9.4. Global Participant Search

10/29/2024 4:34 pm CDT

Click "Global Participant Search" from the Compliance Menu under "Tools/Settings".
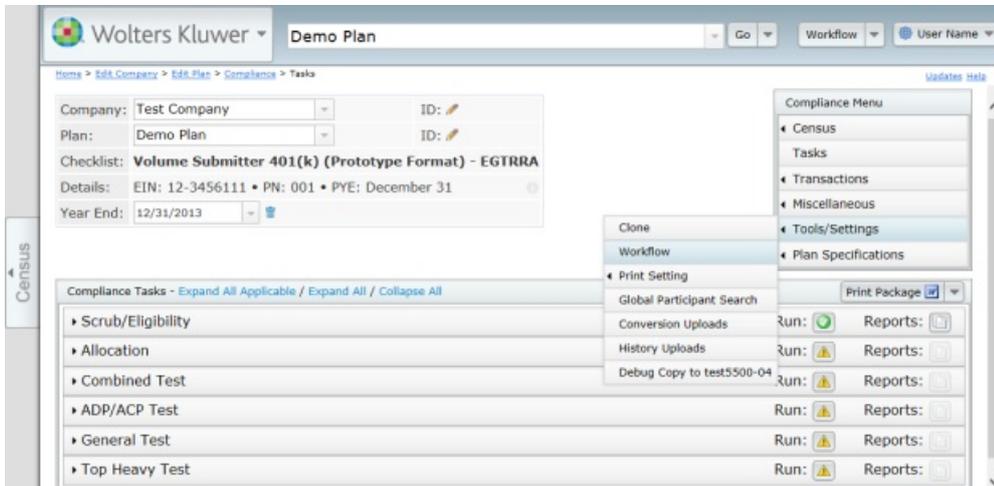
The Global Participant Search enables a user to search for a participant across all companies and plans within a user's company code. Then, with the click of a button the user can be directed to the plan in which the participant belongs.
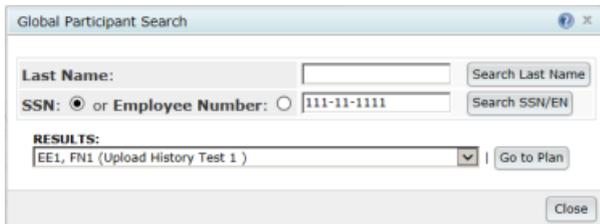
Search Options

Inside Global Participant Search, the user has three search options: last name, social security number or employee number. If searching by social security number or employee number the participant(s) who exactly match the number entered will be listed in a drop-down box. That is, no partial searches are done for those two options. If you search by last name, however, you can type in the entire last name or just part of and the search results will contain all participants matching your entry.

Note: If the total participant count from all companies and plans combined is less than 100, only the drop down box will appear. That is, there are no search options.

Selecting a participant/plan

Once you have entered your search criteria and pressed the search button, all participants matching that criteria will be listed in the "Results" drop-down box. Click on the drop-down box to review the list of participants. The plan that each participant is associated with is shown in parenthesis next to the participant name. To go to that plan, select the participant and click "Go to Plan".

Note: If divisions are used and a participant is located in a plan the user does not have accessibility rights to, the user will be able to see that a participant is in that plan but will not be able to access the plan.