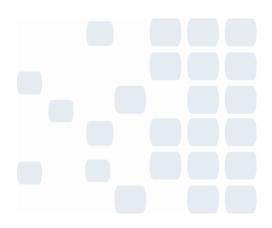


# IBI Benchmarking Portal powered by HDMS Enlight<sup>®</sup> Quick Start Guide

This guide is designed to help you navigate the IBI Benchmarking Portal and access Short-Term Disability, Long-Term Disability, Workers' Compensation, and Family Medical Leave benchmarking dashboards.

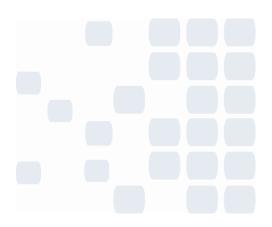






#### Contents

Accessing the IBI Benchmarking Portal	3
Navigating the Homepage	4
Navigating STD dashboards	5
Navigating LTD dashboards	6
Navigating WC dashboards	7
Navigating FML dashboards	8
Adding filter(s) to your dashboards	9
Modifying your dashboard in design mode	10
Exporting your dashboards	11
Saving your dashboards as personal dashboards	12



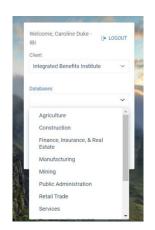




## Accessing the IBI Benchmarking Portal

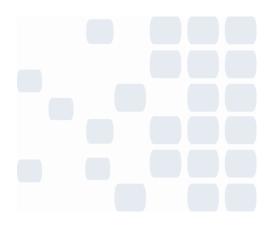
#### Selecting your industry

After you sign in through the IBI website, you will be prompted to select a Database. This is where you will select your industry of interest. You will have the option to select one of ten industries, or all US industries. Once you make your selection, press proceed.



#### A note on access level

Depending on your IBI membership level, you might not have access to the some of the functionality outlined in this guide. For example, the ability to filter is limited to stakeholder members, and charter members will not have access to this functionality.



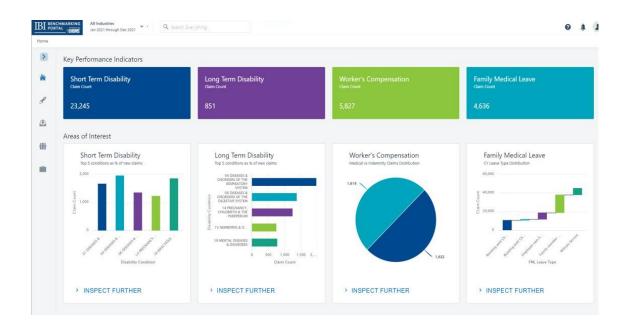


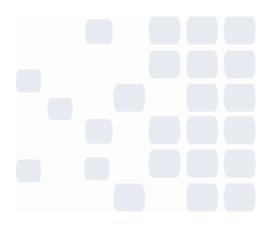


## Navigating the Homepage

After you select your industry of interest, you will be directed to the IBI Benchmarking Portal homepage. The homepage shows a high-level view of Short-Term Disability (STD), Long-Term Disability (LTD), Workers' Compensation (WC), and Family Medical Leave (FML).

The high-level metrics across the top of the homepage show the claim or leave count for each program. Under each high-level metric, there is an Area of Interest card that includes a visual for each program. To explore the benchmarking reports for a specific program, select "Inspect Further."









# **Navigating STD dashboards**

To explore STD benchmarking dashboards, click "Inspect Further" within the short-term disability Area of Interest on the homepage. This will take you to the short-term disability story that includes the following dashboards:

- 1: STD Claims Summary
- 1a: New claims/100 lives, with and without pregnancy % band
- 1b: Active claims/100 covered lives % band
- 1c: New claims as % of active claims, and pregnancy claims as a % of new claims % band
- 2: STD Cost Summary View
- 2a: Calendar year payment/covered life, and payment/closed claim % band
- 3: STD Duration Summary View
- 3a: Calendar year lost work and lost calendar days/100 covered lives % band
- 3b: Calendar year lost workdays/active claim % band
- 3c: Lost calendar days/closed claim, with and without pregnancy % band
- 3d: Lost workdays/closed claim, with and without pregnancy % band
- 3e: Claims reaching max benefit as % of closed claims, and % of closed claims converted to LTD % band
- 4: STD Plan Type Summary View
- 5: STD Condition Specific Summary View
- 6: STD Employers Summary View

Use the "Jump To" dropdown in the top right-hand corner of the screen to navigate to the various dashboards included in the short-term disability story.



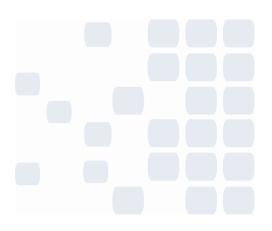
# **Navigating LTD dashboards**

To explore LTD benchmarking dashboards, click "Inspect Further" within the long-term disability Area of Interest on the homepage. This will take you to the long-term disability story that includes the following dashboards:

- 1: LTD Claims Summary View
- 1a: New claims/1,000 covered lives & active claims < 24 months old/1,000 covered lives % band
- 1b: New claims/closed claim % band
- 1c: CY payments/active claim & CY payments/covered life % band
- 1d: Payments/closed claim % band
- 2: LTD Condition Specific Summary View
- 3: LTD Plan Type Summary
- 4: LTD Employers Summary View

Use the "Jump To" dropdown in the top right-hand corner of the screen to navigate to the dashboards included in long-term disability.

1a. New claims/1,000 covered lives & Active claims < 24 months old/1,000 covered	lives % band >	Jump To: 🔽 1. LTD Claims Summary
1. LTD Claims Summary		1a. New claims/1,000 covered lives & Active claims < 24 months old/1,000 covered lives % band
		1b. New claims/closed claim % band
000 Employers with LTD Plans	ाम	LTD Covered Lives 1c. CY payments/active claim & CY payments/covered Life % band
104,371	55,707,	1d. Payments/closed claim % band
		2. LTD Condition Specific Summary
Group Averages		Long Term Disability Covered Lives and Claims by SIC Code 3. LTD Plan Type Summary
Calendar Year	2021	Covered Lives LTD: Top 10 4. LTD Employers Summary
Claims with SSDI Award as a Percentage of Active Claims	43.4%	
Claimants Return to Work (RTW) as a Percentage of Closed Claims	23.7%	H A,000,000 N0,000
Claimants Return to Work (RTW) as a Percentage of Closed Claims Less Than 24 Months Old	33.1%	40,000
New Claims per 1000 Covered Lives	3.7	
Active Claims Less Than 24 Months Old per 1000 Covered Lives	5.2	0 50 WHOLESA
New Claims Per Closed Claim	0.7	30 WINALSK 35 GORDAL 37 MOLELIA 00 93 / 3 DOINESS 00 HDALTH 02 0/ 91 MERCHANDSE DEPOSITORY INSURANCE SERVICES SERVICES EDUCATIONAL ENGINEERING, EXECUTIVE, STORES INSTITUTIONS CARRIERS SERVICES SERVICES ACCOUNTING, LICELATIVE,
Calendar year payments per Active Claim	\$17,535.31	STORES PISITIVITORS CONTROLS SOUTHER, LECTORINE, RESEARCH, AND MANCEMENT, CINERAL
Calendar year payments per Covered Life	\$142.26	AND COVENIENT, RELATED EXCEPT
Payments per Closed Claim	\$26,017.76	SERVICES FINANCE
		2-Digit SIC
1	> <	Covered Lives LTD      Claims
*		





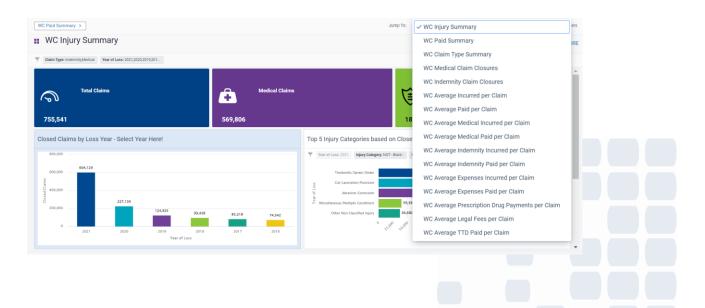


# **Navigating WC dashboards**

To explore workers' compensation benchmarking dashboards, click "Inspect Further" within the workers' compensation Area of Interest on the homepage. This will take you to the workers' compensation story that includes the following dashboards:

- WC Injury Summary
- WC Paid Summary
- WC Claim Type Summary
- WC Medical Claim Closures
- WC Indemnity Claim Closures
- WC Average Incurred per Claim
- WC Average Paid per Claim
- WC Average Medical Incurred per Claim
- WC Average Medical Paid per Claim
- WC Average Indemnity Incurred per Claim
- WC Average Indemnity Paid per Claim
- WC Average Expenses Incurred per Claim
- WC Average Expenses Paid per Claim
- WC Average Prescription Drug Payments per Claim
- WC Average Legal Fees Paid per Claim
- WC Average TTD Paid per Claim

Use the "Jump To" dropdown in the top right-hand corner of the screen to navigate to the dashboards included in the workers' compensation story.





# **Navigating FML dashboards**

To explore family and medical leave benchmarking dashboards, click "Inspect Further" within the family and medical leave Area of Interest on the homepage. This will take you to the family medical leave story that includes the following dashboards:

- 1: FML Key Stats Summary Part 1
- 1a: Total New Leaves/100 eligible lives & Total Active leaves/100 eligible lives % band
- 1b: New Concurrent leaves/100 eligible employees & Active Concurrent leaves/100 eligible employees % band
- 1c: New Standalone leaves/100 eligible employees & Active Standalone leaves/100 eligible employees % band
- 2: FML Key Stats Summary Part 2
- 2a: New Continuous leaves/100 eligible employees & Active Continuous leaves/100 eligible employees % band
- 2b: New Intermittent leaves/100 eligible employees & Active Intermittent leaves/100 eligible employees % band
- 2c: New reduced schedule leaves/100 eligible employees and Active reduced schedule leaves/100 eligible employees
- 3: FML Leaves by Reason Part 1
- 3a: Lost Continuous workdays/100 eligible employees & Lost Intermittent workdays/100 eligible employees % band
- 3b: Lost Reduced schedule workdays/100 eligible employees & Lost Concurrent workdays/100 eligible employees % band
- 3c: Lost standalone workdays per 100 eligible employees % band
- 4: FML Leaves by Reason Part 2
- 4a: Lost workdays per 100 eligible employees for own health/family/military % band
- 4b: Lost workdays per 100 eligible employees for maternity/bonding male/female % band
- 5: FML Lost Time Summary
- 5a: Denied Leave Requests per 100 eligible employees % band
- 5b: Lost workdays/continuous leave & Lost workdays/intermittent leave % band
- 5c: Lost workdays/reduced schedule & Lost workdays/concurrent leave % band
- 5d: Lost workdays/leave and Lost workdays/stand-alone leave % band
- 5e: Lost workdays per 100 eligible employees % band
- 6: FML Leave Duration Summary by State

Explore	Main Menu > IBI > FML New Design > 1, FML Key Stats Summary Part 1			
>	1a. Total New Leaves/100 eligible lives & Total Active leaves/100 eligible lives % ba	id >	Jump To:	<ul> <li>1. FML Key Stats Summary Part 1</li> </ul>
	1. FML Key Stats Summary Part 1			1a. Total New Leaves/100 eligible lives & Total Active leaves/100 eligible lives % band
ñ				1b. New Concurrent leaves per 100 eligible employees & Active Concurrent leaves per 100 eligible employees % band
ę	Employers with FML Coverage	000 FML Covered Lives	FML Leave Count	1c. New Standalone leaves/100 eligible employees & Active Standalone leaves/100 eligible employees % band
•	4,457	18,854,683	3.004.690	2. FML Key Stats Summary Part 2
<u>87</u>	Group Averages	Covered Lives and Employers with FML Coverage by Industry	% Approved/Denied Leaves by Industry	2a. New Continuous leaves/100 eligible employees % Active Continuous leaves/100 eligible employees % band
Ð	Calendar Year 2021	Y Leave Count Top 10	Denied Lea	2b. New Intermittent leaves/100 eligible employees & Active Intermittent leaves/100 eligible employees % band
	Total New Leaves per 100 Eligible Employees         13.4           Total Active Leaves per 100 Eligible Employees         14.0	8,200,000 600	Agriculture 22	2c. New Reduced leaves/100 eligible employees and Active reduced schedule leaves/100 eligible employees % band
	New Concurrent Leaves per 100 Eligible Employees 5.9 Active Concurrent Leaves per 100 Eligible Employees 5.9	2,400,000 450	Mining 12.2%	3. FML Leaves by Reason Part 1
	New Standalone Leaves per 100 Eligible Employees 7.5 Active Standalone Leaves per 100 Eligible Employees 8.4	PR: C	Construction 21.0 Manufacturing 15.46	3a. Lost Continuous workdays/100 eligible employees & Lost Intermittent workdays/100 eligible employees % band
			Transportation & Public Utilities 20.45 Wholesale Trade 20.15	3b. Lost Reduced schedule/100 eligible employees & Lost Concurrent workdays/100 eligible employees % band
			Retail Trade 23	3c. Lost standalone workdays per 100 eligible employees % band
			Finance, Insurance, & Real Estate 11.98	4. FML Leaves by Reason Part 2
		and show and	Services 17.0%	4a. Lost workdays per 100 eligible employees for own health/family/military % band
		stores stores stores are store and store stores and store and stores	Public Administration 19.0% 0.0% 10.0% 20.0%	4b. Lost workdays per 100 eligible employees for maternity/bonding - male/female % band
		2 million		5. FML Lost Time Summary
				5a. Denied Leave Requests per 100 eligible employees % band
				5b. Lost workdays/continuous leave & Lost workdays/intermittent leave % band
				5c. Lost workdays/reduced schedule & Lost workdays/concurrent leave % band
				5d. Lost workdays/leave and Lost workdays/stand-alone leave % band
				5e. Lost workdays per 100 eligible employees % band
023 He	aith Data & Management Solutions, Inc Terms Of Use Disclaimer Contact Feedback			6. FML Leave Duration Summary by State



## Adding filter(s) to your dashboards

To add filter(s) to your dashboards, click the "Filters" button in the top right corner of the screen.



Then, select "Add Filter" next to the Dimension Filters.



Next, you will be prompted to select the dimension you would like to filter on. For example, if you want to view benchmarking data for a specific 2-digit SIC code, select 2-digit SIC code, and click "Next."



Once you have selected your dimension, select your value(s) of interest, click "Add selected," then click "Add filter," and then click "Save." Once you apply your filter(s), the data in the dashboard will update accordingly.

Available Values	Selected Values			
Q Search				
- Blank -				
O1 AGRICULTURAL PRODUCTION-C				
02 AGRICULTURAL PRODUCTION-LI				
☑ 07 AGRICULTURAL SERVICES				
08 -FORESTRY				
Default V ADD SELECTED ADD ALL	Default ~	REMOVE ALL		
ter Available Values				
No filtering 🗸				
	CONVERT TO COMPLEX FILTER			





# Modifying your dashboard in design mode

A limited number of users have access to modify dashboards using design mode. To modify a dashboard cell, hover over the cell title and click "Design" when it pops up. This will bring you into design mode.

roup Averaç 🖌 FULLSCREEN 📝 DESIG	N ••• MC
Calendar Year	2021
New Claims per 100 Covered Lives	6.6
New claims per 100 Covered Lives Excluding Pregnancy	5.4
Active Claims per 100 Covered Lives	8.9
New Claims as a Percentage of Active Claims	73.5%
Pregnancy Claims as a Percentage of New Claims	17.4%

In design mode, you can change the chart type using the dropdown in the top left.

Primary Analytic Focus: Short Term Disability	TABLE
Report Data Table Attributes	
	VERTICAL BAR
Available Dimensions	HORIZONTAL BAR
Search	WATERFALL
> Time	PIE
> Employer	LINE
> Demographic	TREE MAP
Claim	MAP
ADD TO ROWS ADD TO COLUMNS	SCATTER
	1 BUBBLE
Ausilable Measures	

Additionally, you can add and remove dimensions and measures by dragging and dropping. Once you have made your changes, click "Apply."

Dimensions		Row Dimensions		Column Dimensions			
Search	Expand All			Calendar Year	t	5	
Time							
Employer							
Demographic							
Claim		*					
O ROWS ADD TO COLUMNS		REMOVE ALL		REMOVE ALL			
				Show measures in columns			
Measures		Used Measures		Show measures in columns			
Search	Expand All	New Claims per 100 Covered Lives	ê 🍵				
Employer		■ New claims per 100 Covered Lives	Excluding Preg				
Claims		Active Claims per 100 Covered Live	s 🔒				
Financial		New Claims as a Percentage of Act	ive Claims 🔒				
- martona							



# **Exporting your dashboards**

You can export any dashboard within the IBI Benchmarking Portal. To export a dashboard, click "Export" in the top right-hand corner of the screen. You will be prompted to select a format (Excel, PPT, Word, PDF, etc.). Once you select your format, keep the other default settings, and click export.

Note: There is an option to export the dashboard with reports on separate pages, as shown below.

SAVE 🗸	🔻 FILTERS 🏦 EXP	ORT ···· MORE
rgen	Export Dashboard	
e no e	- onnat	es ca ba
	Microsoft PowerPoint (*.ptx)  minute outstandard and report Tracs  include Filter Descriptions  Enable Debug  CANCEL EXPOR	
d;	Export Dashboard	
	Format Microsoft PowerPoint (*.pptx)	~
	Landscape Style Name	~ Ii
	Plain Export Dashboard with Reports on separa	te
	pages.  Include Dashboard and Report Titles	21







# Saving your dashboards as personal dashboards

You also have the option to save a filtered version of any dashboard as a personal dashboard. To do so, click "Save"  $\rightarrow$  "Save As" in the top right-hand corner of the screen.

Next, you will be prompted to name your dashboard. Then, keep the default report "Level" to personal. Lastly, click "Save."

	SAVE 🗸		1 EXPORT	··· MORE
ate: AL,AK,AZ,AR, 7,8,9,N,   🚍	SAVE SAVE AS	ne Period to Clos Closen	d w/i 6 months_   🚍	
Save As				
Name WC Injury	Summary			
Level <ul> <li>Personal</li> </ul>	al 🔵 Group	o 🔵 Global		
Location IBI/Worker	rs Compensa	tion (WC)		CHANGE
			CANCEL	SAVE

