
Employer eServices®
Your Suite of Administrative Services

eServices Customer Reporting

version 2.2 for Select/Expanded Services

At-a-Glance

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Introduction

Objective

The *At-a-glance* document is designed to provide a high-level, visual orientation to the reporting application's screens and the features.

Audience

Employers and brokers with *Select* or *Expanded* customer reporting services.

Scope

The *At-a-glance* document contains a screen-by-screen snapshot of the *eServices Customer Reporting* application. The principle features of each screen are numbered. The numbered features are named and defined.

The *At-a-glance* document is not an instructional guide for running, saving, exporting reports, etc.—although it may aide in these processes. The document does not explore reporting features in detail, nor does it provide any information about reports available through the reporting system or the content of those reports.

Other Resources

Other reference materials are available for topics not covered by this document including:

- *Online Help*
- *eLearning tutorials*
- *Quick Reference Cards*

Reports Home Screen

The screenshot shows the Employer eServices Reports Home Screen. At the top is a navigation bar with links: Reports Home, Automated Reports, Custom Reports, Recent Reports, Help & Training, News, Tools, and Logout. Below the navigation bar is a user greeting: "Welcome Veronica Mtest".

The main content area is divided into three primary sections:

- View Automated Reports:** This section features a folder icon for "May 2007 (reports contain results through 4/30/2007)". Inside this folder are links for "Health Care Cost Management Summary", "Claim Experience Report", "Payments by Month", "Claim Lag Study", and "Payments by Benefit Type". A callout (2) points to the folder icon, and callouts (2a-2d) point to the folder name and its contents.
- Run Custom Reports:** This section shows a folder for "Financial (Data Current Through November 30, 2006)". Inside are links for "Claim Expenses by Size of Payment", "Claim Lag Study", "Detail Payment", "Detail Payment - Non Confidential", "Financial Managed Ad Hoc", "Large Loss Claim Payments", "Payments by Benefit Type", "Payments By Month", "Premium Managed Ad Hoc", and "Premium vs Claims - Paid". Callouts (3a-3e) point to these various report types. A "View All Report Types..." link is also present (3f).
- Recent Reports:** This section displays "Payments By Month" reports. A callout (4) points to the report icon, and callout (4b) points to the "View reports you created in the past 60 days..." link.

On the right side of the screen, there are three additional panels:

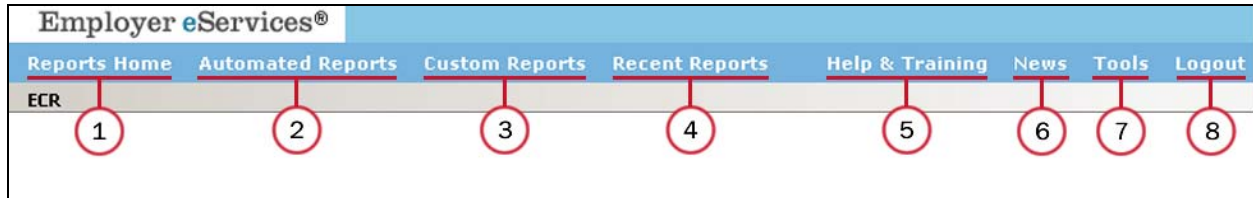
- Help & Training Resources:** Contains contact information (Maintenance Period, Phone, E-mail) and links for "Help with a Specific Report", "Frequently Asked Questions", "Glossary of Terms", "Online Tutorials", and "Printable Reference Materials". Callout (5) points to the contact information.
- Reporting News:** Lists recent news items with dates (5/14/2007, 5/4/2007, 4/30/2007) and titles. Callout (6) points to the news items.
- Reporting Tools:** Includes links for "Create and Modify Group Segment Filters", "Import a Group Segment Filter", and "Share a Group Segment Filter". It also contains instructions on how to use these filters and links for "Manage Your Report Templates" and "Review and change your preferences". Callout (7) points to the "Reporting Tools" section.

1. **Navigation Bar** – This bar is the primary vehicle for getting one portion of the site to another. It appears at the top of almost every screen (see p. 6).
2. **View Automated Reports** – This section provides access to the most recent set of system-generated reports (see p.7).
 - 2a. **Folder**- This folder is dynamically updated to display the most recent delivery month of automated reports. This link opens the *Automated Reports* screen for the specified delivery month. The text in parenthesis indicates the scope of data used to produce reports in the specified folder.

Reports Home Screen continued

- 2b. *Report* – This link opens the specified report in a separate browser window.
- 2c. *Export* – This button opens the File Download dialog box.
- 2d. *View Additional Reports...* – This link opens the Automated Reports screen.
- 3. **Run Custom Reports** – This section provides a starting point for running custom reports (see p.8).
 - 3a. *Report Category Folder* – The folders in this section represent the four main categories of reports. The text in parenthesis is dynamically updated to indicate the most current month of data available to run reports in the specified category.
 - 3b. *Report Link* – This link opens the *Options* screen for the specified report.
 - 3c. *Report Icon* – This image indicates the report contains a single section of output.
 - 3d. *Compound Report Icon* – This image indicates the report contains two or more sections of output.
 - 3e. *Show/Hide* – This icon alternately shows/hides the reports in a specified *Report Category* folder. The contents of the *Financial* folder are shown by default.
 - 3f. *View All Report Types* – This link opens the Custom Reports screen.
- 4. **Recent Reports** – This section provides direct access to the two most recent custom reports (see p.22).
 - 4a. *Report Name* – This link opens the *Results* screen for the specified report.
 - 4b. *View Reports* – This link opens the *Recent Reports* screen for the specified report.
- 5. **Help & Training Resource** – This section contains various means of getting help with the reporting application, including links to online reference materials and tutorials (see p.31).
- 6. **Reporting News** – This section contains links to the most recent data and reporting alert messages, as well as a link to an archive of past articles.
- 7. **Reporting Tools** – This section of the screen contains links to key utilities:
 - Create or Modify a Group Segment Filter, Share a Group Segment Filter, and Import a Group Segment Filter
 - Manage Report Templates
 - Set Preferences

Navigation Bar



1. **Reports Home** – This link opens the reporting application’s default home page.
2. **Automated Reports** – This link opens the screen from which access your system-generated reports.
3. **Custom Reports** – This link opens the screen from which you start the process of running a report.
4. **Recent Reports** – This link opens the screen from which you access reports created during the last 60 days.
5. **Help & Training** – This link opens Online Help in a separate browser window.
6. **News** – This link opens the Reporting News Archives in a separate browser window.
7. **Tools** – This link opens the screen from which you can create a Group Segment Filter, access your report templates and modify your preferences.
8. **Logout** – This link terminates the reporting session.

Automated Reports Screen

Employer eServices®

Reports Home Automated Reports Custom Reports **Reports** Help & Training News Tools Logout

Automated Reports > ABC Company

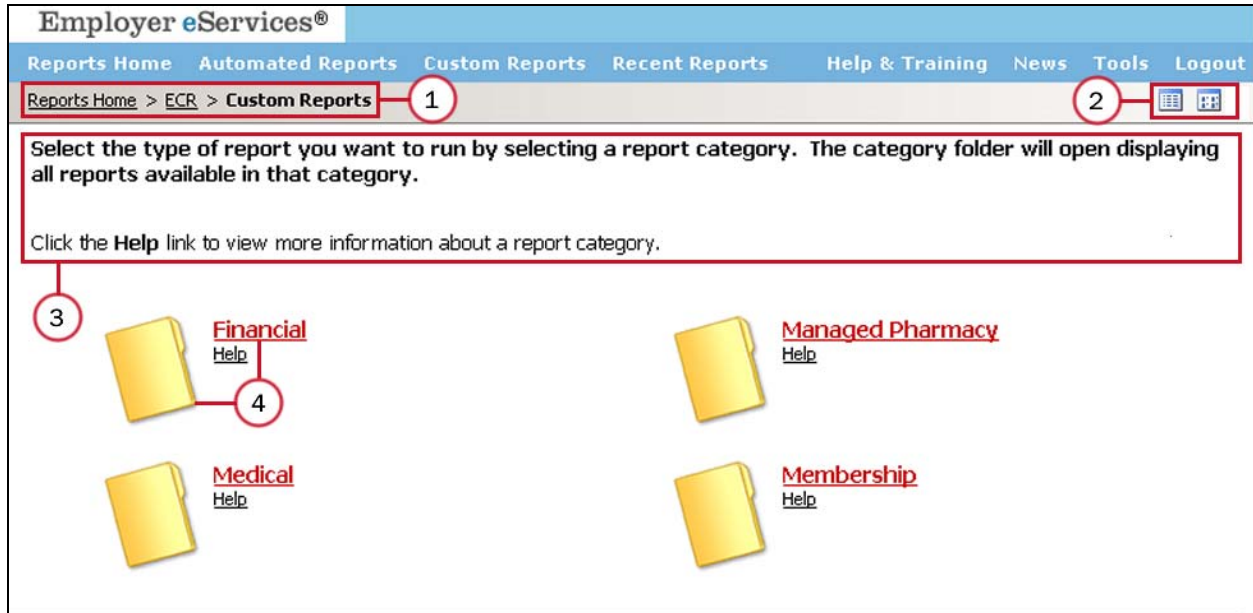
These folders contain the reports eServices Customer Reporting has run for you. To view these reports, select the appropriate folder then use one of the following 3 options:

Click a [report's name](#) to open the report as a document suitable for viewing or printing.
Click to open a report as a Microsoft Excel spreadsheet.
Click the [Help](#) link to learn more about the reports.

	Name	Created Date	Type	Total Size
Help	confidential		Folder	
Help	April 2006 (reports contain results through 3/31/2006)		Folder	
Help	Claim Experience Report ABC Company 000123456 1004	4/19/2006 9:39:17 AM	Report	121 KB
Help	Managed Pharmacy Plan Performance ABC Company 000123456 1004	4/21/2006 5:49:14 AM	Report	2,876 KB
Help	Claim Expenses by Size of Payment ABC Company Inc 000123456 1004	4/22/2006 9:19:09 AM	Report	1,179 KB
Help	Health Care Cost Management Summary ABC Company Inc 000123456 1004	4/23/2006 5:54:08 AM	Report	5,189 KB
Help	Membership by Month ABC Company Inc 000123456 1004	4/24/2006 9:18:04 AM	Report	1,669 KB
Help	Network Utilization ABC Company Inc 000123456 1004	4/25/2006 7:39:32 PM	Report	5,659 KB
Help	Payments by Benefit Type ABC Company Inc 000123456 1004	4/27/2006 2:03:31 PM	Report	1,854 KB
Help	Payments by Month ABC Company Inc 000123456 1004	4/28/2006 1:21:26 AM	Report	7,160 KB
Help	January 2006 (reports contain results through 12/31/2005)		Folder	
Help	October 2005 (reports contain results through 9/30/2005)		Folder	
Help	July 2005 (reports contain results through 6/30/2005)		Folder	

- Onscreen Help** – This text summarizes the steps needed to view, export, and get more help with automated reports.
- Delivery Month Folders** – These folders contain automated reports delivered during the specified month. The contents of the most recent folder are displayed automatically. A folder is only generated for months in which automated reports are delivered.
- Confidential Reports Folder** – This folder contains reports with protected health information (PHI). The confidential reports are sorted into a separate set *Delivery Month Folders* within this folder.
- Period End Date** – This date indicates scope of data used to produce reports in the specified folder.
- Report** – This link opens the results of the specified report.
- Created Date** – The date shown in this column indicate the point in time an automated report was produced.
- Type** – This column indicates if the item in a specified row is a folder or a report.
- Total Size** – The KB (kilobyte) amounts in this column indicate a report's file size.
- Export** – This icon converts the specified report into a downloadable .xls (Excel) file.
- Help** – These links open Online Help for automated reports.

Custom Reports Screen- Folder Level



1. **Breadcrumb Trail** – The links in the breadcrumb trail provide a path of hyperlinks to previous screens.
2. **Display Style** – These icons toggle the screen between displaying content in an icon [shown] or list format.
3. **Onscreen Help** – This text summarize the process of selecting a report category.
4. **Report Category Folders** – These icons/links open the specified report category. Each folder contains reports with a similar business purpose.

Custom Reports Screen- Report Level

Employer eServices®

Reports Home Automated Reports Custom Reports **1** Sent Reports Help & Training News Tools Logout

Reports Home > ECR > Custom Reports > Financial

Select the report you want to run. You will be prompted to enter the criteria for your report including specific dates, your group segment filter or customer segment number and other optional parameters for the report.

Click the **report name** to produce the report with online editing tools.
Click the **Export** link to produce this report as an Excel, CSV or HTML document.
Click the **PDF** link to produce this report as an Adobe PDF document suitable for printing.
Click the **Help** link to view more information about a report.

2

Claim Expenses by Size of Payment
Help
Provides counts of claimants and total claim payments within incremental, fixed dollar ranges.
Export PDF **6**

4

Claim Lag Study
Help
Identifies the time lapse between the date a service was incurred and the date the claim was processed.
Export PDF

5

7

Detail Payment
Help
Provides check transaction information for payments of ASO and SCSL-100 claims. Each transaction contains confidential, individually identifiable health information for the subscriber and claimant associated with the claim.
Export PDF

Detail Payment - Non Confidential
Help
Provides check transaction information for payments of claims for all funding arrangements. No individually identifiable health information is visible on this report.
Export PDF

Large Loss Claim Payments
Help
Provides a detailed profile of each claimant for a specific number of top claimants or above a chosen dollar threshold level.
Export PDF

Payments by Benefit Type
Help
Distributes reimbursement amounts based upon services offered under a health plan
Export PDF **3**

Payments By Month
Help
Distributes reimbursement amounts based on the month they are booked to the financial accounting system
Export PDF

Premium vs Claims - Paid
Help
Provides a monthly comparison between the booked claim expenses and the billed premium.
Export

- 1. Onscreen Help** – This text summarize the steps for selecting and running a report.
- 2. Report** – These icons/links open the option screen for the specified report. The report contains a single section of output. Results are displayed in an online format.
- 3. Compound Report** – These icons/links open the option screen for the specified report. The report contains multiple sections of output. Results are displayed in an online format.
- 4. Description** – This text explains the business purpose of the specified report.
- 5. Quick Export** – The *Export* links open the option screen for the specified report or compound report. Results are converted into .xls, .csv, .htm, or .txt file format. The formats are suitable for viewing in Microsoft Excel.
- 6. Quick PDF** – The *PDF* links open the option screen for the specified report. Results are converted into a .pdf file. PDF files are suitable for viewing in Adobe Reader.
- 7. Help** – These links open *Online Help* for the specified report.

Report Selections Screen

The screenshot shows the 'Report Selections Screen' in the Employer eServices application. The page title is 'Employer eServices®' and the breadcrumb trail is 'Reports Home > ECR > Custom Reports > Financial > Payments By Month'. The main heading is 'STEP 1: SELECT A POLICY NUMBER OR GROUP SEGMENT FILTER * (Required)'. Below this, there are instructions for selecting a policy number and a search field. A list of available policy numbers is shown, with '0000001111' selected. A red line with a circled '1' points to the 'Available' list. Below the search field, there are instructions for selecting a group segment filter. A red line with a circled '2' points to the 'Show Advanced Options' button. Below that, there are instructions for renaming the report, with a red line and circled '3' pointing to the 'Payments By Month' text field. A red line and circled '4' points to the 'Rename Report' button. At the bottom, there are 'Continue' and 'Cancel' buttons, with red lines and circled '5' and '6' pointing to them respectively.

1. **Required Steps** – These items set the conditions necessary to run the report. All reports require you to select the population and time period you want to investigate. Some reports require you to set additional parameters.
2. **Advanced Options** – This button displays any optional steps onscreen. Optional steps let you add more details to your report, limit the report to a more defined subset of the population, or both.
3. **Rename field** – This field contains the report’s name. The field is editable.
4. **Rename button** – This button implements any name change entered into the *Rename* field.
5. **Continue** – This button processes all the conditions established on this screen. If the conditions to process the report are all satisfied, the report’s results are generated; otherwise, another set of options are displayed to satisfy the remaining conditions.
6. **Cancel** – This button terminates the report request.

Processing Screen

The screenshot shows the 'Processing Screen' for a report named 'Payments By Month'. The page title is 'Your request is processing... Please Wait.' Below the title is a progress indicator consisting of five dots, with the second dot from the left being filled. The main content area contains the following information:

- 1. Report name: Payments By Month
- 2. Current status: Running Report
- 3. Report description: Distributes reimbursement amounts based on the month they are booked to the financial accounting system
- Please wait or choose one of the following actions:
 - 4. [Check status again](#)
 - 5. [Go to the Recent Reports Page while this report continues to process.](#)
 - 6. [Show report details](#)
 - 7. [Cancel](#)

1. **Name** – This is the name of the report for which results are currently being processed.
2. **Status Message** – This message indicates the reports current position within the overall processing cycle.
3. **Description** – This text provides a brief definition of the report’s business purpose.
4. **Check Status Again** – This link updates the report’s status. The status automatically updates approximately every 5 seconds.
5. **Go to Recent Reports** – This link opens the *Recent Reports* screen. The *Recent Reports* screen provides access to reports submitted within the past 60 days. Selecting this link does not interfere with the report currently being processed.
6. **Show Report Details** – This link opens the *Report Details* screen. The *Report Details* screen outlines the conditions for the report request. Selecting this link does not interfere with the report currently being processed.
7. **Cancel this Request** – This link terminates the report request.

Results Screen- Reports

The screenshot shows the Employer eServices interface. At the top, there are navigation tabs: Reports, Home, Reports, Custom Reports, Recent Reports, Help & Training, News, Tools, and Logout. Below this is a breadcrumb trail: Reports Home > ECR > Custom Reports > Financial > Payments By. A toolbar contains various icons for file management and data manipulation. Below the toolbar, there is a 'PAGE-BY: none' indicator and a 'Data rows: 7 Data columns: 5' status. The main content is a table with columns for Book Year/Month, Medical Payments, Managed Pharmacy Payments, Dental Payments, Capitation Payments, and Total Payments. The table data is as follows:

Book Year/Month	Medical Payments	Managed Pharmacy Payments	Dental Payments	Capitation Payments	Total Payments
2005-07	\$2,874,311	\$514,447	\$52,373	\$74	\$3,441,204
2005-08	\$3,523,784	\$518,207	\$71,010	\$117	\$4,113,118
2005-09	\$3,257,174	\$809,810	\$61,680	\$95	\$4,128,760
2005-10	\$3,055,719	\$550,988	\$55,916	\$95	\$3,662,719
2005-11	\$3,330,802	\$556,171	\$54,566	\$78	\$3,941,617
2005-12	\$2,918,793	\$531,569	\$56,472	\$86	\$3,506,920
Total	\$18,960,583	\$3,481,192	\$352,018	\$546	\$22,794,338

1. **File menu** – This menu provides access to a report’s file management features—including *Save*, *Print*, and *Export*.
2. **View menu** – This menu provides access to buttons and other controls that can be toggled into/from view. It also provides access to the graphing feature.
3. **Data menu** – This menu provides access to controls for editing a report’s results—including *Sort*, *Refresh*, and *Drill*¹.
4. **Format menu** – This menu provides access to the *Grid Options* dialog box.
5. **Toolbar** – The toolbar contains a set of graphical buttons that provide one-click access to an array of dynamic reporting features and other controls.
6. **Grid** – A grid displays the report’s results in a table.

¹The *Drill* feature is only available with *Expanded* services

Results Screen- Compound Reports

The screenshot shows the 'Managed Pharmacy Plan Performance' report in the Employer eServices system. Callout 1 points to the 'File' menu in the top navigation bar. Callout 2 points to the toolbar containing 'Print', 'Export', 'Refresh', and 'Re-prompt' buttons. Callout 3 points to the main data table. Callout 4 points to a 'Detail' link below the table.

Tier Level	Submission Method Category	Number of Claimants	Number of Prescriptions	Discounts	Ingredient Cost Paid Amount	Dispensing Fee	Sales Tax Amount	Deductible	Coinsurance/Copay	Ancillary Amount	Employee Cost Sharing PMPM	Net Paid	Net Paid Per Prescription	Net Paid PMPM
Tier 1	Retail	8,122	35,505	\$746,131	\$660,064	\$66,150	\$496	\$0	\$253,132	\$0	\$2.33	\$473,577	\$13.34	\$4.36
	Home Delivery	359	1,007	\$80,449	\$63,626	\$50	\$12	\$0	\$9,776	\$0	\$0.09	\$53,912	\$53.54	\$0.50
Tier 2	Retail	5,783	24,527	\$422,687	\$2,244,477	\$40,497	\$1,778	\$0	\$544,030	\$1,471	\$5.02	\$1,741,251	\$70.99	\$16.03
	Home Delivery	530	1,631	\$127,382	\$570,055	\$75	\$36	\$0	\$57,690	\$0	\$0.53	\$512,476	\$314.21	\$4.72
Tier 3	Retail	3,276	9,177	\$159,536	\$844,133	\$15,241	\$500	\$0	\$292,566	\$2,607	\$2.72	\$564,702	\$61.53	\$5.20
	Home Delivery	219	473	\$61,763	\$219,204	\$75	\$39	\$0	\$24,114	\$0	\$0.22	\$195,204	\$412.69	\$1.80

Tier Level	Number of Claimants	Number of Prescriptions	Discounts	Ingredient Cost Paid Amount	Dispensing Fee	Sales Tax Amount	Deductible	Coinsurance/Copay	Ancillary Amount	Employee Cost Sharing PMPM	Net Paid	Net Paid Per Prescription	Net Paid PMPM
Tier 1	8,258	36,512	\$826,579	\$723,690	\$66,200	\$507	\$0	\$262,908	\$0	\$2.42	\$527,490	\$14.45	\$4.86
Tier 2	6,040	26,158	\$550,068	\$2,814,532	\$40,572	\$1,814	\$0	\$601,720	\$1,471	\$5.55	\$2,253,728	\$86.16	\$20.75
Tier 3	3,395	9,650	\$221,298	\$1,063,337	\$15,316	\$539	\$0	\$316,680	\$2,607	\$2.94	\$759,905	\$78.75	\$7.00

Number of Claimants	Number of Prescriptions	Discounts	Ingredient Cost Paid Amount	Dispensing Fee	Sales Tax Amount	Deductible	Coinsurance/Copay	Ancillary Amount	Employee Cost Sharing PMPM	Net Paid	Net Paid Per Prescription	Net Paid PMPM
10,339	72,320	\$1,597,946	\$4,601,559	\$122,088	\$2,860	\$0	\$1,181,307	\$4,077	\$10.91	\$3,541,123	\$48.96	\$32.60

- File menu** – This menu provides access to all features available for compound reports—including *Print*, *Export*, *Refresh* and *Re-prompt*.
- Toolbar** – The toolbar contains a set of graphical buttons that provide one-click access to the *Print*, *Refresh*, *Re-prompt*, and *Export* features.
- Report Section** – Each section of a compound report is actually an individual report that can be opened separately via a link located below it.
- Section Hyperlink** – This hyperlink opens the specified section of the compound report. Once a section is opened, it can be formatted and manipulated using the full array of menu and toolbar options common to most reports.

Results Screen- Report Grid

Book Year/Month	Benefit Payment	Medical	Managed Pharmacy	Dental	Capitation	Total
	Metric	Payments	Payments	Payments	Payments	Payments
2005-07		\$2,874,311	\$514,447	\$52,373	\$74	\$3,441,204
2005-08		\$3,523,784	\$518,207	\$71,010	\$117	\$4,113,118
2005-09		\$3,257,174	\$809,810	\$61,680	\$95	\$4,128,760
2005-10		\$3,055,719	\$550,988	\$55,916	\$95	\$3,662,719
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2005-12		\$2,918,793	\$531,569	\$56,472	\$86	\$3,506,920
Total		\$18,960,583	\$3,481,192	\$352,018	\$546	\$22,794,338

1. **Attribute** – An attribute classifies a set of related values. For example, *Book Year/Month* is an attribute used to categorize a set of dates in which a claim was booked to the financial accounting system.
2. **Values** – A value identifies an exclusive subset of data. For example, *2005-07* is a value used to identify the year (2005) and month (07) in which claims were booked to the financial accounting system.
3. **Metric** – A metric is a measurement used to calculate report results (i.e., calculated values).
4. **Calculated Values** – Calculated values are the results of the report’s measurements (i.e., metrics). Calculated values are computed for any subsets of the population (i.e., values) displayed in the report, and are often shown in aggregate (i.e., grand total).
5. **Sort** – This button opens the *Sort* dialog box. The dialog box has controls for orientating results in ascending or descending order by up-to-3 attributes/metrics.
6. **Move** – These buttons reposition items within the report grid.
7. **Pivot** – This button switches specified items from the columns to the row of the report, and vice versa. Each attribute has its own *pivot* button; metrics, however, share a single *pivot* button.
8. **Page-by** – This button pulls a specified item from the report and place it into the *Page-by Axis* panel. The panel has controls to view results one value/metric at a time. Each attribute has its own *page-by* button; metrics, however, share a single *page-by* button.













Results Screen- Toolbar






Report Toolbar



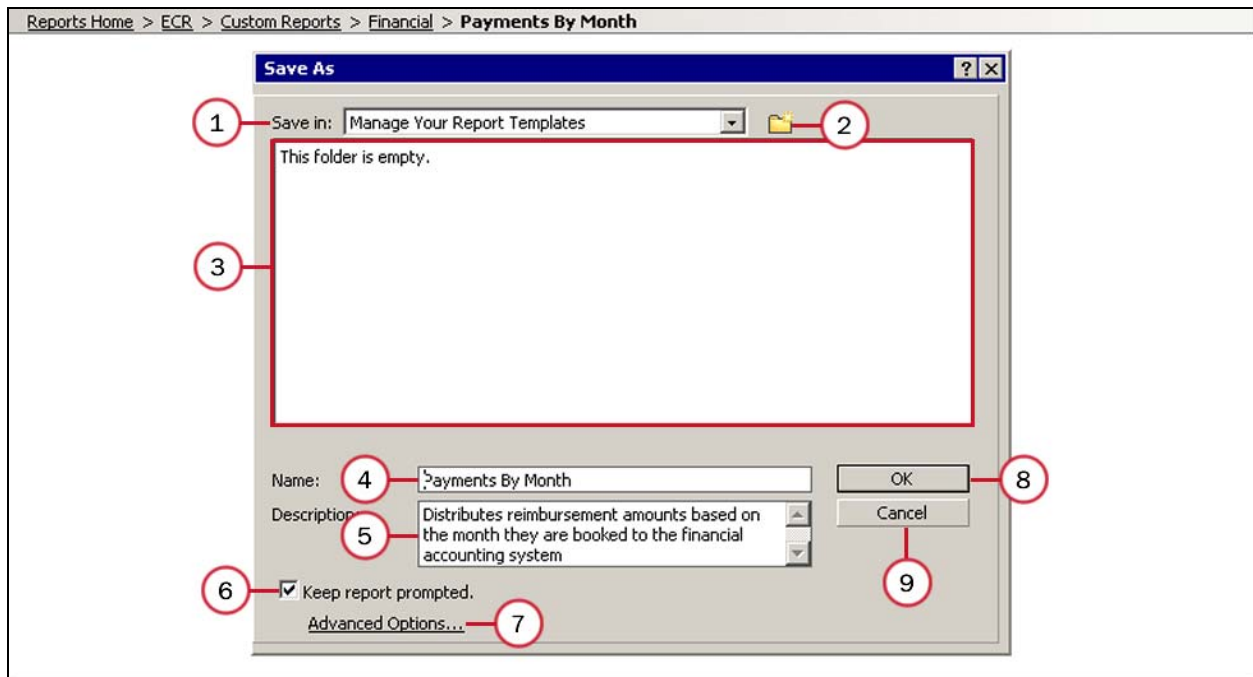
Compound Report Toolbar



Button	Name	Function
	Save	Opens the Save As dialog box. This option saves the report as a template or as a “static” copy.
	Print	Opens the <i>Print Options</i> screen. The screen contains options to create a printable version of the report.
	Undo	Returns the report to a previous state by reversing the effects of one or more commands.
	Redo	Provides the opposite function of <i>undo</i> . If a command is undone, it can be reestablished by selecting <i>redo</i> .
	Refresh	Re-executes the report against the records in the database.
	Reprompt	Opens the <i>Options</i> screen. Re-prompting provides the ability to change the original reporting conditions.
	Export	Opens the <i>Export Options</i> screen. The screen contains options to extract results into a Microsoft Excel file.
	PDF	Opens the PDF Options screen. The screen contains options to create a version of the report viewable in Adobe Reader.
	Swap Rows and Columns	Switches attributes/metrics from the report’s columns to its rows, and vice versa.
	Toggle Totals	Show/hide totals (or any calculation added using the edit totals feature) from the report grid.
	Edit Totals	Opens the Edit Totals dialog box. These options provide the ability to add one or more of the listed calculations into the report.
	Sort	Opens Sort dialog box. Sorting orientates results in ascending or descending order by up-to-3 attributes/metrics.

	Drill	Opens/closes the <i>Drill</i> panel. Drilling digs beneath the initial results to identify underlying details, or generalize your answer set by regrouping results into broader categories. The “Advanced Drill” option provides the power to add more details to your report. This feature is only available to customers with Expanded services.
	Grid	Displays results in a table.
	Graph	Displays results in a bar graph.
	Grid and Graph	Displays results in both a table and bar graph.
	Style	Provides various pre-set styles that alter a grid's color and font schema.
	Banding	Highlights every other row in a report grid to visually separate rows of data.
	Outline	Stratifies information contained in a grid by creating levels by which the report can be viewed separately.
	Thresholds	Toggles threshold amounts on the report between a visual alert system and the actual calculated amount.
	Attribute Forms	Reveals the actual names of attributes merged to appear under a single heading in the report grid.
	Merge Column Headers	Creates a single cell for items that are listed repeatedly across the column headings.
	Merge Row Headers	Creates a single cell for items that appear listed repeatedly across the row headings.
	Lock Column Headers	Keeps the report's headings onscreen while you scroll vertically through results.
	Lock Row Headers	Keeps the values in the leading row onscreen while you scroll horizontally through results.
	Page-by Axis	Opens/closes the <i>Page-by</i> panel. The panel contains tools to view results by each value of a specified attribute. You can also pull all metrics to view results one metric at a time.
	Report Filter	Opens/closes the <i>Report Filter</i> panel. The panel contains a summary of the conditions used to run the report.

Save Options Screen



1. **Save In** – This field/menu is used to identify the location in which the report will be stored. The location is editable.
2. **Create New Folder** – This button creates a subfolder within the folder specified in the *Save In* field.
3. **Folder Contents** – This area displays the names of reports/subfolders saved in a specified folder.
4. **Name** – This field contains the report's name. The field is editable.
5. **Description** – This field contains a brief definition of the report. The field is editable.
6. **Keep Report Prompted** – This checkbox determines if the report will be saved as a *template* (selected) or as a *static copy* (deselected).
7. **Advanced Options** – This link opens a set of conditions that make it possible to override the system's default *Save* settings.
8. **OK** – This button saves the report based upon the conditions set on this screen.
9. **Cancel** – This button closes the *Save Options* screen without saving the report.

Print Options Screen

The screenshot shows the 'Print options' screen for 'Payments By Month'. It includes a 'Header and Footer' section with an 'Edit Custom Settings' button (1). A 'Scaling' section (2) offers 'Adjust font to 100% of original size' (selected) and 'Fit to page' options for 'All rows' and 'All columns'. There are two checked checkboxes: 'Print cover page with filter details' (3) and 'Expand all page-by fields when printing' (4). A 'Hide advanced options' button (5) is present. A note states 'Paper size, orientation and margins should correspond to the browser settings.'. The 'Orientation' section (6) has 'Portrait' selected. The 'Paper size' dropdown (7) is set to 'Letter 8.5" x 11"'. The 'Margins (Inches)' section (8) shows input fields for Left, Right, Top, and Bottom, all set to 0.5. Below this are input fields for 'Maximum header size (Inches): 5.0' (9) and 'Maximum footer size (Inches): 5.0' (10). At the bottom, there is a checkbox for 'Do not prompt me again.' (11) and a 'Show Printable Version' button (12).

1. **Header and Footer** – This option contains a tool to modify content in the header and footer. Click *Edit Custom Settings* to open the utility.
2. **Scaling** – These options adjust the PDF's font size in order to fit the paper size.
3. **Print Cover Page with Filter Details** – When selected, this option includes a report's filter details in the exported file's output. *Filter Details* include any limits applied to a report's data..
4. **Expand all Page-by Fields when Printing** – When selected, this option includes all iterations of a report's *page-by* selections. If not selected, only the iteration currently displayed appears in the printable file. This option only appears when a *page-by* selection is made.

Print Options Screen continued

5. **Show/Hide Advanced Options** – This button alternately shows/hides options print options 6-10.
6. **Orientation** – This option sets the manner in which the report is oriented on the printed page.
7. **Paper Size** – This option sets the size of the paper on which the report is printed.
8. **Margins** – This option sets the amount of white space between an edge of the paper (left, right, top and bottom) and the printed content.
9. **Maximum Header Size (inches)** – This option sets the maximum amount of space, below the top margin, devoted to any header content.
10. **Maximum Footer Size (inches)** – This option sets the maximum amount of space, above the bottom margin, devoted to any footer content.
11. **Do Not Prompt Me Again** – This checkbox provides the option to set the options selected from this screen as the default options for printing a report.
12. **Show Printable Version** – This button opens a printable version of the report in a browser window.

Export Options Screen

The screenshot shows the 'Export Options' screen for a report titled 'Payments By Month'. At the top, there is a 'Help' link and the 'Employer eServices' logo. The main content area contains the following elements:

- Export:** A dropdown menu currently set to 'Whole report' (labeled 1).
- Export Grids To:** A group of radio buttons for file formats: 'Excel with plain text', 'CSV file format', 'Excel with formatting' (selected), 'HTML', and 'Plain text'. A 'Delimiter:' dropdown is set to 'Comma' (labeled 2).
- Export Metric Values As Text:** An unchecked checkbox (labeled 3).
- Export Headers As Text:** An unchecked checkbox (labeled 4).
- Export Filter Details:** A checked checkbox (labeled 5).
- Expand All Page-by Fields:** An unchecked checkbox (labeled 6).
- Remove Extra Column From Exported Grid:** A checked checkbox (labeled 7).
- Footnotes:** '(1) Excel only' and '(2) Excel with formatting only'.
- Do not prompt me again:** An unchecked checkbox (labeled 8).
- Export:** A button to initiate the export process (labeled 9).

1. **Export** – This menu determines the portion of the report that will be exported.
 - Whole Report
 - Portion Displayed Only
2. **Export Grids To** – These options are used to set the file format into which results are converted.
3. **Export Metric Values As Text** – This checkbox provides the option to format metric values (i.e., calculated results) as text for reports exported to Excel.
4. **Export Headers As Text** – This checkbox provides the option to format the contents of a report's headers as text for reports exported to Excel.
5. **Export Filter Details** – This checkbox provides the option to include a report's filter details in the output of your exported file. *Filter Details* include any limits applied to the report's data.
6. **Expand All Page-by Fields** – When selected, this option includes all iterations of a report's *page-by* selections. If not selected, only the iteration currently displayed appears in the exported file. This option only appears when a *page-by* selection is made.
7. **Remove Extra Column From Exported Grid** – This checkbox provides the option to automatically strip excess columns from reports exported to Excel with formatting.
8. **Do Not Prompt Me Again** – This checkbox provides the option to set the options selected from this screen as the default options for exporting a report.
9. **Export** – This button initiates the process of exporting the report based upon the options selected from this screen.

Recent Reports Screen

The screenshot shows the 'Recent Reports' screen in the Employer eServices application. The interface includes a navigation menu at the top with options like 'Reports Home', 'Automated Reports', 'Custom Reports', 'Recent Reports', 'Help & Training', 'News', 'Tools', and 'Logout'. Below the menu is a breadcrumb trail: 'Reports Home > ECR > .. > Membership By Month > Recent Reports'. The main content area is a table with columns for 'Name', 'Status', and 'Message Creation Time'. The table lists several reports, including 'Membership By Month' (Running Report), 'Managed Pharmacy Plan Performance' (Ready), and 'Payments By Month' (Ready and Error). To the right of the table are action buttons: 'Quick Export' (4), 'Quick PDF' (5), 'Report Details' (6), 'Remove' (8), and 'Refresh' (9). A 'Clear All' button (10) is located at the top right. A 'Show/Hide Child Reports' button (11) is located at the bottom right of the table. A 'Remove' checkbox (7) is also present next to the 'Remove' button. The table rows are:

Name	Status	Message Creation Time
Membership By Month	Running Report	6/12/06 9:11:44 AM
Managed Pharmacy Plan Performance	Ready	6/12/06 9:06:05 AM
Managed Pharmacy Plan Performance - Detail		6/12/06 9:07:05 AM
Managed Pharmacy Plan Performance - Subtotals by Tier		6/12/06 9:07:04 AM
Managed Pharmacy Plan Performance - Total		6/12/06 9:07:04 AM
Payments By Month	Ready	6/12/06 9:01:23 AM
Payments By Month	Error	6/12/06 9:00:37 AM

1. **Status Icons** – These icons indicate:
 - Whether the report is comprised of one section of output or multiple sections of output.
 - Whether the report is still processing or has finished processing.
 - Whether the report is ready for viewing after it finished processing, or if a processing error occurred.
2. **Report Links** – These links open the *Results* screen for a specified report.
3. **Status Messages** – These messages indicate a reports current position within the overall processing cycle.
4. **Quick Export** – This button opens the *Export Options* screen for the specified report. The *Export Options* screen contains features to convert the report into a file format suitable for viewing and editing in another software application (e.g., Microsoft Excel).
5. **Quick PDF** – This button opens the *PDF Options* screen for the specified report. The *PDF Options* screen contains features to convert the report into a file format suitable for viewing in Adobe Reader.
6. **Report Details** – This button opens the *Report Details* screen for the specified. The *Report Details* screen references the conditions used to run the report and produce its results.
7. **Remove checkbox** – These checkboxes provide a means to manually select reports for removal from this list. Works in conjunction with the *Remove* button.
8. **Remove button** – This button deletes reports selected to be removed from this list. Works in conjunction with the *Remove* checkboxes.
9. **Refresh** – This button updates the status of all reports in this list.
10. **Clear All** – This button clears all reports from this list. Confirmation is required before reports are deleted.
11. **Show/Hide Child Reports** – This button reveals information regarding each section of a compound report—including each section’s processing status.

Reporting Tools Screen

The screenshot shows the 'Reporting Tools' screen with the following sections:

- Section 1: Group Segment Filters**

Group Segment Filters make it easier to run reports on pre-defined portions of your organization. Do you want reports that focus on one part of your organization (e.g. hourly vs. salaried employees, East Coast vs West Coast, etc)? Leverage the business units you defined during case installation as "customer structure" to create filters that identify one or more of these units. Then, use the filters to create the focused reports you need.

Note: If you are unfamiliar with customer structure values associated with your group, please contact your account representative.

[Create or modify a Group Segment Filter](#) [Help](#)

[Import a Group Segment Filter](#) [Help](#)

[Share a Group Segment Filter](#) [Help](#)
- Section 2: Report Templates**

If you save a custom report you have run as a template, you can rerun it, at any time, and modify your original selections to create a similar report with an entirely different set of results. For example, imagine you created a report showing last month's medical payments for your retirees. You knew you'd need to run a similar report each month throughout the year, so you saved that report as a template. (Good idea.) Thanks to that little extra work up-front, now all you'll have to do is run your template each month and adjust the dates to reflect the most current month of data.

[View and manage your report templates](#)

[Learn how to create and use templates...](#)
- Section 3: Preferences**

Preferences let you modify the system's default settings for exporting, printing and viewing your custom reports. Is the screen's font size too small? Do you want more rows of results to show up on a single screen of your custom report? How about exporting without having to fill out the same options every time you do? Preferences lets you adjust all of these settings...and many more...to best suit your needs.

[Modify Preferences](#)

[Learn more about preferences...](#)

- 1. Create a Group Segment Filter** – This section of the *Reporting Tools* screen provides access to an editor for creating and managing *Group Segment Filters*. Typically, *Group Segment Filters* identify one or more discrete business units within an overall policy/group.

Import a Group Segment Filter – This page allows users to Import a *Group Segment Filter* by filling out a predefined Excel template (.xls).

Share a Group Segment Filter – This page allows users to Share a *Group Segment Filter* with another eCR user.
- 2. Manage Report Templates** – This section of the *Reporting Tools* screen provides access to a portion of the reporting application that stores saved custom report. If a custom report is saved as a template, it maintains all the option selections made when the report was originally run. The template can be reused, and its option selections modified, to create similar reports with an entirely different set of results.

3. **Set Preferences** – This section of the screen contains a link to a tool for modifying the default or existing settings for several categories of reporting features. The changes can be applied to all reports or limited to the current report.

Group Segment Filters- Screen 1

The screenshot shows the 'Group Segment Filter' interface. At the top, there is a navigation bar with links: Reports Home, Automated Reports, Custom Reports, Recent Reports, Help & Training, News, Tools, and Logout. Below this is a breadcrumb trail: ECR > Group Segment Filter.

The main content area is titled 'Create New Group Segment Filter'. It contains two input fields: '(*)Name:' (callout 1) and 'Description:' (callout 2). A 'Create' button (callout 3) is positioned to the right of the 'Description' field.

Below the form is a search section with a 'Search For Existing Filter:' label (callout 4), an input field (callout 4), and a 'Search' button (callout 5).

The first table, titled 'My Filters', has columns for 'My Filters' (callout 6), 'Description' (callout 9), and 'Modified'. It contains one row for 'Sample Group Segment Filter' (callout 8) with a date of '06/12/2006' (callout 10). Below the table is a summary bar: '* Total Filters In This Folder: 5' and 'Sort list: Click on My Filters or Modified column labels to sort.' (callout 7).

The second table, titled 'My Incomplete Filters', has columns for 'My Incomplete Filters' (callout 11), 'Description', and 'Modified'. It contains the text 'Your Filter Inbox is empty.' and a summary bar: '* Total Filters In This Folder: 0' and 'Sort list: Click on My Filters or Modified column labels to sort.'

1. **Name** – This field is used to enter a name for a new *Group Segment Filter*.
2. **Description** – This field is best used to enter a summary of the conditions used to identify the *Group Segment Filter's* population.
3. **Create** – This button opens a screen that contains the tools for defining a segment of the population.
4. **Search field** – This field provides a means to locate a filter within the list of *My Filters*. Type the partial or full name of the item into the *Search* field. The field works in conjunction with the *Search* button.
5. **Search button** – This button implements a look-up of the item entered into the *Search* field.
6. **Delete** – This button deletes the specified filter from the table.
7. **Copy** – This button opens a screen to rename and describe the filter. All the conditions used to define the population of the original filter are maintained in a renamed copy.
8. **Edit** – This button opens a screen containing the conditions set for this filter. Any of those conditions can be changed to alter the population defined by this filter.
9. **Description** – The description listed here is the one entered when the filter was created.
10. **Modified Date** – This date indicates when the filter was initially created or last edited.
11. **My Incomplete Filters** – This table lists *Group Segment Filters* that require further input.

Group Segment Filters- Screen 2

1. **Attributes** – These radio buttons reflect the various levels of customer structure from which expressions are built.
2. **Operators** – An operator is a mathematical function. It creates the logical connection between an *attribute* and its *selected elements* to form an expression.
3. **Elements** – This field lists all values associated with a specified attribute.
4. **Add to Selections** – This button moves highlighted items from the *Elements* field into the *Selected Elements* field.
5. **Deselect** – This button moves highlighted items from the *Selected Elements* field back into the *Elements* field.
6. **Selected Elements** – This field lists elements picked for this expression.
7. **Search field** – This field provides a means to locate an item within the list of *Elements*. Type the partial or full name of the item into the *Search* field. The field works in conjunction with the *Search* button.
8. **Search button** – This button implements a look-up of the item entered into the *Search* field.

Group Segment Filters- Screen 2 continued

9. **Append** – This button finalizes the current *expression* and adds it to an *Expression Group*.
10. **Expression Group** – An *Expression Group* consists of one or more *expressions*. The first expression listed within the group must identify a *Policy Number*.
11. **Expression** – An *expression* defines an identifiable portion of the population. It is comprised of an attribute, an operator, and one or more elements.
12. **Add Attribute** – This button/link enables another *attribute* to be added to the *Expression Group*.
13. **Delete Expression** – This button removes a specified *expression* from the *Expression Group*.
14. **Add New Expression Group** – This button opens another *Expression Group*. This feature is useful for creating a filter for multiple subsets of a policy/group.
15. **Delete Expression Group** – This button removes the *Expression Group* from the filter.
16. **Save Group Segment Filter** – This button finalizes the filter based upon the conditions set on this screen.
17. **Cancel** – This button closes this screen without implementing any changes to the filter.

Sharing Group Segment Filters

Employer eServices®

Reports Home Automated Reports Custom Reports Recent Reports Report Admin Help & Training News Tools Logout

ECR > Reporting Tools > Share a Group Segment Filter [Group Segment Filter Home](#)

Share a Group Segment Filter

This page lets you share a Group Segment Filter (GSF) with anyone who uses eServices Customer Reporting. Sharing filters alleviates the time and costs of duplicate work efforts, and lets you work more collaboratively across your team. [Help](#)

Step 1: Select a Group Segment Filter to Share

Click the name of the filter you want to share from the list below. The filter you choose will appear in the **Selected GSF** field. Only 1 selection is permitted. [Help](#)

Your Filter Inbox is empty. 1

Selected GSF: 2

Step 2: Identify the Person to Share this Filter With

Type a User 3 to the field below, and click the **Find User** button. The name of the person associated with the ID will appear in the **Selected User** field - confirm this 3 person with whom you want to share the filter. If it is correct, click the **Share** button. IDs are case sensitive. To obtain a person's User ID, you must contact that person directly. [Help](#)

User ID: 6 4

Selected User: 5

6 7

1. **Filter Inbox** – The filter inbox lists all of your available filters.
2. **Selected GSF**– This field shows the filter you have selected to share.
3. **User ID**– In this field you will enter the User ID of the person you want to share a filter with.
4. **Find User**– This button will find the user based on the User ID you entered.
5. **Selected User**– This field will display the name of the user associated with the User ID.
6. **Share**– This button will share the filter with the selected user.
7. **Cancel**– This button will cancel the Share Group Segment Filter process.

Importing Segment Filters

Employer eServices®

Reports Home Automated Reports Custom Reports Recent Reports Report Admin Help & Training News Tools Logout

ECR > Reporting Tools > Import a Group Segment Filter [Group Segment Filter Home](#)

Import a Group Segment Filter

This page lets you create a Group Segment Filter by importing a file that has been specially formatted to identify a subset of claimants. This process lets you define a segment of your population offline in Excel, and import them for your reporting needs. [Help](#)

Step 1: Locate the File to Import

Click the **Browse** button to locate the Excel (.xls) file containing the filter you have built. Filters must be built using the preformatted Excel template to import successfully. If your filter is not already setup, [download the template](#), enter your filter information, save the file, and click the Browser button to locate it. [Help](#)

* Path:

Step 2: Name and Describe the Filter

Type a name and a brief description into the fields below to identify the filter, and then click the **Import** button to upload the file. Once imported, you can use the filter to run a report or you can edit it from the Group Segment Filter Screen. [Help](#)

* Filter Name:

Filter Description:

* Required field

1. **Path** – In this field type in the path to the Excel (.xls) file containing the filter you have built or, if you choose the **Browse** button, the path to the Excel (.xls) file containing the filter you have built will show.
2. **Browse** – This button allows you to browse for the Excel (.xls) file containing the filter you have built.
3. **Filter Name** – In this field type in a name for the filter you are importing.
4. **Filter Description** – In this field type in a description for the filter you are importing.
5. **Import** – This button will import the filter you have selected.
6. **Cancel** – This button will cancel the Import Group Segment Filter process.

Manage Report Templates Screen

Employer eServices®

Reports Home Automated Reports Custom Reports **Report Reports** Help & Training News Tools Logout

Reports Home > ECR > Manage Your Report Templates

1

2

Locate and open the report template you want to run. Templates let you re-run reports, at any time, and modify your original selections to create a similar report with an entirely different set of results.

Click the **report name** to produce the report with online editing tools and the option to save the report as a template.
Click the **Export** link to produce this report as an Excel, CSV or HTML document.
Click the **PDF** link to produce this report as an Adobe PDF document suitable for printing.

Learn how to create and use templates 3

4 **Sample Folder**
Help
This folder and its description were created while saving a report. A folder can contain templates and subfolders.

6

5 **Sample Report Name**
Help
This description was created while saving the report. The template contains the original conditions used to run the report. These conditions can be modified to create a similar report for a different population, time period, etc.

7 **Export** **PDF** 8

1. **Onscreen Help** – This text summarizes the steps needed to select, export, and get more help with report templates reports.
2. **Edit Display** – These icons toggle the screen between displaying content in an icon or list format.
3. **Learn How to Create and Use Template** – Opens *Online Help* for using a template to run a report.
4. **Folders** – These icons/links open the templates and subfolders saved within it. Folders are created while saving a report as a template.
5. **Report Templates** – These icons/links open the option screen for the specified report. The report contains a single section of output. Results are displayed in an online format.
6. **Description** – This text explains the purpose of the specified folder/report.
7. **Quick Export** – The *Export* links open the option screen for the specified template. Results are converted into an .xls (Excel), .csv (comma separated value), .htm (hypertext markup) or .txt (text) file format. All of these file formats are suitable for viewing in Microsoft Excel.
8. **Quick PDF** – The *PDF* links open the option screen for the specified template. Results are converted into a .pdf file. PDF files are suitable for viewing in Adobe Reader.

Preferences Screen

The screenshot shows the Employer eServices interface. At the top, there is a navigation bar with links: Reports Home, Automated Reports, Custom Reports, Recent Reports, Help & Training, News, Tools, and Logout. Below this is a breadcrumb trail: Reports Home > ECR > .. > Custom Reports > User Preferences. The main content area is titled 'Grid display' and contains several settings: 'Grid style' (a dropdown menu set to 'Use the format stored in the report definition'), a note stating 'Note: Selecting "use my selected default grid style" will disable all custom grid formatting in Reports.', 'Default grid style' (a dropdown menu set to 'Squares'), 'Maximum rows in grid' (a text input field with '50'), 'Maximum columns in grid' (a text input field with '10'), 'Show attribute form names' (a dropdown menu set to 'Read from report'), and five checked checkboxes: 'Show pivot buttons', 'Show sort buttons', 'Enable sorting by attribute forms that are not displayed on the grid', 'Automatic page-by', and 'Use images for depicting expand and contract in outline mode'. At the bottom, there is an 'Apply' button, a dropdown menu for the scope of the change (set to 'Apply to all projects on the current server'), and a 'Load Default Values' button. Red circles with numbers 1 through 5 are overlaid on the image to highlight specific elements: 1 points to the breadcrumb trail, 2 points to the 'Grid display' title, 3 points to the 'Apply' button, 4 points to the scope dropdown menu, and 5 points to the 'Load Default Values' button.

1. **Category links** – These links open the adjustable settings for a specified feature.
2. **Settings** – These are the adjustable conditions for a specified category.
3. **Apply button** – This button implements the settings for the specified category. The scope of this change is determined by the option selected from the *Apply* menu.
4. **Apply menu** – This drop-down menu provides two options for implementing any adjustments made to a category's settings:
 - *To All Projects* – Applies the settings to all existing and future reports.
 - *To Current Project* – Applies the settings to the report presently open.
5. **Load Default Values** – This button reverts all the category's setting to the original selections/amounts.

Online Help

The screenshot shows the Employer eServices Online Help page for Customer Reporting. It includes a top navigation bar with tabs for HOME, REPORTS, HOW TO, GLOSSARY, eLEARNING, and REFERENCE. Below this is a secondary navigation bar with links for HOME, FAQs, KNOWN ISSUES, and RELEASE NOTES. The main content area is titled 'CUSTOMER REPORTING ONLINE HELP' and contains introductory text, a 'How to Find an Answer' section with a bulleted list of categories, and a 'Need More Help?' section with contact information for phone and email support.

1. **Help Topic tabs** – These tabs open the main page for the specified topic.
 - *Home* – Contains general contact information, frequently asked questions (FAQs), a list of known issues, and release notes.
 - *Reports* – Defines and details each report.
 - *How To* – Provides a step-by-step walk through of the reporting tool's features and functions.
 - *Glossary* – Defines the attributes, values and metrics found in your reports.
 - *eLearning* – Provides ways to enhance your reporting skills with self-guided, online tutorials.
 - *Reference* – Provides access to downloadable support materials.
2. **Secondary Navigation** – These links reference the subtopics available within a chosen *help topic*. The links open *help content* for the specified subtopic.
3. **Help Content** – This area of the screen contains the supporting text for the specified topic.