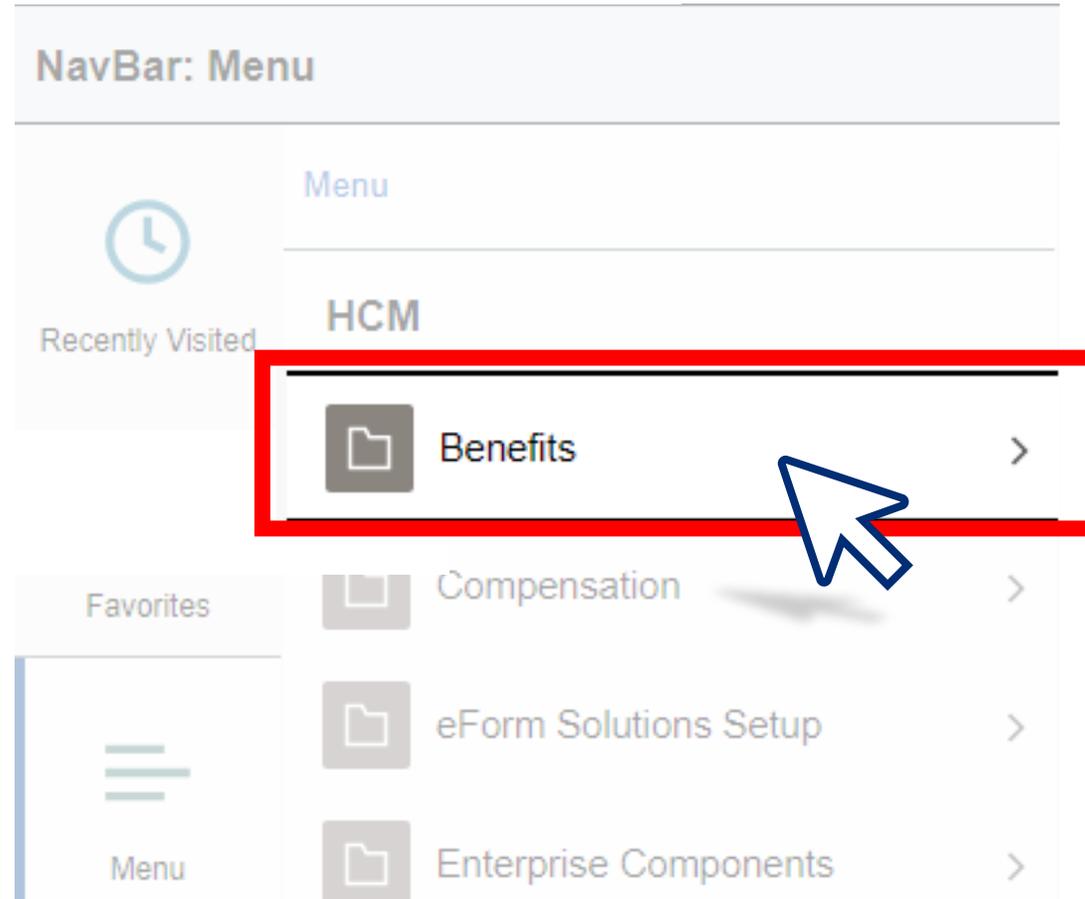
Click on "Reports."
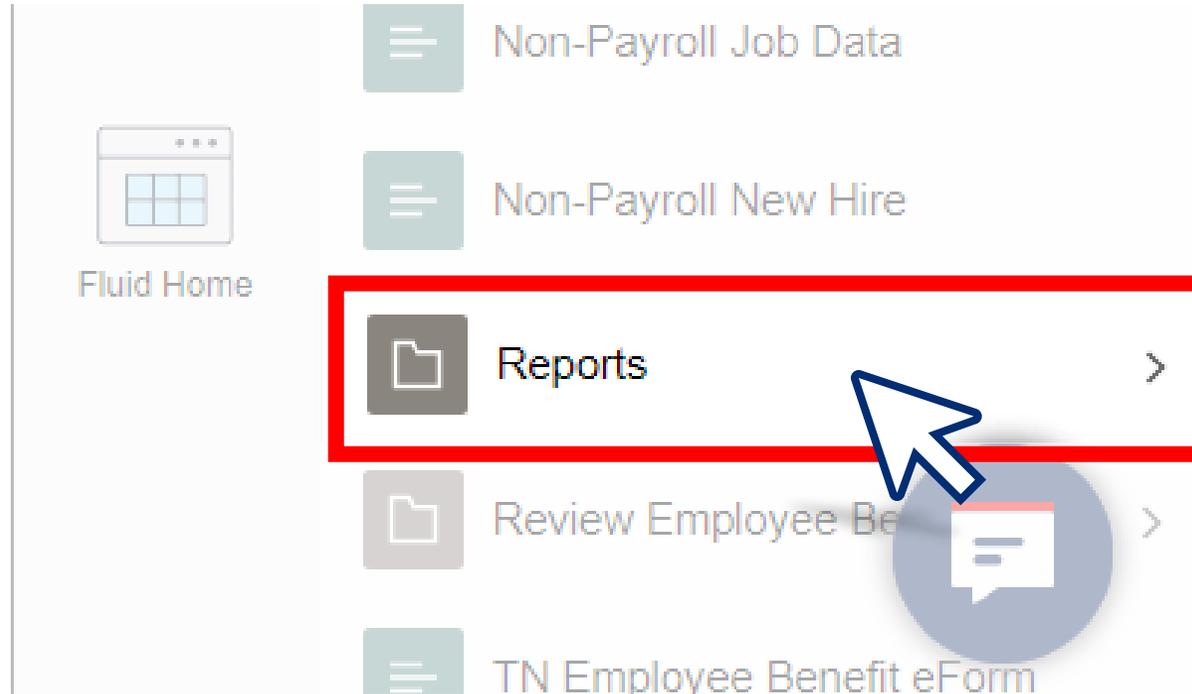
Click on "Contribution and Deductions."
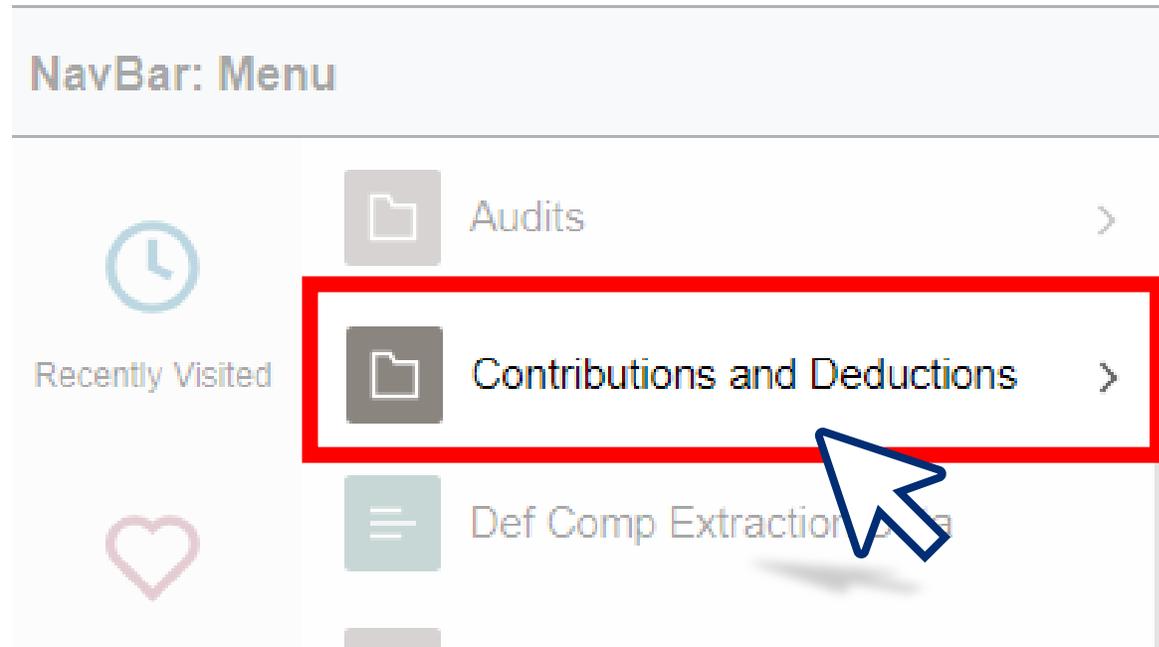
Click on "TN Prem Due/Collect App Deduct."
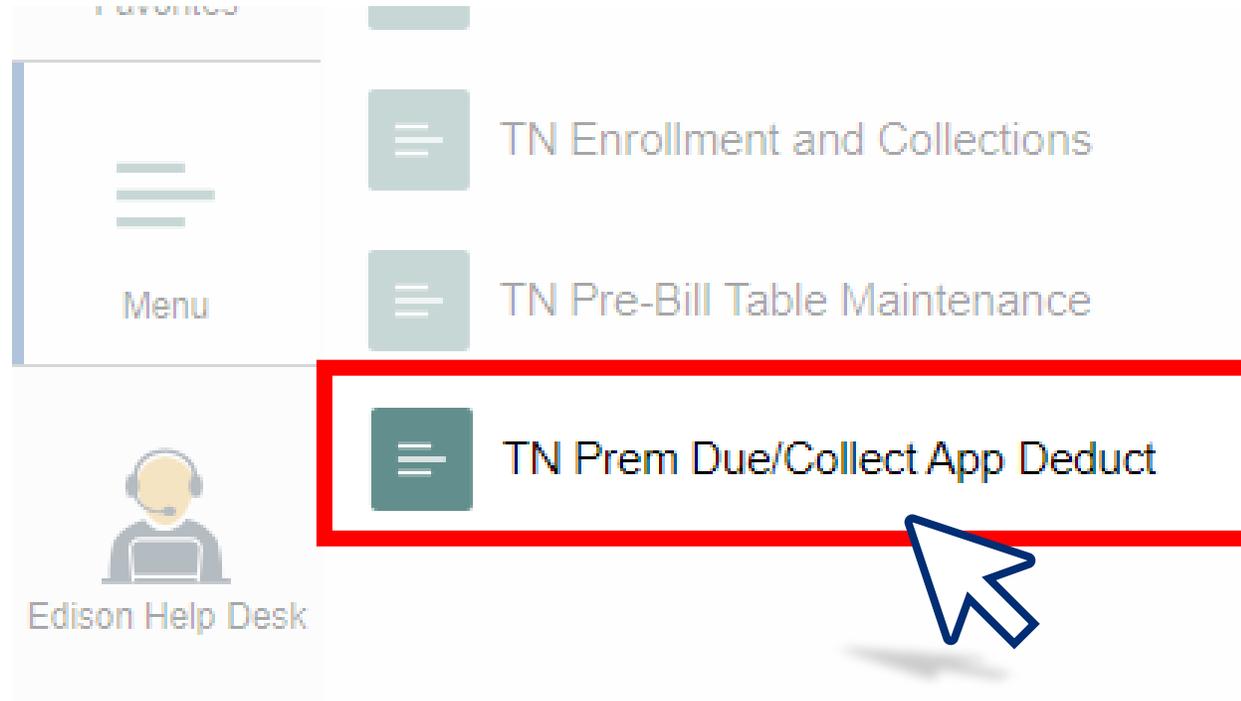
Type the word 'report' into the Run Control ID box and click "Add."

TN Prem Due/Collect App Deduct

Add a New Value

🔍 Find an Existing Value

*Run Control ID   report

Add

Click the magnifying glass next to Department.

Select your department number.

Select "Both."
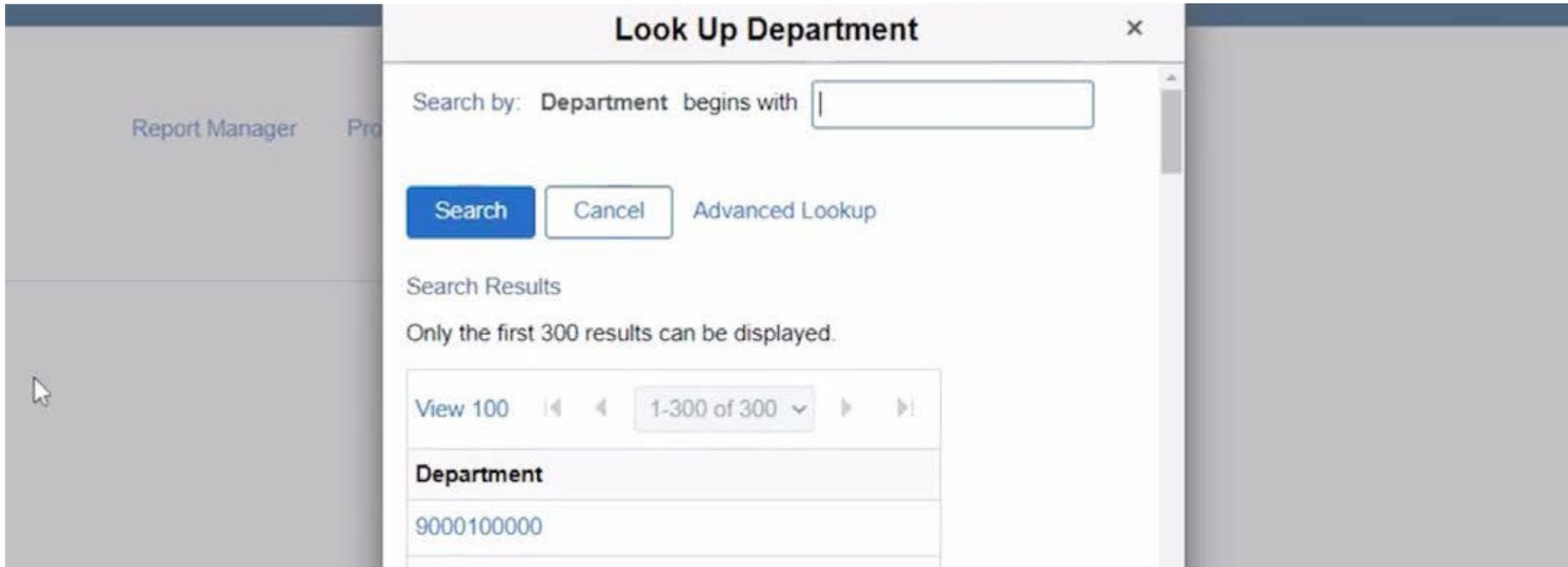
Don't worry about the Pay Run ID field – leave it blank. Next, click the "Run" button.
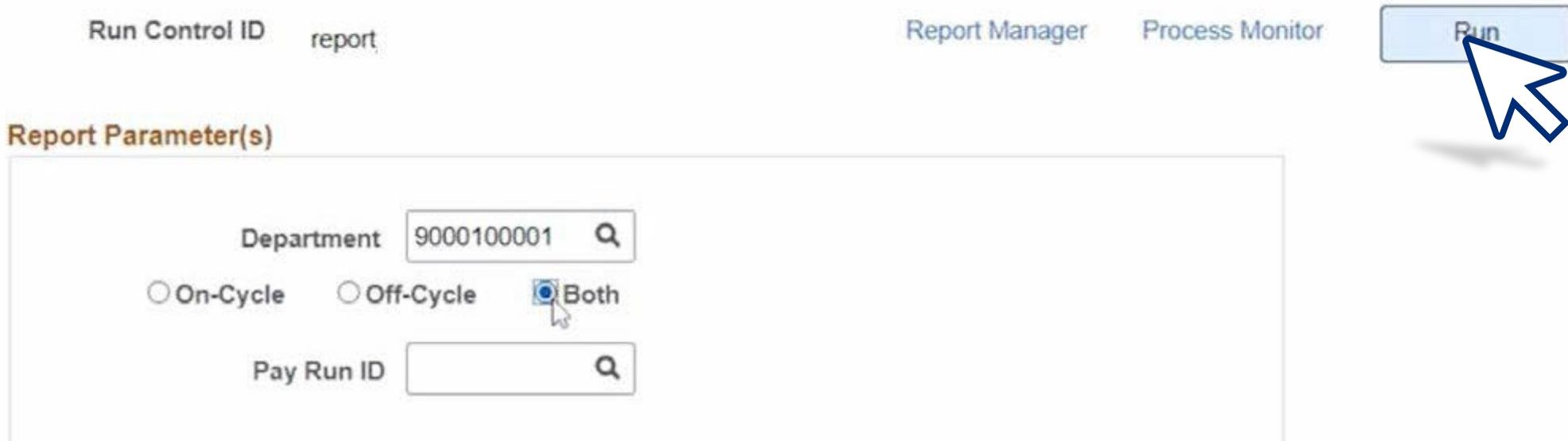
Click the down arrow next to the Recurrence field and select "Monthly_5th_11PM."

The default format of the report is a PDF. If you prefer to view the report as a spreadsheet, click the down arrow in the Format field and select "CSV."
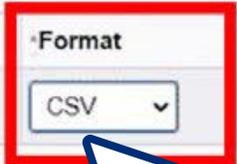
Click the "Distribution" link to take you to the email template.

Select the box next to "Email Web Report."

In the Email Subject field, type in "Your Collections Applied Report is Ready."

In the Message Text field, type "First login to Edison and go to *My Reports* on the home page and click on the link TN_BA138."

Click "OK."

Click "Reset to Current Date," then click "OK."

You are now finished. (The Process Instance number below the run button confirms that the report has been set up.) Your Collections Applied Report will now be automatically emailed to you on the fifth of each month (you will see the email when you come in to work the next business day).