

The screenshot shows a web interface for Employer eServices®. At the top left, the logo "Employer eServices®" is displayed. The main content area is white and contains the following text:

Welcome to the Running Ad Hoc Reports Tutorial

Audience: Employers & Brokers

Module Length: 7 minutes

Last Updated: 07/11/2007

At the bottom left, there is a grey box containing two buttons: "1. Demonstration" and "2. Try It!". Below these buttons, the text "Highlight Box (346 x 100) (X:0; Y:480)" is visible. To the right of this box is a blue-bordered box containing the text: "Welcome to the Running Ad Hoc Reports tutorial. You will learn how to select variables unique in creating Ad Hoc reports and then view the report results."

Welcome to the Running Ad Hoc Reports tutorial. You will learn how to select variables unique in creating Ad Hoc reports and then view the report results.

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!

Highlight Box
(346 x 100)
(X:0; Y:480)

Also, please note that your screens may be a bit different from the ones you'll see in this tutorial. The difference depends on your contractual agreement.

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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!

Highlight Box
(346 x 100)
(X:0; Y:460)

Finally, remember that all sample information you'll see in this tutorial is fictitious. Any resemblance to existing individuals or companies is purely coincidental.

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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.

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

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

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: 0001P9529
MSP053387
NTL081096

Selected: --- none ---

Highlight Box (575 x 415) (X:6; Y:71)

1 - 3 of 3

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](#)
This option allows only one selection.

Search for:

1. Demonstration **2. Try It!**

Highlight Box (346 x 100) (X:0; Y:480)

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

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

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

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Search for: Match case

Available: **Highlight Box**
MSP053387
NTL081096

Selected: --- none ---

1 - 3 of 3

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This option allows only one selection.

Search for:

1. Demonstration **2. Try It!**

Highlight Box
(346 x 100)
(X:0; Y:480)

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

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

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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:
0001P9529
MSP053387
NTL081096

Selected:
--- none ---

1 - 3 of 3

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](#)
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Search for:

1. Demonstration 2. Try It!

Highlight Box
(346 x 100)
(X:0; Y:480)

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

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

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:

Select a Group Segment Filter

Available:
Group Highlight Box1
Group Segment Filter2

Selected:
--- none ---

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

1. Demonstration 2. Try It!

Highlight Box
(346 x 100)
(X:0; Y:480)

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

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.

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**

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)

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This option allows only one selection.

Service Dates

1. Demonstration **2. Try It!**

Highlight Box
(346 x 100)
(X:0; Y:480)

Scroll down to continue.

Scroll down to continue.

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

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
 Process Dates
 Service and Process Dates

Highlight Box
(576 x 176)
(X:4; Y:70)

Select a Date Type

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

Selected:
--- none ---

1. Demonstration 2. Try It!

Highlight Box
(346 x 100)
(X:0; Y:480)

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**

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Service Dates
 Process Dates
 Service and Process Dates

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Available: Selected:

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

--- none --- Highlight Box (577 x 266) (X:6; Y:252)

Select one or more metric options

1. Demonstration 2. Try It!

Highlight Box (346 x 100) (X:0; Y:480)

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

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Service Dates
 Process Dates
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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

Selected:
--- none ---

Select one or more metric options

1. Demonstration 2. Try It!

Highlight Box
(346 x 100)
(X:0; Y:480)

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

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Service Dates
 Process Dates
 Service and Process Dates

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This option requires between 1 and 6 selections.

Available: Selected:
Number of Claimants
Number of Services
Number of Visits
Number of Procedures
Covered Amount
Net Paid

--- none ---

1. Demonstration 2. Try It!

Highlight Box
(346 x 100)
(X:0; Y:480)

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

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

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Service Dates
 Process Dates
 Service and Process Dates

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This option requires between 1 and 6 selections.

Available: Selected:

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

1. Demonstration 2. Try It!

Highlight Box
(346 x 100)
(X:0; Y:480)

Scroll down to continue.

Scroll down to continue.

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

Options to add more details.
This option requires between 1 and 6 selections.

Available: Selected:

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

Number of Claimants
Number of Services
Number of Visits

SELECT ADVANCED OPTIONS

Advanced Options are optional. These steps **Highlight Box** (346 x 100) (X:0; Y:287) add more details to your report (e.g. show the distribution of results by "gender") and/or narrow the focus of your report (e.g. show results for "active" employees only).

Show Advanced Options

RENAME YOUR (574 x 100) (X:0; Y:287)
If you would like **Click the Show Advanced Options button** (346 x 100) (X:0; Y:480) to rename your report, and then click the **Rename** button.

1. Demonstration **2. Try It!**

Highlight Box (346 x 100) (X:0; Y:480)

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.

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

Options to add more details.
This option requires between 1 and 6 selections.

Available: Selected:

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

Number of Claimants
Number of Services
Number of Visits

SELECT ADVANCED OPTIONS

Advanced Options are optional. These steps let you add more details to your report (e.g. show the distribution of results by "gender") and/or narrow the focus of your report (e.g. show results for "active" employees only).

Hide Advanced Options

STEP 4: 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.

1. Demonstration 2. Try It!

Highlight Box
(346 x 100)
(X:0; Y:480)

Scroll down to continue.

Scroll down to continue.

Employer eServices®

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

STEP 4: 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
- Policy Number&Suffix
- Policy Number&Account
- Policy Number&Suffix&Account
- Plan Variation&Report Code

Selected: --- none ---

Select an Add More Details option

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

Selected: --- none ---

1. Demonstration 2. Try It!

Highlight Box (346 x 100) (X:0; Y:480)

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

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.

The screenshot displays the 'Employer eServices' web application interface. At the top, there is a navigation menu with links for 'Reports Home', 'Automated Reports', 'Custom Reports', 'Recent Reports', 'Help & Training', 'News', 'Tools', and 'Logou'. Below this, a breadcrumb trail reads 'Reports Home > ECR > Custom Reports > Medical > Medical Utilization Ad hoc'. The main content area is divided into two sections: 'STEP 4: ADD MORE DETAILS TO THIS REPORT' and 'STEP 5: LIMIT THE REPORT'S RESULTS'. Step 4 includes a list of 'Available' fields (Master Group Number, Policy Number, Suffix, Account, Plan Variation, Report Code, Policy Number&Suffix, Policy Number&Account, Policy Number&Suffix&Account, Plan Variation&Report Code) and a 'Selected' field containing 'Account'. Step 5 includes a list of 'Available' fields (Master Group Number - Include, Medical Age Hierarchy, Cause Hierarchy) and a 'Selected' field containing '--- none ---'. A blue callout box with a curved arrow points to the vertical scrollbar on the right side of the page, indicating that the user should scroll down. At the bottom left, there are two buttons: '1. Demonstration' and '2. Try It!'. A 'Highlight Box' is also present, showing coordinates (346 x 100) and (X:0; Y:480).

Scroll down to continue.

Employer eServices®

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

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

Policy Number&Suffix&Account
Plan Variation&Report Code

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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:

- Highlight Box (592 x 250) (X:0; Y:129)

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.

1. Demonstration 2. Try It!

Highlight Box (346 x 100) (X:0; Y:480)

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.

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.

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

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

Policy Number&Suffix&Account
Plan Variation&Report Code

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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 in the text field below, and then click the **Rename Report** button.

1. Demonstration 2. Try It!

Highlight Box (346 x 100) (X:0; Y:480)

Highlight Box (582 x 106) (X:4; Y:399)

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

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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

Click CONTINUE

Click the **Continue** button

Highlight Box
Cancel

1. Demonstration 2. Try It!

Highlight Box
(346 x 100)
(X:0; Y:480)

Click continue.

Click continue.

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

STEP 6: SELECT PROCESS DATES* (Required)

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: Selected:

Select Process Dates

Highlight Box (745 x 296) (X:6; Y:75)

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.

1. Demonstration **2. Try It!**

Highlight Box (346 x 100) (X:0; Y:480)

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

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Employer eServices®

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

STEP 6: SELECT PROCESS DATES* (Required)

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

Selected: --- none ---

Select Process Dates

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

1. Demonstration 2. Try It!

Highlight Box
(346 x 100)
(X:0; Y:480)

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.

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.

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

STEP 6: SELECT PROCESS DATES* (Required)

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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: --- none ---

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

1. Demonstration **2. Try It!**

Highlight Box
(346 x 100)
(X:0; Y:480)

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

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

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

STEP 6: SELECT PROCESS DATES* (Required)

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

1. Demonstration 2. Try It!

Highlight Box
(346 x 100)
(X:0; Y:480)

Scroll down to continue.

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

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

1. Demonstration 2. Try It!
Highlight Box
(346 x 84)
(X:0; Y:496)

Click continue to process your report.

Click continue to process your report.

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

Your request is processing... Please Wait.

● ● ● ● ●

Report name: Medical Utilization Ad hoc
Current status: Running Report
Report description: Distributes reimbursement amounts based on the month they are booked to the financial accounting system

Please wait or choose one of the following actions:

- [Check status again](#)
- [Go to the Recent Reports Page while this report continues to process.](#)
- [Show report details](#)
- [Cancel](#)

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1. Demonstration **2. Try It!**

Highlight Box
(346 x 100)
(X:0; Y:480)

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

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

Customer Reporting – Running Ad Hoc Reports

Employer eServices®

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

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

File View Data Format Last update: 11/15/2006 1:21:43 PM

PAGE-BY: none ? x

Data rows: 8 Data columns: 3

Subgroup 1 ▲	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	Highlight Box (173 x 176)	43	Highlight Box (588 x 175)	22
BA	(X:6; Y:197)	38,553	(X:181; Y:198)	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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1. Demonstration **2. Try It!**

Highlight Box
(346 x 100)
(X:0; Y:480)

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

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The screenshot shows the Employer eServices Customer Reporting Tutorial interface. At the top left is the logo "Employer eServices®". The main content area is titled "Customer Reporting" and includes a "Tutorial Select" section with a "Please select your user profile:" instruction. There are three user profile options: "Employer", "Broker", and "Select Expanded Automated & Custom Reports". A "Feedback" pop-up window is overlaid on the interface, containing the text: "Your comments and feedback are important to us as we continue to improve our online training tools, please take a moment and take our short survey to let us know how we are doing." Below this text is a "Send Feedback" button. The pop-up also includes a "Feedback" header and a "Note" about access levels. At the bottom of the screenshot, there are two buttons: "1. Demonstration" and "2. Try It!". To the right of these buttons is a text box that says "Please take a moment to provide feedback on this tutorial."

Please take a moment to provide feedback on this tutorial.