



# **Employer eServices® Cost & Utilization Reporting**

Reference Manual



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# Overview

## Manual purpose

The Employer eServices Cost & Utilization Reporting Reference Manual contains information to familiarize you with features and functionality of eServices Customer Reporting.

## Audience

This manual is primarily intended for users of Employer eServices Cost & Utilization Reporting.

## Benefits of using eServices Customer Reporting

The Employer eServices Cost & Utilization Reporting web system provides an easily accessible means of generating reports using up-to-date and reliable data. Because it incorporates Microsoft Windows functionality, you can quickly generate reports to fit your individual needs.

Some of the benefits of using eServices Customer Reporting include:

- Use of the most current data available, including a rolling 36 months of historical claim data
- Reports are accessible 24 hours a day, 7 days/week, with the exception of down time for data loads and maintenance.
- Multiple formatting options to meet your reporting needs
- The ability to export data to Excel or other software applications
- The ability to save a report in Portable Document Format (PDF)



## Reference Manual structure

This manual is segmented into sections that help you easily access the information you need.

Order	Chapter Title	Chapter Description
1	Overview	Introduces the audience, prerequisites, and manual structure
2	Reporting System Basics	How to access and log out of the Employer eServices Customer Reporting application; provides an overview of menu and resource items
3	Reporting Access	Outlines customer reporting access levels and access level details
4	Reports Home Page	Provides a description of the main sections of the Employer eServices home page
5	View Automated Reports	How to access automated reports and contains data delivery details
6	Custom Reports Overview	Defines custom reports, their categories, and the individual reports available
7	Run Custom Reports	How to generate a custom report; defines parameters, date types and, report definitions
8	Advanced Options	Describes the Advanced Options available in a custom report and how to use them effectively
9	Modifying Custom Report Results	Provides a description of all the tools/icons available to further manipulate or customize report results
10	Recent Reports	How to access recent report; outlines any limitations
11	Report Data	Details on how report data is received and stored
12	Help and Training Resources	Summarizes help and training resources available for customer reporting tasks
13	Reporting News	Highlights where to find information on data availability, technical issues, and system updates
14	Report Templates	How to create and use custom report templates
15	Group Segment Filters	How to create and use group segment filters in custom reports
16	Import Group Segment Filters	How to import group segment filters
17	Share Group Segment Filters	How to share group segment filters



# Reporting System Basics

## Keyboard Basics

The following is a list of tips for navigating through the Employer eServices Customer Reporting website:

- Use the Tab key to move to the next field or button within a window.
- Use the left and right arrow keys to move the cursor within a field.
- Use the Backspace or Delete key to remove information from a field.


## Login process

Use the following steps to log in to eServices Customer Reporting.

Step	Action
1	Access Employer eServices website: <a href="https://www.employereservices.com">https://www.employereservices.com</a>
2	Enter User ID and Password.
3	Click Login button.
4	Click the <i>Reports</i> menu item from the Employer eServices home page.
5	Click <i>Visit the UHC Cost &amp; Utilization Site</i>

## Logout process

Use the following steps to log out of the eServices Customer Reporting system.

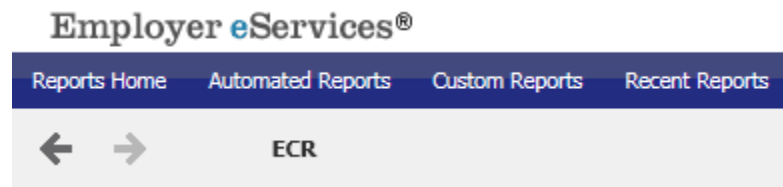
Step	Action
1	<p>Click the Logout option on the eServices Customer Reporting navigation bar:</p>  <p>Result: The logout screen displays.</p>
2	Close the Internet browser window.

## Report Menu

Review the description of each Reporting menu item below:







Link	Link Description
Reports Home	This link displays the Reports home page.
Automated Reports	This link allows you to launch/view any automated reports.
Custom Reports	This link allows you to choose a customer report and criteria to fit your needs.
Recent Reports	This link displays links to custom reports you have generated in the past.

## Resource Menu

Review the description of each Resource menu item below:



Link	Link Description
Help & Training	This link routes you to the online help section of the website.
News	This link connects you to broadcast updates that may impact your reports.
Tools	This links brings you to reporting tools where you may access/change group segment filters, report templates, and preferences.
Logout	This link logs you out of the Employer eServices Reporting website.

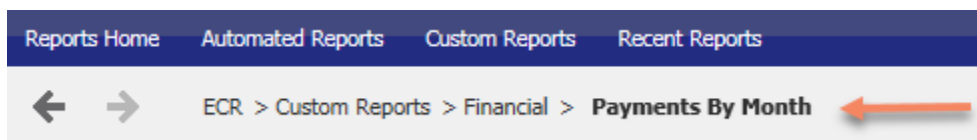


## eServices Customer Reporting minimum requirements

1. **Browsers:** Microsoft Edge Version 95.0.1020.40 (Official Build) (64-bit), Google Chrome Version 98.0.4758.82 (Official Build) (64-bit)
2. **Browser Settings:** Cookies and 128-bit encryption enabled. DHTML recommended for optimal performance.
3. **Internet Connection:** High-speed LAN/T1, cable, or DSL connection with support for SSL
4. **Software:** Latest version of Adobe Acrobat Reader to view PDF files

## Navigation

Path breadcrumb trails display under the menu items on the top of the Employer eServices Customer Reporting home page. This trail is dynamic, as it shows the path of navigation used to get to your current location.



# Reporting Access

## Access Levels

You can determine your access level by using the step/action table below and answering the questions based upon content visible on the Reports Home screen.

Step	Action						
1	<p>Do you see a section labeled Run Custom Reports?</p> <table><tr><th>If...</th><th>Then...</th></tr><tr><td>Yes</td><td><p>Open the Medical folder under Run Custom Reports If “Bill Count by Month” is listed first, you have <b>Expanded</b> access.</p><p>If “Bill Count by Month” is not listed first, Click the <b>Financial</b> folder then Click <b>Premium vs Claims-Incurred – UNDERWRITING</b> folder under <b>Run Custom Reports</b> and go to Step 2.</p></td></tr></table>	If...	Then...	Yes	<p>Open the Medical folder under Run Custom Reports If “Bill Count by Month” is listed first, you have <b>Expanded</b> access.</p> <p>If “Bill Count by Month” is not listed first, Click the <b>Financial</b> folder then Click <b>Premium vs Claims-Incurred – UNDERWRITING</b> folder under <b>Run Custom Reports</b> and go to Step 2.</p>		
	If...	Then...					
Yes	<p>Open the Medical folder under Run Custom Reports If “Bill Count by Month” is listed first, you have <b>Expanded</b> access.</p> <p>If “Bill Count by Month” is not listed first, Click the <b>Financial</b> folder then Click <b>Premium vs Claims-Incurred – UNDERWRITING</b> folder under <b>Run Custom Reports</b> and go to Step 2.</p>						
2	<p>Which report is listed first under the <b>Financial&gt;Premium vs Claims-Incurred - UNDERWRITING</b> folder?</p> <table><tr><th>If the first report listed is...</th><th>Then...</th></tr><tr><td>Premium vs Claims Incurred Including IBNR - Underwriting - Basic</td><td>You have Select access.</td></tr><tr><td>Premium vs Claims Incurred Including IBNR - Underwriting - Non- Standard - Core”</td><td>You have Standard access.</td></tr></table>	If the first report listed is...	Then...	Premium vs Claims Incurred Including IBNR - Underwriting - Basic	You have Select access.	Premium vs Claims Incurred Including IBNR - Underwriting - Non- Standard - Core”	You have Standard access.
	If the first report listed is...	Then...					
	Premium vs Claims Incurred Including IBNR - Underwriting - Basic	You have Select access.					
Premium vs Claims Incurred Including IBNR - Underwriting - Non- Standard - Core”	You have Standard access.						

Or you can determine your access level by opening the Financial folder and viewing the reports that are available.

If you see only <b>Claim Expenses by Size of Payment - Core</b>	Standard access
If you see both <b>Claims Expenses by Size of Payment and Claims Expenses by Size of Payment Core</b>	Select access
If you see <b>Financial Managed Ad Hoc</b>	Expanded access



## Changing your access level

Contact your representative for more information about buy-ups to higher levels of reporting or switching your security level (i.e., confidential vs. non-confidential).

## Reports specific to your access level

The reports contained at each of the three main service levels (Standard, Select, and Expanded) were identified in conjunction with representatives from the business community. If the information found in your set of reports does not address a specific need, please contact your representative for other reporting options.



## Access to the wrong policy

Please contact eServices Customer Reporting End User Support immediately if you have unauthorized access to a policy.

All individuals using the eServices Customer Reporting application are legally obligated to refrain from using the reporting application for abusive, fraudulent, or otherwise illegal purposes—including, but not limited to, viewing information obtained via unauthorized access to a customer policy.

## Access to multiple policies

There are a few legitimate reasons why you would have access to multiple policies:

1. Your role may require you to access information for different customers. This is most commonly the case with Brokers
2. A parent company may identify its distinct business divisions by assigning each to a different policy.
3. A company may identify the different products within its plan design by assigning each to a different policy.

## Multiple policies – Parent Companies

By assigning different policy numbers, the parent company can perform a company-wide analysis by selecting all the policy numbers or perform a targeted study by selecting the number of specific division(s).

UnitedHealth Group is a real-world example of a parent company. It is comprised of several divisions such as:

- UnitedHealthcare
- Uniprise
- Ingenix
- Ovations
- AmeriChoice
- Specialized Care Services
- UnitedHealth Group International

To simplify reporting, UnitedHealth Group assigns a separate policy number to each of these divisions.

## Multiple policies – products

A company may identify the different products within its plan design by assigning each to a different policy.

For example, you could have one policy number assigned to your United Healthcare Select EPO and one to United Healthcare Choice HMO



## Access to confidential reports

Self-Funded (ASO) customers have access to confidential reports. Customers with a fully insured funding arrangement are legally barred from viewing the Protected Health Information (PHI) contained in confidential reports.

ASO customers receive confidential reports by default; so, if you are an ASO customer and do not have access to confidential reports, you (or someone else in your policy) have requested non-confidential access. Contact your representative for more information about your security level.



# Reports Home page

## Introduction

After you have logged into eServices Customer Reporting, the Reports Home page is the first screen displayed.

The home page displays all or a portion of the following sections based on your access level:

- View Automated Reports
- Run Custom Reports
- Recent Reports
- Help and Training Resources
- Reporting News
- Reporting Tools

Employer eServices®

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

← → ECR

Welcome Marie Bouchard

**View Automated Reports**

All Policies

[View additional reports created for you this month and all other months within the past year.](#)

View, print and export reports eServices Customer Reporting has created for you.

**Run Custom Reports**

- Financial (Data Current Through May 31, 2013)
- Managed Pharmacy (Data Current Through May 31, 2013)
- Medical (Data Current Through May 31, 2013)
- Membership (Data Current Through May 31, 2013)

Create, edit, export and print your own reports using up to 36 months of data.

**Recent Reports**

Payments By Month

Payments By Month

View, modify or delete reports you created in the past 30 days. [View reports you created in the past 30 days...](#)

**Help & Training Resources**

Maintenance Period: Nightly 11 p.m. - 7 a.m. (ET)  
Phone: 1-800-651-5465  
E-mail: [CustRept\\_Help@uhc.com](mailto:CustRept_Help@uhc.com)

[Help with a Specific Report](#)  
[Frequently Asked Questions](#)  
[Glossary of Terms](#)  
[Online Tutorials](#)  
[Printable Reference Materials](#)

**Reporting News**

**Reporting Tools**

[Create and Modify Group Segment Filters](#)  
[Import a Group Segment Filter](#)  
[Share a Group Segment Filter](#)  
These filters make it easier to run reports on specific, predefined portions of your organization. [Learn how to create and Group Segment Filters](#)

[Manage Your Report Templates](#)  
Save and adjust your custom report's parameters (e.g., add the most current month of data) to quickly rerun reports you have modified to better meet your reporting needs. [Learn how to create and use templates](#)

[Review and change your preferences](#)  
Modify your settings for exporting, printing and viewing your custom reports. [Learn more about Preferences](#)

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## View Automated Reports

The View Automated Reports section of the home page displays reports that are automatically generated for you. You can view, print, and export reports located in this section.

These reports may be generated monthly, quarterly, or annually based on your agreement with UnitedHealth Group. The month and year of these reports are located in the folder titles.



## Run Custom Reports

The Run Custom Reports section is located in the middle of the left side of the Reports home page. Use this section to create, edit, export, and print reports that are generated with criteria you customize.

## Recent Reports

The Recent Reports section is located on the bottom left side of the Reports home page. Use this section to view, modify, or delete reports you created in the past 60 days.

## Help and Training Resources

The Help & Training Resources section, located on the upper right side of the screen, contains links to the aids and tools listed below:

- [Help with a Specific Report](#)
- [Frequently Asked Questions](#)
- [Glossary of Terms](#)
- [Online Tutorials](#)
- [Printable Reference Materials](#)

## Reporting News

The Reporting News section is located on the middle right side of the Reports home page. This section provides news regarding data availability, technical issues, and system updates.





## Reporting Tools

The Reporting Tools section is located on the bottom right side of the Reports home page. Use these section links to create and manage the following reporting tools:

- Group Segment Filters
- Report Templates
- Preferences



# View Automated Reports

## Overview


Due to low utilization, Automated Reports that have a duplicate Custom Report available, will be discontinued after April 2024.

Automated reports are sorted into folders and housed on a separate page within eServices Customer Reporting. This page is accessible via a link toward the upper left of the Summary screen.


For most customers, automated reports are placed in a folder that corresponds to the month in which the reports were produced. However, if you have access to multiple customers, a separate folder exists for each customer.

The monthly folders are inside each customer folder, and your automated reports are inside the monthly folders.

View Automated Reports



View, print and export reports  
eServices  
Customer  
Reporting has created for you.

 All Policies

[View additional reports created for you this month and all other months within the past year.](#)

## Automated report data delivery

Each report in your automated reporting package is delivered in a batch process that begins shortly after the latest data is added and ends on or before the 20<sup>th</sup> workday of the month. Since reports are systematically produced and delivered over several days, you are encouraged to routinely check the Automated Reports section of the Reports Home screen for delivery updates throughout this time period.

**Note:** Weekends and holidays are not working days; therefore, the 20<sup>th</sup> workday can come as early as the 26<sup>th</sup> or as late as the 31<sup>st</sup> day of the month.



## How often are automated reports delivered?

Two factors dictate how often you will receive automated reports:

1. Your funding arrangement
2. The number of subscribers in your plan




See the table below to identify how often you'll receive automated reports. Frequency does not change with periodic fluctuations to your funding arrangement or your subscriber count.

Funding Arrangement	Subscriber Count	Frequency
ASO or Mixed*	Any number	Monthly
Fully Insured	200+	Quarterly
Fully Insured	100-199	Annually*

\*Note: The frequency may increase for customers affiliated with broker incentive programs.

## How to view an automated report



Follow the steps below to view automated reports on the Employer eServices Reporting website.


Step	Action						
1	Click Automated Reports from the Report navigation menu.						
2	Click the folder of the employer group for which you'd like to view reports.						
3	Click on the Month/Year folder you'd like to view. <i>Result: All automated reports for that timeframe display.</i>						
4	<table border="1"> <thead> <tr> <th>If...</th><th>Then...</th></tr> </thead> <tbody> <tr> <td>You want to view the report online</td><td>Click the report link in the Name column.</td></tr> <tr> <td>You want to export the report to Excel</td><td> <ol style="list-style-type: none"> <li>a. Click the Excel icon  to the left of the report name.</li> <li>b. When the file download window appears, click Open to view the report.</li> </ol> </td></tr> </tbody> </table>	If...	Then...	You want to view the report online	Click the report link in the Name column.	You want to export the report to Excel	<ol style="list-style-type: none"> <li>a. Click the Excel icon  to the left of the report name.</li> <li>b. When the file download window appears, click Open to view the report.</li> </ol>
If...	Then...						
You want to view the report online	Click the report link in the Name column.						
You want to export the report to Excel	<ol style="list-style-type: none"> <li>a. Click the Excel icon  to the left of the report name.</li> <li>b. When the file download window appears, click Open to view the report.</li> </ol>						



## Automated report help

Access descriptions for each report by clicking the Help link to the left of the Excel icon and report title.

	Name
Help 	<u>Payments by Month</u>
Help 	<u>Claim Lag Study</u>



## Automated reports

Available automated reports are listed below. Reports available to you may be different depending on your contractual agreement.

- Claim Expenses by Size of Payment
- Claim Experience
- Claim Lag Study
- Executive Affordability Scorecard
- Group Summary Data
- Health Care Cost Management Summary
- Network Utilization
- Managed Pharmacy Plan Performance
- Membership by Month
- Premium vs. Claims Incurred Including IBNR – Underwriting – Non-Standard
- Payments by Benefit Type
- Payments by Month



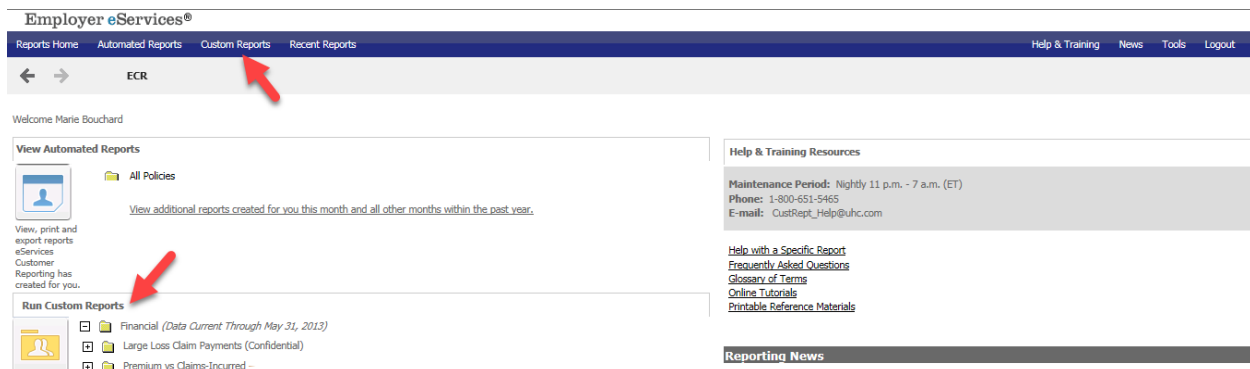
# Custom Reports Overview

## Introduction

The Custom Reports menu item on the Employer eServices Reporting home page allows you to create reports with data supplied by UnitedHealth Group. You have the opportunity to select the type of data included in these reports.

You can access this section of the website by either of the following options:

- Click the Custom Reports menu item.
- Click the Custom Reports title bar from the Employer eServices home page.





## Who can generate custom reports?

The option of running a custom report is available to users with Standard, Select, or Expanded access to the Employer eServices website.

## Display change feature

When viewing custom report options, there are icons which change the display of available reports. See the table below.

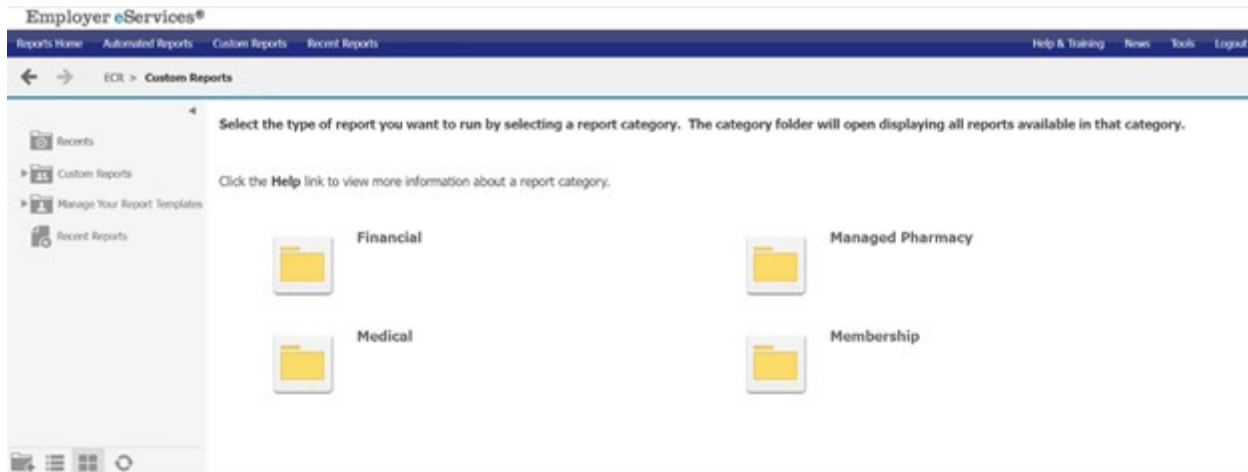
Icon	Display Change Description
	Displays available reports in a text list.
	Displays available reports in folder format.
	Refreshes the page.

## Custom report categories

There are four main categories of custom reports:

1. Financial
2. Managed Pharmacy
3. Medical
4. Membership





## Financial custom reports

Financial custom reports can include the following based on your access level:

- Claim Expenses by Size of Payment
- Claim Expenses by Size of Payment - Core
- Claim Lag Study
- Detail Payment Report
- Detail Payment Report – Non-confidential
- Large Loss Claim Payments
- Payments by Benefit Type
- Payments by Month
- Financial Managed Ad Hoc
- Premium Managed Ad Hoc
- Premium vs. Claims – Incurred-Underwriting
- Premium vs. Claims – Incurred-Underwriting – Non-Standard - Core

## Managed pharmacy reports

Pharmacy reports can include the following based on your access level:

- Managed Pharmacy Cost and Utilization by Month
- Managed Pharmacy Plan Performance
- Key Generic Substitution Indicators by Month
- Managed Pharmacy Critical Indicators
- Managed Pharmacy Utilization by Age Group
- Top Drug Utilization Ranked by Total Net Paid
- Top Drug Utilization Ranked by Volume
- Top Therapeutic Class Utilization Ranked by Total Net Paid
- Top Therapeutic Class Utilization Ranked by Volume
- Managed Pharmacy Ad Hoc



## Medical custom reports

Medical custom reports can include the following based on your access level:

- Cost and Utilization by Procedure
- Utilization by Diagnosis
- Inpatient Utilization by Diagnosis
- Outpatient Utilization by Diagnosis
- Network Utilization
- Top Hospitals Ranked by Total Net Paid
- Top Physicians Ranked by Total Net Paid
- Claim Experience
- Cost and Utilization Summary
- Health Care Cost Management Summary
- Inpatient Utilization and Costs by Admission Type
- Bill Count by Month
- Distribution of Discounts
- Distribution of Ineligible Charges
- Distribution of Other Savings
- Utilization and Costs by Provider Type
- Utilization by Age Group
- Medical Dollar Ad Hoc Discount
- Medical Utilization Ad Hoc
- Medical Dollar Ad Hoc Provider



## Membership custom reports

Membership reports can include the following based on your access level:

- Membership by Market
- Membership by Month
- Membership with Demographic and Geographic Factors
- Membership Managed Ad Hoc





# Run Custom Reports

## Custom Report titles

Individual reports are stored in the report category folders shown on the Custom Reports page. After selecting the custom report category, a complete list of the reports contained in that category displays.

A short description of each report displays.

- To generate a report in the same browser window, click the title of the custom report.
- To generate a report in a new browser window, click the icon in the Actions column.

Employer eServices®

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

ECR > Custom Reports > Financial

Select the type of report you want to run by selecting a report category. The category folder will open displaying all reports available in that category.

Click the [Help](#) link to view more information about a report category.

OR

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.

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.

Report Name	Description	Actions
<b>Claim Expenses by Size of Payment</b>	Provides counts of claimants and total claim payments within incremental, fixed dollar ranges.	[Grid Icon]
<b>Claim Lag Study</b>	Identifies the time lapse between the date a service was incurred and the date the claim was processed.	[Grid Icon]
<b>Detail Payment</b>	Provides check transaction information for payments of ASO and SCS/100 claims. Each transaction contains confidential, individually identifiable health information for the subscriber and claimant associated with the claim.	[Grid Icon]
<b>Detail Payment - Confidential</b>	Provides check transaction information for payments of claims for all funding arrangements. Each transaction contains confidential, individually identifiable health information for the subscriber and claimant associated with the claim.	[Grid Icon]
<b>Detail Payment - Non Confidential</b>	Provides check transaction information for payments of claims for all funding arrangements. No individually identifiable health information is visible on this report.	[Grid Icon]
<b>Financial Managed Ad Hoc</b>	Allows users to develop customized reports using specific Financial attributes	[Grid Icon]

Hover over the name of the report for the EXPORT and PDF options to appear.

**Claim Expenses by Size of Payment**

Provides counts of claimants and total claim payments within incremental, fixed dollar ranges.

[Help](#) [Export](#) [PDF](#)



## Required custom report criteria

After selecting a report, you will be asked to supply your report criteria. Required criteria fields are identified with an asterisk and the word “*Required*.”

Employer eServices®

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

ECR > Custom Reports > Financial > Payments By Month

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](#)

Search for:  ☐ Match case

Available:

- 000000

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](#)

## Policy Number/Group Number segment selection

Use this option to identify a policy number or group segment filter to be included in a custom report. Only one selection can be made for this option.

## Dates

The dates you choose always reference a point in time during which a particular set of activities took place. There are several sets of activities you can track via Employer eServices Customer Reporting. The most common activities are:

- Membership – participation in a given benefit
- Service – use of a benefit for which a claim is incurred
- Process – entry of information derived from a claim into a payment system
- Book – entry of payment by a carrier for a claim into a financial accounting system
- Bill – distribution of an invoice to a customer for payment of an insurance premium



## How to generate a custom report

Follow the steps outlined below to generate a custom report.

Step	Action
1	Access the Run Custom Report section of the Employer eServices website by either method noted below: <ul style="list-style-type: none"> <li>Click the Custom Reports menu item.</li> <li>Click the Custom Reports title bar from the employer eServices home page.</li> </ul>
2	Click the desired custom report category.
3	Select the specific report you'd like to generate under the report category. <i>Result: A new screen appears allowing you to select report criteria and parameters.</i>
4	Highlight Policy Number(s) to be used for the report in the available box in question 1.
5	Use the right arrow to move your selection to the Selected box.
6	Select remaining required and desired optional custom report criteria. <i>Note: You may have to scroll down to see all report criteria options.</i>
7	Click the Next button at the bottom of the screen.
8	View the custom report results.



# Load Labels

## Load Labels

Allows you to store frequently used policy numbers, eliminating the need to search for the policy numbers.


## How to create a label

To create a label, follow the steps below.

Step	Action
1	In Step 1, select the policy number(s) by highlighting and then click the right arrow to move from the Available box to the Selected box.
2	Click the Label the policies you've selected checkbox to select it. <input type="checkbox"/> Label the policies you've selected
3	Enter a name in the box for the policies you've selected. If you wish to save this as the default, click the box next to Set as Default. <input type="checkbox"/> Set as Default
4	Continue to follow the remaining on-screen prompts to run your report. The label is saved upon clicking the Continue button.

## How to use an existing label

To load a label previously created, follow the steps below.

Step	Action
1	After choosing the report to create from the Custom Report option, click the file folder icon in Step 1 next to Load Labels. 
2	A box displays with the previously created labels. Choose the label of interest.
3	The system loads the associated policy numbers in the box Selected.
4	Continue to follow the remaining on-screen prompts to run your report.



## How to rename or delete an existing label

To rename or delete an existing label, follow the steps below.

Step	Action
1	After choosing the report to create from the Custom Report option, click the file folder icon in Step 1 next to Load Labels. 
2	A box displays with the previously created labels. Click More options. 
3	A list of all previously created labels displays. In the upper right, click the  icon to rename the label. Click the  icon to delete the label.



# Advanced Options

## Advanced Options overview

You may elect to use Advanced Options while running a custom report. These optional steps allow you to add more details to your report, and/or limit the report results.

**NOTE:** This is not available for the following reports: Claim Expenses by Size of Payment – Core, and Premium vs. Claims Incurred Including IBNR – Underwriting – Non-Standard - Core. Click the Show Advanced Options button to display Advanced Options.

## Add more details to this report

Adding details lets you see results for topics beyond the original scope of a report. Available variables differ for each custom report. The most common variables are:

- Master Group Number
- Policy Number
- Suffix
- Account
- Plan Variation
- Report Code
- Franchise Code 1
- Franchise Code 2
- Policy Number and Suffix
- Policy Number and Account
- Policy Number and Suffix and Account
- Plan Variation and Report Code
- Benefit Type Category
- Benefit Type
- Benefit Type Detail
- Customer Specific Identifier 1
- Customer Specific Identifier 2
- Employment Status
- Funding Arrangement Category
- Gender
- Health Care Cost Category
- HMO Account Division
- Market Number
- Market Name
- Market Number and Name
- Payee
- Payment Type Category
- Payment Type
- UHC Product Name
- Traditional Product Name
- Product
- Industry Product
- RR-AOFO
- Relationship Category
- Relationship Summary
- Book Dates
- Service Dates
- Transaction Type Category
- Transaction Type Detail



## Example – Add more details

The Payments by Month report is comprised of two attributes (Bill Year/Month and Benefit Payment) and one metric (Payments). The report helps you analyze health care cost trends by displaying health care reimbursement amounts by the month those payments were booked to the financial accounting system.

By adding the variable *Traditional Product Name* in the Add More Details step, your report will trend health care costs based on each product name you choose.

## How to add more details

Follow the steps below to add a variable when creating a custom report.

Step	Action
1	Highlight the variable you'd like to select in the Available field.
2	Click the right arrow to move the variable to the Selected field.

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

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)

1

2



## Limit the report results

Limiting your report's results narrows the scope of report results to elements you choose. Available variables will differ for each custom report. The most common variables are:

- Benefit Type Hierarchy
- Gender – Include
- Health Care Cost Category – Include
- Market Hierarchy
- Relationship Hierarchy
- Transaction Type Hierarchy

## Example – Limit the report's results

If you run a Network Utilization report and want to identify utilization statistics among males, you could select the variable *Gender* in the Limit the Report's Results step. On the next page, you would then specify the value *Male*.

After doing so, your report results would include only male Network Utilization for the time period selected.

## Include and Exclude attributes

If you select an attribute listed as Include, the values by which you limit your report are included in the report results.

If you select an attribute listed as Exclude, the values by which you limit your report are not included in the report results. Only attributes with a large number of values have the Exclude option.





## Attribute hierarchy

Some attributes categorized values at multiple levels of detail, from general to specific. This is called hierarchy.

Example: Relationship is divided into four distinct levels:

1. Category
2. Summary
3. Group
4. Detail

## Example – Attribute hierarchy

When choosing to limit a report, you can narrow results to a particular level in the hierarchy. As an example, the relationship hierarchy is shown below.

Category	Group	Summary	Detail
Subscriber	Subscriber	Subscriber	Subscriber
			Retired Subscriber
			Surviving Spouse
Dependent	Spouse	Spouse	Spouse
			Domestic Partner
	Dependent/Other	Child	Child
			Newborn
			Stepchild
			Handicapped Dependent
			Student
		Other Dependent	Sponsored Dependent
			Collateral Dependent
			Other Dependent
			Unknown



## How to limit a report's results

Follow the steps below to limit results when creating a custom report.

Step	Action
1	Highlight the variable you'd like to select in the Available field.
2	Click the right arrow to move the variable to the Selected field.

### Step 4. LIMIT THE REPORT'S RESULTS.

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 Information - 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)

1

2

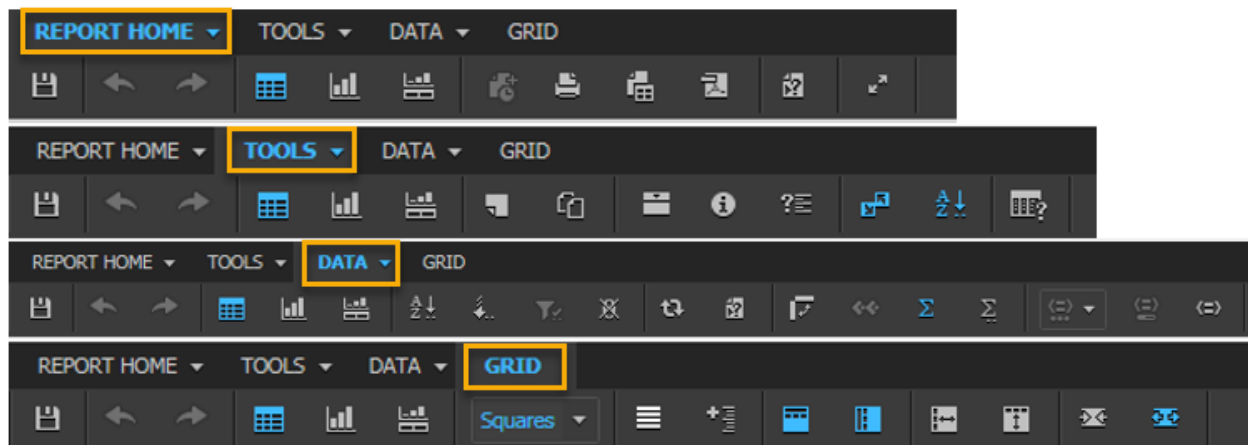
**Note:** You'll receive a prompt to define the variables you selected on the next page of the report.











# Modifying Custom Report Results








## Report icons

The Home toolbar is the default and appears 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. <b>Note:</b> 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	Change 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	Ability to set preferences for the display of Report Options such as Headers and View.
	Swap Rows and Columns	Ability in a single click to interchange rows and columns.
	Visual Threshold Editor Functions	Icons used in conjunction with each other when using the visual threshold editor.
	Banding	Ability to add banding to report rows.
	AutoFit to Contents	Changes your report results display to the contents size of the report.
	Full Screen	Review report using full screen. Reverse is normal screen mode.
	AutoFit to Window	Changes your report results display to the entire window.



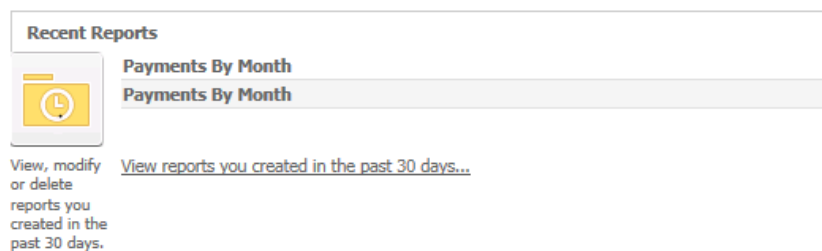
# Recent Reports

## Accessing recent reports

The Employer eServices home page contains two options to access a list of recently run reports.

Scroll to the bottom of the Employer eServices home page. There is a section dedicated to Recent Reports.

- The two most recently run reports display. Click the custom report's name to view its results.
- Click the View reports you created in the past 30 days... link in the Recent Reports section of the Reports Home screen to view a full list of your recent custom reports.



Another way to access these reports is to click Recent Reports from the navigation bar.



## Items stored in recent reports

Only custom reports are stored in the Recent Reports section. The following actions add a new report to the Recent Reports list:

- Custom report request from the Reports home page
- Custom report request from the Custom Reports page
- Custom report request from the Report Templates page
- Drilling into report results
- Filtering on selections of report results

## Recent report time limits

Custom reports remain in your list of Recent Reports for 30 days after the date they were generated.



## Report status

The table below shows the different status messages and definitions.


Status	Description
Ready	Report completed successfully and is ready to view
Waiting for options	Required option selections for the report are incomplete or option selections weren't submitted
Executing SQL	Report is processing SQL server functions and is not ready to view
Executing report sections	Report is processing report sections and is not ready to view
Generating results	Report is processing and is not ready to view
Waiting in queue	Report request is waiting for other previously requested reports to finish processing and is not ready to view
Error	Report request was not completed successfully and will not be processed

## Export to Microsoft Excel

Exporting lets you convert your report into a file format suitable for viewing and editing in Microsoft Excel.

You can maintain a static copy of your results for long-term storage and use by exporting and saving a recent report.

Follow the steps below to export a recent report.

Step	Action
1	Click the Export icon  in the row for the report that you want to export.
2	Change any of the default export settings (optional).
3	Click the Export button.



## Excel Export settings

After clicking the export icon for a report, you can select export settings. See the available export settings in the image below.

Export Options

Membership By Month

Export: Whole report

☐ Excel with plain text  
☐ CSV file format  
☒ Excel with formatting  
☐ HTML  
☐ Plain text

Delimiter: Comma

☒ Export Report Title  
☒ Export filter details  
Remove extra column: Yes

Export Header and Footer: Edit Custom Settings...

**Excel options:**  
☐ Export metric values as text  
☐ Export headers as text


**Excel with formatting options:**  
☐ Embed all images

☐ Do not prompt me again.

Export

## Export to PDF

Selecting the PDF icon exports the report data into an Adobe Acrobat (.pdf) file. Report data exported in a PDF file cannot be changed. The data is saved in view only format.

Step	Action
1	Click the PDF export icon  in the row for the report that you want to export.
2	Change any of the default export settings (optional).
3	Click the Export button.





## PDF Export settings

After clicking the PDF export icon for a report, you can select export settings. Select from the following:

PDF Options

Membership By Month

Export: Whole report

Scaling:

☒ Adjust font to 100 % of original size
 ☐ Fit to: 1 pages wide by 1 tall

Orientation:

☒ Portrait
 ☐ Landscape

Show advanced options

Page Header and Footer: Edit Custom Settings...

Report Header: Edit Custom Settings...

☒ Print cover page
 

☒ With Filter Details
 ☐ With Report Details

Cover page location:

☒ Before report
 ☐ After report

☐ Do not prompt me again.
 

Export

## Details

Clicking the information icon  displays the following information about a recent report:

- Report description
- Owner
- Date and time last modified
- Date and time generated
- Options used to generate it

Employer eServices®

Reports Home

Automated Reports

Custom Reports

Recent Reports

←

→

ECR > Custom Reports > Membership > **Membership By Month**

Close

Report name:

Membership By Month

Report description:

Provides a count of subscribers and dependents categorized by membership month.

Owner:

Administrator

Report path:

ECR > Custom Reports > Membership > Membership By Month

Modified:

3/8/07 10:07:06 PM

Start time:

11/2/17 9:47:08 AM

Finish time:

11/2/17 9:57:16 AM

Report Details:

Report Description:

Provides a count of subscribers and dependents categorized by membership month.

Prompt 1: SELECT A POLICY NUMBER OR GROUP SEGMENT FILTER \* (Required)

Prompt 2: SELECT A POLICY NUMBER OR GROUP SEGMENT FILTER \* (Required)

Prompt not answered

Prompt 3: SELECT MEMBERSHIP DATES

Prompt 4: SELECT THE BENEFIT YOU WANT TO MEASURE

Medical

Prompt 5: ADD MORE DETAILS TO THIS REPORT

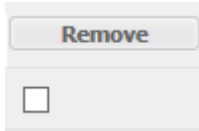
SQL statement:



## Remove a report

To remove a single report from the Recent Reports list:

1. Select the checkbox in the Remove column for the report you want to delete.



2. Click the Remove button in the column heading.

Once a report is removed from the Recent Reports list, there is no way to retrieve it.



# Report Data

## Data availability

Typically, all data from the prior month is added to the reporting system by the 10<sup>th</sup> workday of the current month. For example, May's data is added in June; June's is added in July, and so on. Once a new month of data is available, you can use it to run your custom reports.

*Note:* Weekends and holidays are not working days; therefore, the 10<sup>th</sup> workday can come as early as the 12<sup>th</sup> or as late as the 15<sup>th</sup> day of the month.

## Financial report data vs. medical/managed pharmacy report data

The results of financial reports differ from medical and managed pharmacy reports for two main reasons:

1. **Dates**  
There is an average delay of 2.5 days between the date a claim is processed and the date it is booked to the financial accounting system.
2. **Data**  
There are different sets of information used to produce a financial report versus a medical or managed pharmacy report.

## Dates

Dates reference a point in time during which a particular set of activities take place.

- Medical and managed pharmacy reports are based on the date claim information is entered into the payment system—process dates.
- Financial reports are based on the date claims are logged into the financial accounting system—book dates.

Because of the short (usually a couple days) delay between a claim's process and book activity, there will be some claims processed at the end of one month that are not booked until the start of the next month.

Any claims processed at month's end are not reported in that month's financial reports, while claims booked at the beginning of the month are not reported in that month's medical and managed pharmacy reports.



## Data limitations

Several factors contribute to different report results from month to month:

- Financial data is streamlined to contain only information about transaction related activity for claim payments. This includes special transactions such as manual adjustments, bulk refunds, and reversals—items not considered with medical and managed pharmacy reports.
- Financial data does not include details for ineligible charges, discounts, cost sharing, coordination of benefits, and other provisions of your plan design. Those details are found in the statistical claim data used to generate medical and managed pharmacy reports—making these sets of reports ideal for tracking the utilization and performance of your plan.
- Medical reports are limited to medical coverage, and managed pharmacy reports are limited to managed pharmacy coverage; however, many financial reports include data for multiple lines of coverage, (e.g., medical, managed pharmacy, dental, vision, etc.)

## Why do the results of financial reports differ from billing and banking reports?

Billing reports do not include information for self-funded (ASO) customers. If your benefit program includes an ASO portion, those dollars appear in your financial reports but not in your billing reports.

The results of your banking reports are subject to the time lapses typical of the check clearing process. Funds that have yet to clear may not show up on your banking report, but those same dollars would appear in your financial reports regardless of whether or not the check cleared.



## Date parameters

See the definitions below for different date related parameters in custom reports.

- Membership Date – a point in time in which an individual participated in a given benefit.
- Service Date – a point in time in which a benefit was used (i.e., a service was rendered/claim was incurred).
- Process Date – a point in time in which information derived from a claim was entered into the claim payment system.
- Book Date – a point in time in which a carrier's payment for a claim was registered to the financial accounting system.
- Bill Date – a point in time in which an invoice was distributed to a customer for payment of an insurance premium.

## Negative dollar amounts

Typically, negative dollar amounts reflect adjustments made for claims paid during a prior period.

## Subscriber number 99999999999

A subscriber number of "99999999999" is the default value for all unknown subscribers when a claim is manually processed. Examples of situations where this might occur are bulk adjustments and recoveries, capitated payments, and NYCRA surcharges.

## How long is data stored?

The system maintains the data on a rolling 36-month schedule. When the most current data is added to the system, the oldest month's data is deleted.



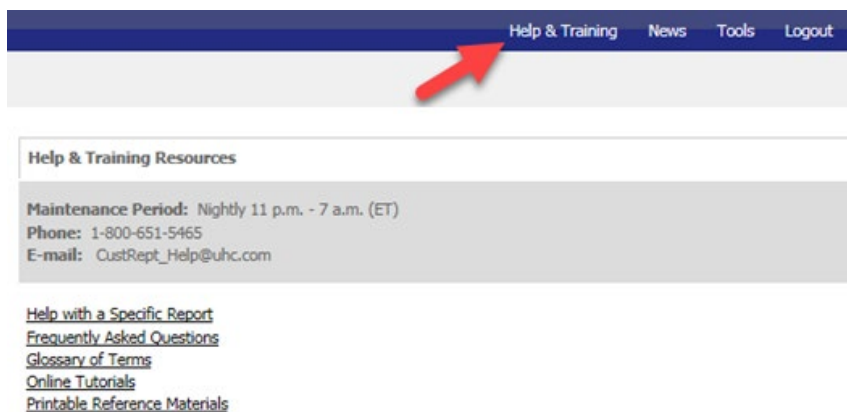
# Help and Training Resources

## Accessing help and training resources

There are two main ways to access help and training resources from the Employer eServices Reporting home page. Both options access the same set of help resources.

1. Click Help & Training from the navigation bar.
2. Select one of the individual help links listed in the Help & Training section of the Employer eServices home page.

Customer Reporting Help & Training Resources opens in a new browser window.



## Customer reporting online help

Information on the Customer Reporting Online Help page is divided into six segments:

- Home
- Reports
- How To
- Glossary
- Tutorials
- Reference



## Home tab

The online help Home tab provides an overview of the tabs available in online help and links to three help sections:

- **FAQs (Frequently Asked Questions)** – Click this link to view questions that are commonly posed and their associated answers.
- **Known Issues** – This link provides an up-to-date list of reporting or Employer eServices technical issues and workarounds.
- **Release Notes** – Click this link to learn more about the changes implemented in application enhancements.

Employer eServices®

Online Help: eServices Customer Reporting

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.

#### 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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## Reports tab

The reports tab provides quick links to explain details for any Employer eServices report. Use your mouse to hover over the report type to open a drop-down menu for each category. You can also select a report by scrolling down in the browser window.

The information available after selecting a report is:

- The report's definition
- A sample report
- The data that the report includes/excludes by default
- Steps to run the report
- A list of the details you can add to the report
- A list of the items by which you can limit your report results
- Print options

Employer eServices®

Online Help: eServices Customer Reporting

Home Reports How to Glossary Tutorials Reference

▼ FINANCIAL ▼ MANAGED PHARMACY ▼ MEDICAL ▼ MEMBERSHIP

**REPORT HELP**

This section of Online Help lists the interactive reports available and provides links to support documentation for specific reports. Custom reports are run interactively through the reporting application, determine the population, dates, and other conditions you want to report on.

The support documentation includes:

- The report definition
- A sample report
- The data the report includes/excludes by default
- Steps to run the report
- A list of the details you can add to the report (Report On; Drill\*)
- A list of the items you can limit your results to (Filter On)
- Printing options

\* The "Drill" feature is only available with Expanded services.

CATEGORY	REPORT NAME	SEL	EXP
Financial	Claim Expenses by Size of Payment	•	•
	Claim Lag Study	•	•
	Detail Payment	•	•
	Detail Payment - Non-Confidential	•	•
	Large Loss Claim Payments	•	•
	Payments by Benefit Type	•	•
	Payments by Month	•	•
	Premium vs Claims Incurred Including IBNR - Underwriting - Non-Standard	•	•
	Financial Managed Ad Hoc	•	•
	Premium Managed Ad Hoc	•	•
Managed Pharmacy	Managed Pharmacy Cost and Utilization by Month	•	•
	Managed Pharmacy Plan Performance	•	•
	Key Generic Substitution Indicators by Month	•	•
	Managed Pharmacy Ad Hoc	•	•
	Managed Pharmacy Critical Indicators	•	•
	Managed Pharmacy Utilization by Age Group	•	•
	Top Drug Utilization Ranked by Net Paid	•	•
	Top Drug Utilization Ranked by Volume	•	•
	Top Therapeutic Class Utilization Ranked by Net	•	•
	Top Therapeutic Class Utilization Ranked by Volume	•	•





## How To tab

Step/action processes are divided into three segments. Each segment is further defined by individual step/action directions:

- Getting Started
- Running a Report
- Working with Results

To access How To information, either use your mouse to hover over the category links at the top of the How To tab or scroll down on the browser window and click a direct link to a topic.

## Glossary tab

Use the Glossary tab to find definitions of terms and acronyms specific to customer reports. To look up a term or acronym, click the letter it starts with in the alphabet banner at the top of the page.

Employer eServices®

Online Help: eServices Customer Reporting

Home Reports How To **Glossary** Tutorials Reference

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z |

### GLOSSARY — A

[Go to top](#)

#### Abuse and Fraud

[Function: Metric]

The amount of submitted charges not covered due to willful and material misrepresentation of a health care claim.

Found in the following report by default:

- [Distribution of Ineligible Charges](#)

Option to add to the following report:

- [Medical Dollar Ad Hoc](#)

[Show/Hide the Claim Reduction table](#)

[Go to top](#)

#### Accident

[Function: Value]

The cause of an injury for which services are provided by a health care professional/facility.

Parent Attribute:

- [Cause Category](#)
- [Cause Detail](#)
- [Cause Summary](#)

[Go to top](#)

#### Account

[Function: Attribute]

Codes assigned by an employer that are used to identify specific business units or populations within

## Tutorials

The Tutorials tab stores tutorials on many common tasks performed on the Employer eServices Customer Reporting site. Choose your security level to display the tutorials appropriate to your level of access.

Click the title of the desired task to begin a tutorial.



## Reference tab

Clicking the Reference tab displays an online help page containing links to downloadable training and reference material. The materials are in Adobe Acrobat (.pdf) format.

The following documents are available on this page:

- eCR Reference Manual
- Printable Reporting Tutorials
- Report-specific Information



# Reporting News

The Reporting News section of the Employer eServices home page provides up-to-date news on data availability, technical issues, and system updates.

## Reporting News

8/31/2022

[Member Cost Sharing Detail Reports To Be Discontinued](#)

8/31/2022

[Prescription Tier Corrected for April - June 2022](#)

8/22/2022

[Sign up for instructor - led eCR training!](#)

[More News...](#)

## Reporting news details

Use one of the following methods to access Reporting News:

- Click the individual links displayed in the Reporting News section of the page.
- Click the More News... link.

## Reporting news help

You can view a short summary of news items listed on the page. To view issues in more detail, click the issue title to view in html format.

Employer eServices®
eServices Customer Reporting

### News Archives

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**August 31, 2022 -Member Cost Sharing Detail Reports to be Discontinued**

**Description:**

Effective September 8, 2022, the Member Cost Sharing Detail reports will no longer be available in the eServices Customer Reporting application. These reports will be discontinued because there are better, more accurate sources available to obtain the data these reports provide.

**Impact:**

The following reports will be discontinued:

- Member Cost Sharing Detail Report – Non-Confidential
- Member Cost Sharing Detail Report – ASO Non-Confidential

**Where can I get more help?**

If you have questions regarding this or any other reporting issue, please contact your account representative.

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# Report Templates

## What is a report template?

A template is a custom report you saved. The template maintains all the selections made when you originally ran the report.

**Example 1:** You create a report showing last month's medical payments for your retirees. Knowing you'll need to run a similar report each month throughout the year, you save that report as a template. To run that report every month, all you need to do is run your template, adjusting the dates to reflect the most current month of data.

**Example 2:** Suppose you want to analyze dates of April-June but your template includes dates of January-March. When generating a report from a template, deselect the January-March dates and then select April-June.

## Template location

Templates are located in a folder directory on the Report Templates page.

To open the directory of your report templates:

1. Click Tools from the navigation bar.
2. Click the View and Manage Your Report Templates link in the Report Templates section.

You may also select a report template by clicking the Reporting Tools section of the Employer eServices home page.

## Creating a report template

Follow the steps below to create a template. By default, a report is saved as a template. When you access a template to generate another report:

- The report options screen displays.
- Your original selections are retained for all options.

Step	Action
1	Click the Save icon on the Reports results screen.
2	Type a name for the report into the Save As field.
3	Click the Save button.



## Using a report template

To access your saved report template and generate another report, follow the steps below.

Step	Action
1	Click Tools from the Employer eServices Customer Reporting home page.
2	Click Manage Your Report Templates.
3	Select the report template you'd like to use.
4	Adjust your original selections to generate a new report.

## Changing default export and print settings

The system's default export and print settings can be adjusted from the Preferences screen. To view the Preferences screen, click *Tools* from the main navigation bar and then click the Preferences link.

The left side of the Preferences screen contains links to the settings you can edit including Export and Print. Each setting contains several options you can adjust to your liking. Remember to click the Apply button to finalize settings that you modify.

## Static report copies

By default, when you save a custom report, it is saved as a template. You can; however, override the default and save the report as a "static" copy.

If you save your report and re-run it from your Report Templates, you cannot modify the options you selected because the report is produced using the exact same selections as the original.



# Group Segment Filters

Creating a group segment filter is the only way you can run a report using a segment of your customer population. This eliminates the need for secondary option selections and allows you to run targeted reports with efficiency and ease every time.

By creating a filter for your full population, you are essentially identifying and labeling your Policy Number.

## How to create a group segment filter

The Policy Number is equivalent to your policy or group number. With few exceptions, the policy/group number defines an organization's full claimant population. Most companies have a single policy/group number.

Step	Action
1	Select Tools from the Navigation bar.
2	Click Create or Modify a Group Segment Filter under the Group Segment Filter section of the Reporting Tools screen.
3	Type a name for the filter into the Name field on the Group Segment Filter screen.
4	Type a description of the filter in the Description field (optional).
5	Click the Create button.
6	Click Add Attribute.
7	Type a Policy Number in the Search box.
8	Click the Search icon.
9	Select Operator.
10	Select a Policy Number from the Elements field.
11	Click ►[Move to Selected].
12	Click Append.
13	Click Save.

## Using a group segment filter

When generating a custom report, you can select this filter from the first report options screen. This process is shorter than selecting a Policy Number and then the policy/group number.



# Import Group Segment Filters

You may create a Group Segment Filter (GSF) 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 it for your reporting needs.

## How to import a group segment filter

To import a group segment filter, follow the steps below.

Step	Action
1	Click Tools from the Navigation bar to open the Reporting Tools screen.
2	Click the Import a Group Segment Filter link.
3	Click the Browse button to locate the file to import. Select the desired file and click the <i>Open</i> button.
4	Type a name for the filter in the Filter Name field.
5	Type a description of the filter in the Filter Description field (optional).
6	Click the Import button. If the import is successful, you will see, "Congratulations! Your filter was successfully imported."



# Share Group Segment Filters

You may 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.

## How to share a group segment filter

To share a group segment filter, follow the steps below.

Step	Action
1	Click Tools from the Navigation bar to open the Reporting Tools screen.
2	Click the Share a Group Segment Filter link.
3	Select the group segment filter you want to share from the list in the Filter Inbox. <i>Note:</i> The filter you choose appears in the Selected GSF field. Only one selection is permitted.
4	Identify the Person to Share this Filter With by typing a User ID into the User ID field, then click the Find User button. <i>Note:</i> IDs are case sensitive. To obtain a person's User ID, you must contact that person directly.
5	Confirm that the name of the person with whom you want to share the filter appears in the Selected User field.
6	Click the Share button. If the share is successful, you will see, "Congratulations! Your filter was successfully sent to [User ID]."

