

## Overview

Maintaining a list of employee contacts serves two essential functions. The first is providing online access to the employee's emergency contact information. Employees should always be encouraged to keep this information current. The second function is essential for benefits and COBRA administration. This screen lists all dependents and beneficiaries to ensure they are correctly covered by the benefits selected and receive mandated COBRA notices when changes occur.

## Recording Employee Contacts

To add a contact's name, personal information, and other details:

1. Navigate to **Employee Management > Human Resources > Employee Contacts**
2. Select your employee from the **Employee List**
3. Click **Add New**.
4. In the **Contact Type** section, select the **Relationship** from the dropdown.
5. Select the checkboxes to designate this contact as **Emergency Contact**, **Dependent**, and/or **Beneficiary** if desired.  
**Note:** Dependent and/or beneficiary is required if the employee wants those contacts added to benefit plans as needed for carrier feeds and COBRA services
6. In the **Other Information** section, select to **Hide contact in ESS** if desired. Manager/supervisor access to dependent/beneficiary information can be removed, allowing access only to the emergency contact fields.
7. Select the checkbox to mark the individual as **Deceased** (not required).
8. If adding this contact as a dependent, in the **Dependent Information** section, select the checkboxes to designate if this individual is a **Full-time student** or **Disabled** (if applicable).
9. In the **General Information** section, add the **First name**, **Middle name**, **Last name**, **Prefix**, and **Suffix** of the contact.  
**Note:** Only the First name and Last name are required fields in this section.
10. If adding this individual as a dependent and/or beneficiary, specify the individual's **SSN**, **Birthdate**, and **Gender** in the **Personal** section.  
**Note:** The **SSN** and **Birthdate** are required for benefits, carrier feeds, and COBRA services.
11. Enter the following information in the **Contact Information** section:
  - a. **Call Order**
  - b. **Primary**, **Secondary**, or **Work** phone number
  - c. **Email Address****Note:** All are optional, but essential for emergency contact information.
12. The **Address** section defaults to the employee's address but can be changed if the contact's address differs from the employees.  
**Note:** For customers using the isolved Benefits or COBRA Service: Enter a complete address (address, city, state, ZIP) if different from the employee's address. No partial addresses.
13. Click **Save**

To add another contact for the employee if multiple contacts apply, follow the same process.

## Employee Self-Service

Before beginning open enrollment or a life event change, employees are prompted to update dependents and beneficiaries via the **Contact** screen. They can also be given access to change this information.

As an admin, you may add this information for employees under **Employee Management > Human Resources > Employee Contacts**. All Human Resource (HR) screens have corresponding reports, and the data is also available in **Report Writer**, providing the ability for custom reporting.

The **Employee Contact** screen includes fields for all dependent and beneficiary information required. This information is not ordinarily available to managers or supervisors.

## Reports

Navigate to **Reporting > Client Reports** and select the **Benefits** category or filter for the report name or description.

Reports that include dependent information are:

- Benefit Enrollment E-Signature Acknowledgements
- Benefit Plan Date Range
- Benefit Plan Detail – Condensed
- Benefit Plan Detail – Version 1
- Benefit Plan Detail – Version 2
- Benefit Plans (By Payroll Run)
- Benefit Plans (As of Date)
- Benefit Statement
- Broker Census with Dependents
- Benefit Carrier Feed
- Benefit Carrier Detail Feed/Export
- Dependent Age Out Report

## Report Writer

1. Click **Add New**.
2. Select "HR Report" for the **Report Type**.
3. Select "Employee Contacts Report" for **Sub Report Type**.
4. Add a **Report Title**.
5. Select a **Report Group**.
6. Click **Save**.

## Add Columns

1. Select "Employee Contacts" from the **Field Category** dropdown.
2. In the **Column** area, highlight the column headers to include.
3. Use the >> and << arrows to move them in and out of the report.
4. **Save** when finished.

## Edit Columns

Columns can be edited to change the width, alignment, position, sort, and value depending on the user's needs. Click **Save** when finished.

## Report Filters

Report filters can be set on any column of data. To apply a filter, select the column, and a list of data will populate for a specific **Filter Value**. For example, the **Employment Status** column can be filtered to show only "Active" employees and those contacts listed as emergency contacts. Once the filters are set, click **Save** to complete the process.

## Preview by Company

Choose the **Company** and **Output Type** for the report, then click **Generate Report**. To view the report, click **Go To My Report Queue**.

Department Code	Employee Number	Employee Name	Emergency Contact	Relationship Description	Emergency Contact Call Order	Full Name	Home Phone	Mobile Phone
20	1004	Adams, Daniel L	Yes	Sister	1	Sue Adams		412-555-1212
20	1004	Adams, Daniel L	Yes	Mother	3	Mary A Barrett	716-555-3409	716-341-5678
90	1008	Jackson, Mitchell	Yes	Spouse	1	Mary Jackson	803-678-3456	
50	1010	Haynes, Lydia A	Yes	Friend	1	Lena Reese	757-222-1515	
90	1015	Barnes, Richard L	Yes	Spouse	1	Lydia P Barnes		678-451-9002
70	1027	Bennett, John A	Yes	Spouse	1	Joan Bennett		301-245-6789
70	1027	Bennett, John A	Yes	Sister	2	Susan Brown	718-825-6987	
70	1028	Martin, John P	Yes	Mother	1	MaryAnn Smith	213-456-7890	213-444-5000
50	1051	Matteson, Margaret A	Yes	Mother	1	Martha Poole		310-999-7777
40	1056	Walsh, Anne Marie	Yes	Mother	1	Mary Marshall	412-555-1212	
60	1082	Ford, Taylor	Yes	Spouse	1	Julie Ford	914-855-1212	
20	10000	Morgenson, Julius	Yes	Father	1	Frederick J Morgenson		630-2421212
50	10003	Pennington, Karen	Yes	Brother	1	Donald J Pennington	512-555-1212	
40	10004	Mayview, Joshua	Yes	Brother	1	Steve Pennington		412-555-5541
30	10007	Pretender, Kris The	Yes	Mother	1	Lucy B Goode		914-555-1212
80	10008	May, Alice	Yes	Brother	1	Joe Bro	457-855-0001	
40	10010	Franklin, Tyler	Yes	Grandparent	1	William John Franklin Jr		269-555-1414
20	124122	McMillian, Alexander	Yes	Brother	1	Don Adams		412-555-1212