

Employer eServices®

## Welcome to the Viewing Automated Reports Tutorial

**Audience:** Employers

**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®**

Reports Home Automated Reports Help & Training News Logout

ECR

Welcome Standard Employer

**View Automated Reports** Highlight Box

**January 2006** (reports contain results through 12/31/2005)

- PVC-Paid
- Payments by Benefit Type
- Claim Expenses by Size of Payment
- Network Utilization
- Membership by Month
- Managed Pharmacy Plan Performance
- Health Care Cost Management Summary
- Claim Experience Report
- Group Summary Data
- PVC-Incurred

View additional reports created for you this month and all other months within the past year.

**Help & Training Resources**

Maintenance Period: Nightly 10 p.m. - 7 a.m. (ET)  
Phone: 1-800-651-5465  
E-mail: 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...](#)

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

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There are several ways an employer 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 shows the Employer eServices interface. At the top, there are navigation links: Reports Home, Automated Reports, Help & Training, News, and Logout. Below this is a header for 'ECR' and a welcome message for a 'Standard Employer'. The main content area is titled 'View Automated Reports' and contains a list of reports for 'January 2006' (reports contain results through 12/31/2005). The reports listed are: PVC-Paid, Payments by Benefit Type, Claim Expenses by Size of Payment, Network Utilization, Membership by Month (highlighted with a red box), Managed Pharmacy Plan Performance, Health Care Cost Management Summary, Claim Experience Report, Group Summary Data, and PVC-Incurred. To the right of the reports list is a 'Help & Training Resources' section with links for Maintenance Period, Phone, E-mail, and various help topics. Below that is a 'Reporting News' section with dates and links for Extraneous 1Q-2005 Capitation, Missing Inpatient Event Data, and UNet Capitation Update. At the bottom left, there are two buttons: '1. Demonstration' and '2. Try It!'. The '2. Try It!' button is highlighted with a blue box, and its description, 'Highlight Box (346 x 100) (X:0; Y:480)', is also highlighted with a blue box. The description explains that clicking on one of the quick report links under the 'View Automated Reports' section title allows access to the most recent reports created for the user.

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

Employer eServices®

Reports Home **Automated Reports** Help & Training News Logout

ECR

Welcome Standard Employer

**View Automated Reports** Select the **Automated Reports** link

**January 2006** (reports contain results through 12/31/2005)

- PVC-Paid
- Payments by Benefit Type
- Claim Expenses by Size of Payment
- Network Utilization
- Membership by Month
- Managed Pharmacy Plan Performance
- Health Care Cost Management Summary
- Claim Experience Report
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View additional reports created for you this month and all other months within the past year.

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[More News...](#)

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

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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.

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**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	<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  
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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

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	Total Size
Help 	<a href="#">April 2006 (reports contain results through 3/31/2006)</a>		Folder	
Help 	<a href="#">January 2006 (reports contain results through 12/31/2005)</a>		Folder	
Help 	<a href="#">October 2005 (reports contain results through 9/30/2005)</a>		Folder	
Help 	<a href="#">July 2005 (reports contain results through 6/30/2005)</a>		Folder	

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

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In this example we will choose the April 2006 folder.

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**Employer eServices®**

Reports Home Automated Reports Help & Training News Logout

Automated Reports > 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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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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## Customer Reporting – Viewing Automated Reports











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[Reports Home](#)   [Automated Reports](#)   [Help & Training](#)   [News](#)   [Logout](#)

Automated Reports > **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.  
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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

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Reports Home Automated Reports Help & Training News Logout

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

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Click the [Help](#) link to learn more about the reports.

	Name	Created Date	Type	TotalSize
Help	<a href="#">PVC-Raid 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="#">Claim Experie...</a>	4/6/2006 2:02:28 PM	Report	213 KB
Help	<a href="#">Group Summary...</a>	4/6/2006 2:07:14 PM	Report	49 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 (346 x 100) (X:0; Y:480)

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

### Membership By Month

**Report Filter:**  
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 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

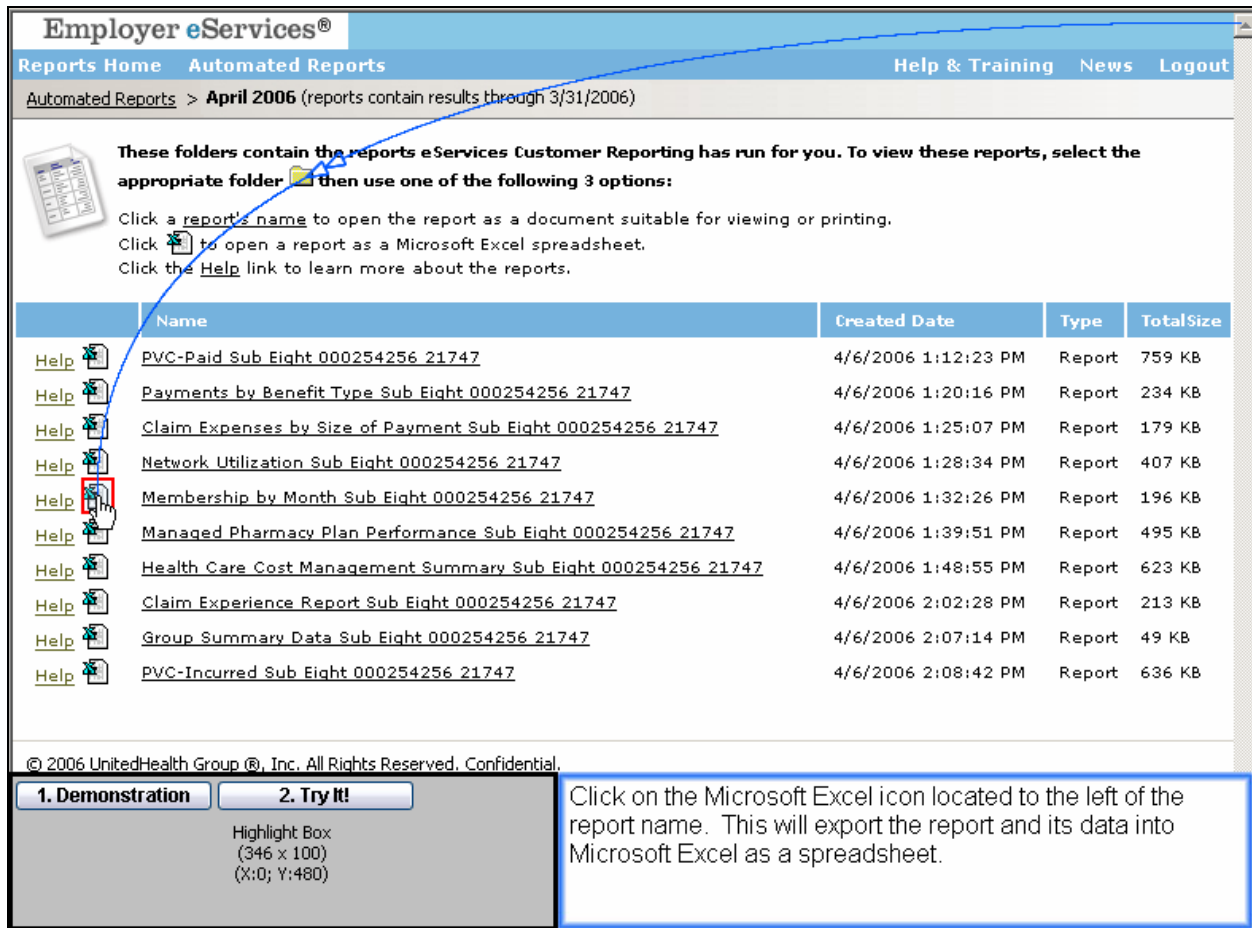
**1. Demonstration**   **2. Try It!**

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

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## Customer Reporting – Viewing Automated Reports
















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Reports Home Automated Reports Help & Training News Logout

Automated Reports > 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
<a href="#">Help</a> 	<a href="#">PVC-Paid Sub Eight 000254256 21747</a>	4/6/2006 1:12:23 PM	Report	759 KB
<a href="#">Help</a> 	<a href="#">Payments by Benefit Type Sub Eight 000254256 21747</a>	4/6/2006 1:20:16 PM	Report	234 KB
<a href="#">Help</a> 	<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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**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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The screenshot shows the Employer eServices interface. At the top, there are navigation links: Reports Home, Automated Reports, Help & Training, News, and Logout. Below this, a breadcrumb trail indicates 'Automated Reports > April 2006 (reports contain results through 3/31/2006)'. The main content area contains instructions on how to view reports and a list of report folders. A 'File Download' dialog box is open in the foreground, displaying file information and asking for confirmation to open or save the file. The 'Open' button is highlighted with a red box, and a blue callout box points to it with the text 'Click the Open button'. Another blue callout box points to the dialog box with the text 'The File Download dialog box opens'. At the bottom left, 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 large blue callout box at the bottom right contains the text: '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.'

Name	Type	TotalSize
PVC-Paid Sub Eight	Report	759 KB
Payments by Benefit	Report	234 KB
Claim Expenses by S	Report	179 KB
Network Utilization S	Report	407 KB
Membership by Mont	Report	196 KB
Managed Pharmacy	Report	495 KB
Health Care Cost Ma	Report	623 KB
Claim Experience Re	Report	213 KB
Group Summary Dat	Report	49 KB
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1. Demonstration    2. Try It!

Highlight Box  
(346 x 100)  
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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

**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.

Policy Number	Suffix	Account	Membership Year/Month	Single Subscribers	Subscribers plus Spouse
000254256	NM	0000	2003-03	43	3
000254256	NM	0000	2003-04	41	3
000254256	NM	0000	2003-05	42	3
000254256	NM	0000	2003-06	41	3
000254256	NM	0000	2003-07	42	3
000254256	NM	0000	2003-08	41	4
000254256	NM	0000	2003-09	43	3
000254256	NM	0000	2003-10	43	4
000254256	NM	0000	2003-11	42	4
000254256	NM	0000	2003-12	42	4
000254256	NM	0000	2004-01	42	5

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 blue header bar. Below this, the text "Congratulations!" is centered, followed by "You have completed the Viewing Automated Reports" in a bold font. At the bottom of the interface, there is a navigation bar with two buttons: "1. Demonstration" and "2. Try It!". To the right of these buttons, a blue-bordered box contains the text "Congratulations! You have completed the Viewing Automated Reports task." Below the navigation bar, a grey box contains the text "Highlight Box (346 x 100) (X:0; Y:480)".

Congratulations! You have completed the Viewing Automated Reports task.

**Congratulations!**

**You have completed the Viewing Automated Reports Tutorial.**