

# 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.



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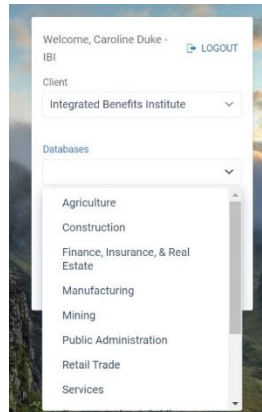
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## Accessing the IBI Benchmarking Portal

### 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

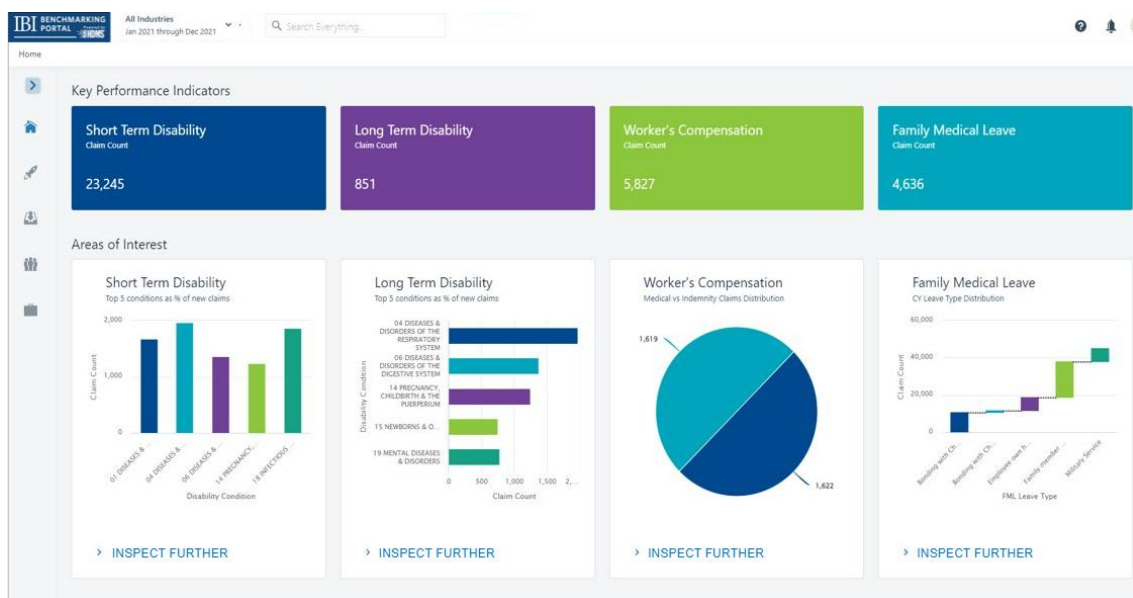
Depending on your IBI membership level, you might not have access to some of the functionality outlined in this guide. For example, the ability to filter is limited to stakeholder members, and charter members will not have access to this functionality.



## 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."

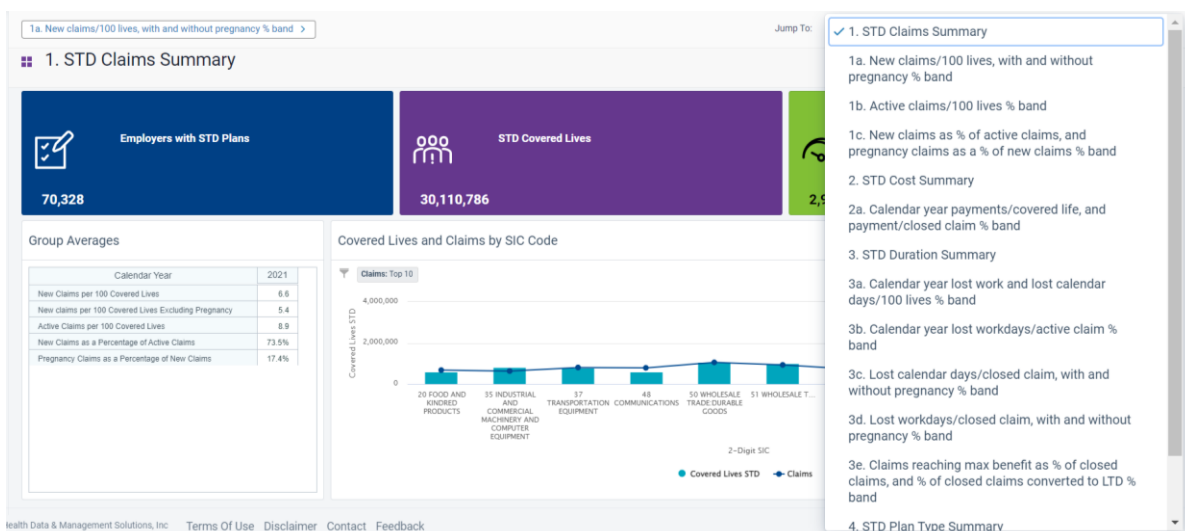


## Navigating STD dashboards

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.

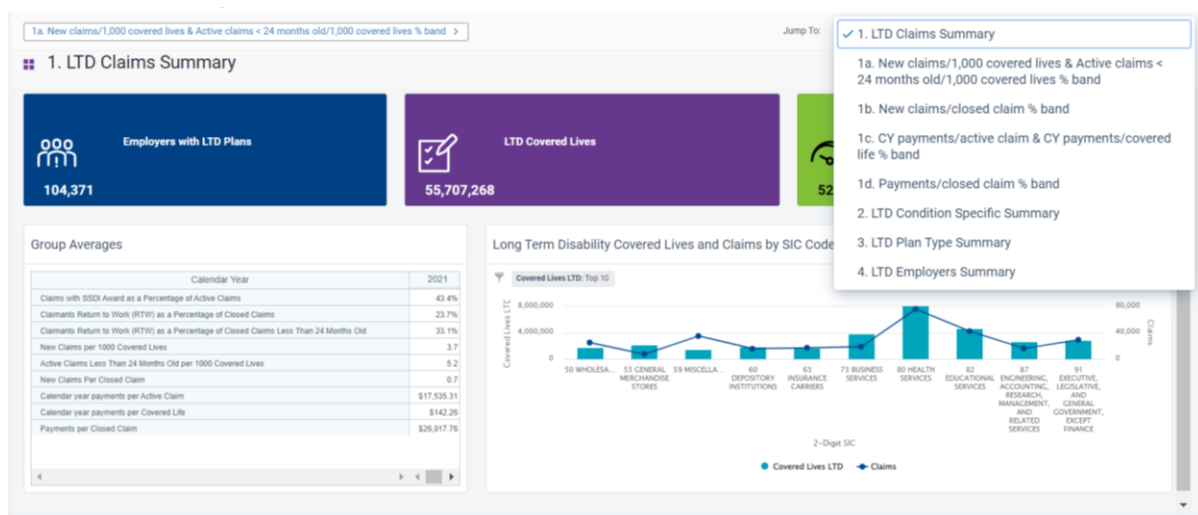


## Navigating LTD dashboards

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.

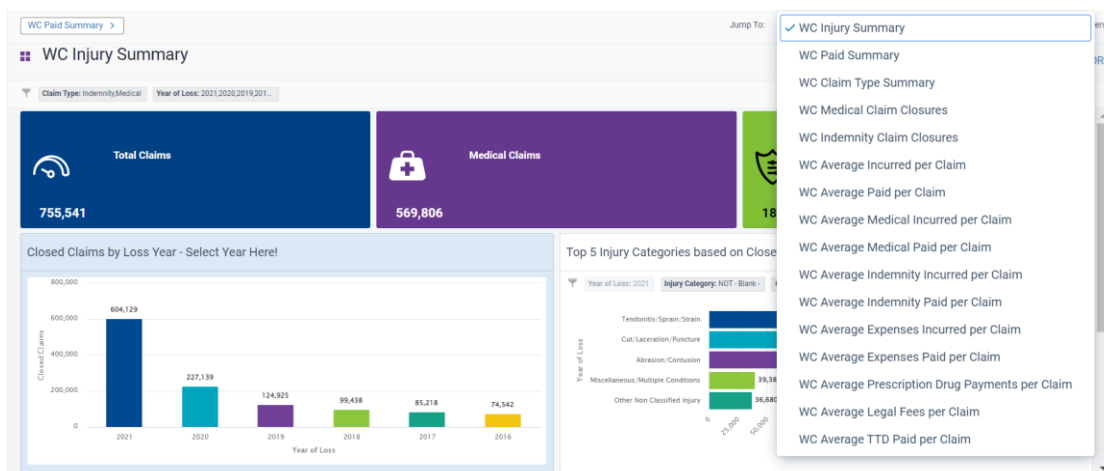


## Navigating WC dashboards

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

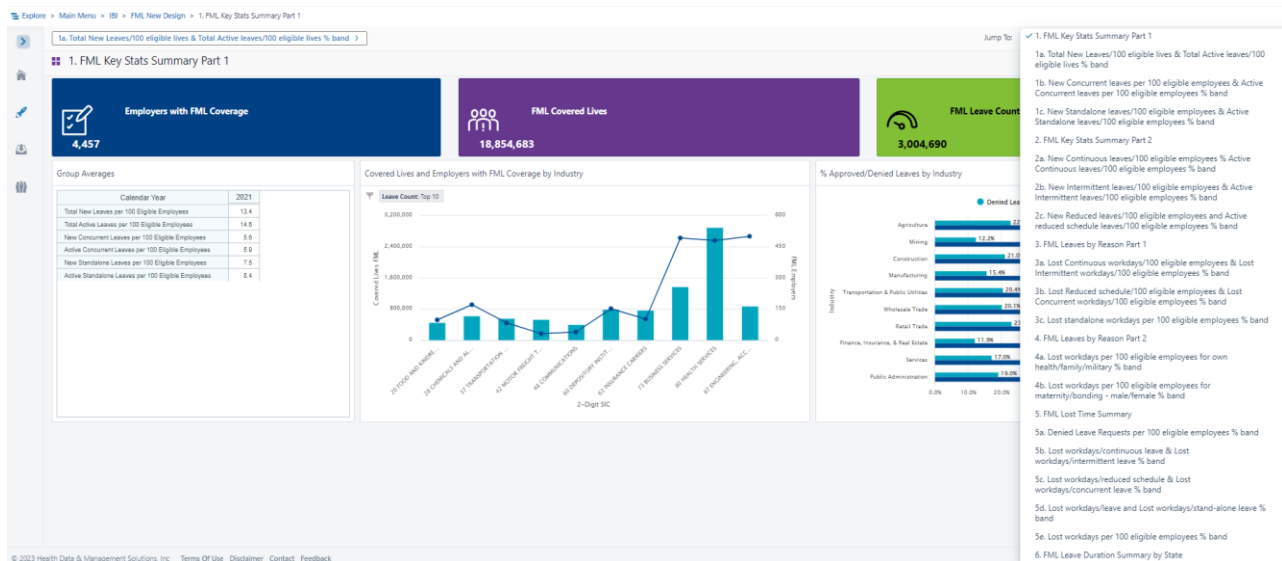
Use the "Jump To" dropdown in the top right-hand corner of the screen to navigate to the dashboards included in the workers' compensation story.



## 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:

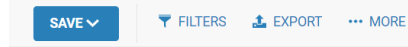
- **1: FML Key Stats Summary Part 1**
- 1a: Total New Leaves/100 eligible lives & Total Active leaves/100 eligible lives % band
- 1b: New Concurrent leaves/100 eligible employees & Active Concurrent leaves/100 eligible employees % band
- 1c: New Standalone leaves/100 eligible employees & Active Standalone 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**



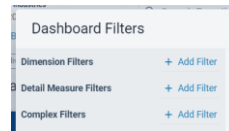


## Adding filter(s) to your dashboards

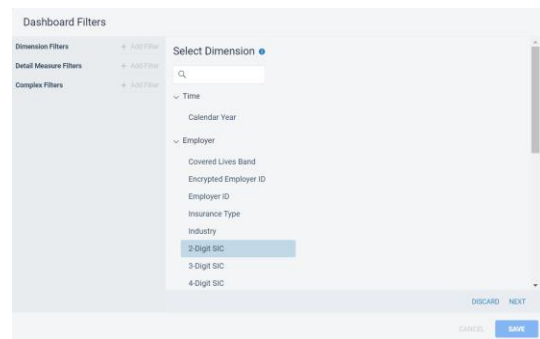
To add filter(s) to your dashboards, click the “Filters” button in the top right corner of the screen.



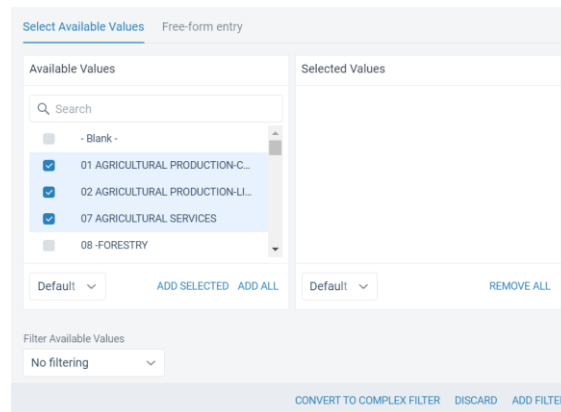
Then, select “Add Filter” next to the **Dimension Filters**.



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.”

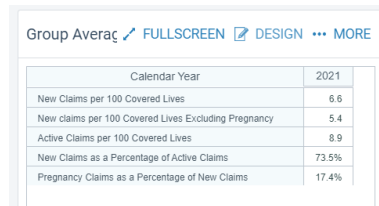


Once you have selected your dimension, select your value(s) of interest, click “Add selected,” then click “Add filter,” and then click “Save.” Once you apply your filter(s), the data in the dashboard will update accordingly.



## Modifying your dashboard in design mode

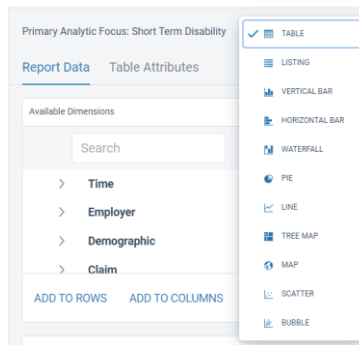
A limited number of users have access to modify dashboards using design mode. To modify a dashboard cell, hover over the cell title and click “Design” when it pops up. This will bring you into design mode.



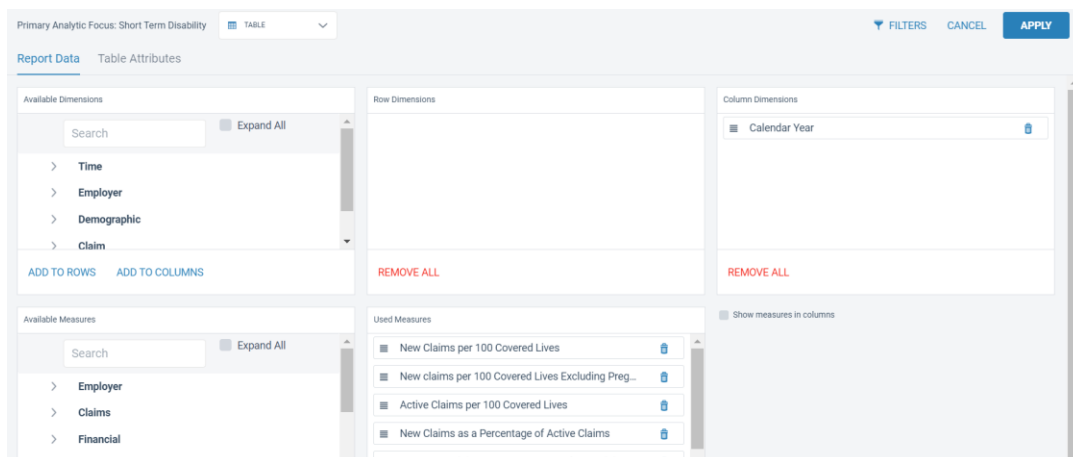
Group Average FULLSCREEN DESIGN MORE

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.



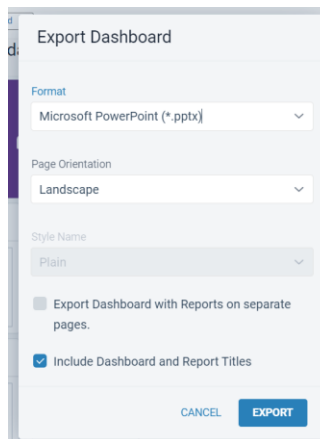
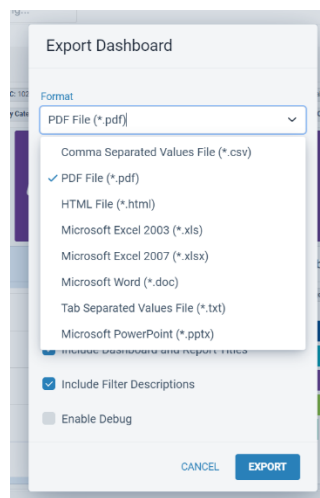
Additionally, you can add and remove dimensions and measures by dragging and dropping. Once you have made your changes, click “Apply.”



## 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.



## 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” → “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.”

