



Cost & Utilization Reporting

At-a-Glance

version 4.4



This At-a-Glance document is for Employers and Brokers with Standard, Select, or Expanded customer reporting services and is designed to provide a high-level visual orientation to the reporting application's screens and features.

This document is not intended as an instructional guide for running, saving, exporting reports, etc. 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 reference materials are available for topics not covered by this document including Online Help & eLearning tutorials.

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What is eServices Customer Reporting?

Employer eServices Customer Reporting (eCR) is a web-based system for viewing and/or generating cost and utilization reports based on reliable and up-to-date paid claims data (including a rolling 36 months of historical claim data). The system is accessible 24 hours a day, seven days per week, with the exception of down time for data loads and maintenance.

Reports are classified into four main categories: Financial Reports, Pharmacy Reports, Medical Reports, and Membership Reports.

The reports available depend on the level of reporting:

- Standard & Select – customized report parameters deliver more detailed data and membership/utilization information
- Expanded – variety of report templates and levels of information designed to facilitate utilization analysis and provide detailed performance information on the plans, network, medical management, and managed pharmacy programs

Reports Home Screen

The screenshot shows the Employer eServices Reports Home Screen. At the top is a navigation bar (1) with links: Reports Home, Automated Reports, Custom Reports, Recent Reports, Help & Training, News, Tools, and Logout. Below the navigation bar is a welcome message for Genda Clark. The main content area is divided into several sections. On the left, there are three main sections: 'View Automated Reports' (2) with a link to 'All Policies excl UHG RR', 'Run Custom Reports' (3) with a list of report categories like Financial, Premium vs Claims Incurred, and Medical, and 'Recent Reports' (4) which is currently empty. On the right, there are three sections: 'Help & Training Resources' (5) with links like 'Maintenance Period' and 'Help with a Specific Report', 'Reporting News' (6) with a list of news items, and 'Reporting Tools' (7) with links like 'Create and Modify Group Segment Filters' and 'Manage Your Report Templates'. The bottom of the page contains a disclaimer about UHC's PBI & PHI.

1. Navigation Bar

This bar is the primary vehicle for getting from one portion of the site to another. It appears at the top of almost every screen.

2. View Automated Reports

This section provides access to the most recent set of system-generated reports. Folders are dynamically updated to display the most recent delivery month of automated reports. This link opens the *Automated Reports* screen for the specified delivery month.

3. Run Custom Reports

This section provides a starting point for running custom reports. The folders in this section represent the four main categories of reports. The text in parentheses is dramatically updated to indicate the most current month of data available to run reports in the specified category.

4. Recent Reports

This section provides direct access to the two most recent custom reports.

(continued on next page)



The screenshot shows the Employer eServices web application interface. The top navigation bar includes links for Reports Home, Automated Reports, Custom Reports, Recent Reports, Help & Training, News, Tools, and Logout. A welcome message for Glenda Clark is displayed. The main content area is divided into several sections:

- View Automated Reports:** Includes a link for "All Policies excl UHG RL" and a description of automated reports.
- Run Custom Reports:** Lists various report types such as Financial, Premium vs Claims Incurred, Claim Expenses by Size of Payment, and others.
- Recent Reports:** A section for viewing recently created reports.
- Help & Training Resources:** Contains links for maintenance periods, frequently asked questions, glossary, and other resources.
- Reporting News:** A section for the latest reporting news and updates.
- Reporting Tools:** A section for various reporting utilities, including filters, templates, and preferences.

Numbered callouts (1-7) highlight specific features: 1 points to the top navigation bar; 2 points to the "All Policies excl UHG RL" link; 3 points to the "Run Custom Reports" section; 4 points to the "Recent Reports" section; 5 points to the "Help & Training Resources" section; 6 points to the "Reporting News" section; and 7 points to the "Reporting Tools" section.

5. Help & Training Resources

This section contains various means of getting help with the reporting application including links to online reference material and tutorials.

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.

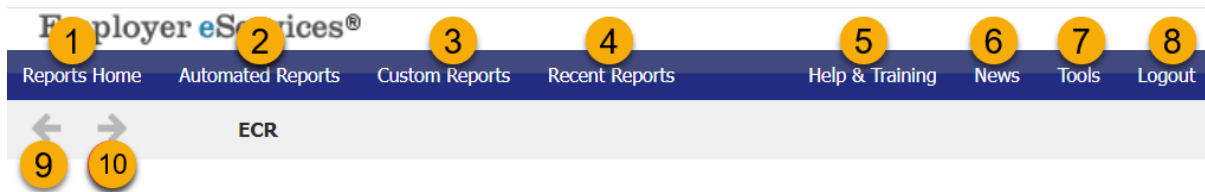
7. Reporting Tools

This section of the screen contains links to key utilities:

- Create and Modify Group Segment Filters
- Import a Group Segment Filter
- Share a Group Segment Filter
- Manage Your Report Templates
- Review and change your preferences
- Policy Number Lookup



Navigation Bar



1. **Reports Home**
This link opens the reporting application's default home page.
2. **Automated Reports**
Use this link to access your system-generated reports.
3. **Custom Reports**
Use this link to 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**
Use this link to create a Group Segment Filter, access your report templates, and modify your preferences.
8. **Logout**
This link terminates the reporting session.
9. **Back**
This link displays the previous screen.
10. **Forward**
This link displays the next screen.



Automated Reports Screen

Employer eServices®

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

Automated Reports

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. **1**

Click  to open a report as a Microsoft Excel spreadsheet.

Click the [Help](#) link to learn more about the reports.

	Name	Created Date	Type	TotalSize
Help	Subrogation Report 2	2/7/2022 9:00:19 AM	Report	8 KB
Help	Shared Savings Report Summary	2/7/2022 5:00:21 PM	Report	159 B
Help	ANALYTICS AND RECOVERY 2 2022	2/11/2022 5:00:14 PM	Report	21 KB
Help	Executive Affordability Scorecard FEB	2/21/2022 9:00:52 AM	Report	341 KB

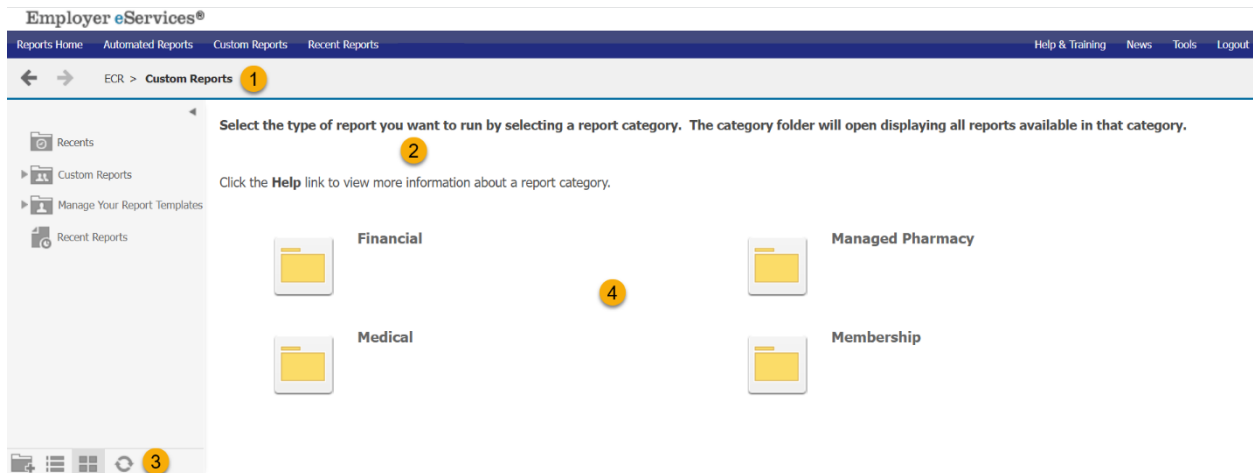
3

- 1. Onscreen Help**
This text summarizes the steps needed to view, export, and get more help with automated reports.
- 2. Report**
This link opens the results of the specified report.
- 3. Help**
These links open Online Help for automated reports.
- 4. Export**
This icon converts the specified report into a downloadable .xls (Excel) file.
- 5. Created Date**
The dates shown in this column indicate the point in time an automated report was produced.
- 6. Type**
This column indicates if the item in a specified row is a folder or a report.
- 7. Total Size**
The KB (kilobyte) amounts in this column indicate a report's file size.



Custom Reports Screen

Folder Level



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



Report Level

The screenshot displays the 'Employer eServices' web application interface. The top navigation bar includes links for 'Reports Home', 'Automated Reports', 'Custom Reports', 'Recent Reports', 'Help & Training', 'News', 'Tools', and 'Logout'. The breadcrumb trail shows 'ECR > Custom Reports > Financial'. The left sidebar contains a tree view with categories like 'Recents', 'Custom Reports', 'Financial', 'Premium vs Claims-Incur', 'Managed Pharmacy', 'Medical', 'Membership', 'Manage Your Report Templates', and 'Recent Reports'. The main content area is titled 'OR' and contains instructions: '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 policy number and other optional parameters for the report.' Below this, there are several report cards, each with an icon, a title, a description, and links for 'Help', 'Export', and 'PDF'. The report cards are: 'Premium vs Claims-Incurred - UNDERWRITING', 'Claim Lag Study', 'Claim Expenses by Size of Payment', 'Detail Payment', 'Detail Payment - Non Confidential', and 'Financial Managed Ad Hoc'. Numbered callouts are placed over the interface: 1. Over the instruction text; 2. Over the 'Premium vs Claims-Incurred' report icon; 3. Over the 'Claim Lag Study' description; 4. Over the 'Export' link of the 'Claim Expenses by Size of Payment' report; 5. Over the 'PDF' link of the 'Claim Expenses by Size of Payment' report.

1. Onscreen Help

This text summarizes 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. Description

This text explains the business purpose of the specified report.

4. Quick Export

The *Export* link displays when you hover over a report icon. When clicked, it opens the option screen for the specified report or compound report. Results are converted into .xls, .csv, .html, or .txt file format. The formats are suitable for viewing in Microsoft Excel.

5. Quick PDF

The *PDF* link displays when you hover over a report icon. When clicked, it opens the option screen for the specified report. Results are converted into a .pdf file. PDF files are suitable for viewing in Adobe Reader.



Report Selections Screen

Employer eServices®

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

ECR > Custom Reports > Financial > **Claim Expenses by Size of Payment**

Step 1. SELECT A POLICY NUMBER OR GROUP SEGMENT FILTER * (Required) 1

Select a Policy Number
A Policy Number typically contains information for a company's full claimant population. To select a policy, simply double-click it from the Available list or use the Search field to locate a policy. [Help](#)

☐ Label the policies you've selected

Search for: ☐ Match case

Available:

- 000000
- 00
- 000000000
- 000000001
- 000000002
- 000000003
- 000000005
- 000000000

Selected: (none)

OR Select a Group Segment Filter
A Group Segment Filter contains information for a subset of a company's claimant population. The filters listed here were created by you in a separate process. [Help](#)

Rename Report: Claim Expenses by Size of Payment 2

Continue 3 Cancel 4 Show Advanced Options 5

Step 2. SELECT A DATE TYPE (Required) 1

Service dates indicate when services were rendered (i.e., a claim was incurred). **Book dates** indicate when claim payments are entered into the financial accounting system. You'll select the actual dates (years/months) after you click CONTINUE. [Help](#)

This option allows only one selection.

- ☐ Service Dates
- ☐ Book Dates
- ☐ Service and Book Dates

1. Required fields

Step 1– Select a Policy Number or Group Segment Filter and Step 2 – Select a Date Type. 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. Rename Report

This field contains the report's name and is editable.

3. Continue

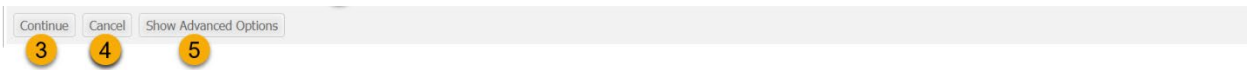
This button processes all the conditions established on this screen. If the conditions to process the report are all satisfied, the report's results are generated; otherwise, another set of options is displayed to satisfy the remaining conditions.

4. Cancel

This button terminates the report request.

(continued on next page)





5. Show Advanced Options

This button displays any optional steps onscreen. NOTE: These options are not available for Core reports.

Optional steps let you:

Employer eServices®

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

ECR > Custom Reports > Financial > Claim Expenses by Size of Payment

Step 3. ADD MORE DETAILS TO THIS REPORT **A**

Adding details lets you view results for topics beyond the original scope of this report. For example, selecting "Gender" lets you see how results are distributed amongst "males" and "females".
This option cannot accept more than 6 selections.

Available:

- Master Group Number
- Policy Number
- Suffix
- Account
- Plan Variation
- Report Code
- Franchise Code 1
- Franchise Code 2

Selected: (none)

Step 4. LIMIT THE REPORT'S RESULTS. **B**

Limiting your report's results lets you target selected data values. For example, if you select "Employment Status" from the list below, you can limit results to active or retired employees. You'll select the actual values after you click CONTINUE.

Available:

- Customer Specific Identifier 2 - Exclude
- Employment Status - Include
- Funding Arrangement Category - Include
- Gender - Include
- Healthcare Cost Category - Include
- HMO Account Division - Include
- HMO Account Division - Exclude
- Market Hierarchy

Selected: (none)

A. Add More Details To This Report

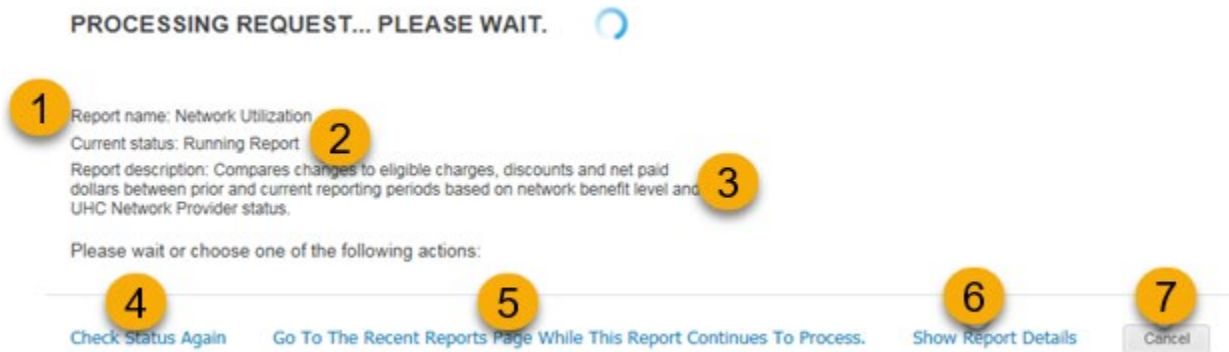
Can add up to 6 selections. Options vary by report.

B. Limit The Report's Results

Define a subset of the population. Options vary by report.



Processing Screen



1. **Name**
This is the name of the report for which results are currently being processed.
2. **Status Message**
This message indicates the report's current position within the overall processing cycle.
3. **Description**
This text provides a brief description of the report's business purpose.
4. **Check Status Again**
This link updates the report's status. The status automatically updates approximately every five seconds.
5. **Go to Recent Reports Page While This Report Continues to Process**
This link opens the *Recent Reports* screen. The *Recent Reports* screen provides access to reports submitted within the past 30 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 link terminates the report request.



Load Labels

Employer eServices®

Reports Home Automated Reports Custom Reports Recent Reports Help & Training News Tools Logou

← → ECR > Custom Reports > Financial > **Claim Lag Study**

Step 1. SELECT A POLICY NUMBER OR GROUP SEGMENT FILTER * (Required)

Select a Policy Number
A Policy Number typically contains information for a company's full claimant population. To select a policy, simply double-click it from the Available list or use the Search field to locate a policy. [Help](#)

☒ Load Labels **1**
☐ Label the policies you've selected **2**

Search for: ☐ Match case

Available:

Selected: (none)

1. Load Labels

Provides the listing of policy numbers you have saved. You can also rename a label as well as delete a label.

2. Label the policies you've selected

Allows you to save frequently used policy numbers. You can name the policy number as well as set as a default.



Results Screen

Reports

Employer eServices®

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

ECR > Custom Reports > Financial > Payments By Month

REPORT HOME TOOLS DATA GRID Last update: 12/4/17 10:12:34 AM

Data rows: 6 | Data columns: 4

Book Year/Month	Benefit Payment	Medical Payments	Managed Pharmacy Payments	Dental Payments	Total Payments
2010-10		\$301,033	\$64,464	\$34,660	\$400,157
2010-11		\$396,469	\$64,856	\$36,909	\$498,234
2010-12		\$381,055	\$70,507	\$35,285	\$486,846
2011-01		\$195,462	\$60,095	\$16,180	\$271,738
2011-02		\$75,595	\$0	\$5,945	\$81,539

1. Toolbar

The toolbar contains a set of drop-down menus that provide one-click access to an array of dynamic reporting features and other controls.

2. Grid

A grid displays the report's results in a table.

Compound Reports

Employer eServices®

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

ECR > Custom Reports > Managed Pharmacy > Managed Pharmacy Plan Performance

DOCUMENT HOME TOOLS DATA Last update: 12/4/17 10:23:17

Managed Pharmacy Plan Performance

Managed Pharmacy Plan Performance - Detail

Tier Level	Submission Method	Number of Claims	Number of Prescriptions	Discounts	Ingredient Cost Paid Amount	Dispensing Fee	Sales Tax Amount	Deductible/Coinsurance/Copay	Ancillary Amount	Employee Cost Sharing PMPM	Plan Net Paid	HRA Net Paid	Total Net Paid	Plan Net Paid Per Prescription	HRA Net Paid Per Prescription
Tier 1	Home Delivery	939	4,506	\$183,621	\$84,583	\$5,625	\$562	\$7,983	\$58,099	\$0	\$4,28	\$24,687	\$0	\$24,687	\$5.48
Tier 1	Home Delivery	256	1,256	\$165,670	\$142,187	\$84	\$569	\$4,776	\$28,118	\$0	\$2,13	\$109,946	\$0	\$109,946	\$87.54
Tier 2	Home Delivery	328	861	\$94,776	\$417,675	\$890	\$593	\$7,320	\$34,275	\$0	\$2,69	\$377,563	\$0	\$377,563	\$438.52
Tier 2	Home Delivery	173	564	\$70,343	\$252,672	\$34	\$1,224	\$237	\$32,635	\$0	\$2,13	\$221,058	\$0	\$221,058	\$391.95
Tier 3	Home Delivery	341	697	\$19,990	\$105,428	\$870	\$421	\$5,951	\$37,498	\$0	\$2,81	\$63,268	\$0	\$63,268	\$90.77
Tier 3	Home Delivery	144	410	\$44,069	\$151,378	\$43	\$1,047	\$2,831	\$42,174	\$0	\$2,91	\$107,463	\$0	\$107,463	\$262.11

Managed Pharmacy Plan Performance - Subtotal by Tier

Tier Level	Number of Claims	Number of Prescriptions	Discounts	Ingredient Cost Paid Amount	Dispensing Fee	Sales Tax Amount	Deductible/Coinsurance/Copay	Ancillary Amount	Employee Cost Sharing PMPM	Plan Net Paid	HRA Net Paid	Total Net Paid	Plan Net Paid Per Prescription	HRA Net Paid Per Prescription
Tier 1	996	5,752	\$349,291	\$226,770	\$5,708	\$1,131	\$12,759	\$96,216	\$0	\$6,41	\$134,633	\$0	\$134,633	\$22.37
Tier 2	419	1,425	\$165,118	\$670,347	\$924	\$1,818	\$7,557	\$66,910	\$0	\$4,82	\$598,622	\$0	\$598,622	\$420.09
Tier 3	416	1,107	\$64,059	\$256,806	\$912	\$1,468	\$8,782	\$79,672	\$0	\$5,73	\$170,732	\$0	\$170,732	\$154.23

1. Toolbar

The toolbar contains a set of graphical buttons providing one-click access to the *Print*, *Refresh*, *Re-prompt*, and *Export* features.

2. Reports Section

Each section of a compound report is actually an individual report that can be opened separately via a link located below it.

3. Section Hyperlink

This hyperlink opens the specified section of the compound report. Once opened, a section can be formatted and manipulated using the full array of menu and toolbar options common to most reports.



Report Grid

Employer eServices®

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

ECR > Custom Reports > Financial > Payments By Month

REPORT HOME TOOLS DATA GRID Last update: 12/4/17 10:12:34 AM

Data rows: 6 | Data columns: 4

Book Year/Month	Benefit Payment	Medical Payments	Managed Pharmacy Payments	Dental Payments	Total Payments
2010-10		\$301,033	\$64,464	\$34,660	\$400,157
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2010-12		\$381,055	\$70,507	\$35,285	\$486,846
2011-01		\$195,462	\$60,095	\$16,180	\$271,738
2011-02		\$75,595	\$0	\$5,945	\$81,539
Total		\$1,349,613	\$259,921	\$128,979	\$1,738,514

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. Move

This button repositions items within the report grid.

6. 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.

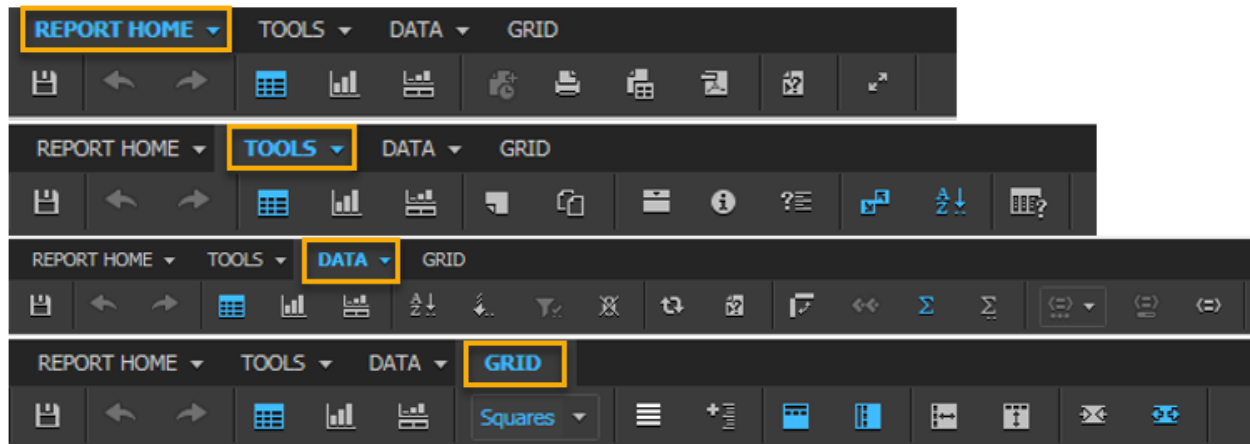
7. Page-by








This button pulls a specified item from the report and places 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.











Report Toolbars and Icons

The Home toolbar is the default and displays with custom report results. Other toolbars are available by clicking on the appropriate tabs.
















Icon	Title	Description
	Save	Stores a copy of the report definition to the Recent Reports section of the website.
	Print	Opens a second browser window with options to create a hard copy of your report.
	Undo	Cancels your last action.
	Redo	Restores the last undo action.
	Refresh	Reproduces the report using new data.
	Re-prompt	Displays a page where you can reproduce the report based on new criteria.
	Export	<p>Opens a second browser window with options to send results to third-party software for further data manipulation.</p> <p>Note: You can also use this feature to save a copy of your results to your hard drive or removable disk.</p>



	PDF	Opens a second browser window with the option to create a Portable Document Format (PDF) version of the report.
	Show Totals	Moves the totals display in the column after the metrics column.
	Edit Totals	Changes the Totals and/or Subtotal display.
	Sort	Sorts reports results from ascending to descending values.
	Drill	Displays details on summarized information appearing in report results.
	Grid	Changes your report results display to a table format. This is a dynamic icon and is only displayed if the report is displayed in graph format.
	Graph	Changes your report results display to a graph format. This is a dynamic icon and is only displayed if the report is displayed in grid format.
	Grid and Graph	Changes your report results display to both graphic and table format.
	Outline	Changes the report results display to appear in an outline format.
	Merge Column Headers	Combines the column headers.
	Merge Row Headers	Combines the row headers.
	Lock Column Headers	Locks the current column header display.
	Lock Row Headers	Locks the current row header display.
	Page-by Axis	Changes the report results display to view one group of element data at a time.



	Report Filters	Limits report results to values specified.
	Notes	Displays any notes associated with the report.
	Related Reports	Displays list of related reports.
	Report Details	Displays details used in creating the report.
	Option Details	Displays options used in creating the report.
	Show Pivot Buttons	Turns the display of pivot buttons on or off on the displayed report.
	Report Options	Provides ability to set preferences for the display of Report Options such as Headers and View.
	Swap Rows and Columns	Provides ability to interchange rows and columns.
	Visual Threshold Editor Functions	Displays icons used in conjunction with each other in the Visual Threshold editor.
	Banding	Provides ability to add Banding to report rows.
	AutoFit to Contents	Changes your report results display to the contents size of the report.
	Full Screen	Allows you to view reports in full screen. Reverse is Normal Screen Mode.
	AutoFit to Window	Changes your report results display to the entire window.



Save Options Screen

1. **Save In**
This field/menu is used to identify the location where 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 description 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.



Print Options Screen

- 1. Scaling**
These options adjust the PDF's font size in order to fit the paper size.
- 2. Orientation**
This option sets the manner in which the report is oriented on the printed page.
- 3. Print Cover Page with Filter Details and Location**
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. Header and Footer**
This option contains a tool to modify content in the header and footer. Click *Edit Custom Settings* to open the utility.
- 5. Show/Hide Advanced Options**
This button alternately shows/hides print options (options 6-9)

(continued on next page)



Advanced Print Options

The screenshot shows the 'Advanced Print Options' dialog box. It contains the following elements:

- Paper size:** A dropdown menu set to 'Letter 8.5" x 11"', marked with a yellow circle containing the number 6.
- Margins (Inches):** Four input fields for Left, Right, Top, and Bottom, all set to '0.5', marked with a yellow circle containing the number 7.
- Maximum header size (Inches):** An input field set to '5.0', marked with a yellow circle containing the number 8.
- Maximum footer size (Inches):** An input field set to '5.0', marked with a yellow circle containing the number 9.
- Embed fonts:** A checkbox that is currently unchecked.
- Do not prompt me again:** A checkbox at the bottom left, marked with a yellow circle containing the number 10.
- Show Printable Version:** A button at the bottom right, marked with a yellow circle containing the number 11.

6. Paper Size

This option sets the size of the paper on which the report is printed.

7. Margins

This option sets the amount of white space between an edge of the paper (left, right, top, and bottom) and the printed content.

8. Maximum Header Size (inches)

This option sets the maximum amount of space below the top margin devoted to any header content.

9. Maximum Footer Size (inches)

This option sets the maximum amount of space above the bottom margin devoted to any footer content.

10. 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.

11. 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' window. At the top, it says 'Payments By Month'. Below this, there's a dropdown menu for 'Export:' set to 'Whole report' (callout 1). To the right is a button 'Export Header and Footer: Edit Custom Settings...'. Below the dropdown is a group of radio buttons for file formats: 'Excel with plain text', 'CSV file format', 'Excel with formatting' (selected), 'HTML', and 'Plain text'. A red box highlights these options (callout 2). Next to 'Plain text' is a 'Delimiter:' dropdown set to 'Comma'. To the right, under 'Excel options:', there are checkboxes for 'Export metric values as text' (callout 3) and 'Export headers as text' (callout 4). Below that, under 'Excel with formatting options:', is a checkbox for 'Embed all images'. Further down, there are checkboxes for 'Export Report Title' (callout 5) and 'Export filter details' (callout 6), both of which are checked. Below these is a 'Remove extra column:' dropdown set to 'Yes' (callout 7). At the bottom left is a checkbox 'Do not prompt me again.' (callout 8). At the bottom right is an 'Export' button (callout 9).

1. **Export**
This menu determines the portion of the report that will be exported (whole report or 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 Report Title**
When checked, this option exports the title of the report.
6. **Export filter details**
This checkbox provides the option to include a report's filter details in the output of the exported file. *Filter Details* include any limits applied to the report's data.
7. **Remove extra column**
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

Name	Status	Message Creation Time	Actions	Remove
Managed Pharmacy Plan Performance	Ready [mark as "unread"]	8/5/22 10:22:05 AM	[Icon 4] [Icon 5] [Icon 6] [Icon 7]	[Icon 8]
Payments By Month	Ready [mark as "unread"]	8/5/22 10:11:27 AM	[Icon 4] [Icon 5] [Icon 6] [Icon 7]	[Icon 8]
Payments By Month	Ready [mark as "unread"]	8/5/22 10:00:02 AM	[Icon 4] [Icon 5] [Icon 6] [Icon 7]	[Icon 8]
Payments By Month	Ready [mark as "unread"]	8/5/22 9:27:38 AM	[Icon 4] [Icon 5] [Icon 6] [Icon 7]	[Icon 8]
Network Utilization	Ready [mark as "unread"]	8/5/22 9:17:16 AM	[Icon 4] [Icon 5] [Icon 6] [Icon 7]	[Icon 8]
Payments By Month	Ready [mark as "unread"]	8/5/22 8:32:59 AM	[Icon 4] [Icon 5] [Icon 6] [Icon 7]	[Icon 8]
Membership By Month	Ready [mark as "unread"]	7/29/22 2:07:10 PM	[Icon 4] [Icon 5] [Icon 6] [Icon 7]	[Icon 8]

1. Status Icons

These icons indicate whether the report:

- is comprised of one section of output or multiple sections of output
- is still processing or has finished processing
- 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 report's 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 report. 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).



Reporting Tools Screen

Employer eServices®

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

← → ECR > Reporting Tools

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 define 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](#)

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 medic 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...](#)

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 you to import a Group Segment Filter by filling out a predefined Excel template (.xls).

Share a Group Segment Filter

This page allows you 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 reports. 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 options 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 current reports.



Group Segment Filters

Screen 1

Step 1. Create New Group Segment Filter

* Name:

Description:

☐ Activate

Or search for group segment filter

Search for:

My Filters	Description	Modified Date
* Total Filters In This Folder:0 Sort List: Click on My Filters or Modified column to sort.		
<div>6</div> <div>My Incomplete Filters</div> <div>test123</div> <div>testing</div>	<div>Description</div> <div>Simple test</div> <div>testing</div> <div>8</div>	<div>Modified Date</div> <div>5-19 09:45:28</div> <div>5-19 09:43:30</div> <div>9</div>
* Total Filters In This Folder:2 Sort List: Click on My Incomplete Filters or Modified column to sort.		

- Name**
This field is used to enter a name for a new *Group Segment Filter*.
- Description**
This field is best used to enter a summary of the conditions used to identify the *Group Segment Filter's* population.
- Create**
This button opens a screen that contains the tools for defining a segment of the population.
- Search for**
This field allows you 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.
- Search button**
This button implements a look-up of the term entered into the *Search* field.
- Delete**
This button deletes the specified filter from the table.
- Edit**
This button opens a screen containing the conditions set for the filter. Any of those conditions can be changed to alter the population defined by this filter.
- Description**
The description listed here is the one entered when the filter was created.
- Modified Date**
This date indicates when the filter was initially created or last edited.



Screen 2

Step 2. Build Group Segment Filter Expressions

Group Segment Filter:

Select an attribute, enter a filter and then perform a search to retrieve values.
If you leave the filter empty, all values will be returned and it may take longer to retrieve.
The Search button must be clicked to continue.

Attribute: Search for:

Operators	Elements	Select Elements
= in		

Current Expression Number: 1

New Expression Group

Expression Group 1 of 1

-Policy Number =

✕ Suffix in 0001,0002,0003,0004

+ Add Attribute

AND

- Attribute**
This drop-down menu reflects various levels of customer structure from which expressions are built.
- Operators**
An operator is a mathematical function. It creates the logical connection between an *attribute* and its *selected elements* to form an expression.
- Elements**
This field lists all values associated with a specified attribute.
- Add to Selector**
This button moves highlighted items from the *Elements* field into the *Selected Elements* field.

(continued on next page)



Step 2. Build Group Segment Filter Expressions

Group Segment Filter:

Select an attribute, enter a filter and then perform a search to retrieve values.
If you leave the filter empty, all values will be returned and it may take longer to retrieve.
The Search button must be clicked to continue.

Attribute: Policy Number (1) Search for: (7) Search button (8)

Operators (2) Elements (3) Select Elements (6)

Current Expression Number: 1 Append (9)

Add (14) New Expression Group

Expression Group 1 of 1 (10) Delete (13)

-Policy Number = (11)

Suffix in 0001,0002,0003,0004 (12)

AND

5. Deselect

This button moves highlighted items from the *Selected Elements* field back into the *Elements* field.

6. Select Elements

This field lists elements picked for this expression.

7. Search for

This field allows you 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 term entered into the *Search* field.

9. Append

This button finalizes the current expression and adds it to an *Expression Group*.

(continued on next page)



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 allows you to add 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. Save Group Segment Filter

This button finalizes the filter based upon the conditions set on this screen.

16. Exit

This button closes the screen without implementing any changes to the filter.



Sharing Group Segment Filters

Employer eServices®

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

ECR > Reporting Tools > Share Group Segment Filter

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](#)

1

2

Step 2: Identify the Person to Share this Filter With

Type a User ID into 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 is the 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](#)

3

4

5

6

7

- Filter Inbox**
The filter inbox lists all of your available filters.
- Selected GSF**
This field shows the filter you have selected to share.
- User ID**
Type the User ID of the person with whom you want to share a filter.
- Find User**
This button finds the user based on the User ID you entered.
- Selected User**
This field displays the user with whom you have selected to share a filter.
- Share**
This button shares the filter with the selected user.
- Cancel**
This button cancels the Share Group Segment Filter process.



Importing Group Segment Filters

Employer eServices®

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

ECR > Reporting Tools > Import Group Segment Filter

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**
Type the path to the Excel (.xls) file containing the filter you have built.
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 imports the filter you have selected.
6. **Cancel**
This button cancels the Import Group Segment Filter process.



Manage Report Templates Screen

The screenshot shows the 'Manage Your Report Templates' page. At the top, there's a navigation bar with 'Reports Home', 'Automated Reports', 'Custom Reports', and 'Recent Reports'. Below it, a breadcrumb trail shows 'ECR > Manage Your Report Templates'. A paragraph explains that templates allow re-running reports with different selections. Callout 1 points to this text. Callout 2 points to a link 'Learn how to create and use templates'. Callout 3 points to an 'Example' folder icon. Callout 4 points to a 'Payments By Month' report card, which includes a description, a 'Help' link, and 'Export' and 'PDF' links. Callout 5 points to the 'Claim Expenses by Size of Payment' report card, which includes a description. Callout 6 points to the 'Export' link on the 'Payments By Month' card, and callout 7 points to the 'PDF' link on the same card. A footer note states: 'This page contains UHC's PBI &/or PHI. Recipient is liable for protecting PBI & PHI from further disclosure or misuse, consistent with contractual obligations with UHC, FOIA, & state/federal law. | Details here'.

1. **Onscreen Help**
This text summarizes the steps to select, export, and get more help with report templates.
2. **Learn how to create and use templates**
Opens *Online Help* for using a template to run a report.
3. **Folders**
These icons/links open the templates and subfolders saved within them. Folders are created when saving a report as a template.
4. **Report Templates**
These icons/links open the options screen for the specified report. The report contains a single section of output. Results are displayed in an online format.
5. **Description**
This text explains the purpose of the specified folder/report.
6. **Quick Export**
The *Export* link opens the options 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. The *Export* link only appears when you hover over the description.
7. **Quick PDF**
The *PDF* link opens the options screen for the specified template. Results are converted into a .pdf (Portable Document Format) file which is suitable for viewing in Adobe Reader. The *PDF* link only appears when you hover over the description.



Preferences Screen

The screenshot shows the 'User Preferences' screen in the Employer eServices application. The interface includes a top navigation bar with links like 'Reports Home', 'Automated Reports', 'Custom Reports', and 'Recent Reports'. A breadcrumb trail shows 'ECR > User Preferences'. A dropdown menu at the top allows selecting the scope of changes: 'Apply to all projects on the current Employer eServices Server' (highlighted with a yellow box and callout 3) or 'Close'. On the left, a 'PREFERENCES' sidebar (callout 1) lists categories: General, Grid display (selected), Graph display, Export Reports, Print Reports (PDF), Drill mode, Options, Report Services, and Change Password. The main area, titled 'Grid display' (callout 2), contains settings for grid style (a dropdown set to 'Squares'), maximum rows (50), maximum columns (10), and show attribute form names (a dropdown set to 'Read from report'). Below these are several checkboxes: 'Show pivot buttons' (checked), 'Show sort buttons' (checked), 'Show unused attributes in page-by panel' (unchecked), 'Display empty grid axes in view mode' (checked), 'Enable sorting by attribute forms that are not displayed on the grid' (checked), 'Automatic page-by' (checked), 'Show page-by axis by default' (unchecked), and 'Use images for depicting expand and contract in outline mode' (checked). At the bottom, there is an 'Apply' button (callout 4) and a 'Load Default Values' button (callout 5). A footer note states: 'This page contains UHC's PBI &/or PHI. Recipient is liable for protecting PBI & PHI from further disclosure or misuse, consistent with contractual obligations with UHC, FOIA, & state/federal law. | Details here'.

1. Category links

These links open the adjustable preference settings for a specified feature.

2. Settings

These are the adjustable conditions for a specified category.

3. 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

4. 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.

5. Load Default Values

This button reverts all the categories' settings to the original selections/amounts.



Employer eServices®

Online Help: eServices Customer Reporting

1

Home

Reports

How To

Glossary

Tutorials

Reference

2

HOME

|

FAQS

|

KNOWN ISSUES

|

RELEASE NOTES

CUSTOMER REPORTING ONLINE HELP

Online Help provides quick and accurate answers to your questions regarding eServices Customer Reporting.

How to Find an Answer

Use the tabs at the top of the screen to navigate through the main content areas of Online Help. Content is divided into the following categories:

• **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**—step-by-step walk through of the reporting tool's features and functions.

• **Glossary**—defines the attributes, values and metrics found in your reports.

• **Tutorials**—enhance your skills via self-guided, online training exercises.

• **Reference**—view and print sample reports, quick-start guides and other support documentation.

3

Need More Help?

If you still have questions after consulting Online Help, toll-free assistance is available 24-hours-a-day 7-days-a-week by calling the Employer eServices Customer Support line at:

1-800-651-5465

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These tabs open the main page for the specified topic.

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.

Tutorials – provides ways to enhance your reporting skills with self-guided, online tutorials.

Reference – provides access to downloadable support materials.

These links reference the subtopics available within a chosen *help topic*. The links open help content for the specified subtopic.

This area of the screen contains the supporting text for the specified topic.