MetLink User Guide

Absence Management and Disability Reporting (DE/Cat)

Navigating life together

L1222028010[exp1224]
[All States][All Territories]

Contents

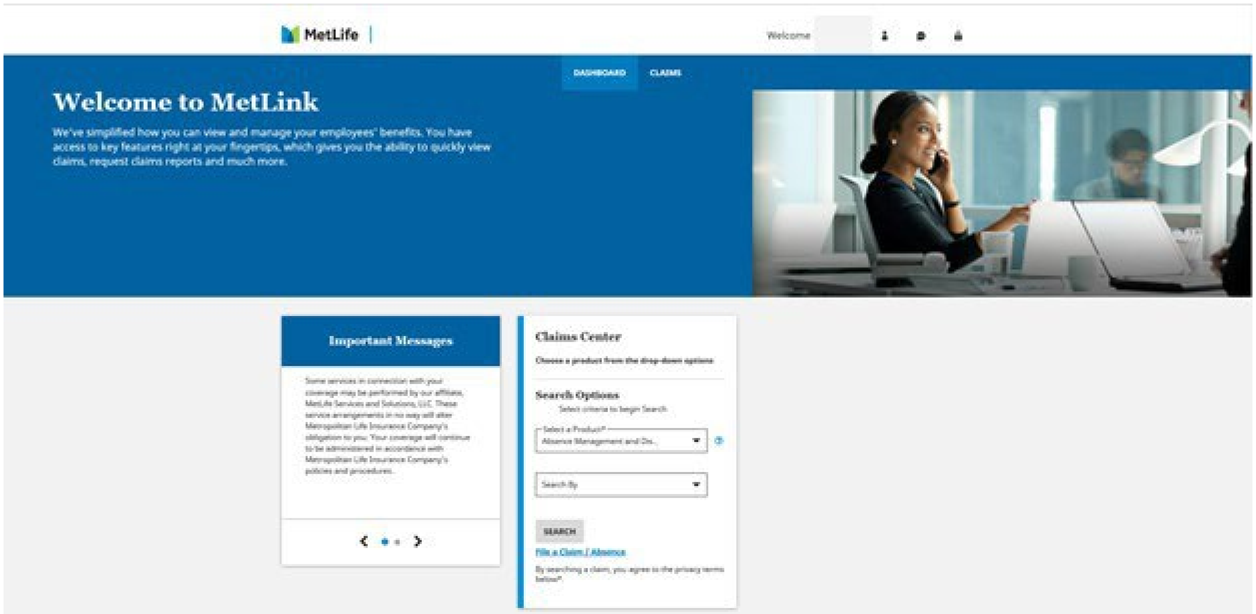
Overview

MetLink is a secure portal which is available on both desktop and mobile platforms, offering a host of benefits administration capabilities supporting the many products and services available through MetLife.

The MetLink Reporting experience offers access to Absence and Disability Claim information in report formats, enabling easy access to information needed to support benefits administration functions. This user guide focuses on the reporting aspect of MetLink and will help users navigate the capabilities and features available for Absence and Disability reporting. The features to be covered in this User Guide include how to:

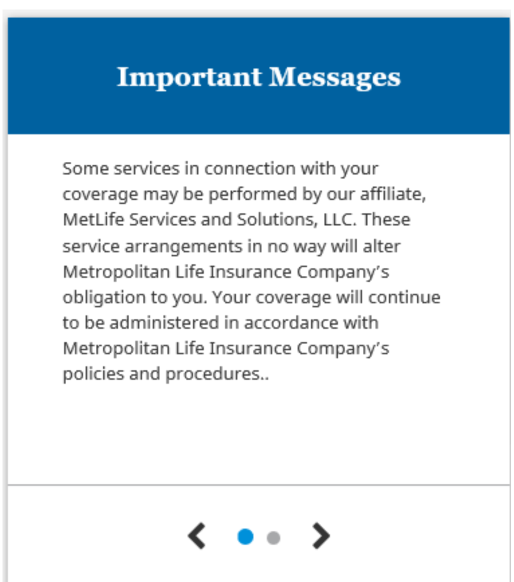
- Create a Report Package
- Find a Report Package
- Report Package Details
- View and Download a Report Package
- Delete, Rename, Share/Unshare and Transfer a Report Package
- View Sample Reports

Dashboard



Upon logging in, the user will land on the Dashboard. The Dashboard tab (located on the navigation bar) is highlighted to let a user know where they are within MetLink.

There are many functions and features available from the Dashboard page that include Important Messages and Claims Center Information.



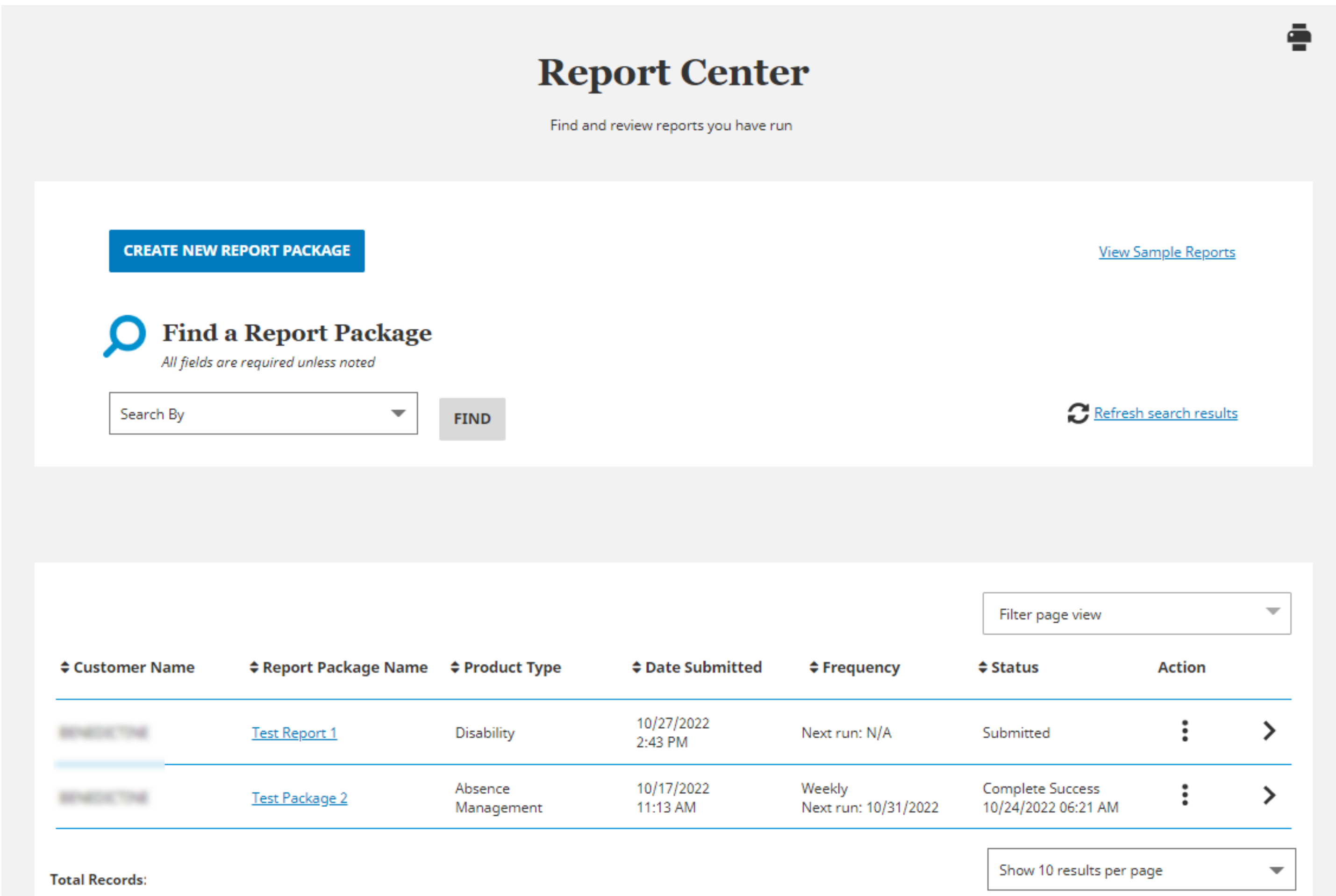
The Important Messages feature provides users with access to site-level information such as upcoming maintenance, activity, etc. Directional arrows are available at the bottom of the card to navigate to the next or previous message(s) if multiple messages are posted

Report Center

The Report Center tab, found on the navigation bar, brings the user to the main Report Center page.

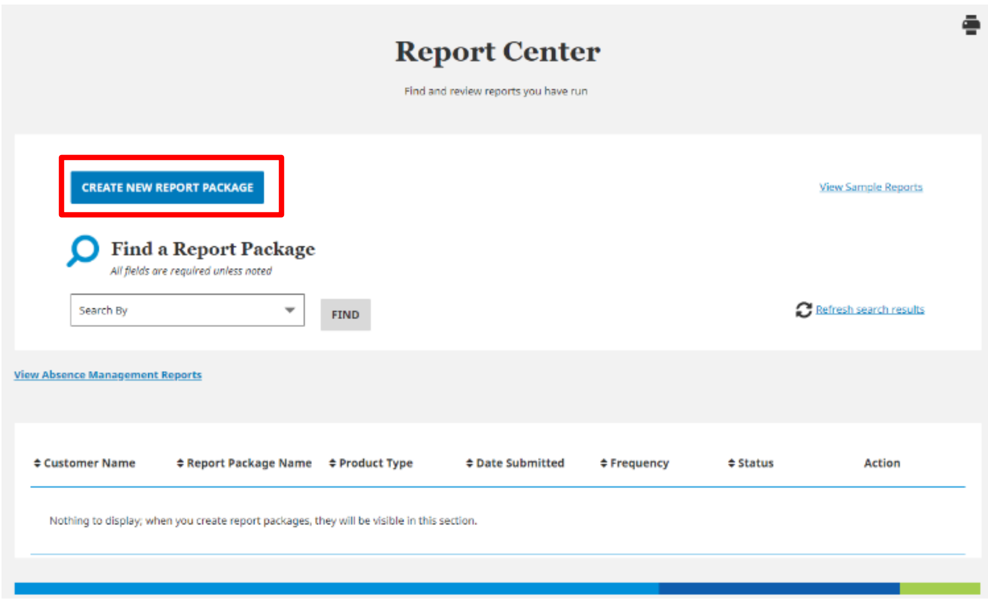
From the report Center landing page, the user can:

- Create a Report Package – Request a report of several reports and view sample reports
- Find a Report Package – Access previously requested report packages

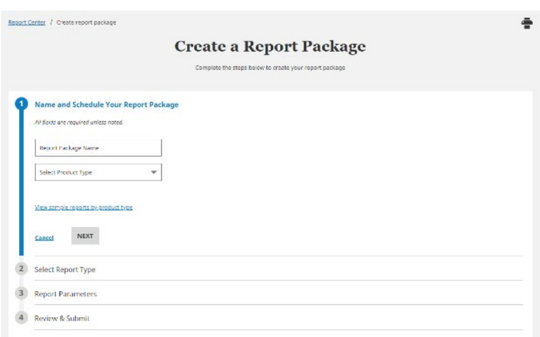


Create A Report Package

A report package can consist of a single report or multiple reports. The steps below outline how the user can build reports, select the frequency they wish to receive the reports and select other report criteria. A user may navigate to "Create Report Package" from either the Report Center (below) or from the Report Package Details page (located on page 15).



When selecting Create Report Package, the user will land on the Create Reports Package page.

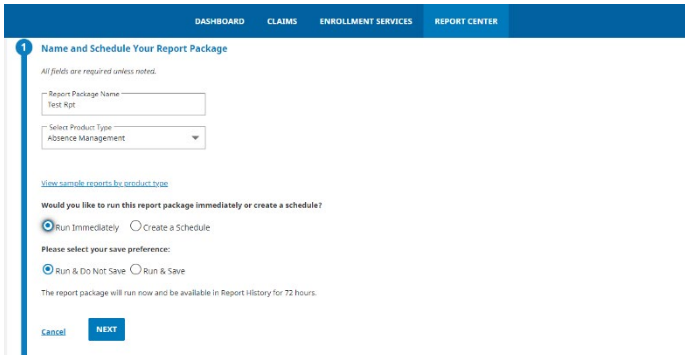


Step 1 Name and Schedule Your Report Package: A user must name the report package (a minimum of three characters is required, and no special characters may be used) Depending on entitlements, the user may have access to multiple reporting products, and will have the option to select Absence Management or Disability from the drop down.

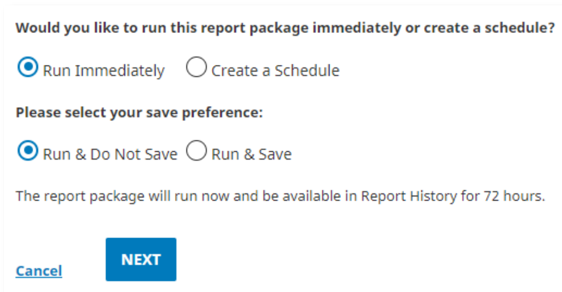
The user will have the option to

- Run the report package immediately or
- Create a schedule.
- Select the timing and
- Save preferences for the report package.

When all required fields are selected the Next button will be highlighted.



- When the user selects the radio button under “Would you like to run this report package immediately or create a schedule?” the next question will populate and change, based on the selection.

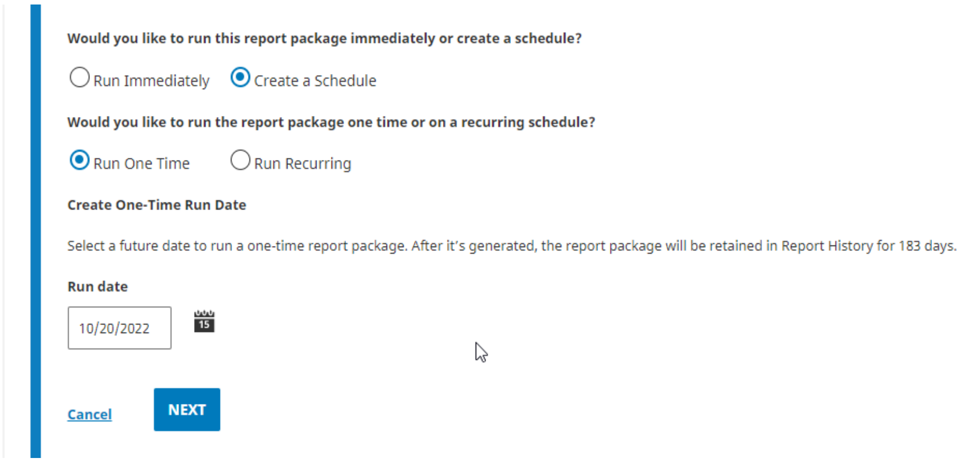


The user will be defaulted to requesting their report package to “**Run Immediately**” and “**Run & Do Not Save**,” the user has the option to change to any of the following options:

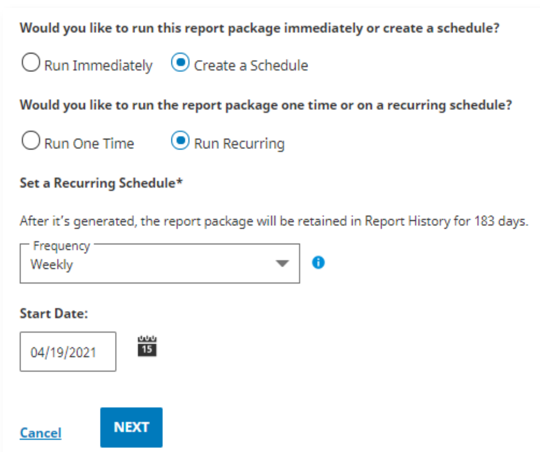
1) “**Run Immediately**” and “**Run & Do Not Save**,” the report will remain available and accessible to the user for 72 hours and then removed from view. This is the default if no changes are made.
2) “Run Immediately” and “**Run & Save**”, the report will be saved and accessible to the user for 183 days.
3) “Create a Schedule” and “**Run One Time**”, then the report will require a Run Date selected to be generated and the report will remain available and accessible to the user for 72 hours and then removed.
4) “Create a Schedule” and “**Run Recurring**”, then the report will require recurring schedule to be generated and the start date . The ongoing reports will be archived and remain available and accessible to the user for 183 days.

If the user selects **Create a Schedule**, they must then specify "**Run One Time**" or "**Run Recurring**."

1. "**Run One Time**" is the default setting where the user must enter a future date to run the report and the report will remain available and accessible to the user for 72 hours and then removed. The calendar icon to the right of the "Run date" text field allows a user to select a date.



2. **If "Run Recurring**" is selected, the Frequency and Start Date must be entered. Depending on the product, the frequency options may vary (daily, weekly, monthly) .



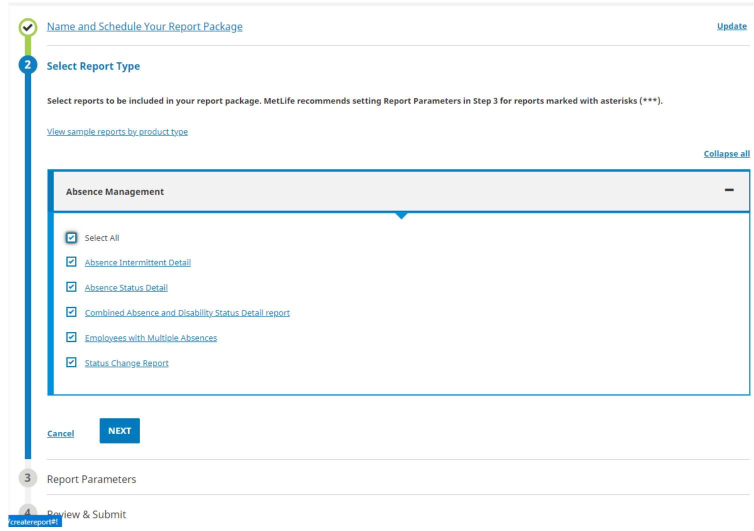
3. For more information about the scheduling rules for each frequency when selecting "Run Recurring", the user may click on the icon. Recurring packages will continue to run based on the date parameter options selected in Step 3.

   Keep in mind, some reports can be generated for certain frequencies. If you select a frequency and the report you wish to run is not shown in Step 2, it's not available in that frequency. Return to Step 1 to update the frequency.

   - Select the Next button to proceed to Step 2

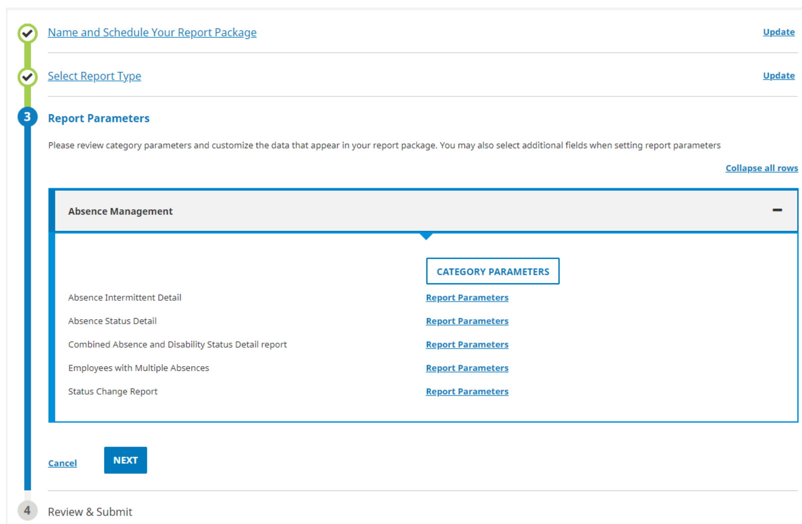
Step 2 Select Report Type: A user has the option to select the types of reports available based on their entitlement to include in the report package. Additionally, if the user selected "**Run Immediately**" or "**Run One Time**," in Step 1, they will have the option to select the reporting period (dates of actual reporting period will/can be selected in step 3 Report Parameters).

- Select report or reports to be included in your report package by clicking on the radio box next to the report name. The user may view Sample Reports by clicking the link of the report name to see the report view and confirm it includes the necessary details.
- After selecting the desired reports, click next to proceed to Step 3.



Step 3 Report Parameters: The content displayed in this step will populate based on the selections made in Steps 1 & 2. Default selections are set for both Category and Report Parameters. If a user chooses to complete the report package with the default settings, they may simply select the NEXT button to move to Step 4.

However, a user may customize the Category and Report parameters to meet their reporting needs, by clicking on the Category Parameters or Report Parameters links.

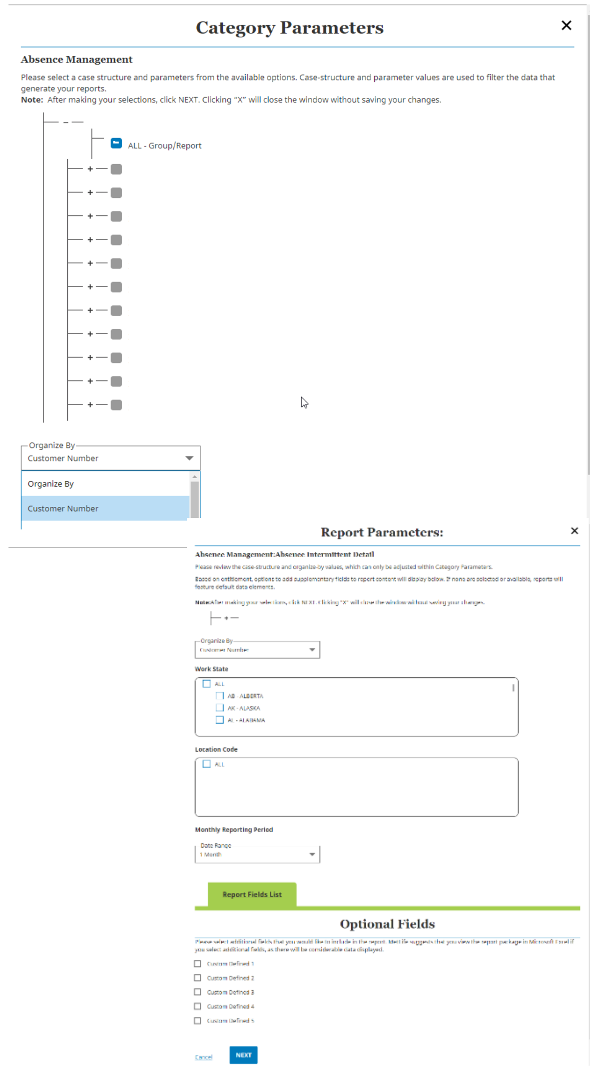


- **Category Parameters**: The options available within the Category Parameters offer the ability to customize a report package case structure and how the report output is organized. The selections made within the Category Parameters will apply to each report within that category. Default options appear when the Category Parameters card is opened. If no parameters are selected, the default selection will remain. Custom options include:

Organize Data by:

- Customer Number
- Group/Report Number
- Subcode
- Branch/Paypoint

To proceed with your chosen category parameters, click NEXT.



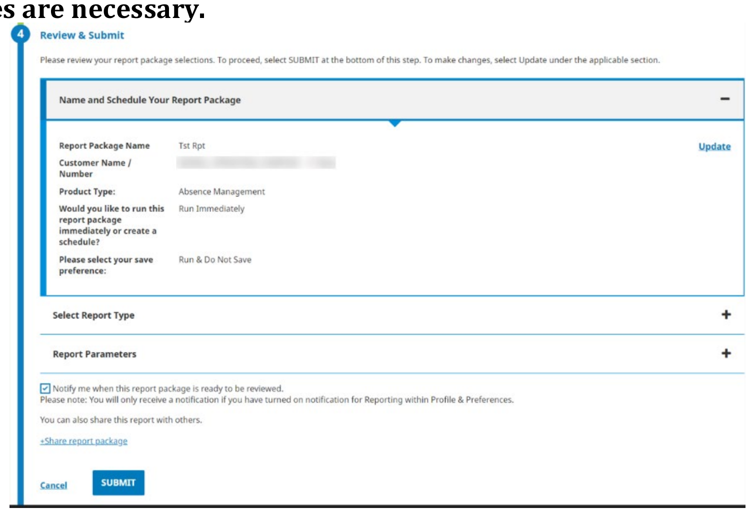
- **Report Parameters:** The selections made in the Category Parameters will be displayed in the Report Parameters but are not editable. The Report Parameters allow you to select individual filters for each report in the report package. Each report can be filtered by Work State and Location Code. Additional options and fields will vary based on the reports selected.

  NOTE: To save any changes made to the Category or Report Parameters, the user must click the NEXT button at the bottom of the pop-up window.

  Once the desired Category and Report Parameters have been selected, click the NEXT button at the bottom of Step 3 to proceed to Step 4.

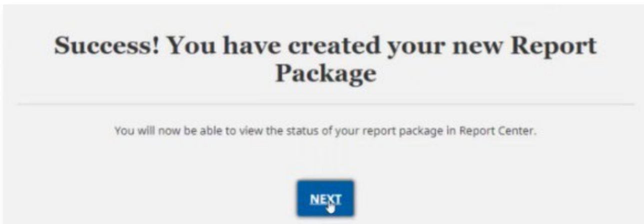
Step 4: The Review and Submit step provides the user the opportunity to review all of their report package selections made in Steps 1 through 3 prior to final submission.

Users may update any of the selections made in the previous steps. Note: If the user changes any options selected in prior steps, they must review subsequent steps as they may need to be changed. The user will be able to review all selected options prior to submission and may select "update" if changes are necessary.

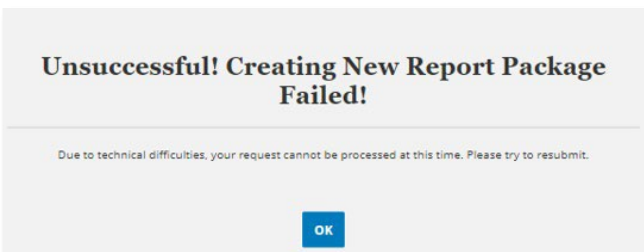


- A check box with the option to notify the user when the report package is available for download. This will prompt an email sent to the user notifying them that the report package has generated and ready for viewing.
- A link allowing the report package to be shared with another user this process which is discussed later in this guide. Note, the recipient must have entitlement to view the reporting being shared.
- After reviewing the selections, click the Submit button.

Once submitted successfully, the following message will display. Users will then be taken back to the Report Center homepage. After clicking the refresh link, the new report package will be listed in the package summary table.

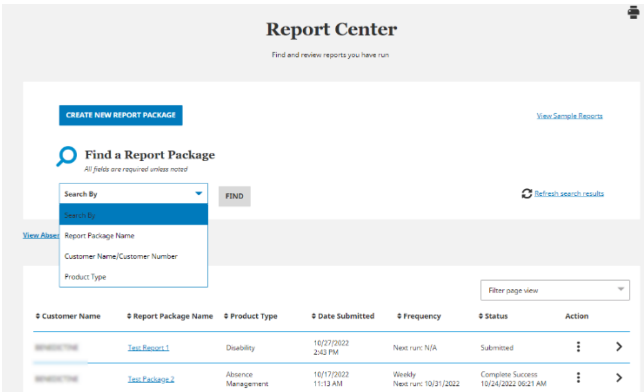


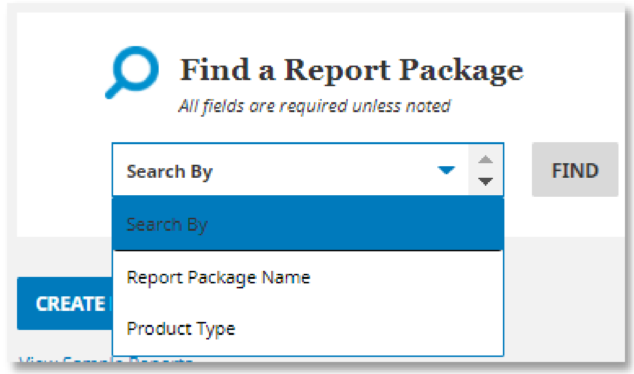
If technical difficulties prevent the report from being created, the following message will be displayed. Clicking OK will return the user to Step 4 of the Report Creation process, where they can re-submit the request.



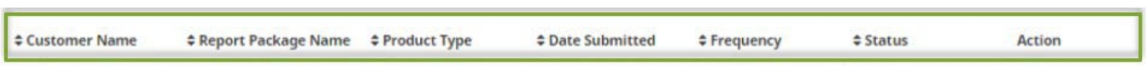
Find a Report Package

The Find a Report Package feature enables the user to search for a specific report package by Report Package Name or Product Type. Clicking the arrow in the “Search By” dropdown box allows you to choose which parameter to search by. After selecting a search parameter and entering a corresponding value in the adjacent field, click Find to conduct the search. A list of report packages matching the search criteria will be displayed.





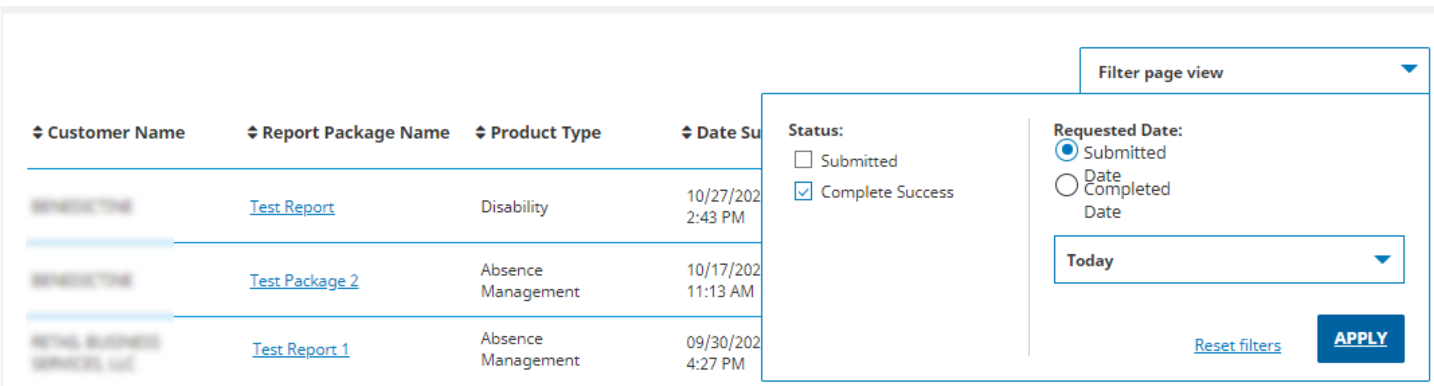
- **Sorting**: To sort any of these columns in ascending and descending order, click the corresponding ⬍ button.



- Customer Name
- Report Package Name
- Product Type
- Date Submitted
- Frequency of Report
- Report Status

- **Filtering:** Select the Filter page view dropdown arrow and choose from the following available options:
    - Status (Pending, Complete Success, Complete Error)
    - Requested Date (Submitted, Completed)
        - A Date Range dropdown has the following options:
            - Today
            - Yesterday
            - Previous Week
            - Previous Month
            - Previous 3 Months
            - Previous 6 Months
            - Custom Date Range

  Click 'Apply' to apply the filter.

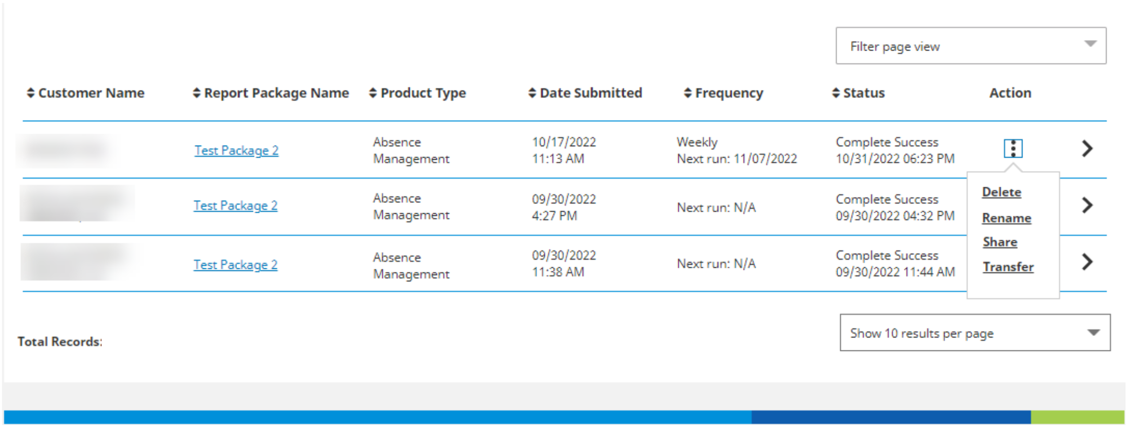


- **Status:** This column will display the status for each report package in the list. A list of possible package status descriptions is shown below.

Status	Description
Pending	Package has been submitted but processing has not started
Submitted	Package has been submitted and processing has started
Complete Success	Package has completed and the reports are available for users to view and download
Complete – Error	Package has failed to run due to an entitlement issue

- **Results per Page**: The number of report packages displayed in the Summary View defaults to 10 results per page. To change the number of report packages displayed, select the dropdown box at the bottom of the list.

- **Actions:** The 'Action' column in the list displays the ⋮ button. The following actions are available (and are also available in the 'I want to …' dropdown box on the Report Package Details page): Delete, Rename, , Share and Transfer.



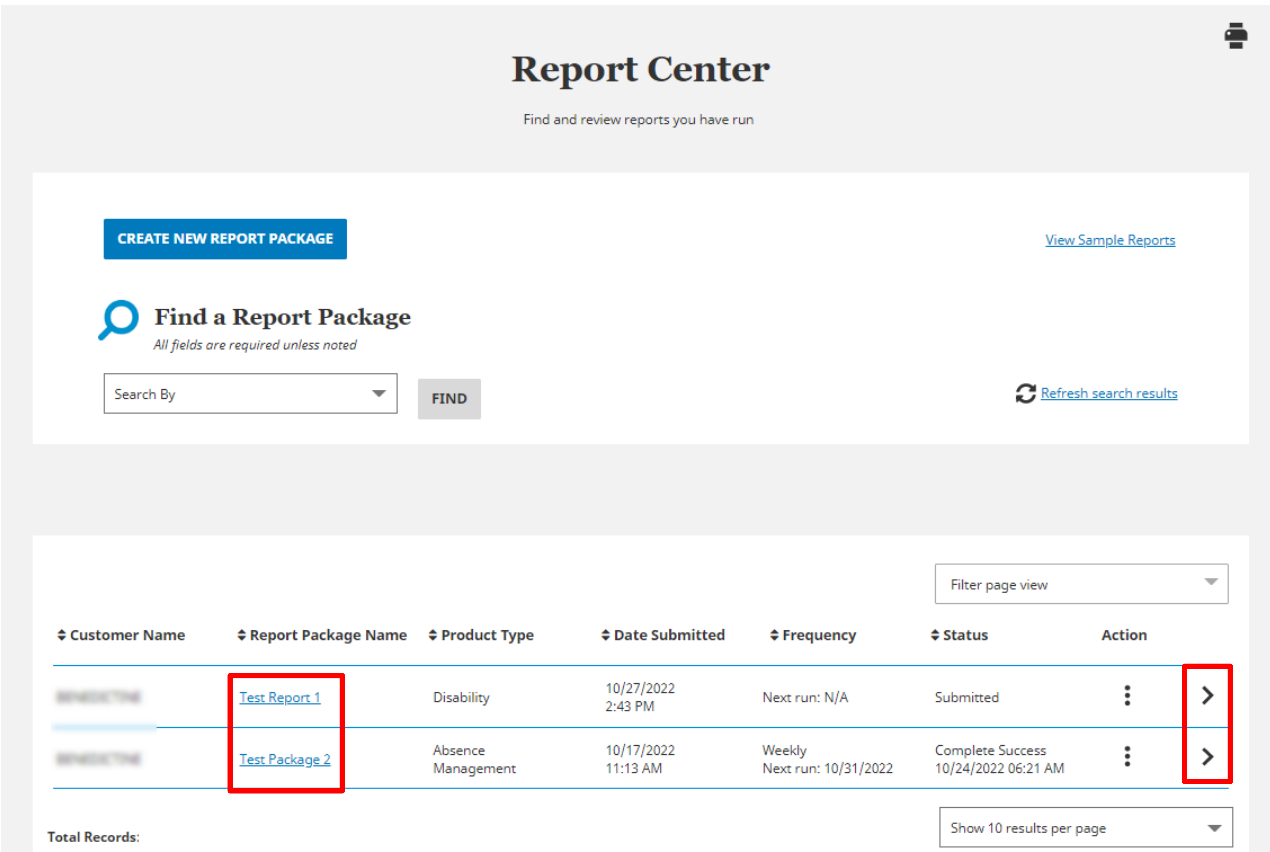
When a user selects an action item, a pop-up window will appear for the user to enter information required for the specific action.

Note, that if a user is accessing the Report Center to view a report that was shared with them, the interface may be slightly different.

Report Package Details

To view the details of a specific Report Package, from the Report Center page a user may:

1. Select the underlined Report Name, or
2. Select the button displayed at the end of each row.



Report Package Details Page Expanded:

When selecting any one of the options to view the details for a specific Report package, the user will be taken to the Report Package Details page where the following information is displayed:

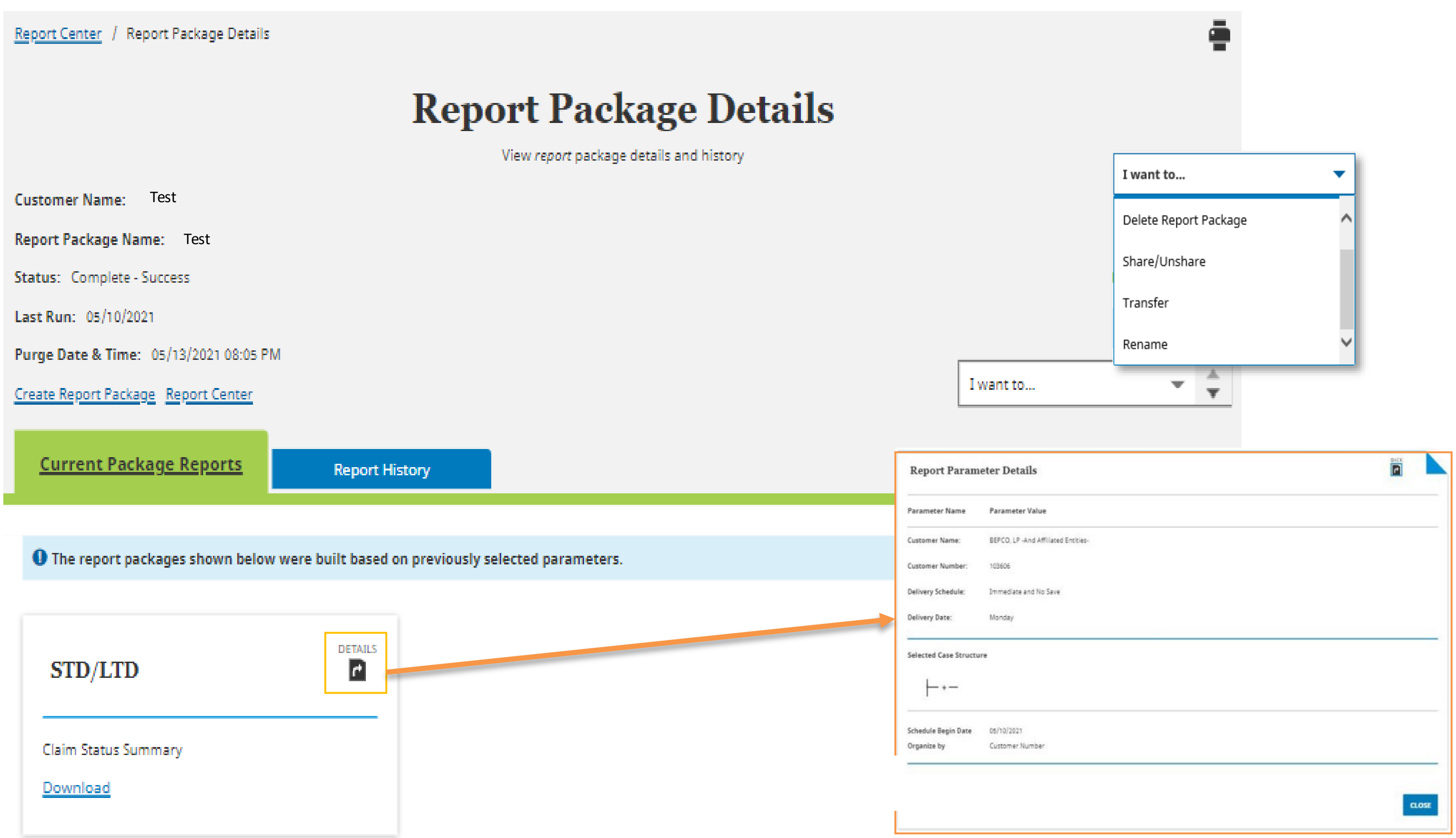
1. The "'I Want to' feature" provides a user with the same capabilities as the Action Menu on the Report Center page. Upon selecting the drop-down a user can select to share/un-share, rename, transfer, or delete a report.

2. The Current Package Reports tab contains information for recently run report(s) included in the report package. For each report, there will be a summary card displaying the product name and the report name, as well as a details icon to view the report's details.

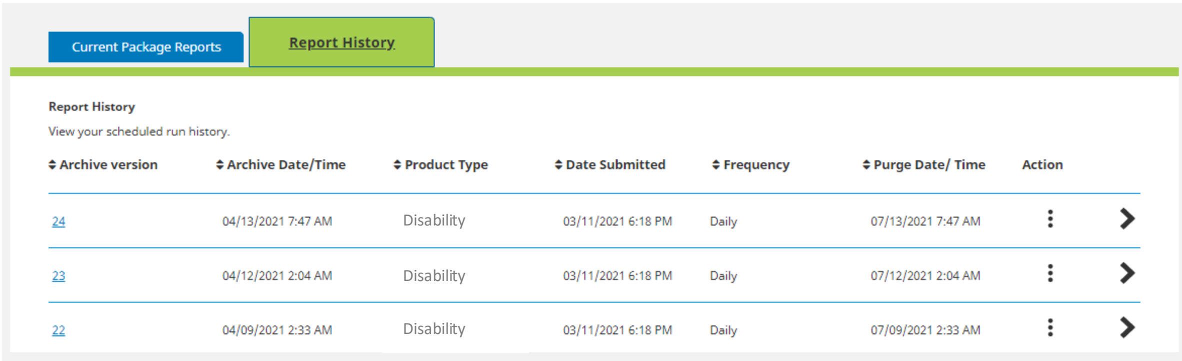
3. When a report is run on a scheduled basis, the historical versions can be found by selecting the Report History tab located next to the Current Package Reports tab.

4. Breadcrumbs: a navigation tool which reveals to a user where they are within the application. A user can navigate to another page by selecting the hyperlink of that page. For example, by selecting the Report Center hyperlink, the user will navigate back to the Report Center.

5. Basic information such as: Customer name, Report package, name, report status, shared information when the report package is shared with another user(s).

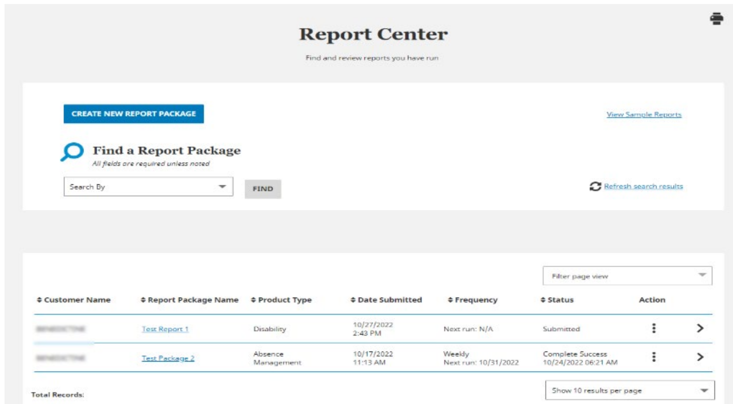


- Scheduled reports run on a recurring basis and stop when deleted or when ownership is transferred. It is recommended that users always download reports and save them to a secure location, for future reference.



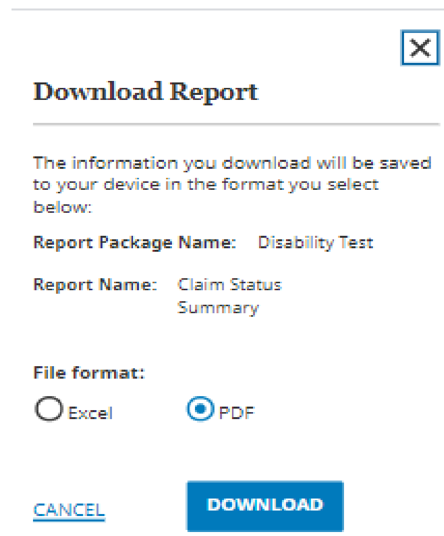
View and Download Report Packages

After successfully submitting a report package, the Report Center page will show the status of the report, (Pending, Submitted, Complete Success, or Complete Error). To pull the most current status, the User can click on the “Refresh Search Results” link.

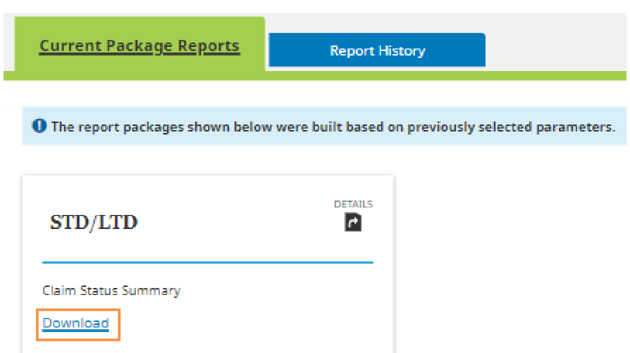


Once the status reflects “Complete Success”, the report is available to be viewed and downloaded.

To access a report package, a user may click the  button or the report package name link.

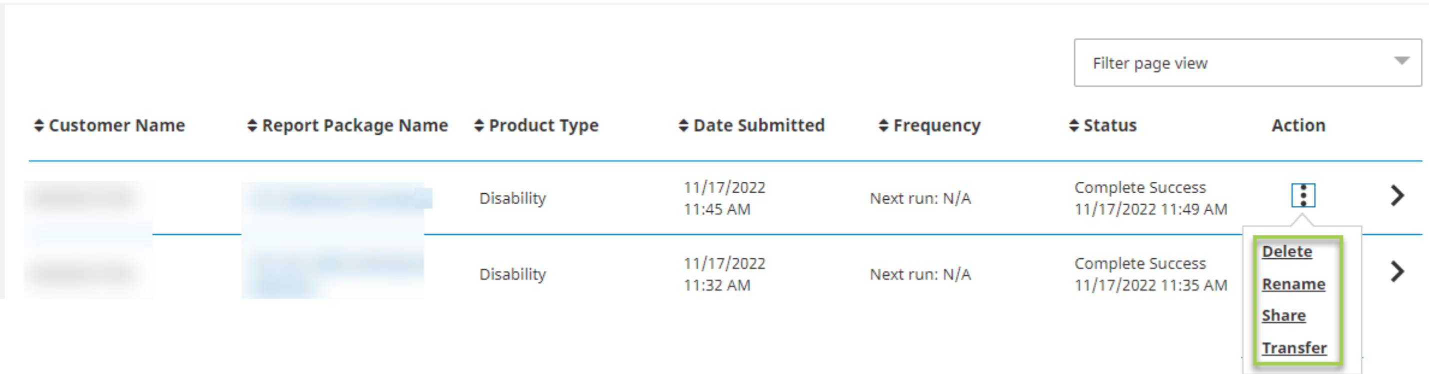


- From here, a user is taken to the report package details page where the individual reports will be available and additional information displayed.
- To download report, click the download button. The user will be prompted to select a file format, if applicable.
- To download a report, click the download button. The user will be prompted to select a file format, if applicable.

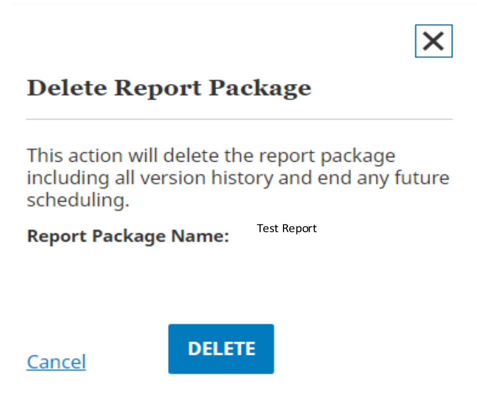


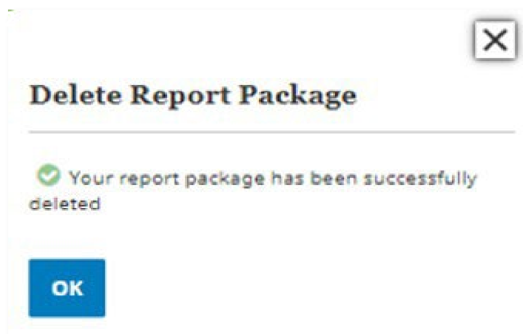
Note: A user can view the report selection criteria by clicking the details button.

Delete, Rename, Share/Unshare and Transfer a Report Package



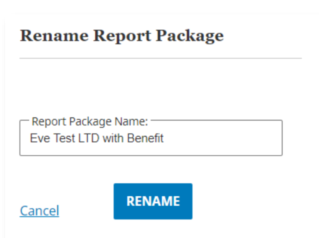
- **Delete |** To delete a report package, including all version history and end any future scheduling, click the ⋮ button and click delete. A window will pop-up confirming the deletion.

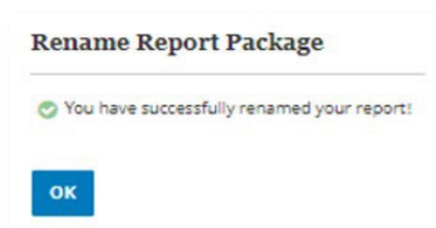




- **Rename |** To change the name of the report package, take the following action:

  1. Enter a new name into the text field and click the RENAME button. A confirmation message will appear

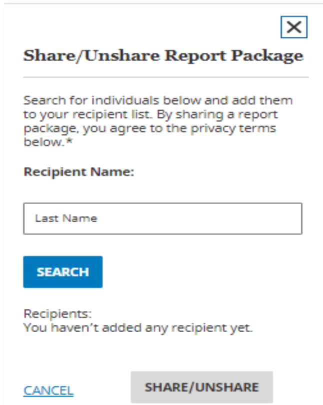


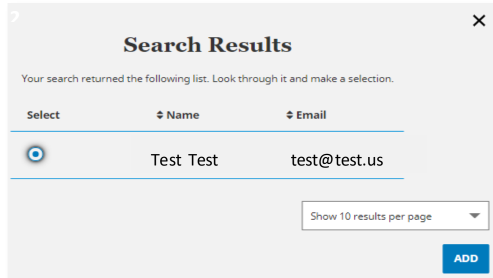


- **Share/Unshare |** To share/unshare the report package with another user who has entitlements to review the same report and same structure, take the following steps:

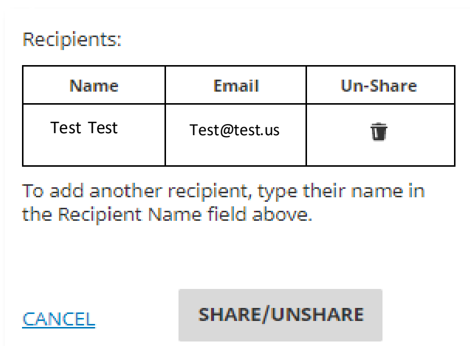
  Enter the last name of the recipient and click search. A search results box will appear.

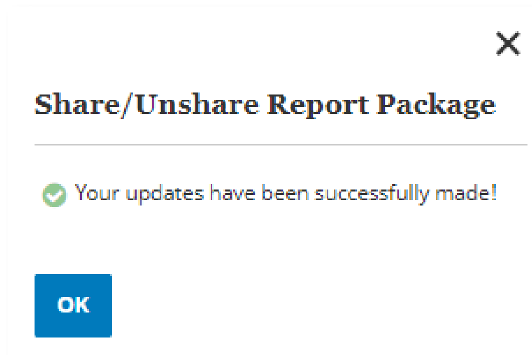
  1. Select the desired recipient and click Add. The recipient's name and email address will appear.
  2. To unshare the report package with a recipient, click the SHARE/UNSHARE button.





3. Confirm by clicking the SHARE/UNSHARE button





The recipient will be able to access the report package unless unshare is selected at a later time.

- **Transfer |** To transfer ownership of a report package to another Absence Management or Disability product user, take the following steps:

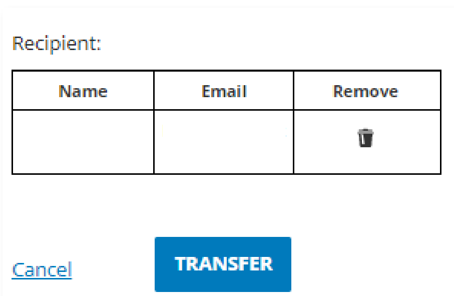
1. Enter the last name of the recipient and click Search. A search results box will appear.

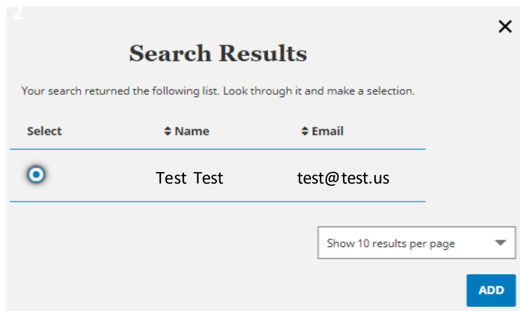
2. Select the desired owner and click Add. The recipient's name and email address will appear.

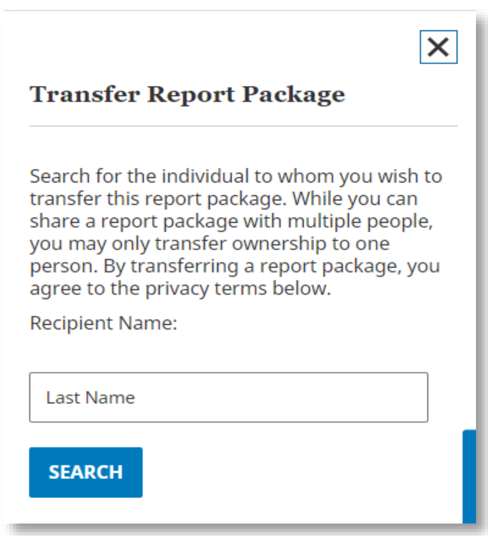
3. To confirm the transfer, click the 

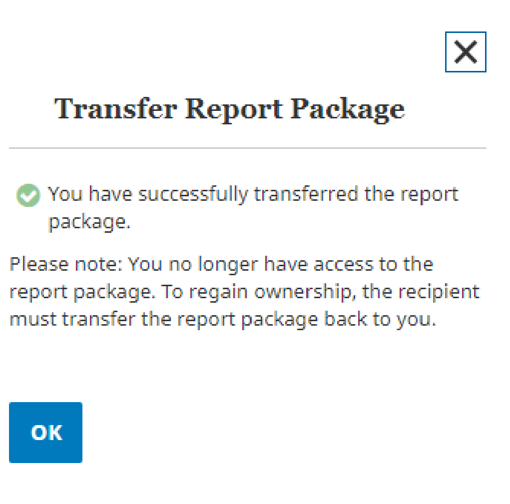
button.

Once a report package is transferred, it no longer appears in the original user's report list. If the report is a scheduled report, the transferor will no longer receive the package when the package is generated in the future.





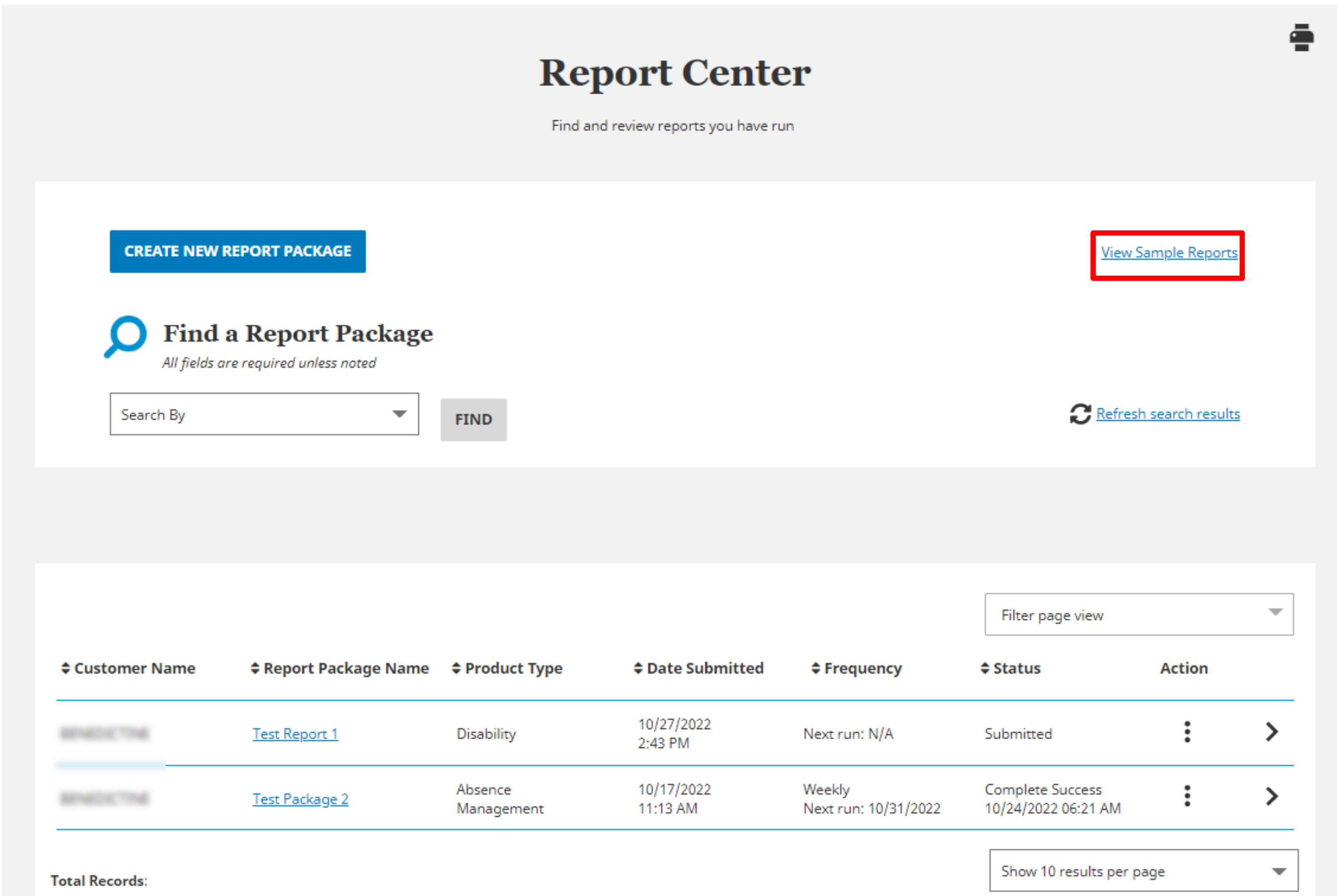




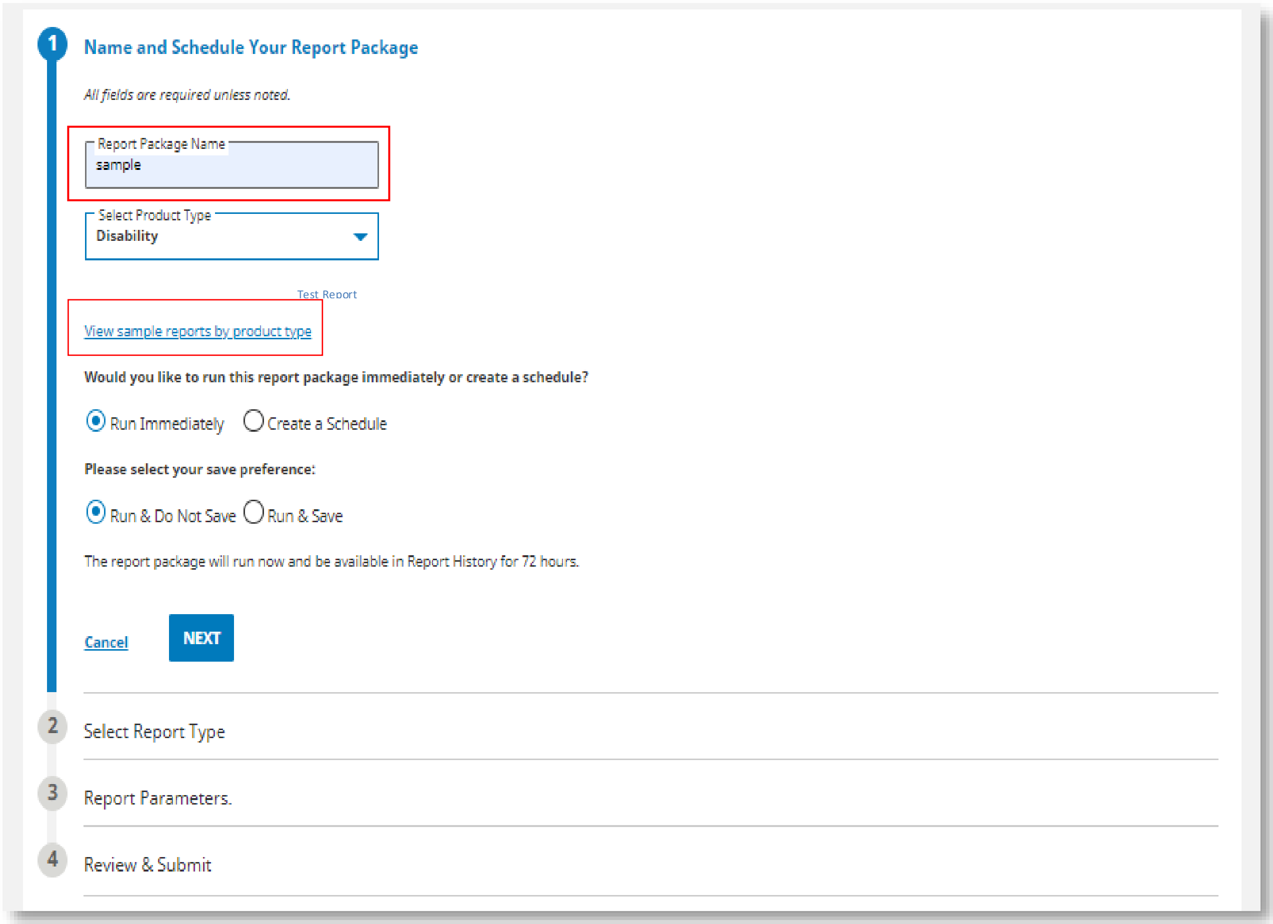
View Sample Reports

Sample reports provide examples and templates of reports by product types. A user can view sample reports from 3 locations:

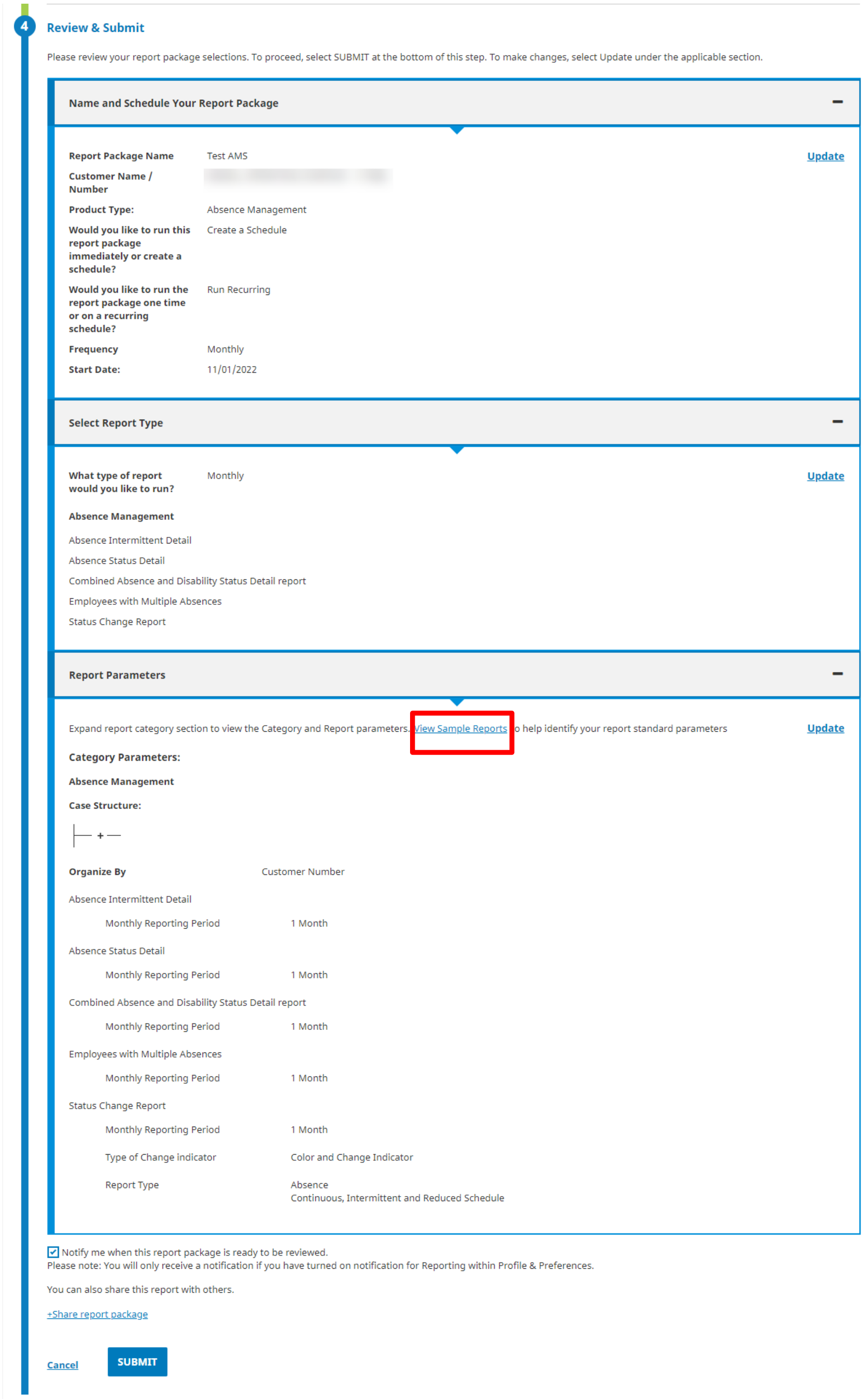
1. The Report Center Homepage



2. Within Step 1 and Step 2 of the Create a Report Package process.



3. Report parameter's section in step 4 of the Create a New Report Package process.



4 Review & Submit

Please review your report package selections. To proceed, select SUBMIT at the bottom of this step. To make changes, select Update under the applicable section.

Name and Schedule Your Report Package

Update

Report Package Name	Test AMS
Customer Name / Number	
Product Type:	Absence Management
Would you like to run this report package immediately or create a schedule?	Create a Schedule
Would you like to run the report package one time or on a recurring schedule?	Run Recurring
Frequency	Monthly
Start Date:	11/01/2022

Select Report Type

Update

What type of report would you like to run?	Monthly

Absence Management

Absence Intermittent Detail

Absence Status Detail

Combined Absence and Disability Status Detail report

Employees with Multiple Absences

Status Change Report

Report Parameters

Expand report category section to view the Category and Report parameters. View Sample Reports to help identify your report standard parameters

Update

Category Parameters:

Absence Management

Case Structure:

Organize By		Customer Number
Absence Intermittent Detail		
	Monthly Reporting Period	1 Month
Absence Status Detail		
	Monthly Reporting Period	1 Month
Combined Absence and Disability Status Detail report		
	Monthly Reporting Period	1 Month
Employees with Multiple Absences		
	Monthly Reporting Period	1 Month
Status Change Report		
	Monthly Reporting Period	1 Month
	Type of Change indicator	Color and Change Indicator
	Report Type	Absence Continuous, Intermittent and Reduced Schedule

☑ Notify me when this report package is ready to be reviewed.
Please note: You will only receive a notification if you have turned on notification for Reporting within Profile & Preferences.

You can also share this report with others.

+Share report package

Cancel SUBMIT

Clicking the View Sample Reports link will open a new window displaying all available Sample Reports.

View Sample Reports

View sample reports that can be included in a report package

Absence Management

Absence Management

Absence Intermittent Detail

This report displays all intermittent leaves with specific dates/time requested and eligibility, certification and entitlement status. Includes all intermittent dates that are pending, approved or denied.

Absence Status Detail

This report displays all leaves by claim number, employee, leave plan, leave status and cumulative time taken in minutes, hours, days and weeks. Includes leaves in the following status as of the end of the reporting time period: New, Pending, Approved, Partially Approved, Approved – Extension pending, Partially Approved – Extension Pending, Denied, Approved – Closed, Partially Approved – Closed, Canceled, See Details. Leaves Denied and Closed during the reporting time period are included.

Combined Absence and Disability Status Detail report

This report displays all Leaves and Disability claims by claim number, employee, leave plan, leave or benefit status and cumulative time taken in minutes, hours, days and weeks.

Includes leaves in the following status as of the end of the reporting time period: New, Pending, Approved, Partially Approved, Approved – Extension pending, Partially Approved – Extension Pending, Denied, Approved – Closed, Partially Approved – Closed, Canceled, See Details. Leaves Denied and Closed during the reporting time period are included.

Includes Disability claims in Pending, Active, Denied, Closed and Suspended status as of the end of the reporting time period. Denied and Closed claims are those that were denied/closed during the reporting time period.

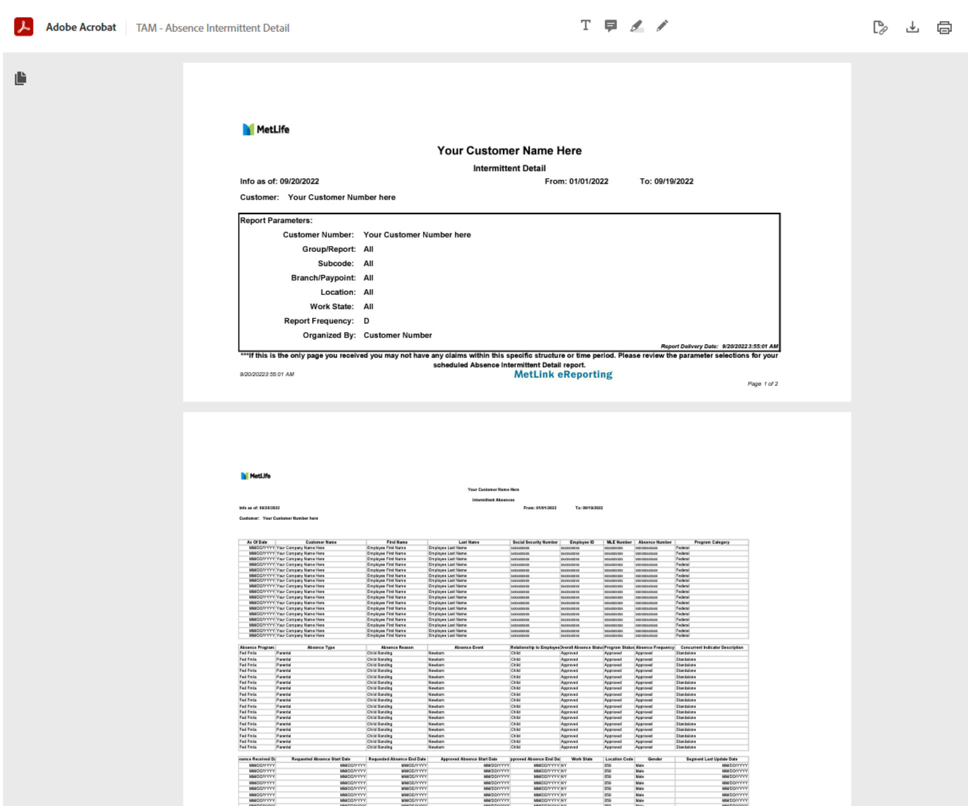
Employees with Multiple Absences

This report displays a list of Employees with multiple requests for leaves of absence in the reporting period. Leave requests with overlapping dates are highlighted. The report excludes the requests for leaves that are denied.

Status Change Report

This report shows all the new and changed leaves by claim number, employee details, leave plan, leave status, absence start and end date and indicates what the change is. There will be Yes/No indicators and color highlights to indicate changes to the following fields: New leave, Absence Start Date, Absence End Date, Status, Return To Work Date, Certification change, Date Last Worked Updates, First Work Date Out Updates, Absence Frequency Changes

EXAMPLE SAMPLE REPORT



If You Need Assistance

Technical errors may be encountered when attempting to retrieve or update data. In these situations, the following message is displayed, containing the error code number of the appropriate error: “A system error has occurred. Please call the Call Center and quote the error number.” If you experience this error, attempt to repeat the action you just attempted. If you are still unable to proceed, call the call center at 1-877-9METWEB. Record the error number to assist when investigating the issue.

The hours of operation are Monday through Friday, 8 AM – 11 PM ET.

For any other questions, please contact your Client Services Consultant (CSC).