Cost & Utilization Reporting

At-a-Glance

version 4.4

United Healthcare

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?

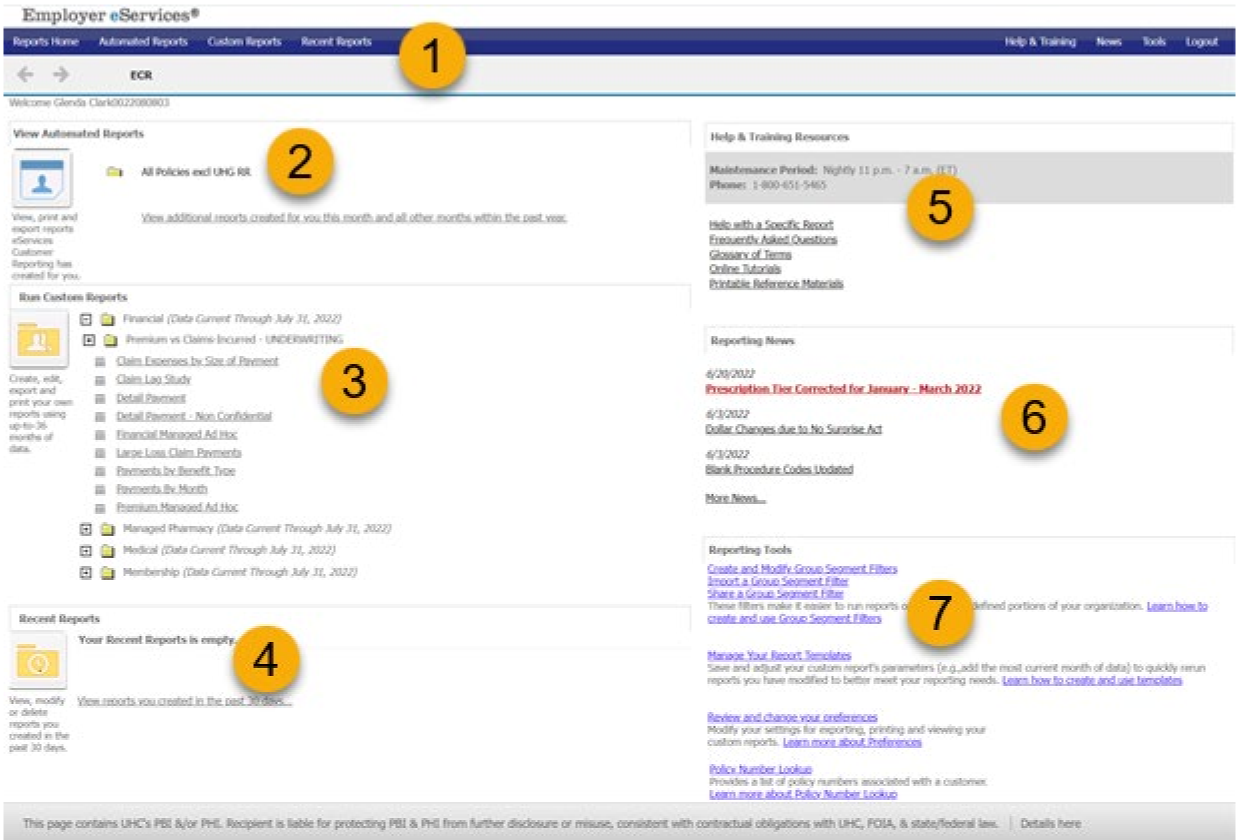
Employer eServices Customer Reporting (eCR) is a web-based system for viewing and/or generating cost and utilization reports based on reliable and up-to-date paid claims data (including a rolling 36 months of historical claim data). The system is accessible 24 hours a day, seven days per week, with the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



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.

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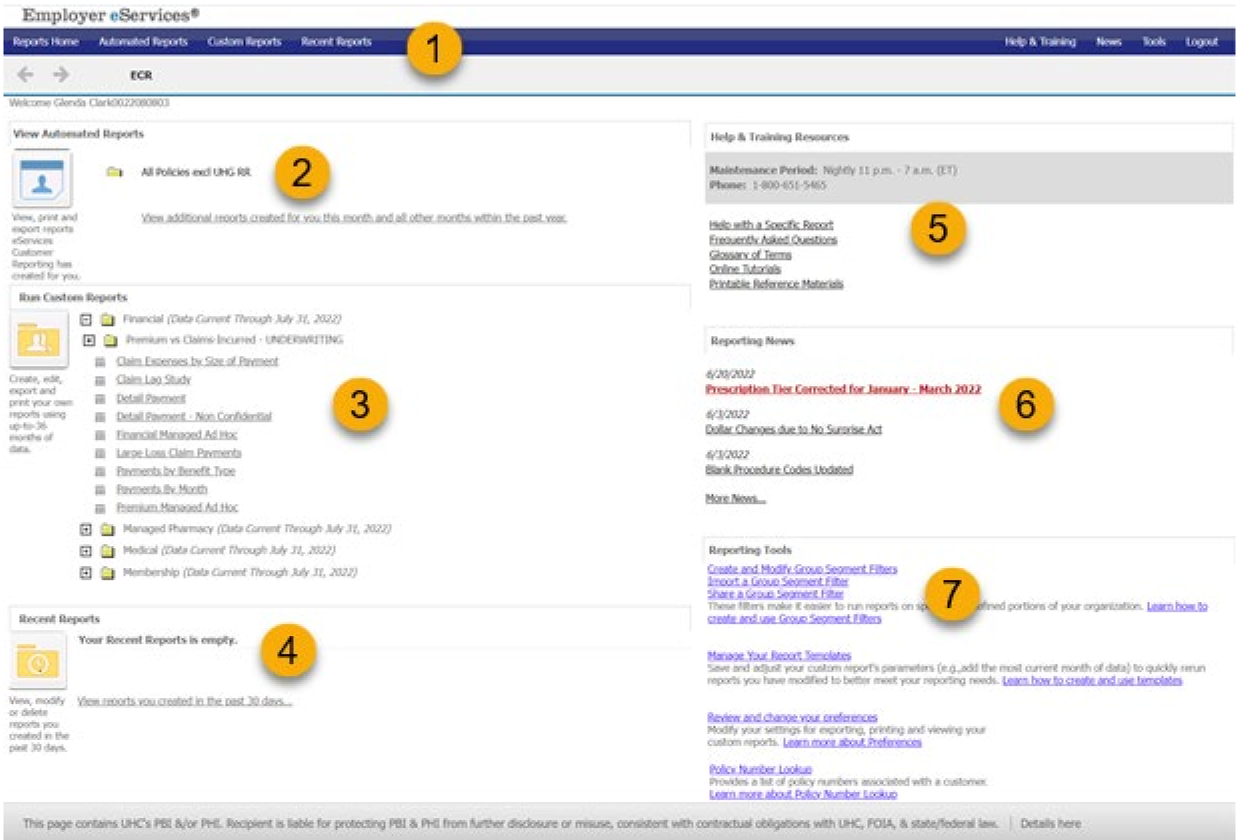
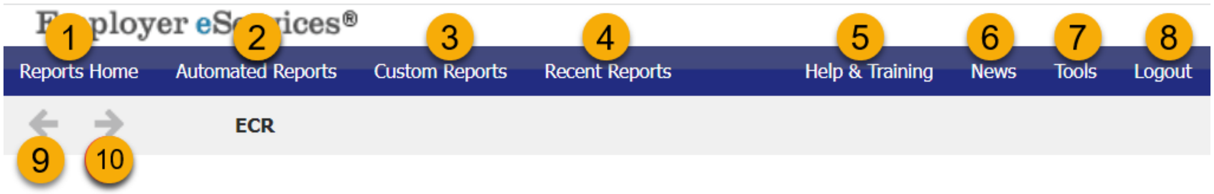


5. **Help & Training Resources**
   This section contains various means of getting help with the reporting application including links to online reference material and tutorials.

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

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.

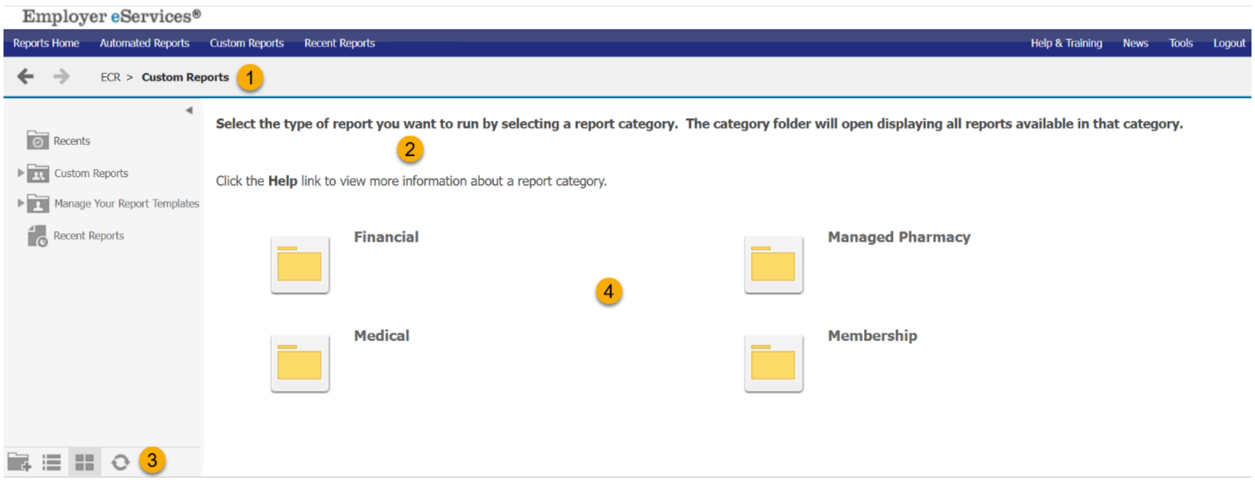
5. **Created Date**
   The dates shown in this column indicate the point in time an automated report was produced.

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



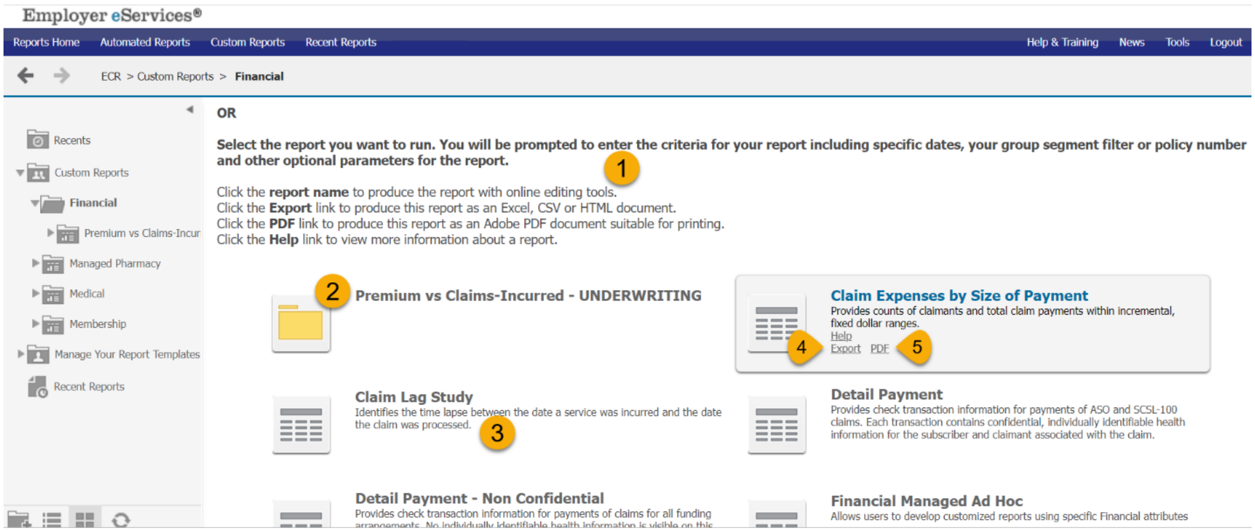
1. **Breadcrumb Trail**
   The links in the breadcrumb trail provide a path of hyperlinks to previous screens.

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



1. **Onscreen Help**
   This text summarizes the steps for selecting and running a report.

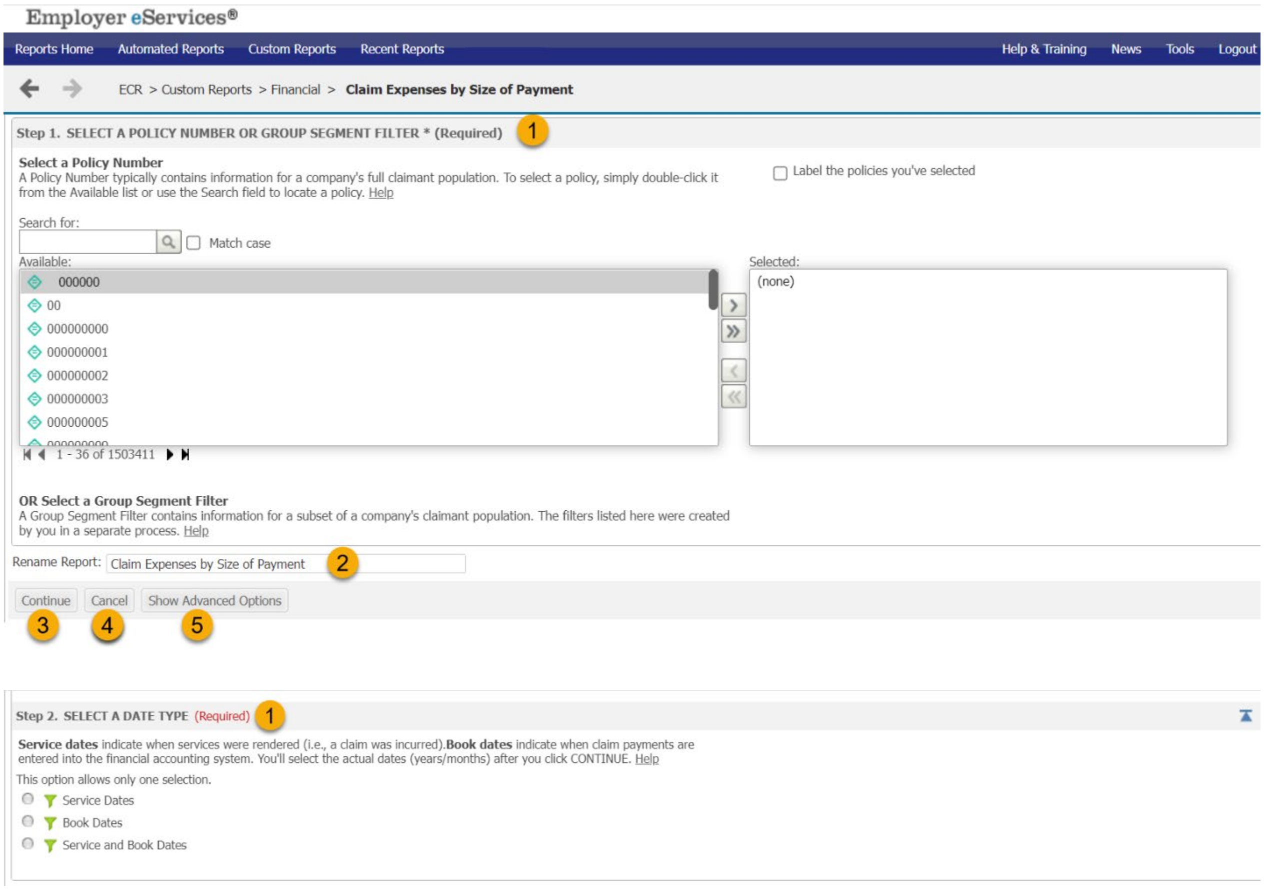
2. **Report**
   These icons/links open the option screen for the specified report. The report contains a single section of output. Results are displayed in an online format.

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



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.

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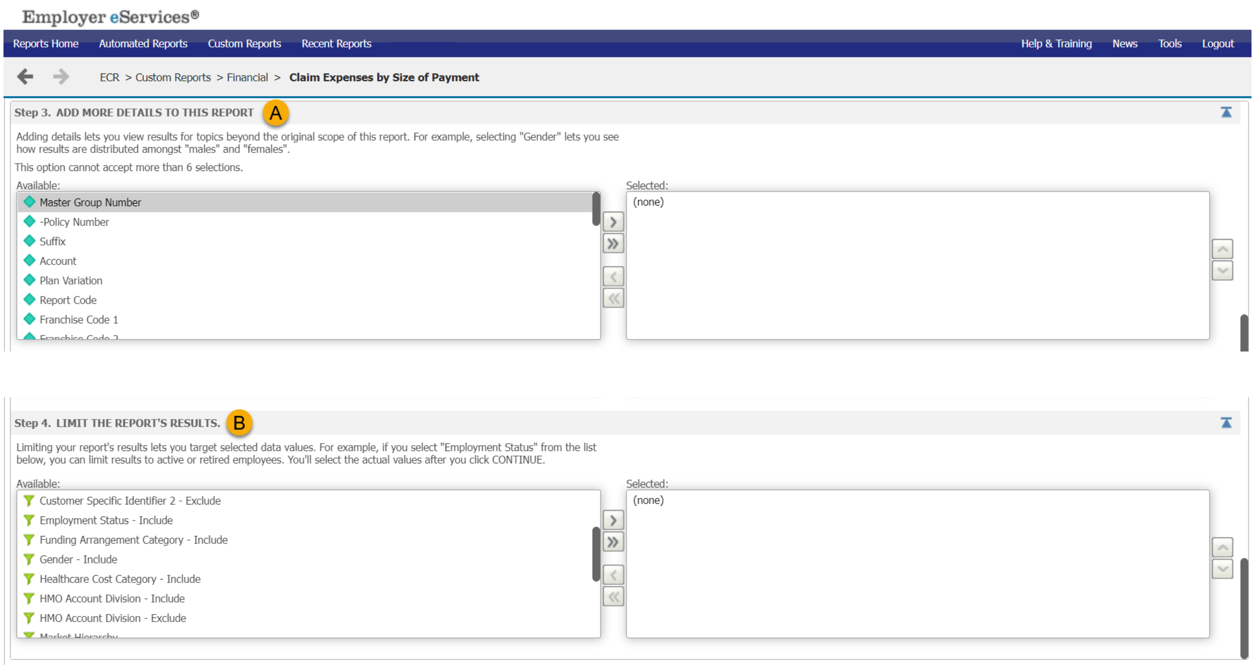
5. **Show Advanced Options**
   This button displays any optional steps onscreen. NOTE: These options are not available for Core reports.

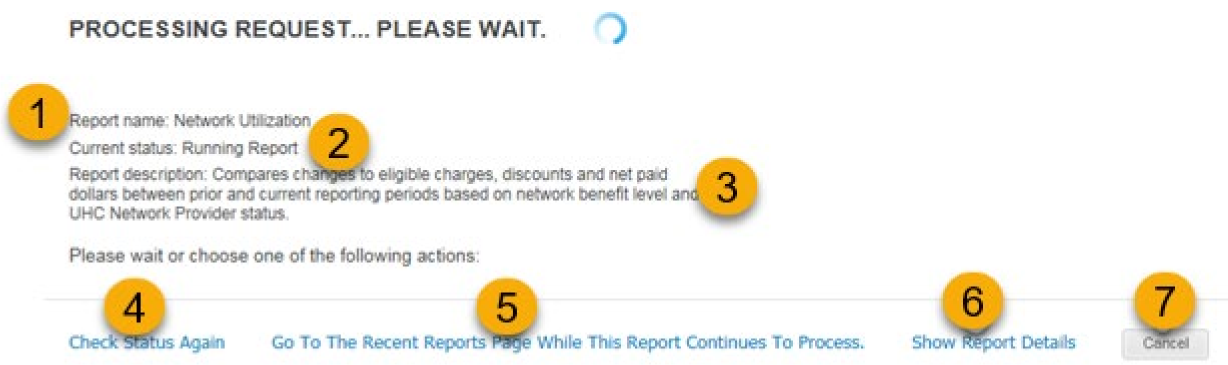
   Optional steps let you:



A. **Add More Details To This Report**
   Can add up to 6 selections. Options vary by report.

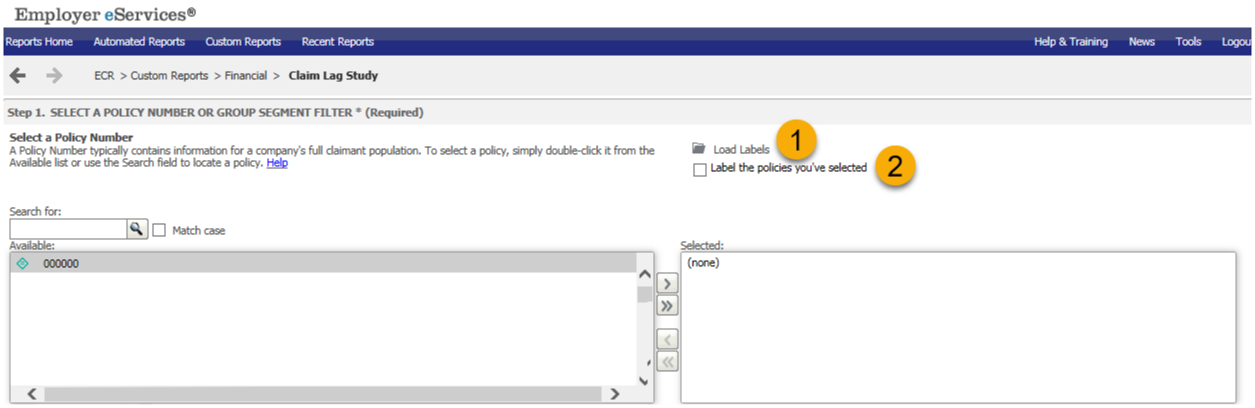
B. **Limit The Report's Results**
   Define a subset of the population. Options vary by report.

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.

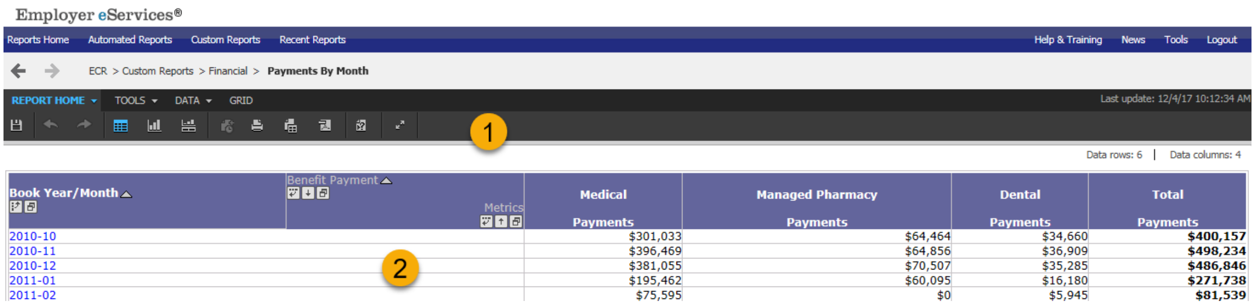
Load Labels



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.

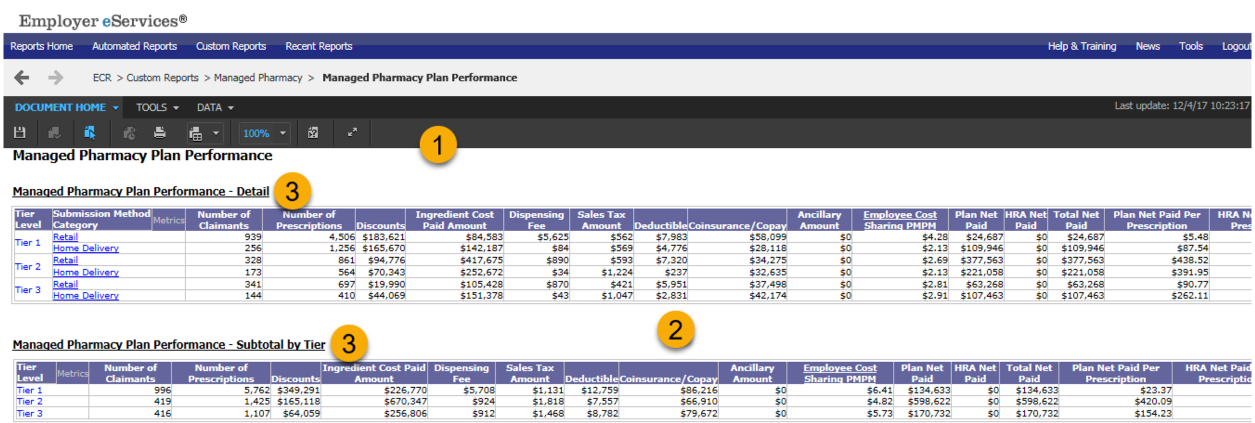
Results Screen

Reports



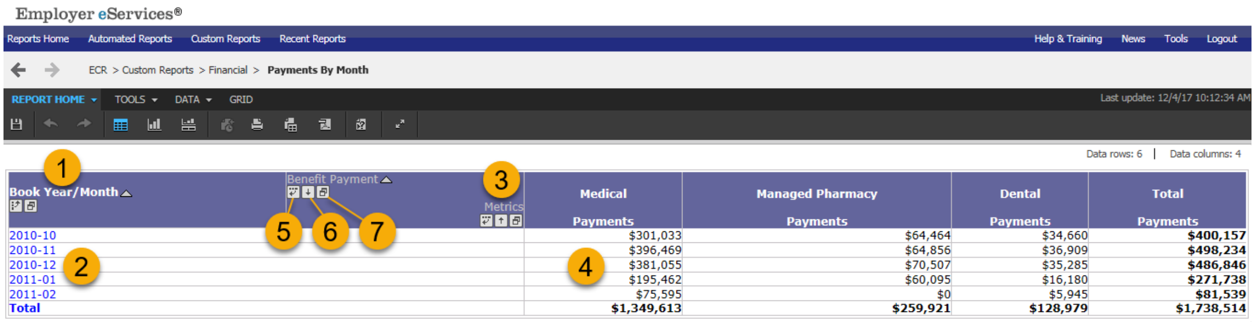
1. **Toolbar**
   The toolbar contains a set of drop-down menus that provide one-click access to an array of dynamic reporting features and other controls.
2. **Grid**
   A grid displays the report's results in a table.

Compound Reports



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



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).

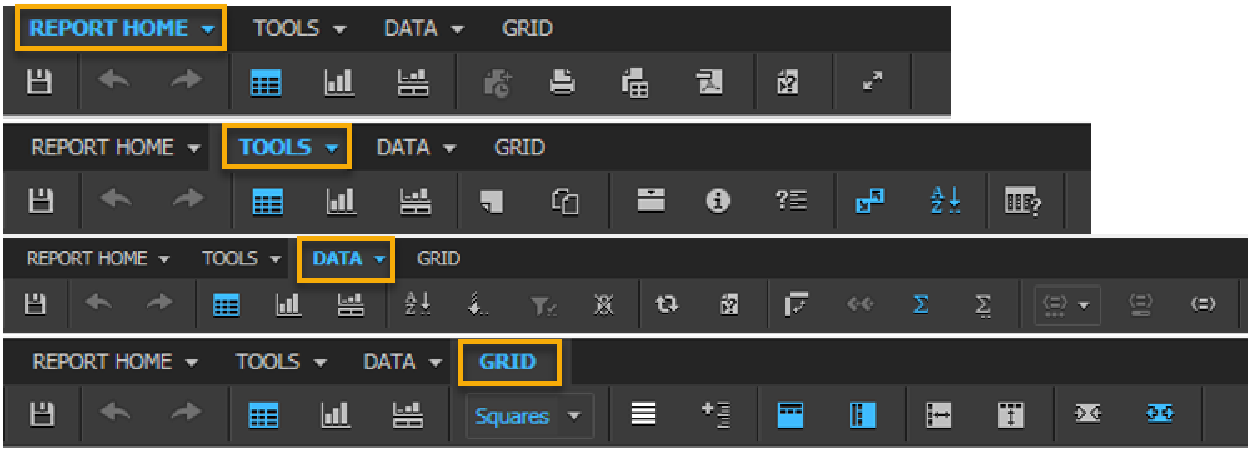
5. **Move**
   This button repositions items within the report grid.

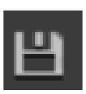
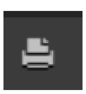
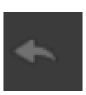
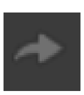
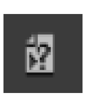
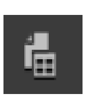
6. **Pivot**
   This button switches specified items from the columns to the row of the report and vice versa. Each attribute has its own *pivot* button; metrics, however, share a single *pivot* button.

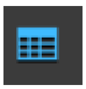
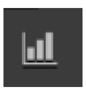
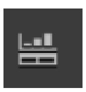
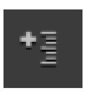
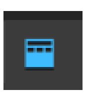
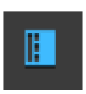
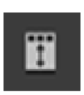
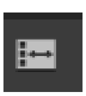
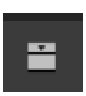
7. **Page-by**
   This button pulls a specified item from the report and places it into the Page-by Axis panel. The panel has controls to view results one value/metric at a time. Each attribute has its own *page-by* button; metrics, however, share a single *page-by* button.

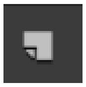
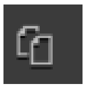
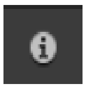
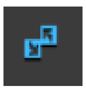
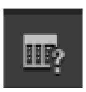
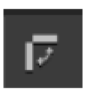
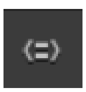
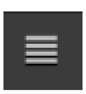
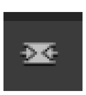
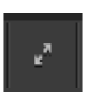
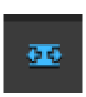
Report Toolbars and Icons

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

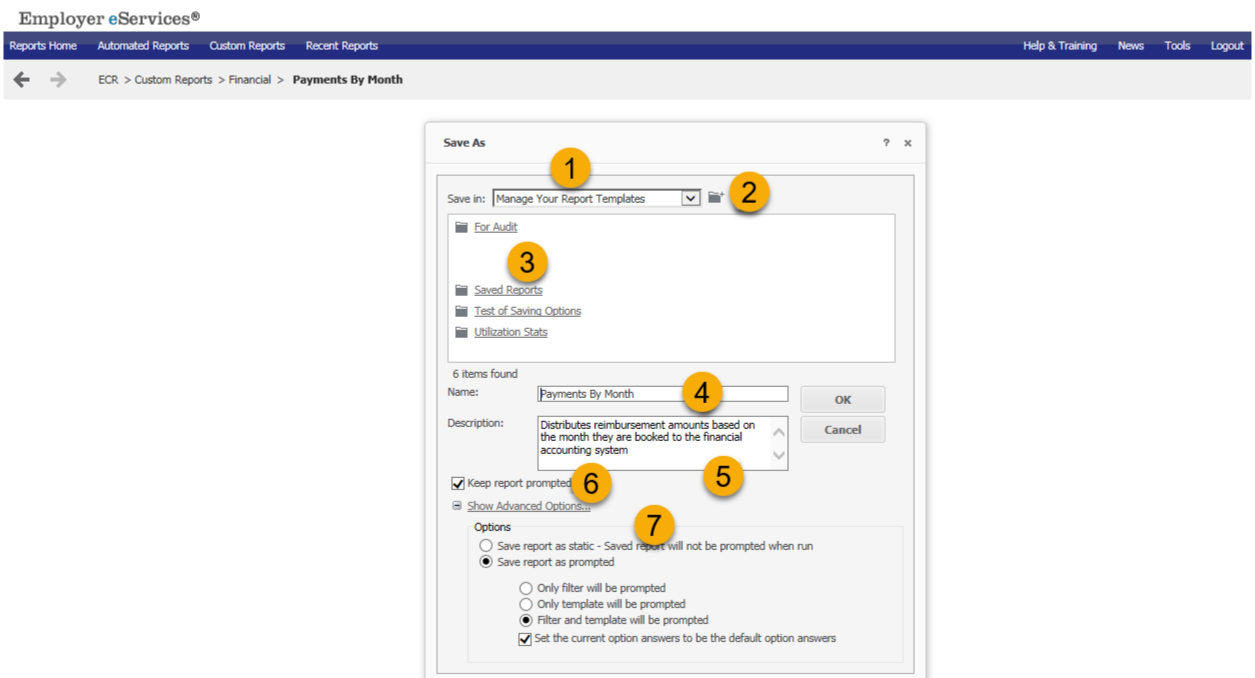


Icon	Title	Description
	Save	Stores a copy of the report definition to the Recent Reports section of the website.
	Print	Opens a second browser window with options to create a hard copy of your report.
	Undo	Cancels your last action.
	Redo	Restores the last undo action.
	Refresh	Reproduces the report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

	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.

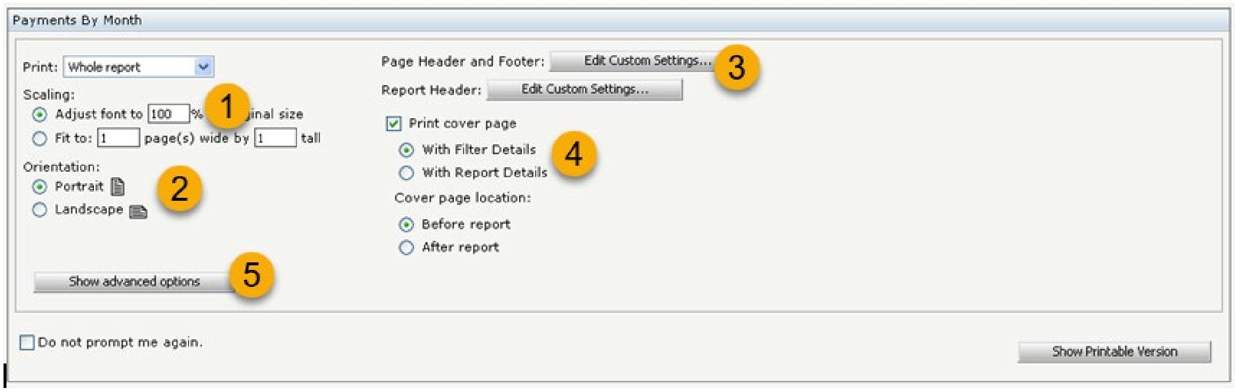
	Report Filters	Limits report results to values specified.
	Notes	Displays any notes associated with the report.
	Related Reports	Displays list of related reports.
	Report Details	Displays details used in creating the report.
	Option Details	Displays options used in creating the report.
	Show Pivot Buttons	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)

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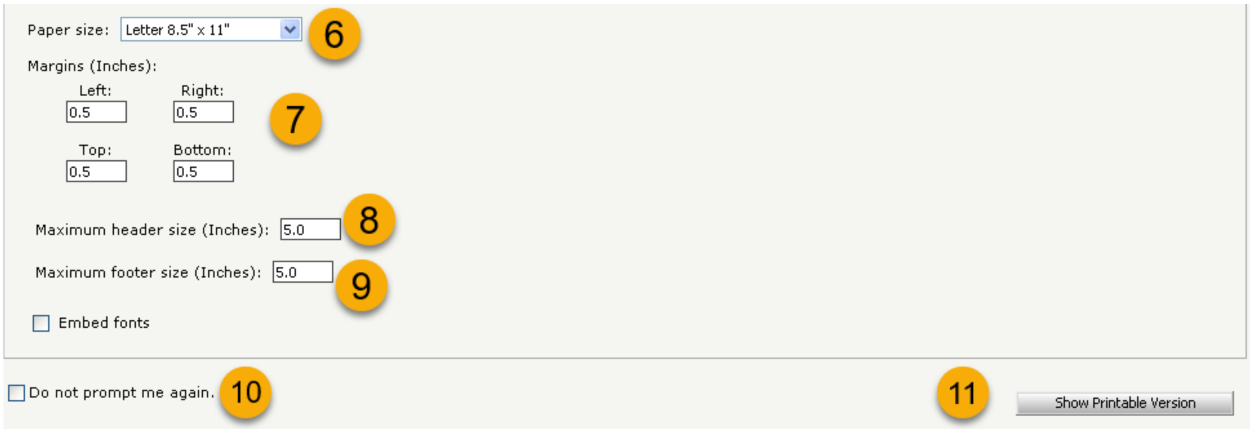
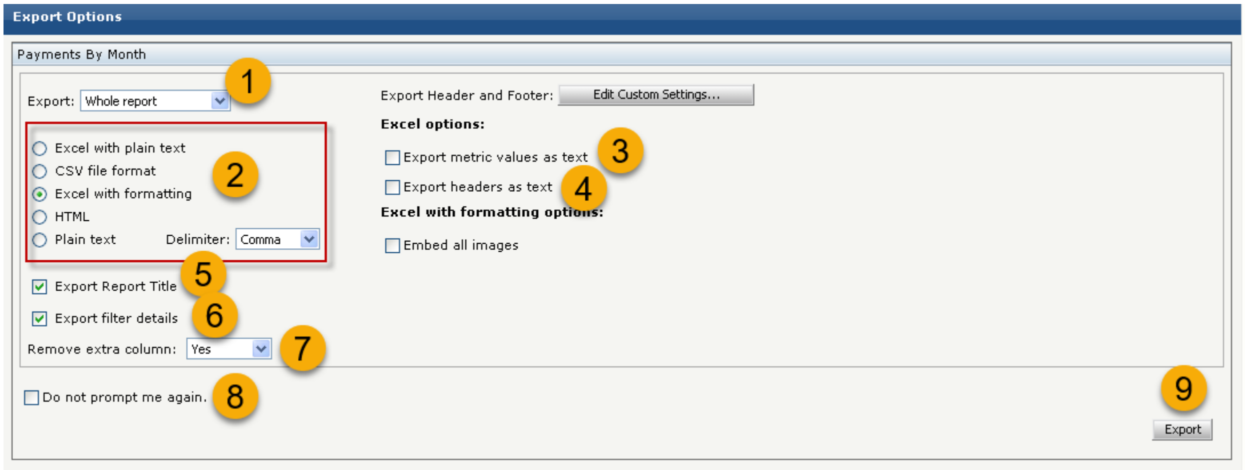
Advanced Print Options



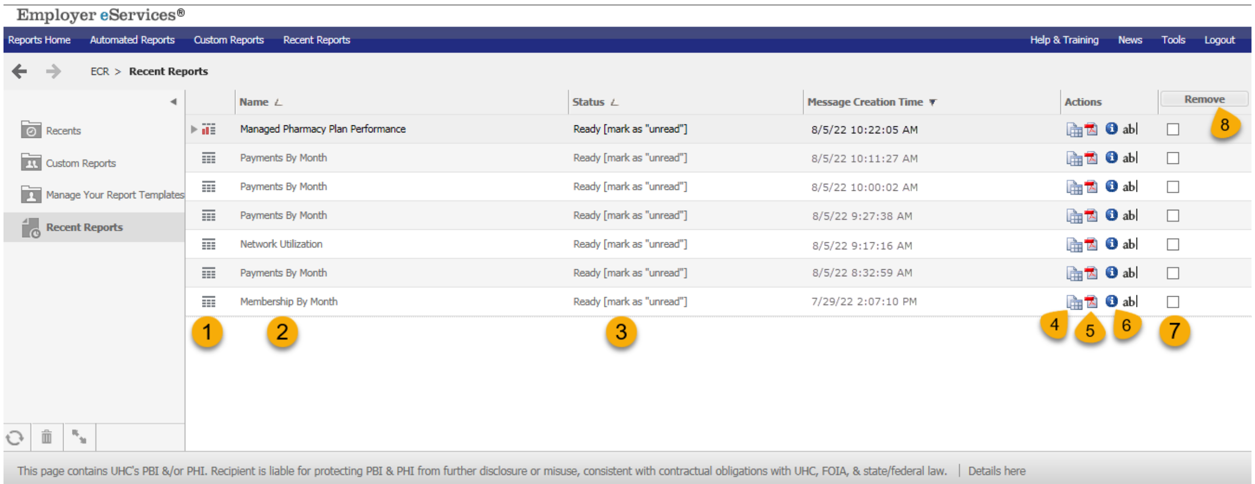
6. **Paper Size**
   This option sets the size of the paper on which the report is printed.
7. **Margins**
   This option sets the amount of white space between an edge of the paper (left, right, top, and bottom) and the printed content.
8. **Maximum Header Size (inches)**
   This option sets the maximum 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



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



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).

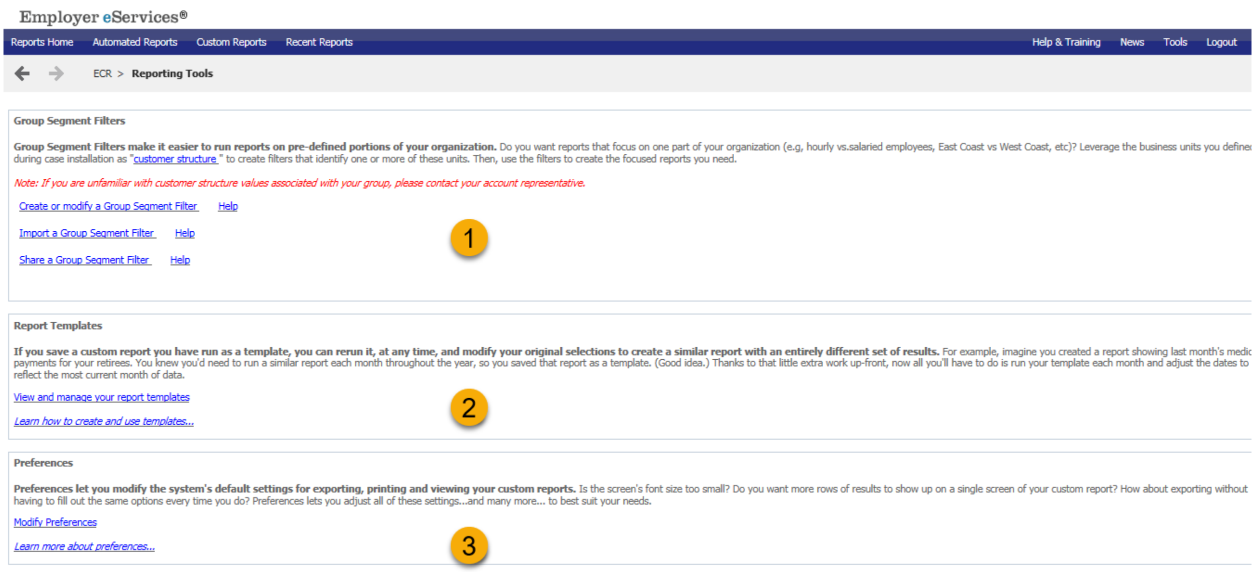
5. **Quick PDF**
   This button opens the *PDF Options* screen for the specified report. The *PDF Options* screen contains features to convert the report into a file format suitable for viewing in Adobe Reader.

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



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.

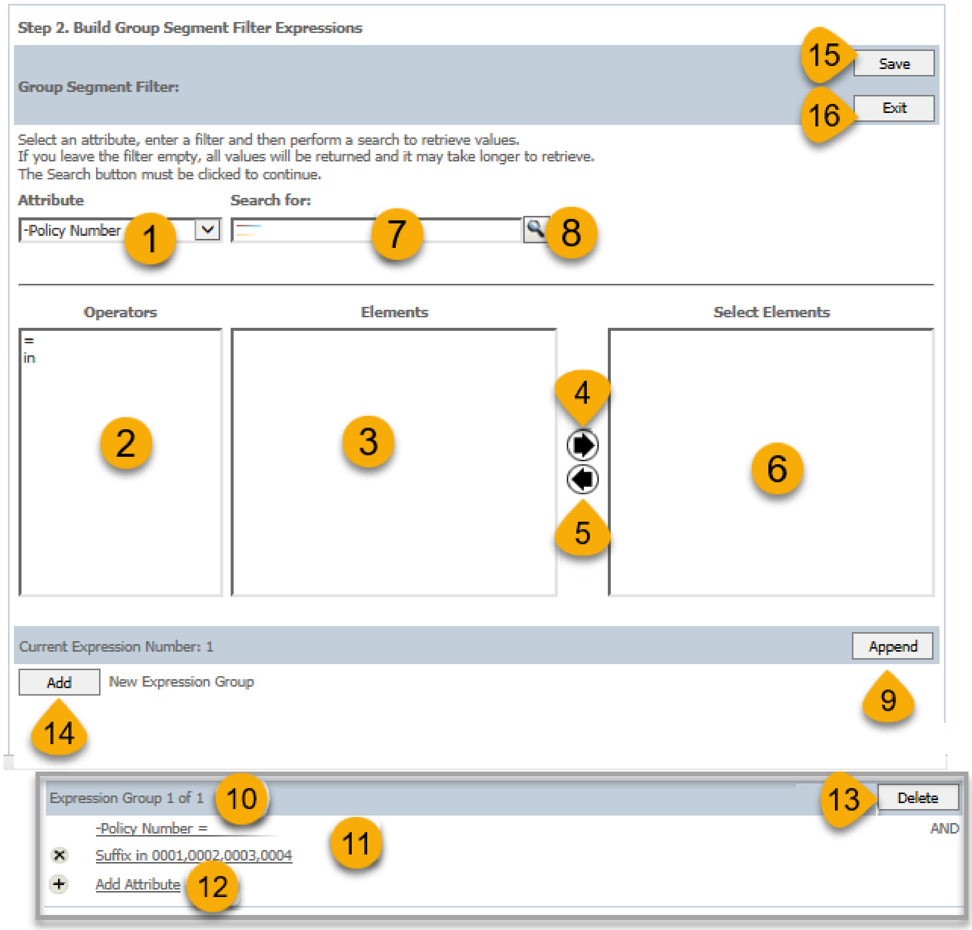
3. **Set Preferences**
   This section of the screen contains a link to a tool for modifying the default or existing settings for several categories of reporting features. The changes can be applied to all reports or current reports.

Group Segment Filters

Screen 1

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 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.
5. **Search button**
   This button implements a look-up of the term entered into the *Search* field.
6. **Delete**
   This button deletes the specified filter from the table.
7. **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.
8. **Description**
   The description listed here is the one entered when the filter was created.
9. **Modified Date**
   This date indicates when the filter was initially created or last edited.

Screen 2



1. **Attribute**
   This drop-down menu reflects 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 Selector**
   This button moves highlighted items from the *Elements* field into the *Selected Elements* field.

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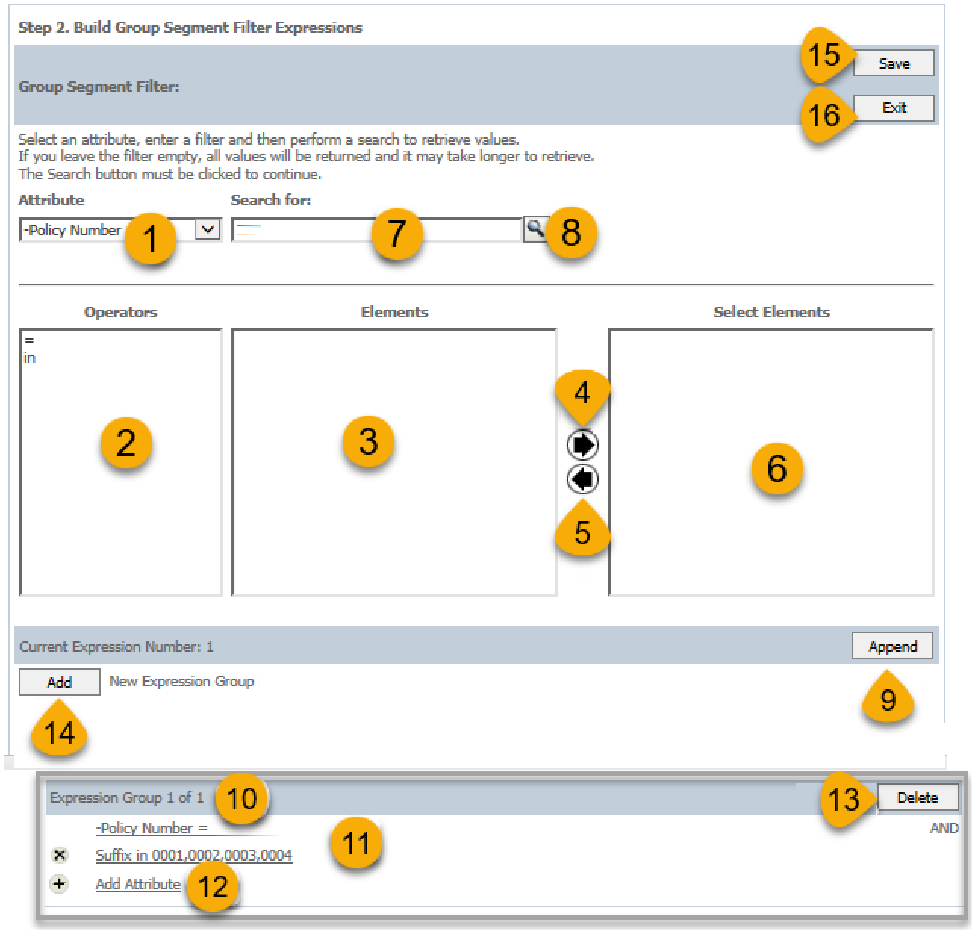

5. **Deselect**
   This button moves highlighted items from the *Selected Elements* field back into the *Elements* field.

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*.

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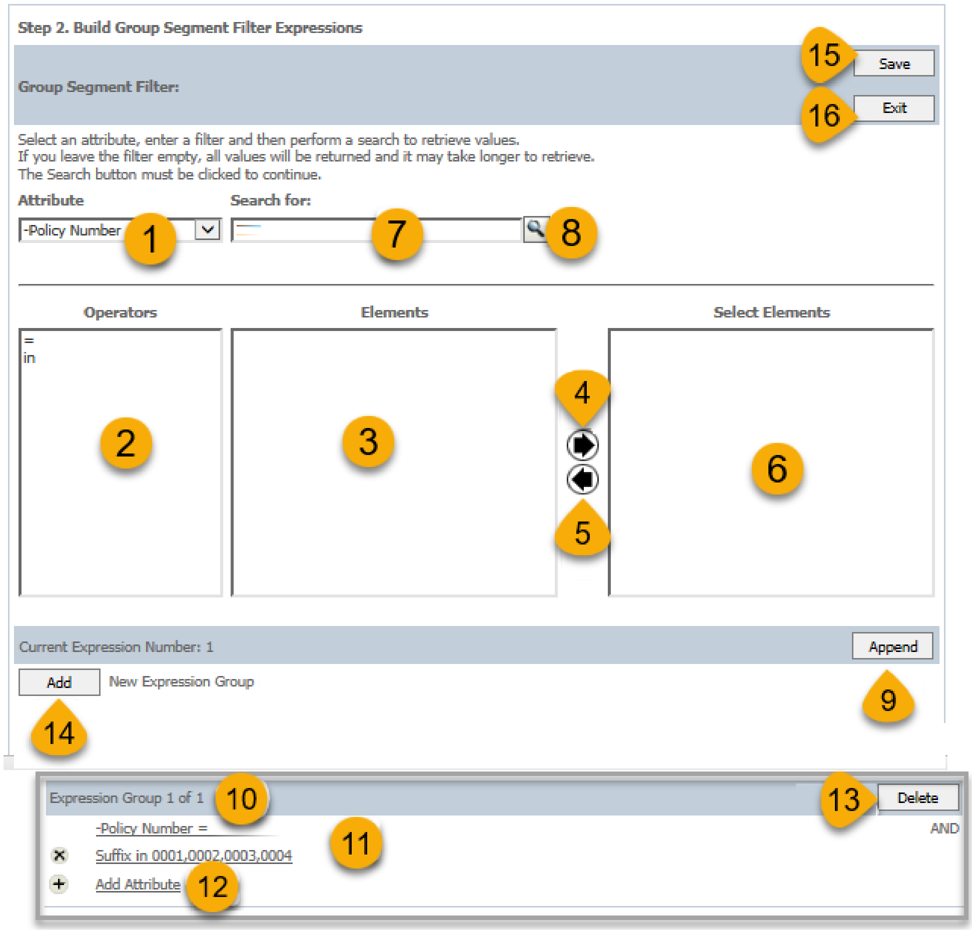


10. **Expression Group**
    An *Expression Group* consists of one or more *expressions*. The first expression listed within the group must identify a *Policy Number*.

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*.

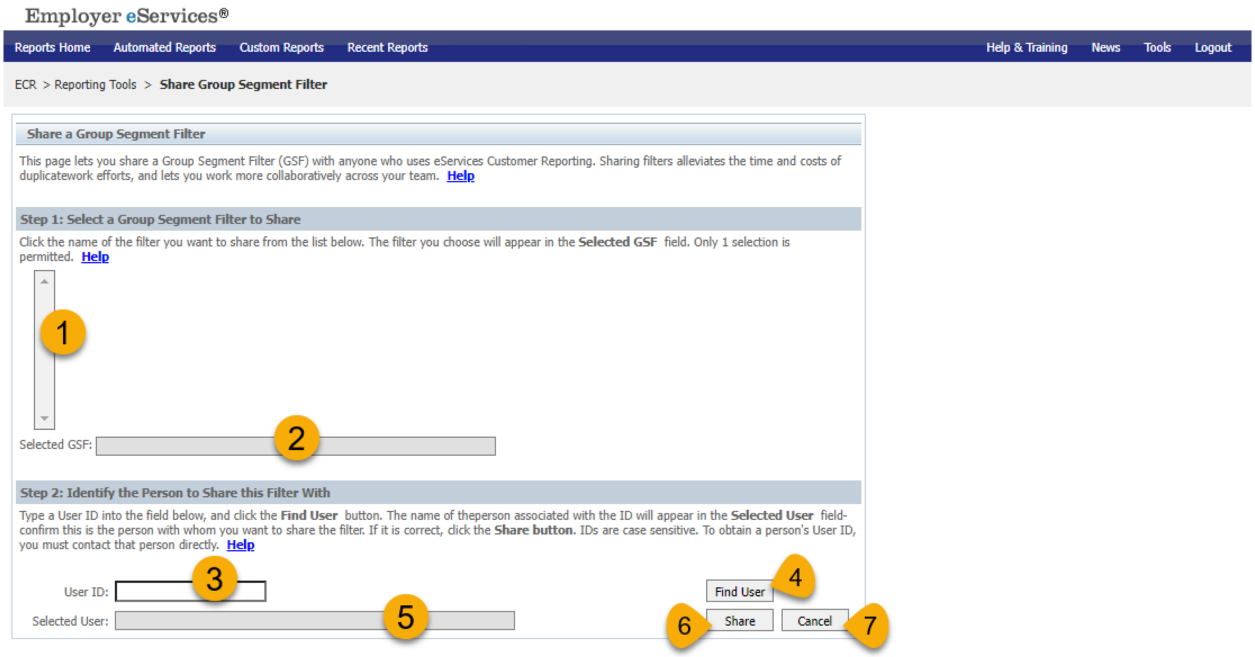
13. **Delete Expression**
    This button removes a specified *expression* from the *Expression Group*.

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.

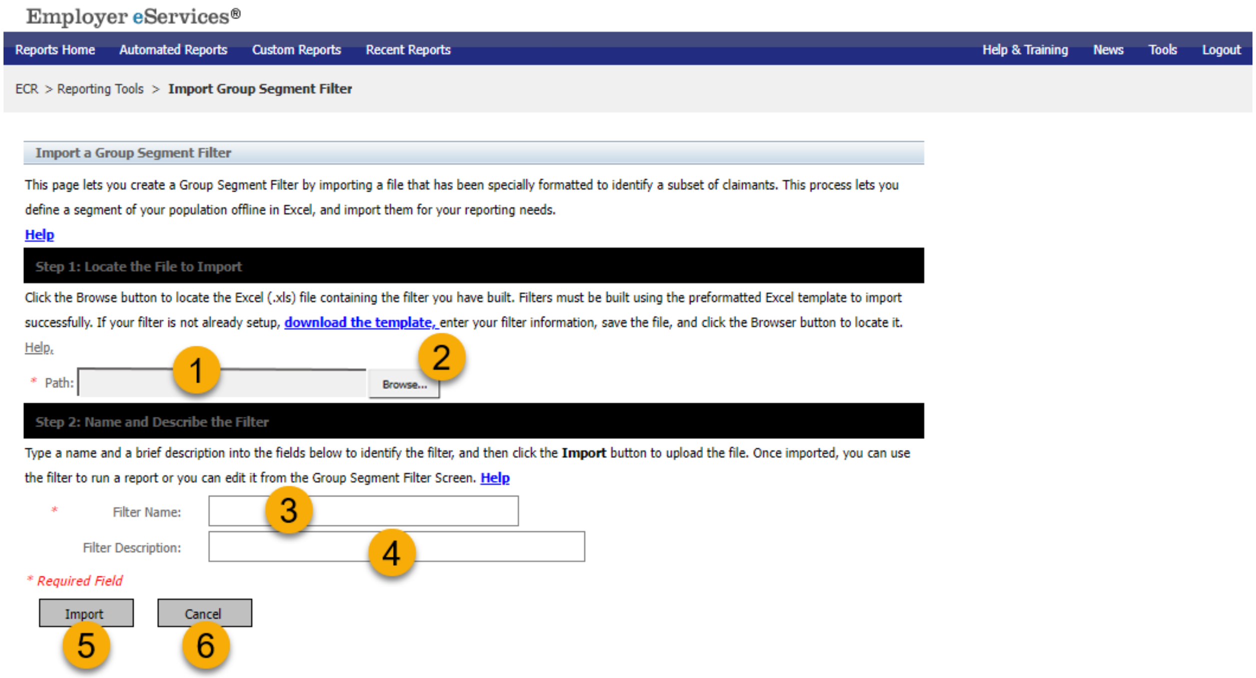
16. **Exit**
    This button closes the screen without implementing any changes to the filter.

Sharing Group Segment Filters



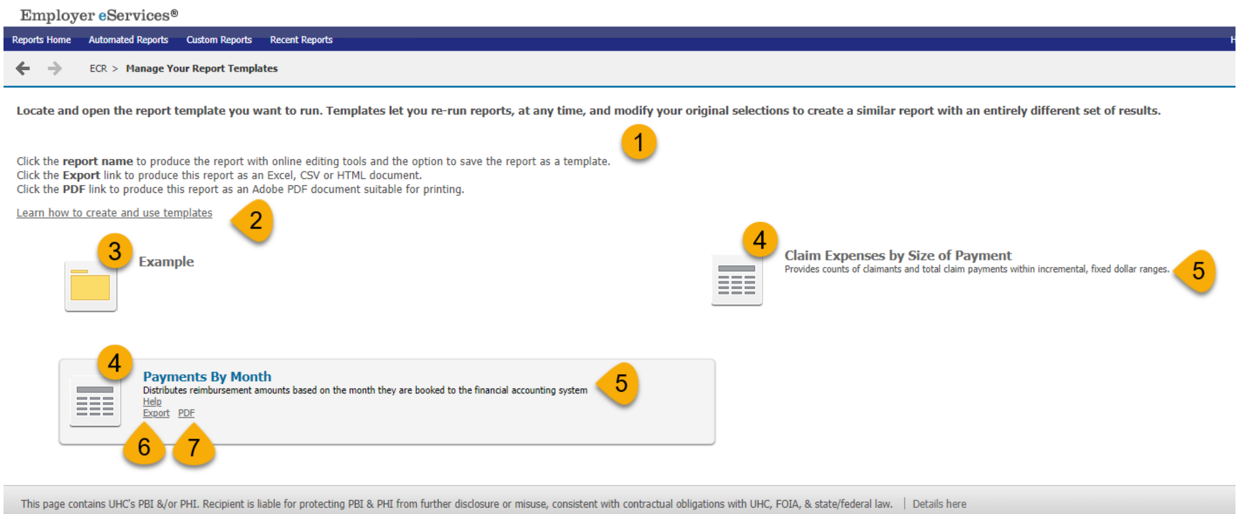
1. **Filter Inbox**
   The filter inbox lists all of your available filters.
2. **Selected GSF**
   This field shows the filter you have selected to share.
3. **User ID**
   Type the User ID of the person with whom you want to share a filter.
4. **Find User**
   This button finds the user based on the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

Importing Group Segment Filters



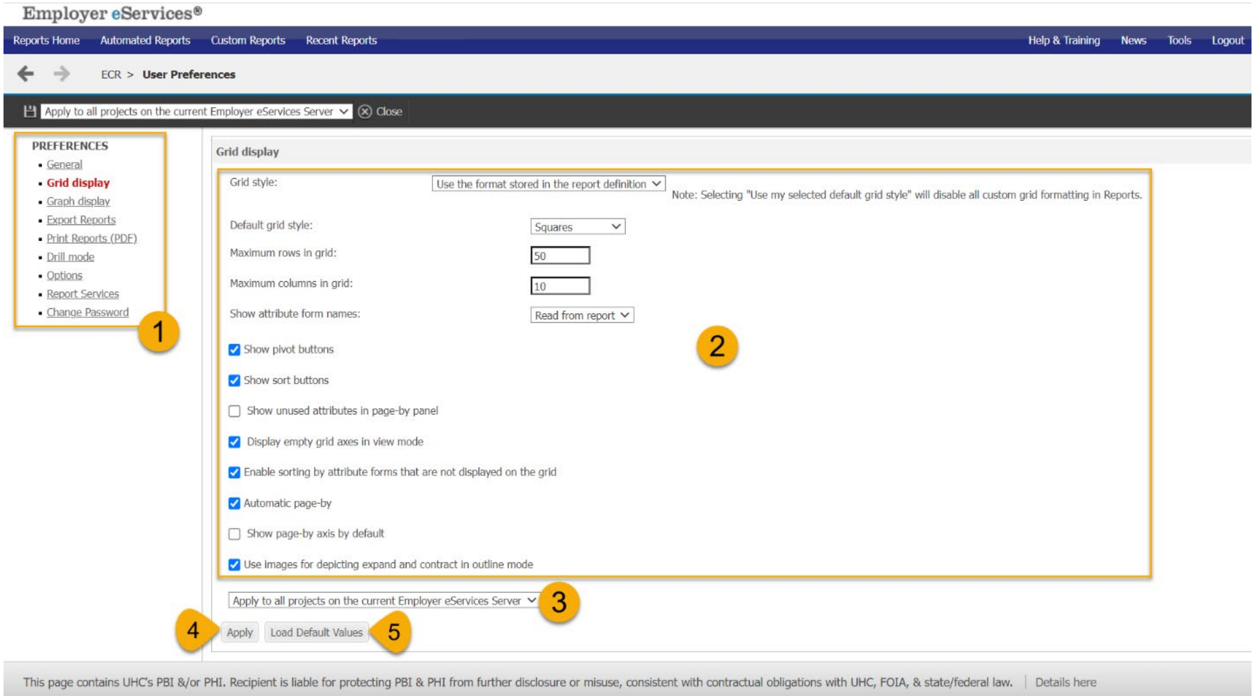
1. **Path**
   Type the path to the Excel (.xls) file containing the filter you have built.
2. **Browse**
   This button allows you to browse for the Excel (.xls) file containing the filter you have built.
3. **Filter Name**
   In this field, type in a name for the filter you are importing.
4. **Filter 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



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



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:

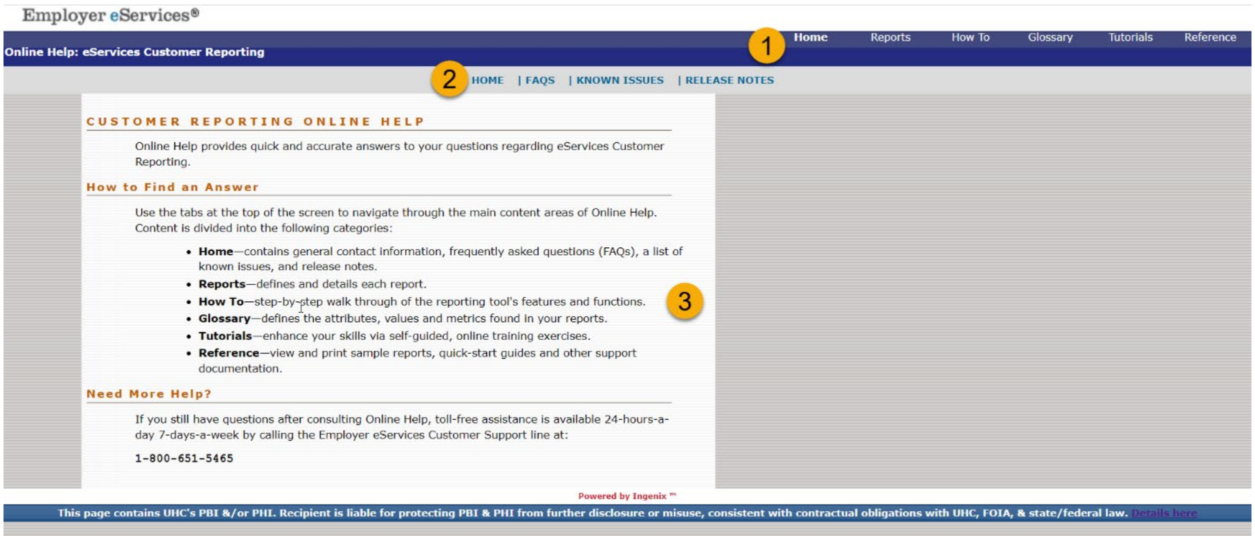
To All Projects – applies the settings to all existing and future reports

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.

Online Help



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.

Tutorials – 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.