Employer eServices®
Your Suite of Administrative Services

eServices Customer Reporting

version 6.07 for Select/Expanded Services

Reference Manual

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Table of Contents

Overview

Manual purpose

The eServices Customer 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 eServices Customer Reporting.

Prerequisites

To use this manual effectively, you must have a fundamental understanding of the Microsoft Windows environment. This includes using your mouse to select:

- Menu options
- Toolbars
- Icons

In addition, you should be able to use and manipulate data in Microsoft Excel if you plan to export reports to Excel.

Benefits of using eServices Customer Reporting

The eServices Customer Reporting web system provides an easily accessible means of generating reports using up-to-date and reliable data. Because it incorporates Microsoft Windows functionality, users can quickly generate reports to fit their 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 hour 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).

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Overview continued

Reference Manual structure

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

Order	Chapter Title	Chapter Description
1	Overview	Introduces the audience, pre-requisites and manual structure.
2	Reporting System Basics	How to access and log out of the Employer eServices customer reporting application, and 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	Shows you 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	Explains how to initiate a custom report and defines parameters, date types and report options.
8	Advanced Options	Describes theAdvanced 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	Explains how to access recent reports and outlines any limitations.

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Overview continued

Reference Manual structure (continued)

Order	Chapter Title	Chapter Description
11	Report Data	Explains details on how report data is received and stored.
12	Help and Training Resources	Summarizes the 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	Explains how to create and use custom report templates.
15	Group Segment Filters	Explains how to create and use group segment filters in custom reports.
16	Import Group Segment Filters	Explains how to import group segment filters.
17	Share Group Segment Filters	Explains 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 ← and → keys to move the cursor within a field.
- Use the Backspace or Delete key to remove information from a field.

Log on process

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

Step	Action
1	Access Employer eServices website: https://www.employereservices.com/
2	Enter User ID and Password
3	Click Login button.
4	Click the Reports menu item from the Employer eServices home page.

Logout process

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

Step	Action
1	Click on the Logout option on the on eServices Customer Reporting navigation bar.  *Result: The logout screen will display.*
2	Close the internet browser window.

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Reporting System Basics continued

Report menu

Review the description of each Reporting menu item below:

Link	Link Description
Reports Home	This link will display the Reports home page.
Automated Reports	This link will display and allow 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 will display 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 link 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.

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Reporting System Basics continued

eServices Customer Reporting minimum requirements

1. Hardware: Pentium class processor or equivalent with 64 MB RAM.
2. Browsers: IE 6.0 and Netscape 7.2.
3. Browser Settings: Cookies and128-bit encryption enabled. DHTML recommended for optimal performance.
4. Internet Connection: High-speed LAN/T1, cable, or DSL connection with support for SSL.

Navigation

Path breadcrumb trails are displayed 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 and answer the questions based upon content visible on the Reports Home screen:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Do you see a section labeled Run Custom Reports?
<table>
<tr><th>If…</th><th>Then…</th></tr>
<tr><td>Yes</td><td>Open the Medical folder under Run Custom Reports and go to Question 2</td></tr>
<tr><td>No</td><td>You have Standard access.</td></tr>
</table></td></tr>
<tr><td>2</td><td>Which report is listed first under the Medical folder?
<table>
<tr><th>If the first report listed is…</th><th>Then…</th></tr>
<tr><td>Claim Experience Report</td><td>You have Select access.</td></tr>
<tr><td>Bill Count by Month</td><td>You have Expanded access.</td></tr>
</table></td></tr>
</table>

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.

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Reporting Access continued

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 is able to perform a company-wide analysis by selecting all the policy numbers, or perform a targeted-study by selecting the number of specific division.

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

- 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.

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Reporting Access continued

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 Definity® health care plan and another to your PPO.

Access to confidential reports

1. 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.
2. 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.

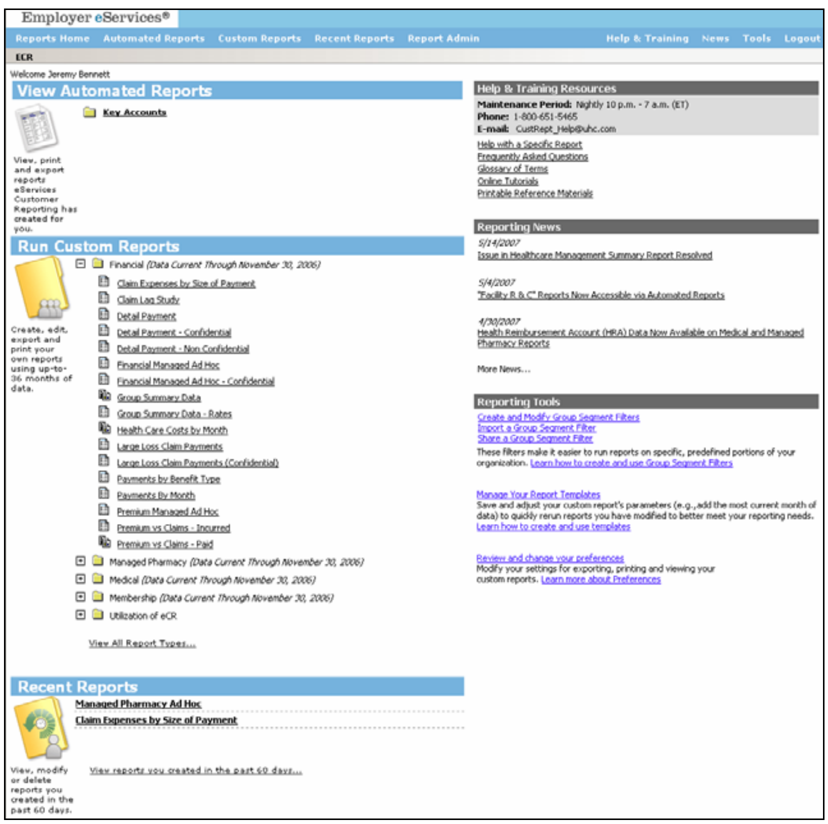
Reports Home Page

Introduction

The Reports Home Page is the first screen that is displayed after you have logged into eServices Customer Reporting,

The Home Page displays all or a portion of the following sections based your access level:

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



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Reports Home Page continued

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. This section allows you to create, edit, export and print reports that are initiated with criteria you customize.

Recent Reports

The Recent Reports section is located on the bottom of the left side of the Reports home page. This section allows you 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. This section provides links to create and manage the following reporting tools:

- Group Segment Filters
- Report Templates
- Preferences

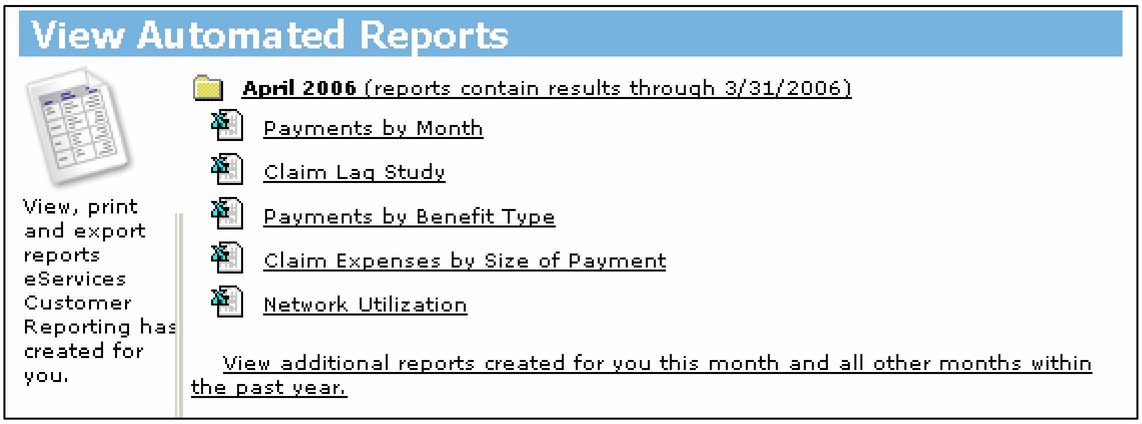
View Automated Reports

Overview

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 policies, a separate folder exists for each policy.

Within each policy's folder are the monthly folders, and within the monthly folders – your automated reports.



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 20th 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 holiday's are not working days; therefore, the 20th workday can come as early as the 26th or as late as the 31st day of the month.

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View Automated Reports continued

How often automated reports are 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 customer affiliated with broker incentive programs.

Can I change the frequency?

The frequency in which automated reports are delivered is pre-defined based on a combination of customer size and funding. These pre-defined standards were established with input from members of the business community.

If you need these reports produced on a more regular basis, please contact your representative for other reporting options.

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View Automated Reports continued

How to view an automated report

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

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Click on Automated Reports from the Report Navigation menu.</td></tr>
<tr><td>2</td><td>Click on the folder for the employer group or policy (depending on your level of access) on which you’d like to view reports.</td></tr>
<tr><td>3</td><td>Click on the Month/Year folder you’d like to view.
Result: All automated reports for that time frame are displayed.</td></tr>
<tr><td>4</td><td><table>
<tr><th>If…</th><th>Then…</th></tr>
<tr><td>You want to view the report online</td><td>Click on the report link in the Name column.</td></tr>
<tr><td>You want to export the report to Excel</td><td>a. Click on the Excel icon to the left of the report name. ( )
b. When the file download window appears, click Open to view the report.</td></tr>
</table></td></tr>
</table>

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View Automated Reports continued

Automated report help

Descriptions for each report can be accessed by clicking the Help link to the left of the Excel icon and report title.

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
- PVC (Premium vs Claims) Paid
- 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 on the Custom Reports menu item
- Click on the Custom Reports title bar from the Employer eServices home page.

Who can initiate custom reports?

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

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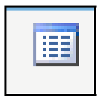
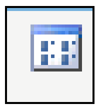
Custom Reports Overview continued

Display change feature

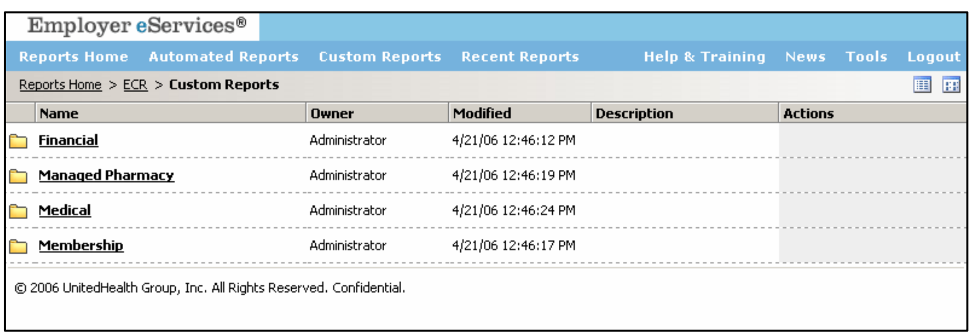
When viewing custom report options, there are two icons below the Logout resource item list that change the display of available reports. See the table below to

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

Custom report categories

There are four main categories of custom reports:

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



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Custom Reports Overview continued

Financial custom reports

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

- Claim Expenses by Size of Payment
- 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

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

Continued on next page

Custom Reports Overview continued

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
- Healthcare Cost Management Summary
- Inpatient Utilization and Costs by Admission Type
- Member Cost Sharing Detail Report – ASO Confidential
- Member Cost Sharing Detail Report – Non-confidential
- 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
- Medical Utilization Ad Hoc

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

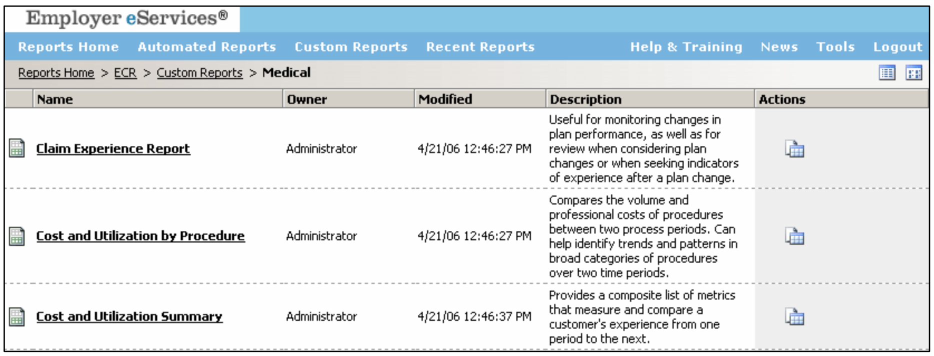
Run Custom Reports

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 are displayed.

A short description of each report is displayed.

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



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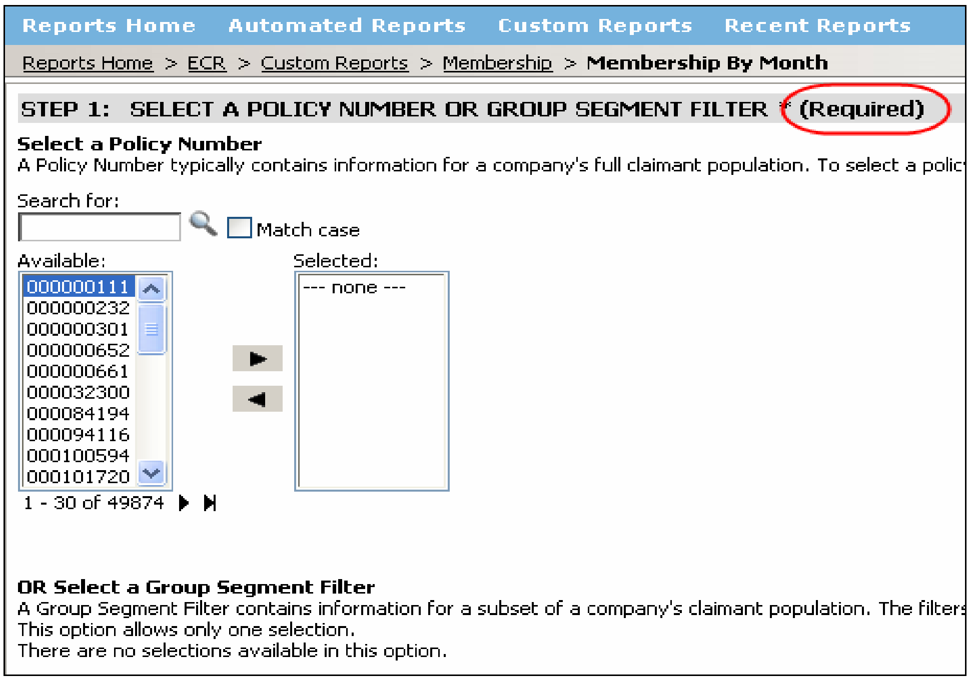
Run Custom Reports continued

Required custom report criteria

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



Policy Number / Group Segment Selection

This option allows you 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.

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Run Custom Reports continued

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 into a payment system of information derived from a claim
- Book—entry into a financial accounting system of payment by a carrier for a claim
- Bill—distribution of an invoice to a customer for payment of an insurance premium

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Run Custom Reports continued

How to initiate a custom report

Follow the steps noted below to initiate a custom report:

Step	Action
1	Access the Run Custom Report section of the Employer eServices website by either method noted below: • Click on the Custom Reports menu item • Click on the Custom Reports title bar from the Employer eServices home page.
2	Click on the desired custom report category.
3	Select the specific report you'd like to generate under the report category. *Result: A new screen will appear allowing you to select report criteria and parameters.*
4	Highlight Policy Number(s) to be used in 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. Note: You may have to scroll down to see all report criteria options.
7	Click the Next button at the bottom of the screen.
8	View the custom report results.

Advanced Options

Advanced Options overview

While running a custom report, you may elect to use Advanced Options. These optional steps allow you to:

- Add more details to your report, and/or
- Limit the report's results

To display Advanced Options, click the Show Advanced Options button.

Add More Details to this Report

Adding details lets you see results for topics beyond the original scope of a report. Available variables will 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
- HHealthcare 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

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Advanced Options continued

Example - Add More Details

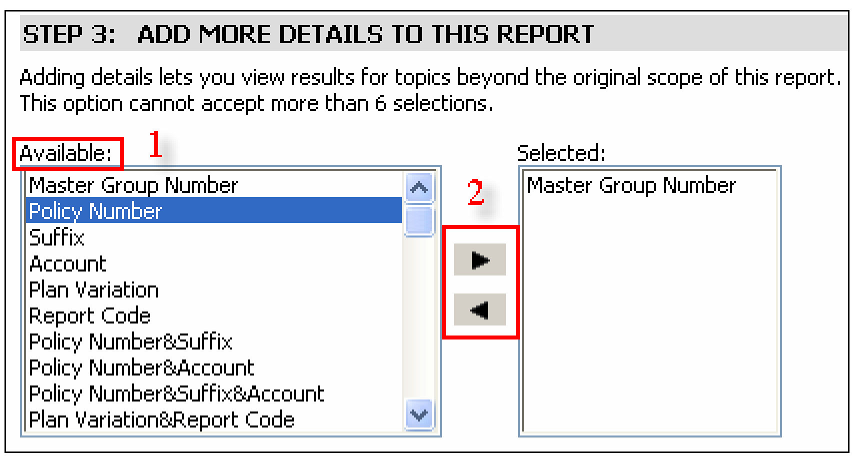
The Payments by Month report is comprised of two attributes (Bill Year/Month and Benefit Payment) and one metric (Payments). The report helps you analyze health care cost trends by displaying health care reimbursement amounts by the month those payments were booked to the financial accounting system.

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.



Note: You'll be prompted to define the variables you have selected on the next page of the report.

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Advanced Options continued

Limit the Report's Results

Limiting your report's results lets you narrow the scope of report results to elements you choose.

Available variables will differ for each custom report. The most common variables are:

- Master Group Number – Include
- Benefit Type Hierarchy
- Customer Specific Identifier 1 – Include
- Customer Specific Identifier 1 – Exclude
- Customer Specific Identifier 2 – Include
- Customer Specific Identifier 2 – Exclude
- Employment Status – Include
- Gender – Include
- Healthcare Cost Category – Include
- HMO Account Division – Include
- HMO Account Division – Exclude
- Market Hierarchy
- Medicare Status – Include
- Payee – Include
- Payment Type Hierarchy
- Product Hierarchy
- RR-AOFO – Include
- Relationship Hierarchy
- Transaction Type Hierarchy

Example – Limit the Report's Results

If you ran a Network Utilization report and wanted 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.

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Advanced Options continued

Include and Exclude attributes

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

If you select an attribute listed as Exclude, the values with 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 categorize 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

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Advanced Options continued

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
			Step child
			Handicapped Dependent
			Student
		Other Dependent	Sponsored Dependent
			Collateral Dependent
			Other Dependent
			Unknown

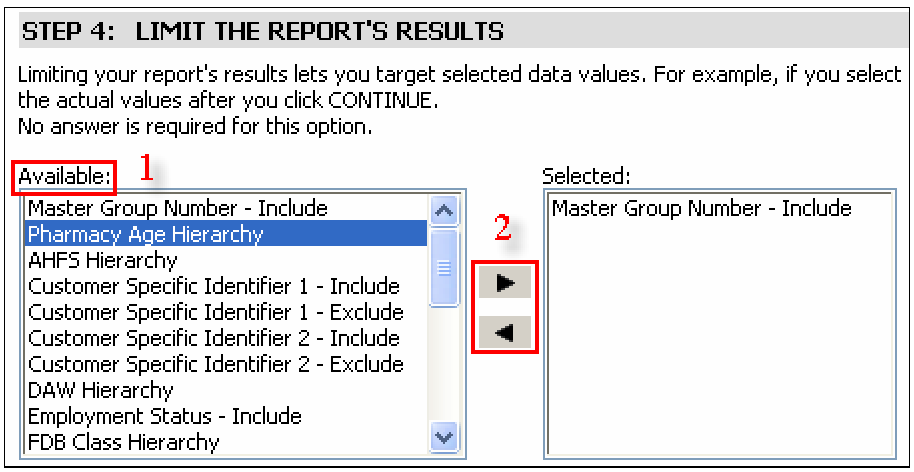
Continued on next page

Advanced Options continued

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.

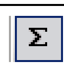
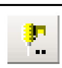


Note: You'll be prompted to define the variables you have selected on the next page of the report.

Modifying Custom Report Results

Report Icons

The toolbar pictured below, or a portion of it, will appear with custom report results

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.
	Edit Options	Displays page where you can reproduce the report based on new criteria.
	Export	Opens a second browser window with options to send results to a 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.
	Toggle 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.

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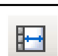
Modifying Custom Report Results continued

Report Icons (continued)

Icon	Title	Description
	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.
	Report Display	Changes the report format display
	Outline	Changes the report result 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	Displays the report filters used to generate the report

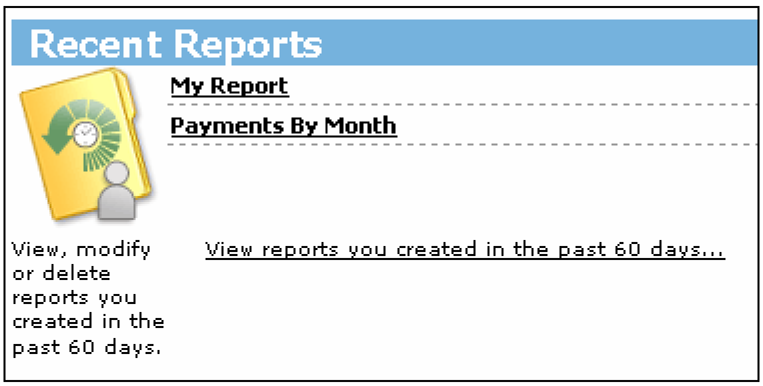
Recent Reports

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 recent reports run are displayed. Click the custom report's name to view its results.
- To view a full list your recent custom reports, click the View Reports You Created In the Last 60 Days link in the "Recent Reports" section of the "Reports Home" screen.



Another way to access these items is to click the Recent Reports menu item.

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Recent Reports continued

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

If you export a report directly to Microsoft Excel or Adobe Acrobat from either the Custom Reports or Report Templates pages, it will not be included in the Recent Reports list.

Recent Report time limits

Custom reports remain in your list of Recent Reports for 60 days after the date they were generated.

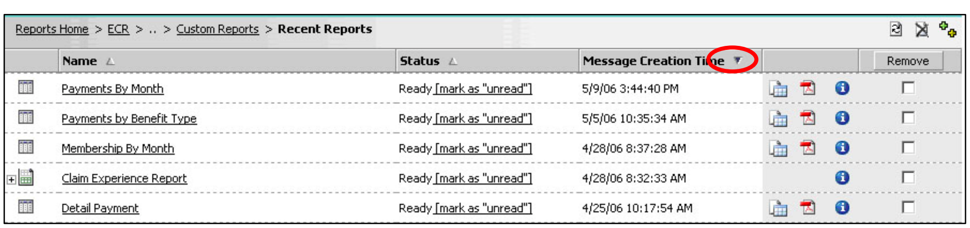
Sorting options

By default, Recent Reports are sorted by the date and time they were created. They can also be sorted alphabetically by the Name and Status column entries.

The sort arrows let you reorient the list by a column's contents:

- To sort by ascending order, click **[**Sort Ascending] or [Sorted Descending] to sort by ascending order.
- To sort by descending order, click [Sort Descending] or [Sorted Ascending] to sort by ascending order.

The darker arrow indicates the order the list is currently being sorted.



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Recent Reports continued

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 reports requested before it 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.

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

Follow the steps below to export a Recent Report:

Step	Action
1	Click [**Export**] in the same row in which the report you want to export is listed.
2	[Optional] Change any of the default export settings.
3	Click the Export button.

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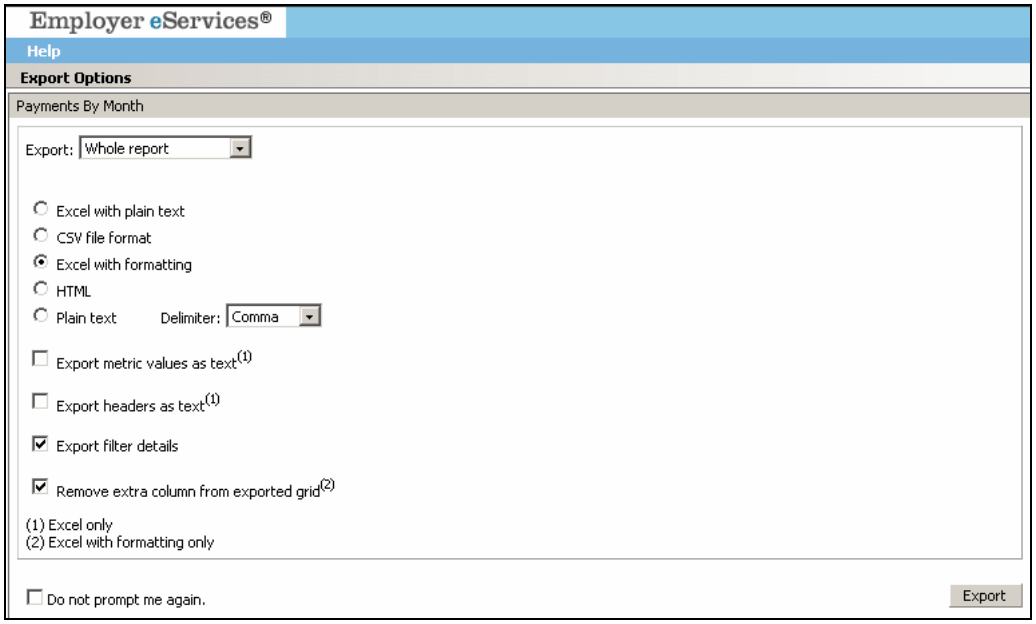
Recent Reports continued

Excel Export settings

After clicking the export icon for a report, you'll be prompted to select export settings. See the export settings available in the image below:



Export to PDF

Selecting the PDF icon will export the report data into an Adobe Acrobat (.pdf) file. PDF files do not allow any changes to be made to the report data. It will be saved in an inquiry only format.

Step	Action
1	Click the pdf export icon ( ) in the same row in which the report you want to export is listed.
2	[Optional] Change any of the default export settings.
3	Click the Export button.

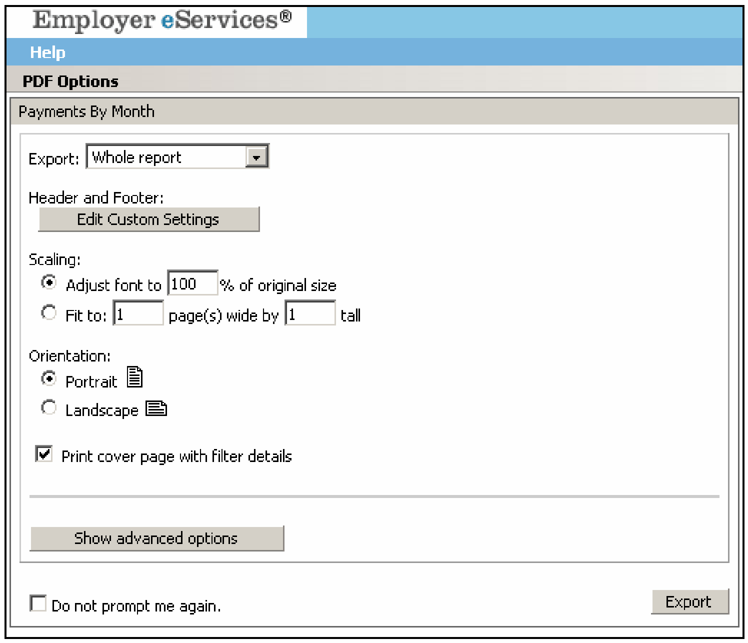
Continued on next page

Recent Reports continued

PDF export settings

After clicking the pdf export icon for a report, you'll be prompted to select export settings. Export settings allow you to select the following:

- Header and Footer
- Scaling
- Orientation



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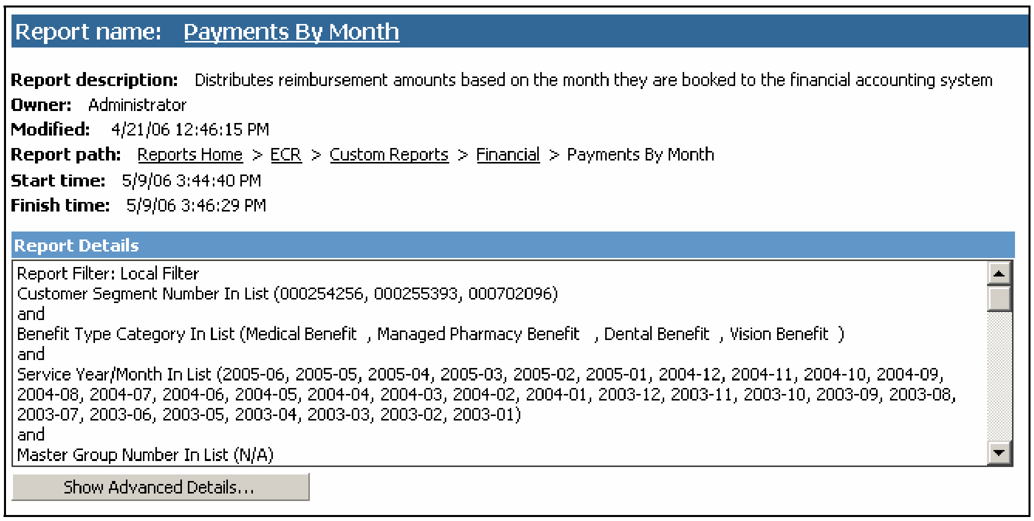
Recent Reports continued

Details

Clicking the information icon will display the following information about a recent report:

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



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.

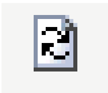
Continued on next page

Recent Reports continued

No data refresh

If you open a report from your list of Recent Reports the results are not refreshed, even if the data was updated since the last time you accessed the report. The same data will appear every time the report is opened.

Report status refresh



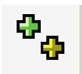
To update a report's status, click the refresh icon located in the upper right of the Recent Reports page.

Clearing Recent Reports

To remove all Recent Reports, click on the clear icon in the upper right of the Recent Reports page.

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

Show Report Sections



The Show Report Sections for documents icon will expand a summary report and display each of the reports that were used to create that summary report.

Report Data

Data availability

Typically, all data from the prior month is added to the reporting system by the 10th 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 10th workday can come as early as the 12th or as late as the 15th 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 took place.

- Medical and Managed Pharmacy reports are based on the date claim information was entered into the payment system – process dates.
- Financial reports, on the other hand, are based on the date claims were logged into the financial accounting system – book dates.

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

Any claims processed at months 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.

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Report Data continued

Managed Pharmacy data

A delay in the receipt of records from Medco® (the vendor for managed pharmacy benefits) may further compound the difference in report results.

Medco supplies a bulk of data twice per month, on average. If a data feed is delayed and is not received until the end of the month, all the claims in that data feed may not be booked until the next month.

This also causes an extra feed to be necessary two months a year. This will increase the normal Managed Pharmacy Claim total for those months.

Data limitations

There are several factors that 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 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 do not appear 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 the check cleared or not.

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Report Data continued

Date parameters	See the definitions below for different date related parameters in custom reports: • Membership Dates – a point in time in which an individual participated in a given benefit. • Service Dates – a point in time in which a benefit for was used (i.e., a service was rendered/claim was incurred). • Process Dates – a point in time in which information derived from a claim was entered into the claim payment system. • Book Dates – a point in time in which a carrier's payment for a claim is registered to the financial accounting system. • Bill Dates – a point in time in which an invoice is 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.

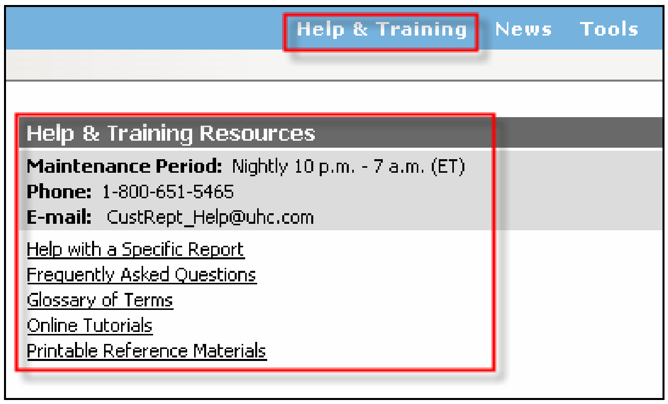
Help and Training Resources

Accessing Help and Training resources

There are two main ways to access Help and Training resources from the Employer eServices Reporting home page. Both access options will bring you to the same set of help resources.

1. Click the Help and Training menu item.
2. Select one of the individual help resource links listed in the Help and Training section of the Employer eServices home page.

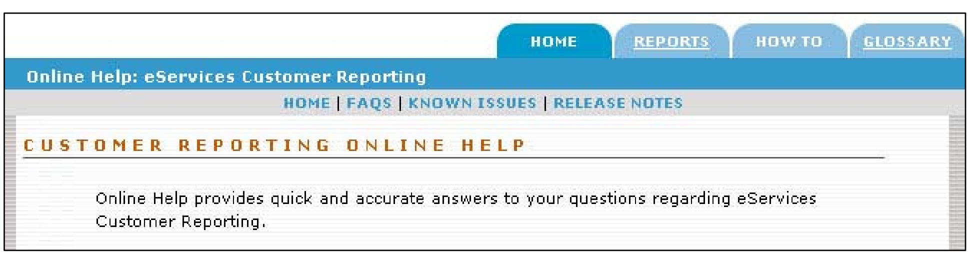
After using one of these methods to access online help, a separate browser window is initiated with Customer Reporting Help and Training resources



Online Customer Reporting Help

The Online Customer Reporting Help window displays a total of six tabs:

- Home
- Reports
- How To
- Glossary
- eLearning
- Reference



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Help and Training Resources continued

Home tab

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

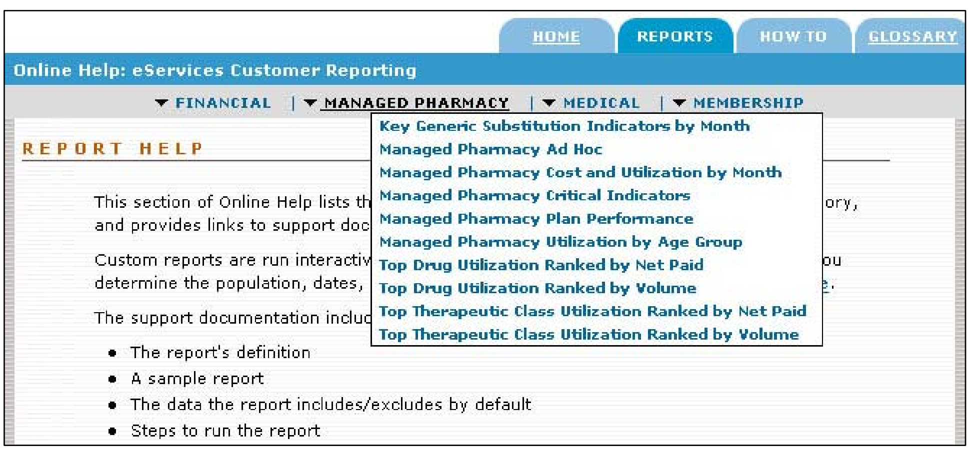
- FAQs (Frequently Asked Questions) – Click this link to view questions that are commonly posed and their associated answers.
- Known Issues – This link provides an up to date list of reporting or Employer eServices technical issues and workarounds
- Release Notes – After application enhancements, you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

Reports tab

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

The information available once you select a report is:

- The report's 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
- A list of the items you can limit your results to
- Printing options



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Help and Training Resources continued

How To tab

The How To tab categorizes how to step/action processes into three segments. Each segment is further defined by individual step/action directions:

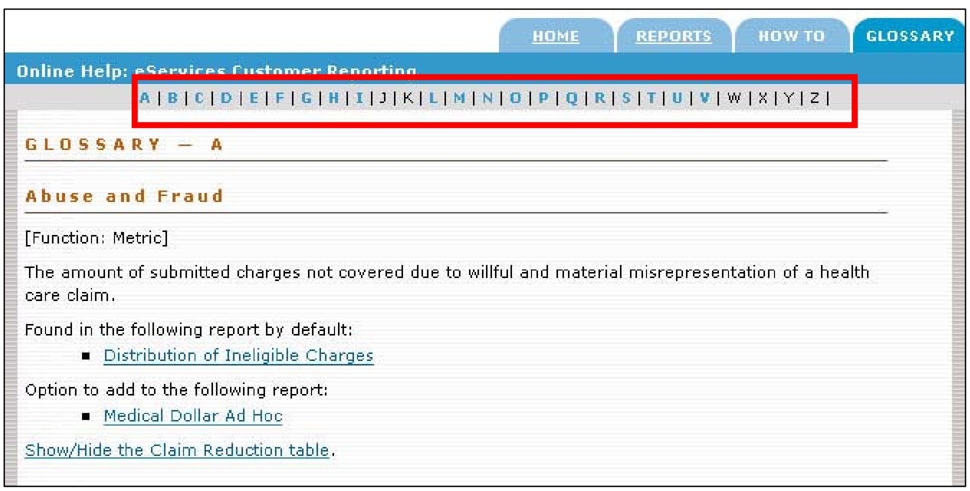
- Getting Started
- Running a Report
- Working with Results

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 in the browser and click on a direct link to a topic.

Glossary tab

The Glossary tab is where you can find definitions for terms and acronyms specific to Customer Reports.

To look up a term or acronym, click on the letter it starts with in the alphabet banner at the top of the page.



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Help and Training Resources continued

eLearning tab

The eLearning tab stores tutorials on many common tasks performed on the Employer eServices Customer Reporting site. You will be asked to click on your access level and the tutorials appropriate to your security level will be displayed.

To begin a tutorial, click the link of the desired task title.

Reference tab

Clicking on the Reference tab will initiate an online help page. This page contains links to downloadable training and reference material. The materials are in Adobe Acrobat (.pdf) format.

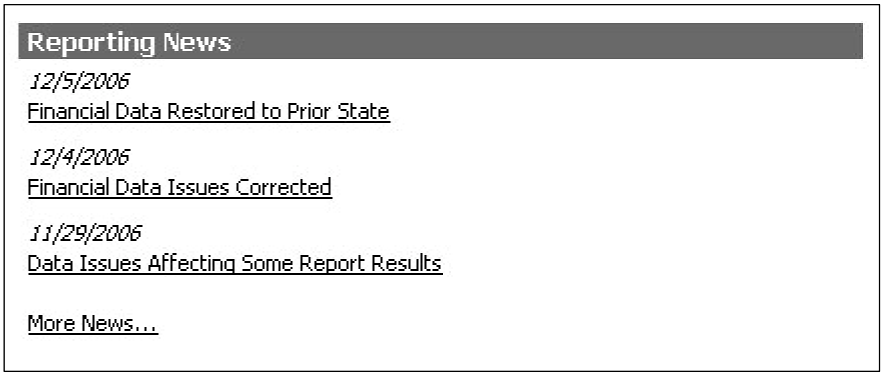
The following documents are available on this page:

- eCR Reference Manual
- Printable Reporting Tutorials
- Quick Reference Cards
- Report Specific Information

Reporting News

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 details

To access Reporting News use one of the following processes:

- Click on the Reporting News banner
- Click on individual links displayed in the Reporting News section
- Click on the More News… link

Reporting News help

After accessing Reporting News, 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, or the .pdf icon to view in Adobe Acrobat format.

Report Templates

What is a report template?

A template is a custom report you saved. The template maintains all the selections you 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 each month and adjust 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 you initiate 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 screen.

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.

Another option to select a report template is to click on 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 that template to generate another report:

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

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

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Report Templates continued

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 initiate 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 Preferences link.

The left side of the Preferences screen contains links to topics you can edit, including Export and Print. Each topic contains several settings you can adjust to your liking.

Remember to click the Apply button to finalize settings for each topic 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 have selected because the report is produced using the exact same selections as the original.

Group Segment Filters

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	[Optional] Type a description of the filter in the Description field.
5	Click the Create button.
6	Select a Policy Number from the Elements field.
7	Click ▶[Move to Selected].
8	Click Append.
9	Click Save

Using a group segment filter

When initiating 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

Import a Group Segment Filter

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 them 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 menu to open the Reporting Tools screen.
2	Click the Import a Group Segment Filter link to open the Import a Group Segment Filter screen.
3	Locate the File to Import by clicking the Browse button. Select the desired filter and click the Open button.
4	Name and Describe the Filter by entering a Filter Name and Filter Description in the appropriate fields. Note: Filter Description is an optional field.
5	Click the Import button. If the import was successful you will see the following message, “Congratulations! Your filter was successfully imported.”

Share Group Segment Filters

Share a Group Segment Filter

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