Employer eServices®

Welcome to the Running Ad Hoc Reports Tutorial

Audience: Employers & Brokers

Module Length: 7 minutes

Last Updated: 07/11/2007

1. Demonstration	2. Try It!

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To demonstrate Ad Hoc reports, we have selected the Medical Utilization Ad Hoc report found under the Custom Reports section. Please refer to the Custom Reports tutorial to learn how to select a report.

Any custom report first requires you to select a Policy Number or Group Segment Filter.

To select a Policy Number, either search for a specific number or select a number within the Available menu list.

Click the right arrow button to add the number to the Selected menu list.

To select a Group Segment Filter, you first had to create a customized filter in a separate process. Please refer to the Creating Group Segment Filter's tutorial for more information.

Scroll down to continue.

To select a Group Segment Filter, either search for a specific filter or select a filter within the Available menu list.

Click the right arrow button to add the filter to the Selected menu list.

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. This option allows only one selection.

Search for:

Available:
- Group Segment Filter1
- Group Segment Filter2

Selected:
- Group Segment Filter1

1 - 2 of 2

STEP 2: SELECT A DATE TYPE*(Required)

Service dates indicate when services were rendered (i.e., a claim was incurred). **Process dates** indicate when details from the claims were entered into the payment system. You'll select the actual dates (years/months) after you click CONTINUE. Help
This option allows only one selection.

○ Service Dates

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Note that you can only select a Policy Number or a Group Segment Filter, not both.

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Reports Home > ECR > Custom Reports > Medical > **Medical Utilization Ad hoc**

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Search for:

Available:

| Group Segment Filter1 |
| Group Segment Filter2 |

Selected:

| Group Segment Filter1 |

1 - 2 of 2

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Scroll down to continue.

Scroll down to continue.

The next step is to select a Date Type. Select either Service Dates or Process Dates, or both Service and Process Dates. In this example, we select Process Dates.

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Reports Home > ECR > Custom Reports > Medical > **Medical Utilization Ad hoc**

STEP 2: SELECT A DATE TYPE *(Required)

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This option allows only one selection.

○ Service Dates
◉ Process Dates
○ Service and Process Dates

STEP 3: SELECT THE METRICS FOR THIS REPORT *(Required)

Select from the list of metrics below to generate the specific calculation desired in the report. Your selections form the columns of the report. Only grand total amounts are shown for the metrics you select, unless you use **Advanced Options** to add more details.
This option requires between 1 and 6 selections.

Available:

Number of Claimants
Number of Services
Number of Visits
Number of Procedures
Covered Amount
Net Paid

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Selected:
--- none ---

▶

Select one or more metric options

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Only Ad Hoc reports require you to select metrics. In this example we select Number of Claimants, Number of Services, and Number of Visits.

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Click the right arrow button to add to Selected menu list.

Scroll down to continue.

When creating any custom report, you can select Advanced Options that will add more detail or narrow down your report. Click the Show Advanced Options button.

Scroll down to continue.

The Add More Details to This Report option appears. In this example we choose to add the Account detail.

Click the right arrow button to add to Selected menu list.

Scroll down to continue.

Advanced options also allow you to limit your report's results. In this example we choose not to limit our results and skip this step.

You have the choice to Rename Your Report. Please refer to the Custom Reports tutorial for more information.

STEP 5: 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.
No answer is required for this option.

Available:

- Master Group Number - Include
- Medical Age Hierarchy
- Cause Hierarchy
- Customer Specific Identifier 1 - Include
- Customer Specific Identifier 1 - Exclude
- Customer Specific Identifier 2 - Include
- Customer Specific Identifier 2 - Exclude
- Diagnosis Hierarchy
- Employment Status - Include
- Funding Arrangement Category - Include

Selected:

--- none ---

RENAME YOUR REPORT

If you would like to rename this report, type a new name into the text field below, and then click the **Rename Report** button.

Medical Utilization Ad hoc   Rename Report

Click the **Continue** button

Click CONTI

Highlight Box   Cancel

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Click continue.

Click continue.

Last, you will be asked to pick either specific Service Dates, Process Dates, or both, depending on what you selected as a Date Type.

In this example, we select all the available Process Dates in 2006. Note, you must select each date you want to include in the report.

Click the right arrow button to add to Selected menu list.

Scroll down to continue.

Your report will be limited to claims **processed** (i.e., details from the claims were entered into the payment system) during the months you select. Help
This option requires at least one selection.

Search for:

☐ Match case

Available:

2006-07
2006-06
2006-05
2006-04
2006-03
2006-02
2006-01
2005-12
2005-11
2005-10

Selected:

2006-07
2006-06
2006-05
2006-04
2006-03
2006-02
2006-01

1 - 30 of 60 ▶ ▶|

RENAME YOUR REPORT

If you would like to rename this report, type a new name into the text field below, and then click the **Rename Report** button.

Medical Utilization Ad hoc

Rename Report

Click the **Continue** button

Click **CONTINUE** to continue processing this report.

Highlight Box   Cancel

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Click continue to process your report.

Click continue to process your report.

You can start another report request while the first report is processing by clicking the link above.

When viewing your Ad Hoc Report results, notice that the "Add More Details To This Report" category appears in the first column and the metric values are listed in the columns that follow the divider column labeled Metrics.

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Data rows: 8   Data columns: 3

Subgroup1 △	Metrics	Number of Claimants ▾	Number of Services ▾	Number of Visits ▾
A		264	4,386	1,28
AA		73,001	1,262,356	362,52
B		43	812	22
BA		38,553	570,492	149,53
BLANK		118	1,183	1
C		5	200	3
CA		176	1,990	46
Total		**112,160**	**1,841,419**	**514,07**

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For more information on moving table rows and columns, refer to the Manipulating Report Data tutorial.

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Please take a moment to provide feedback on this tutorial.