

Employer eServices®

## Welcome to the Viewing Automated Reports Tutorial

**Audience: Brokers**

**Module Length: 5 minutes**

**Last Updated: 07/11/2007**

**1. Demonstration**

**2. Try It!**

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

Welcome to the Automated Reports tutorial. In this tutorial, you will learn how to select and export an automated report.

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Employer eServices®

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**Employer eServices®**

Reports Home Automated Reports Help & Training News Logout

ECR

Welcome Standard Broker

**View Automated Reports** Highlight Box

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

- Sub Eight
- Sub Five
- Sub Four
- Sub Six
- Sub Test B
- Sub Test C
- Sub Test D
- Sub Test E
- Sub Test F
- Sub Test G
- Sub Test H
- Sub Test I
- Sub Test J
- Sub Test K
- Sub Test L

[View more customers...](#)

**Help & Training Resources**

**Maintenance Period:** Nightly 10 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**

*3/16/06*  
[Extraneous 1Q-2005 Capitation](#)

*3/14/06*  
[Missing Inpatient Event Data](#)

*3/01/06*  
[UNet Capitation Update](#)

[More News...](#)

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

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There are several ways a broker can access an Automated Report from the Employer eServices Reporting home page. The first option is to click on the View Automated Reports section title.

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The screenshot displays the Employer eServices web application interface. At the top, there is a navigation bar with links for 'Reports Home', 'Automated Reports', 'Help & Training', 'News', and 'Logout'. Below this, a 'Welcome Standard Broker' message is shown. The main content area is titled 'View Automated Reports' and features a list of client folders: Sub Eight, Sub Five, Sub Four, Sub Six, Sub Test B, Sub Test C, Sub Test D Highlight Box (X:86, Y:118), Sub Test F, Sub Test G, Sub Test H, Sub Test I, Sub Test J, Sub Test K, and Sub Test L. A red box highlights this list, and a callout box points to it with the text 'Generically named client folders'. To the right, there are sections for 'Help & Training Resources' (including Maintenance Period, Phone, E-mail, and various help links) and 'Reporting News' (with dates and titles like 'Extraneous 1Q-2005 Capitation' and 'Missing Inpatient Event Data'). At the bottom, there are two buttons: '1. Demonstration' and '2. Try It!'. A 'Highlight Box' is also present with coordinates (346 x 100) and (X:0; Y:480). A text box at the bottom right explains that clicking on a quick link client folder allows access to the most recent reports.

The second option is to click on one of the quick link client folders under the View Automated Reports section title. This option allows you to access the most recent reports Employer eService Reporting has created for a specific client.

The screenshot shows the Employer eServices website interface. At the top, there is a navigation bar with links for 'Reports Home', 'Auto Highlight Box', 'Help & Training', 'News', and 'Logout'. Below this, the main content area is divided into sections. On the left, there is a 'View Automated Reports' section with a list of sub-reports: Sub Eight, Sub Five, Sub Four, Sub Six, Sub Test B, Sub Test C, Sub Test D, Sub Test E, Sub Test F, Sub Test G, Sub Test H, Sub Test I, Sub Test J, Sub Test K, and Sub Test L. A callout box with a blue border and white background points to the 'Auto Highlight Box' link with the text 'Select the Automated Reports link'. On the right, there is a 'Help & Training Resources' section with links for 'Maintenance Period', 'Phone', 'E-mail', 'Help with a Specific Report', 'Frequently Asked Questions', 'Glossary of Terms', 'Online Tutorials', and 'Printable Reference Materials'. Below that is a 'Reporting News' section with dates and titles like '3/16/06 Extraneous 1Q-2005 Capitation' and '3/14/06 Missing Inpatient Event Data'. At the bottom of the screenshot, there are two buttons: '1. Demonstration' and '2. Try It!'. A text box to the right of these buttons explains: 'The third option is to click the Automated Reports menu link from the home page. In this example we will access an Automated Report by clicking on the Automated Reports menu link.'

The third option is to click the Automated Reports menu link from the home page. In this example we will access an Automated Report by clicking on the Automated Reports menu link.

**Employer eServices®**  
Reports Home Automated Reports Help & Training News Logout

**Automated Reports**

These folders contain the reports eServices Customer Reporting has run for you. To view these reports, select the appropriate folder then use one of the following 3 options:

Click a report's name to open the report as a document suitable for viewing or printing.  
Click to open a report as a Microsoft Excel spreadsheet.  
Click the Help link to learn more about the reports.

	Name	Created Date	Type	TotalSize
Help	<u>High Five</u>		Folder	
Help	<u>Sub 1</u>		Folder	
Help	<u>Su</u>		Folder	
Help	<u>Su</u>		Folder	
Help	<u>Sub Test B</u>		Folder	
Help	<u>Sub Test C</u>		Folder	
Help	<u>Sub Test D</u>		Folder	
Help	<u>Sub Test E</u>		Folder	
Help	<u>Sub Test F</u>		Folder	
Help	<u>Sub Test G</u>		Folder	
Help	<u>Sub Test H</u>		Folder	
Help	<u>Sub Test I</u>		Folder	
Help	<u>Sub Test J</u>		Folder	

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

Highlight Box  
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Select the desired client folder. In this example, we will select the generically named Sub Eight client folder.

Select the desired client folder. In this example, we will select the generically named Sub Eight client folder.

**Employer eServices®**

Reports Home Automated Reports Help & Training News Logout

Automated Reports > Sub Eight

These folders contain the reports eServices Customer Reporting has run for you. To view these reports, select the appropriate folder then use one of the following 3 options:

Click a [report's name](#) to open the report as a document suitable for viewing or printing.  
 Click to open a report as a Microsoft Excel spreadsheet.  
 Click the [Help](#) link to learn more about the reports.

	Name	Created Date	Type	TotalSize
Help	<b>April 2006</b> (reports contain results through 3/31/2006)		Folder	
Help	<b>January 2006</b> (reports contain results through 12/31/2005)		Folder	
Help	<b>October 2005</b> (reports contain results through 9/30/2005)		Folder	
Help	<b>July 2005</b> (reports contain results through 6/30/2005)		Folder	

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

Highlight Box  
(346 x 100)  
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On the Automated Report date selection screen you will see a list of folders that contain reports for a specific time span within the past 12 months. Click on the month and year you are interested in viewing. Notice that the most recent month and year will display at the top.

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## Customer Reporting – Viewing Automated Reports

**Employer eServices®**

Reports Home Automated Reports Help & Training News Logout

Automated Reports > Sub Eight

**These folders contain the reports eServices Customer Reporting has run for you. To view these reports, select the appropriate folder** **then use one of the following 3 options:**

Click a report's name to open the report as a document suitable for viewing or printing.  
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	Name	Created Date	Type	Total Size
Help	<b>April 2006</b> (reports contain results through 3/31/2006)		Folder	
Help	<b>January 2006</b> (reports contain results through 12/31/2005)		Folder	
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**1. Demonstration** **2. Try It!**

Highlight Box  
(346 x 100)  
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In this example we will choose the April 2006 folder.


In this example we will choose the April 2006 folder.

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Help & Training   News   Logout


Reports Home   Automated Reports

Automated Reports > Sub Eight > April 2006 (reports contain results through 3/31/2006)













**These folders contain the reports eServices Customer Reporting has run for you. To view these reports, select the appropriate folder  then use one of the following 3 options:**

Click a report's name to open the report as a document suitable for viewing or printing.

Click  to open a report as a Microsoft Excel spreadsheet.

Click the Help link to learn more about the reports.

	Name	Created Date	Type	TotalSize
Help 	<a href="#">PVC-Paid Sub Eight 000254256 21747</a>	4/6/2006 1:12:23 PM	Report	759 KB
Help 	<a href="#">Payments by Benefit Type Sub Eight 000254256 21747</a>	4/6/2006 1:20:16 PM	Report	234 KB
Help 	<a href="#">Claim Expenses by Size of Payment Sub Eight 000254256 21747</a>	4/6/2006 1:25:07 PM	Report	179 KB
Help 	<a href="#">Network Utilization Sub Eight 000254256 21747</a>	4/6/2006 1:28:34 PM	Report	407 KB
Help 	<a href="#">Membership by Month Sub Eight 000254256 21747</a>	4/6/2006 1:32:26 PM	Report	196 KB
Help 	<a href="#">Managed Pharmacy Plan Performance Sub Eight 000254256 21747</a>	4/6/2006 1:39:51 PM	Report	495 KB
Help 	<a href="#">Health Care Cost Management Summary Sub Eight 000254256 21747</a>	4/6/2006 1:48:55 PM	Report	623 KB
Help 	<a href="#">Claim Experience Report Sub Eight 000254256 21747</a>	4/6/2006 2:02:28 PM	Report	213 KB
Help 	<a href="#">Group Summary Data Sub Eight 000254256 21747</a>	4/6/2006 2:07:14 PM	Report	49 KB
Help 	<a href="#">PVC-Incurred Sub Eight 000254256 21747</a>	4/6/2006 2:08:42 PM	Report	636 KB

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

Highlight Box  
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(X:0; Y:480)


This next screen lists all the available reports for the month and year selected. Once a folder has been opened, all the available reports for the month and year selected are listed. If you'd like to view a more detailed description of the report, click the Help link to the left of the Microsoft Excel icon.


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**Employer eServices®**
Help & Training   News   Logout


Reports Home   Automated Reports

Automated Reports > Sub Eight > April 2006 (reports contain results through 3/31/2006)













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**1. Demonstration**   **2. Try It!**

Highlight Box  
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To view an automated report, click a report's name to open the report in a separate browser window or click the Microsoft Excel icon to open the report in Microsoft Excel.


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## Customer Reporting – Viewing Automated Reports











**Employer eServices®**

Reports Home Automated Reports Help & Training News Logout

Automated Reports > Sub Eight > April 2006 (reports contain results through 3/31/2006)

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Help 	<a href="#">Payments by Benefit Type Sub Eight 000254256 21747</a>	4/6/2006 1:20:16 PM	Report	234 KB
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Help 	<a href="#">Health Care C...</a>	4/6/2006 1:48:55 PM	Report	623 KB
Help 	<a href="#">Claim Experie...</a>	4/6/2006 2:02:28 PM	Report	213 KB
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**1. Demonstration** **2. Try It!**

Highlight Box  
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In this example we will choose the Membership by Month report link.

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Run Date: 4/6/2006 1:32:12 PM

### Membership By Month

**Report Filter:**  
 Policy Number = 000254256, 000255393 or 000702096  
 And  
 Type of Coverage = Medical  
 And  
 Funding Arrangement Category = Fully Insured, Alternate (X:17; Y:175) Unknown  
 And  
 Membership Year/Month = 2004-02, 2004-01, 2003-12, 2003-11, 2003-10, 2003-09, 2003-08, 2003-07, 2003-06, 2003-05, 2003-04 or 2003-03

**Policy Number:** ALL  
**Suffix:** ALL  
**Account:** ALL

Membership Year/Month	Single Subscribers	Subscribers plus Spouse	Subscribers plus Child/Children	Subscribers plus Family	Total Subscribers	Non-Positively Enrolled Dependents	Positively Enrolled Dependents	Total Members
2003-03	149	23	19	33	224	0	144	368
2003-04	151	20	18	44	233	0	175	408

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

Highlight Box  
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A new browser window will open showing report data. Use the scroll bar to view all entries in this report. Notice that the Report Filter section displays the parameters used to create this report.

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## Customer Reporting – Viewing Automated Reports

Run Date: 4/6/2006 1:32:12 PM

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**Report Filter:**  
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 And  
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2003-03	149	23	19	33	224	0	144	368
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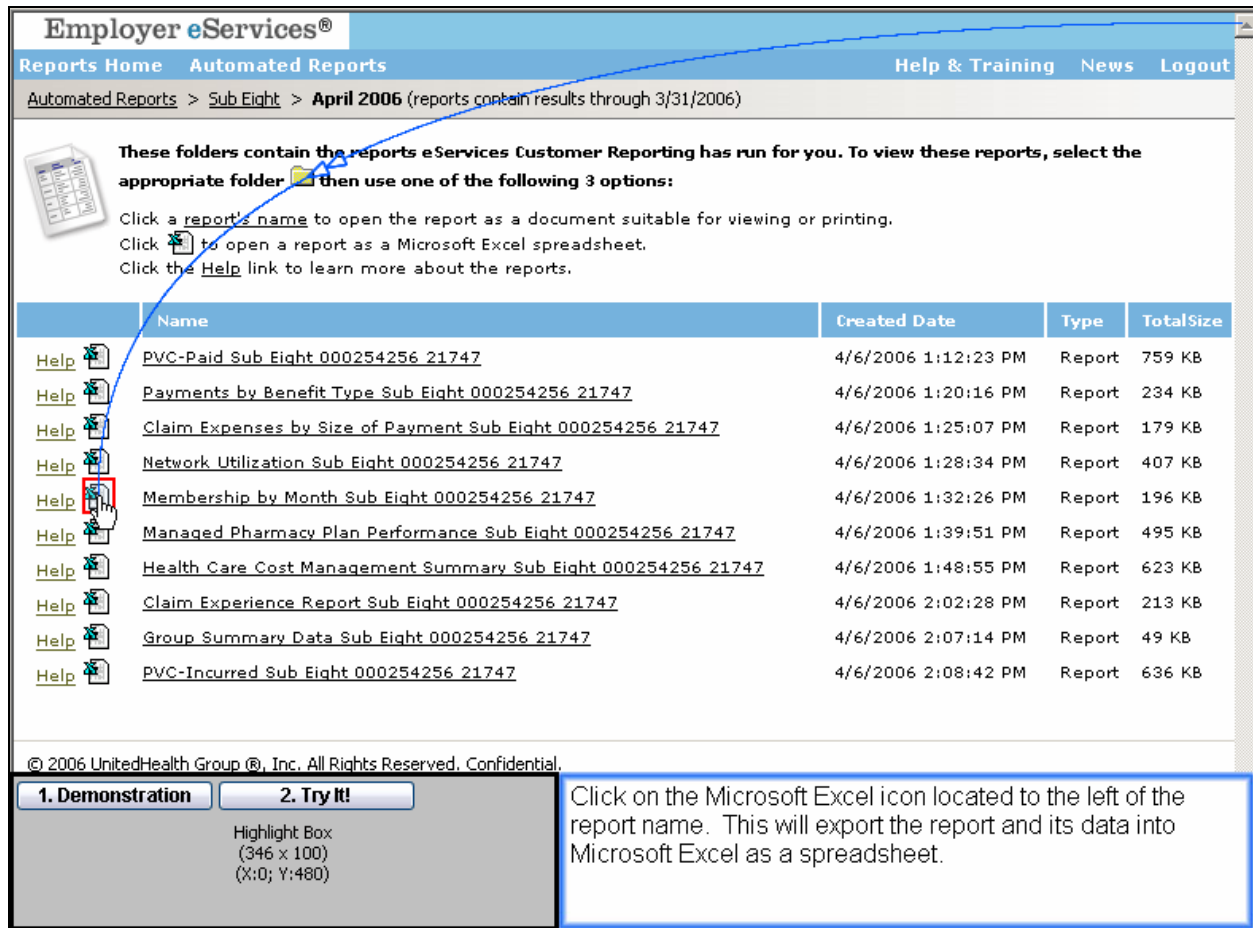
**1. Demonstration**   **2. Try It!**

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

To print the report, use your browser Print function. To return to the report selection list, close this window.

To print the report, use your browser Print function. To return to the report selection list, close this window.


## Customer Reporting – Viewing Automated Reports














**Employer eServices®**

Reports Home Automated Reports Help & Training News Logout

Automated Reports > Sub Eight > April 2006 (reports contain results through 3/31/2006)

These folders contain the reports eServices Customer Reporting has run for you. To view these reports, select the appropriate folder  then use one of the following 3 options:

Click a report's name to open the report as a document suitable for viewing or printing.  
Click  to open a report as a Microsoft Excel spreadsheet.  
Click the Help link to learn more about the reports.

	Name	Created Date	Type	TotalSize
Help 	<a href="#">PVC-Paid Sub Eight 000254256 21747</a>	4/6/2006 1:12:23 PM	Report	759 KB
Help 	<a href="#">Payments by Benefit Type Sub Eight 000254256 21747</a>	4/6/2006 1:20:16 PM	Report	234 KB
Help 	<a href="#">Claim Expenses by Size of Payment Sub Eight 000254256 21747</a>	4/6/2006 1:25:07 PM	Report	179 KB
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Help 	<a href="#">PVC-Incurred Sub Eight 000254256 21747</a>	4/6/2006 2:08:42 PM	Report	636 KB

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

Highlight Box  
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Click on the Microsoft Excel icon located to the left of the report name. This will export the report and its data into Microsoft Excel as a spreadsheet.

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**Employer eServices®**  
 Reports Home Automated Reports Help & Training News Logout  
 Automated Reports > Sub Eight > April 2006 (reports contain results through 3/31/2006)

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Click a report's name to open the report as a document suitable for viewing or printing.  
 Click to open a report as a spreadsheet in Microsoft Excel.  
 Click the Help link to learn more about the report.

Name	Type	TotalSize
Help PVC-Paid Sub Eight	Report	759 KB
Help Payments by Benefit	Report	234 KB
Help Claim Expenses by S	Report	179 KB
Help Network Utilization S	Report	407 KB
Help Membership by Mont	Report	196 KB
Help Managed Pharmacy	Report	495 KB
Help Health Care Cost Ma	Report	623 KB
Help Claim Experience Re	Report	213 KB
Help Group Summary Dat	Report	49 KB
Help PVC-Incurred Sub Eic	Report	636 KB

**File Download**

Some files can harm your computer. If the file information below looks suspicious, or you do not fully trust the source, do not open or save this file.

File name: ... by Month 21747-465712.xls  
 File type: Microsoft Excel Worksheet

The File Download dialog box opens

Would you like to open the file or save it to your computer?

Open Save Cancel More Info

Always ask before opening this type of file.

Click the Open button

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

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

The File Download dialog box opens. Click the Open button to open the report as a spreadsheet in Microsoft Excel. Notice you can also click the Save button to name and save the spreadsheet as an .xls file to a location on your desktop.

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## Customer Reporting – Viewing Automated Reports

The screenshot shows a Microsoft Excel window titled "Microsoft Excel - Sub Eight 000254256 Membership by Month 21747-465712[1].xls". The menu bar includes File, Edit, View, Insert, Format, Tools, Data, Window, and Help. The toolbar contains various icons, with the "Highlight Box" icon highlighted in a red box. The spreadsheet displays a "Report Filter" section with the following criteria:

- Policy Number = 000254256, 000255393 or 000702096
- And
- Type of Coverage = Medical
- And
- Funding Arrangement Category = Fully Insured, Alternate Funding or Unknown
- And
- Membership Year/Month = 2004-02, 2004-01, 2003-12, 2003-11, 2003-10, 2003-09, 2003-08, 2003-07, 2003-06, 2003-05, 2003-04

Below the filter is a table with the following columns: Policy Number, Suffix, Account, Membership Year/Month, Single Subscribers, and Subscribers plus Spouse. The data rows show membership details for policy number 000254256 from 2003-03 to 2003-12.

A callout box at the bottom of the screenshot contains the following text:

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

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

Within Microsoft Excel, you can manipulate your report data using the available spreadsheet functions. To print the report, use the Microsoft Excel print icon or menu item.

Within Microsoft Excel, you can manipulate your report data using the available spreadsheet functions. To print the report, use the Microsoft Excel print icon or menu item.

The screenshot shows the Employer eServices interface. At the top left, the logo "Employer eServices®" is displayed. The main content area features a large white box with the text "Congratulations!" and "You have completed the Viewing Automated Reports" centered. Below this, there is a grey sidebar with two buttons: "1. Demonstration" and "2. Try It!". A blue-bordered box on the right side of the sidebar contains the text "Congratulations! You have completed the Viewing Automated Reports task." Below the sidebar, the text "Highlight Box (346 x 100) (X:0; Y:480)" is visible.

Congratulations! You have completed the Viewing Automated Reports task.