

The screenshot shows the Employer eServices logo in the top left corner. The main content area is titled "Welcome to Running Custom Reports" and includes the following information: Audience: Employers & Brokers, Module Length: 10 minutes, and Last Updated: 07/11/2007. At the bottom, there are two buttons: "1. Demonstration" and "2. Try It!". A highlight box is positioned over the "2. Try It!" button, with a text box to its right containing the tutorial description: "Welcome to the Custom Reports tutorial. In this tutorial, you will learn how to select a custom report, custom define a report, and view report results."

Welcome to the Custom Reports tutorial. In this tutorial, you will learn how to select a custom report, custom define a report, and view report results.

The screenshot shows the Employer eServices interface. At the top left, the logo "Employer eServices®" is displayed. The main content area is titled "Welcome to Running Custom Reports". Below the title, the following information is listed: "Audience: Employers & Brokers", "Module Length: 10 minutes", and "Last Updated: 07/11/2007". At the bottom of the interface, there are two buttons: "1. Demonstration" and "2. Try It!". Below the "2. Try It!" button, there is a "Highlight Box" with dimensions (346 x 100) and coordinates (X:0; Y:480). To the right of these buttons, a blue-bordered box contains the text: "Finally, remember that all sample information you'll see in this tutorial is fictitious. Any resemblance to existing individuals or companies is purely coincidental."

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.

Employer eServices®

## Welcome to Running Custom Reports

**Audience: Employers & Brokers**

**Module Length: 10 minutes**

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

**1. Demonstration**

**2. Try It!**

Highlight Box  
(346 x 100)  
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**Employer eServices®**

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

**ECR**

Welcome Expanded Broker

**View Automated Reports**

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

- Sub Eight
- Sub Five
- Sub Four
- Sub Six
- Sub Test B

[View more customers...](#)

**Run Custom Reports** Highlight Box

Create, edit, export and print your own reports using up-to-36 months of data.

- Financial (Data Current Through May 31, 2006)
- Claim Expenses by Size of Payment
- Claim Lag Study
- Detail Payment
- Detail Payment - Non Confidential
- Financial Managed Ad Hoc
- Large Loss Claim Payments
- Payments by Benefit Type
- Payments By Month

**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**

11/13/2006  
[Inpatient Event Data Unavailable](#)

10/20/2006  
[Membership Issue Affects Some Customers](#)

10/02/2006  
["Percent of Savings" and "Shared Savings" Reports Now Available via Automated Reporting](#)

[More News...](#)

**Reporting Tools**

[Create and Modify Group Segment Filters](#)

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

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

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

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The screenshot displays the Employer eServices web application. At the top, there is a navigation bar with links for Reports Home, Automated Reports, Custom Reports, Recent Reports, Help & Training, News, Tools, and Logout. Below this is a sub-header for ECR (Employer Customer Reporting) with a welcome message for an Expanded Broker.

The main content area is divided into two primary sections:

- View Automated Reports:** This section includes a folder icon and a list of sub-reports: Sub Eight, Sub Five, Sub Four, Sub Six, and Sub Test B. A link "View more customers..." is also present.
- Run Custom Reports:** This section features a folder icon and a list of report types, including "Financial (Data Current Through May 31, 2006)", "Claim Expenses by Size of Payment", "Claim Lag Study", "Detail Payment Highlight Box (333 x 168)", "Detail Payment Web Confidential (378 x 306)", "Financial Managed Ad Hoc", "Large Loss Claim Payments", and "Payments by Benefit Type".

On the right side of the page, there are three additional sections:

- Help & Training Resources:** Provides contact information for maintenance (1-800-651-5465), email (CustRept\_Help@uhc.com), and links to help articles, FAQs, glossary, tutorials, and printable materials.
- Reporting News:** Lists recent news items with dates, such as "11/13/2006 Inpatient Event Data Unavailable" and "10/20/2006 Membership Issue Affects Some Customers".
- Reporting Tools:** Includes a link for "Create and Modify Group Segment Filters".

At the bottom left, there are two buttons: "1. Demonstration" and "2. Try It!". Below the "2. Try It!" button, a highlight box is shown with dimensions (346 x 100) and coordinates (X:0; Y:480).

A blue-bordered text box on the bottom right contains the following text: "The second option is to click one of the quick report links under the Run Custom Reports section title. You may have to click the '+' sign beside the folder to see all available reports."

The second option is to click one of the quick report links under the Run Custom Reports section title. You may have to click the "+" sign beside the folder to see all available reports.

**Employer eServices®**

Reports Home Automated Reports **Custom Reports** Recent Reports Help & Training News Tools Logout

ECR

Welcome Expanded Broker

### View Automated Reports

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

- Sub Eight
- Sub Five
- Sub Four
- Sub Six
- Sub Test B

[View more customers...](#)

### Run Custom Reports

Create, edit, export and print your own reports using up-to-36 months of data.

- Financial (Data Current Through May 31, 2006)
  - Claim Expenses by Size of Payment
  - Claim Lag Study
  - Detail Payment
  - Detail Payment - Non Confidential
  - Financial Managed Ad Hoc
  - Large Loss Claim Payments
  - Payments by Benefit Type
  - Payments By Month

**Reporting News**

- 11/13/2006  
[Inpatient Event Data Unavailable](#)
- 10/20/2006  
[Membership Issue Affects Some Customers](#)
- 10/02/2006  
["Percent of Savings" and "Shared Savings" Reports Now Available via Automated Reporting](#)

[More News...](#)

**Reporting Tools**

- [Create and Modify Group Segment Filters](#)

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

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

The third option is to click on the Custom Reports menu link. In this example we will access a Custom Report by clicking on the Custom Reports menu link.

The third option is to click on the Custom Reports menu link. In this example we will access a Custom Report by clicking on the Custom Reports menu link.

Report category folders are accessible from the Custom Report screen. Select a category folder by clicking it once.

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Reports Home Automated Reports **Custom Reports** Recent Reports Help & Training News Tools Logout

Reports Home > ECR > Custom Reports

Select the type of report you want to run by selecting a report category. The category folder will open displaying all reports available in that category.

Click the **Help** link to view more information about a report category.

**Financial**  
Help

**Managed Pharmacy**  
Help

**Medical**  
Help

**Membership**  
Help

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

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

Click the Help link to view more information about a specific report category.

Click the Help link to view more information about a specific report category.



In this example we will select the Financial category folder. Once selected, the folder will open and display all reports available in that category.

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

Reports Home > ECR > Custom Reports > Financial

Select the report you want to run. You will be prompted to enter the criteria for your report including specific dates, your group segment filter or policy number and other optional parameters for the report.

Click the **report name** to produce the report with online editing tools.  
Click the **Export** link to produce this report as an Excel, CSV or HTML document.  
Click the **PDF** link to produce this report as an Adobe PDF document suitable for printing.  
Click the **Help** link to view more information about a report.

**Claim Expenses by Size of Payment**  
Help  
Provides counts of claimants and total claim payments within incremental, fixed dollar ranges.  
Export PDF

**Claim Study**  
Help  
Identifies the time lapse between the date a service was incurred and the date the claim was processed.  
Export PDF

**Detail Payment - Confidential**  
Help  
Provides check transaction information for payments of ASO and SCSL-100 claims. Each transaction contains confidential, individually identifiable health information for the subscriber and claimant associated with the claim.  
Export PDF

**Detail Payment - Non Confidential**  
Help  
Provides check transaction information for payments of claims for all funding arrangements. No individually identifiable health information is visible on this report.  
Export PDF

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

On the Financial Report Selection screen, click on the title of the report you'd like to generate. If you'd like to view a more detailed description of a report, click the Help link found under each report name.

On the Financial Report Selection screen, click on the title of the report you'd like to generate. If you'd like to view a more detailed description of a report, click the Help link found under each report name.

The screenshot shows the Employer eServices interface. At the top, there is a navigation bar with links: Reports Home, Automated Reports, Custom Reports, Recent Reports, Help & Training, News, Tools, and Logou. Below this is a breadcrumb trail: Reports Home > ECR > Custom Reports > Financial. The main content area contains instructions: "Select the report you want to run. You will be prompted to enter the criteria for your report including specific dates, your group segment filter or policy number and other optional parameters for the report." It then lists actions: "Click the report name to produce the report with online editing tools.", "Click the Export link to produce this report as an Excel, CSV or HTML document.", "Click the PDF link to produce this report as an Adobe PDF document suitable for printing.", and "Click the Help link to view more information about a report." There are four report cards, each with a spreadsheet icon, a title, a Help link, a description, and Export/PDF links. The 'Export' link for the 'Claim Expenses by Size of Payment' report is highlighted with a red box. At the bottom, there are two buttons: '1. Demonstration' and '2. Try It!'. A text box on the right says: "Click the Export link to select the report criteria and export as an Microsoft Excel, CSV or HTML document." A 'Highlight Box' is also visible with coordinates (346 x 100) and (X:0; Y:480).

Click the Export link to select the report criteria and export as an Microsoft Excel, CSV or HTML document.

The screenshot shows the Employer eServices interface. At the top, there is a navigation bar with links: Reports Home, Automated Reports, Custom Reports, Recent Reports, Help & Training, News, Tools, and Logou. Below this is a breadcrumb trail: Reports Home > ECR > Custom Reports > Financial. The main content area contains instructions: "Select the report you want to run. You will be prompted to enter the criteria for your report including specific dates, your group segment filter or policy number and other optional parameters for the report." It then lists actions: "Click the report name to produce the report with online editing tools.", "Click the Export link to produce this report as an Excel, CSV or HTML document.", "Click the PDF link to produce this report as an Adobe PDF document suitable for printing.", and "Click the Help link to view more information about a report." There are four report cards, each with a spreadsheet icon, a title, a Help link, a description, and an Export link with a PDF button. The PDF buttons for "Claim Expenses by Size of Payment", "Claim Lag Study", "Detail Payment", and "Detail Payment - Non Confidential" are highlighted with red boxes. At the bottom left, there are two buttons: "1. Demonstration" and "2. Try It!". A blue-bordered box on the right contains the text: "Click the PDF link to select the report criteria and export as an Adobe PDF document suitable for printing." A grey box at the bottom left contains the text: "1. Demonstration", "2. Try It!", "Highlight Box", "(346 x 100)", "(X:0; Y:480)".

Click the PDF link to select the report criteria and export as an Adobe PDF document suitable for printing.

**Employer eServices®**

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

Reports Home > ECR > Custom Reports > Financial

Select the report you want to run. You will be prompted to enter the criteria for your report including specific dates, your group segment filter or policy number and other optional parameters for the report.

Click the **report name** to produce the report with online editing tools.  
Click the **Export** link to produce this report as an Excel, CSV or HTML document.  
Click the **PDF** link to produce this report as an Adobe PDF document suitable for printing.  
Click the **Help** link to view more information about a report.

**Claim Expenses by Size of Payment**  
Help  
Provides counts of claimants and total claim payments within incremental, fixed dollar ranges.  
Export PDF

**Claim Lag Study**  
Help  
Identifies the time lapse between the date a service was incurred and the date the claim was processed.  
Export PDF

**Detail Payment**  
Help  
Provides check transaction information for payments of ASO and SCSL-100 claims. Each transaction contains confidential, individually identifiable health information for the subscriber and claimant associated with the claim.  
Export PDF

**Detail Payment - Non Confidential**  
Help  
Provides check transaction information for payments of claims for all funding arrangements. No individually identifiable health information is visible on this report.  
Export PDF

1. Demonstration 2. Try It!  
Highlight Box (346 x 100) (X:0; Y:480)

Scroll down the browser window to see the entire list of reports available.

Scroll down the browser window to see the entire list of reports available.

Click the **PDF** link to produce this report as an Adobe PDF document suitable for printing.  
Click the **Help** link to view more information about a report.

The screenshot shows a grid of report options, each with a small spreadsheet icon. The reports are:

- Claim Expenses by Size of Payment**: Provides counts of claimants and total claim payments within incremental, fixed dollar ranges. [Export](#) [PDF](#)
- Claim Lag Study**: Identifies the time lapse between the date a service was incurred and the date the claim was processed. [Export](#) [PDF](#)
- Detail Payment**: Provides check transaction information for payments of ASO and SCSL-100 claims. Each transaction contains confidential, individually identifiable health information for the subscriber and claimant associated with the claim. [Export](#) [PDF](#)
- Detail Payment - Non Confidential**: Provides check transaction information for payments of claims for all funding arrangements. No individually identifiable health information is visible on this report. [Export](#) [PDF](#)
- Large Loss Claim Payments**: Provides a detailed profile for a specific number of top above a chosen dollar threshold. [Export](#) [PDF](#)
- Payments by Benefit Type**: Provides reimbursement amounts based on services offered under a health plan. [Export](#) [PDF](#)
- Payments By Month**: Distributes reimbursement amounts based on the month they are booked to the financial statement. [Export](#) [PDF](#)
- Premium vs Claims - Paid**: Provides a monthly comparison between the booked claim expenses and the billed premium. [Export](#) [PDF](#)

A blue callout box points to the **Payments By Month** link with the text: "Select the Payments By Month link".

At the bottom left, there are two buttons: "1. Demonstration" and "2. Try It!". Below "2. Try It!" is a "Highlight Box" with dimensions (346 x 100) and coordinates (X:0; Y:480).

At the bottom right, a blue-bordered box contains the text: "In this example we will click the Payments By Month report link to open the available report options."

In this example we will click the Payments By Month report link to open the available report options.

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

Reports Home > ECR > Custom Reports > Financial > Payments By Month

**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 bar 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. This option allows only one selection.

Search for:

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

Highlight Box (764 x 403) (X:5; Y:74)

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

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

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**Employer eServices®**

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

Reports Home > ECR > Custom Reports > Financial > Payments By Month

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Search for:   Match case

Available: **Highlight Box**  
MSP05437  
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. This option allows only one selection.

Search for:

Available: Selected:

**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.

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



**Employer eServices®**

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

Reports Home > ECR > Custom Reports > Financial > Payments By Month

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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 bar to locate a policy. [Help](#)

Search for:   Match case

Available: Selected:

0001P9529  
MSP053387  
NTL081096

--- none ---

1 - 3 of 3

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Search for:

Available: Selected:

**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.

**Employer eServices®**

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

Reports Home > ECR > Custom Reports > Financial > Payments By Month

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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 box to locate a policy. [Help](#)

Search for:   Match case

Available: 0001P9529  
MSP053387  
NTL081096

Selected: 0001P9529

1 - 3 of 3

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Search for:

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

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

Highlight Box (759 x 94) (X:5; Y:381)

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.

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

Reports Home > ECR > Custom Reports > Financial > Payments By Month

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**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 box to locate a policy. [Help](#)

Search for:   Match case

Available: 0001P9529  
MSP053387  
NTL081096

Selected: 0001P9529

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. This option allows only one selection.

Search for:

Available: Selected:

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

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

Scroll down to continue.

Scroll down to continue.

**Employer eServices®**

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

Reports Home > ECR > Custom Reports > Financial > Payments By Month

**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:  
[Search Box]

Available:  
Group Highlight Box  
Group Segment Filter

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). **Book dates** indicate when claim payments are entered into the financial a 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.

**Employer eServices®**

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

Reports Home > ECR > Custom Reports > Financial > Payments By Month

**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:  
[Search Box]

Available:  
Group Segment Filter1  
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). **Book dates** indicate when claim payments are entered into the financial a 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)

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

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

**Employer eServices®**

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

Reports Home > ECR > Custom Reports > Financial > **Payments By Month**

**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). **Book dates** indicate when claim payments are entered into the financial a 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)

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

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**Employer eServices®**

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

Reports Home > ECR > Custom Reports > Financial > Payments By Month

**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). **Book dates** indicate when claim payments are entered into the financial a dates (years/months) after you click CONTINUE. [Help](#)  
This option allows only one selection.

Service Dates

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

Highlight Box  
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Scroll down to continue.

Scroll down to continue.

**Employer eServices®**

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

Reports Home > ECR > Custom Reports > Financial > Payments By Month

1 - 2 of 2

**STEP 2: SELECT A DATE TYPE\* (Required)**

**Service dates** indicate when services were rendered (i.e., a claim was incurred). **Book dates** indicate when claim payments are entered into the financial system. You can select either Service dates (years/months) after you click CONTINUE. [Help](#)  
This option allows only one selection.

Service Dates  
 Book Dates  
 Service and Book Dates

Select a Date Type

**SELECT ADVANCED**

**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 results (e.g. show results for "active" employees only).

Show Advanced Options

**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)

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

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**Employer eServices®**

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

Reports Home > ECR > Custom Reports > Financial > Payments By Month

1 - 2 of 2

**STEP 2: SELECT A DATE TYPE\* (Required)**

**Service dates** indicate when services were rendered (i.e., a claim was incurred). **Book dates** indicate when claim payments are entered into the financial a dates (years/months) after you click CONTINUE. [Help](#)  
This option allows only one selection.

Service Dates  
 Book Dates  
 Service and Book Dates

**SELECT ADVANCED OPTIONS**

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

Show Advanced Options

**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)

When creating a custom report, you can select Advanced Options that will add more detail or narrow down your report. Please refer to the Using Advanced Options tutorial for more information.

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Employer eServices®

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

Reports Home > ECR > Custom Reports > Financial > Payments By Month

1 - 2 of 2

**STEP 2: SELECT A DATE TYPE\* (Required)**

**Service dates** indicate when services were rendered (i.e., a claim was incurred). **Book dates** indicate when claim payments are entered into the financial a dates (years/months) after you click CONTINUE. [Help](#)  
This option allows only one selection.

Service Dates  
 Book Dates  
 Service and Book Dates

**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 for "active" employees only).

Show Advanced Options

**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.

Payments By Month Re

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

Use the Rename Report feature to further customize your report. Type the new name in the Rename Report field and click the Rename Report button.

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**Employer eServices®**

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

Reports Home > ECR > Custom Reports > Financial > Payments By Month

1 - 2 of 2

**STEP 2: SELECT A DATE TYPE\* (Required)**

**Service dates** indicate when services were rendered (i.e., a claim was incurred). **Book dates** indicate when claim payments are entered into the financial a dates (years/months) after you click CONTINUE. [Help](#)  
This option allows only one selection.

Service Dates  
 Book Dates  
 Service and Book Dates

**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 for "active" employees only).

Show Advanced Options

**RENAME YOUR REPORT** Click the **Rename Report** button

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

My

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

The screenshot shows the Employer eServices interface. At the top, there is a navigation bar with links: Reports Home, Automated Reports, Custom Reports, Recent Reports, Help & Training, News, Tools, and Logout. Below this is a breadcrumb trail: Reports Home > ECR > Custom Reports > Financial > Payments By Month. The main content area is titled "STEP 2: SELECT A DATE TYPE\* (Required)". It explains that "Service dates" indicate when services were rendered, and "Book dates" indicate when claim payments are entered. Below this, there are three radio button options: "Service Dates", "Book Dates" (which is selected), and "Service and Book Dates".

Below the date type selection, there is a section titled "SELECT ADVANCED OPTIONS". It states that advanced options are optional and allow for adding more details to the report. A "Show Advanced Options" button is present.

The "RENAME YOUR REPORT" section is also visible, with a text field containing "My Report" and a "Rename Report" button.

Overlaid on the screenshot is a "Microsoft Internet Explorer" dialog box titled "Rename Successful". It contains a yellow warning icon and the text "Rename Successful". Below the text is a "Highlight" button, which is highlighted with a red box. A blue callout box with the text "Click the OK button" points to the "Highlight" button. Another blue callout box at the bottom right of the dialog box contains the text "The Rename Confirmation window appears. Click OK to continue."

The Rename Confirmation window appears. Click OK to continue.

**Employer eServices®**

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

Reports Home > ECR > Custom Reports > Financial > Payments By Month

1 - 2 of 2

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Show Advanced Options

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My Report

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

Scroll down to continue.

Scroll down to continue.

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. There are no selections available in this option.

**STEP 2: SELECT A DATE TYPE\* (Required)**

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This option allows only one selection.

Service Dates  
 Book Dates  
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My Report

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

Click the **Continue** button

Click continue.

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Click continue.

**Employer eServices®**

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

Reports Home > ECR > Custom Reports > Financial > My Report

**STEP 3: SELECT BOOK DATES\* (Required)**

Your report will be limited to claims **booked** (i.e., a payment was entered into the financial accounting system) during the months you select. The system maintains a rolling 36-months of booked claims. [Help](#)  
This option requires at least one selection.

Search for:   Match case

Available:  Selected:

2006-06  
2006-05  
2006-04  
2006-03  
2006-02  
2006-01  
2005-12  
2005-11  
2005-10  
2005-09

1 - 30 of 36

**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)

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

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

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**Employer eServices®**

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

Reports Home > ECR > Custom Reports > Financial > My Report

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This option requires at least one selection.

Search for:   Match case

Available: 2003-06  
2006-05  
2006-04  
2006-03  
2006-02  
2006-01  
2005-12  
2005-11  
2005-10  
2005-09

Selected: --- none ---

Select Book Dates

1 - 30 of 36

**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.

My Report

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

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

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

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**Employer eServices®**

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

Reports Home > ECR > Custom Reports > Financial > **My Report**

**STEP 3: SELECT BOOK DATES\* (Required)**

Your report will be limited to claims **booked** (i.e., a payment was entered into the financial accounting system) during the months you select. The system maintains a rolling 36-months of booked claims. [Help](#)  
This option requires at least one selection.

Search for:   Match case

Available: 2006-06  
2006-05  
2006-04  
2006-03  
2006-02  
2006-01  
2005-12  
2005-11  
2005-10  
2005-09

Selected: --- none ---

1 - 30 of 36

**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)

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

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

The screenshot shows the 'Employer eServices' interface. At the top, there is a navigation bar with links: Reports Home, Automated Reports, Custom Reports, Recent Reports, Help & Training, News, Tools, and Logout. Below this is a breadcrumb trail: Reports Home > ECR > Custom Reports > Financial > My Report.

The main content area is titled 'STEP 3: SELECT BOOK DATES\* (Required)'. It contains the following text: 'Your report will be limited to claims **booked** (i.e., a payment was entered into the financial accounting system) during the months you select. The system maintains a rolling 36-months of booked claims. [Help](#). This option requires at least one selection.'

Below the text is a search section with a 'Search for:' text box, a magnifying glass icon, and a 'Match case' checkbox. Underneath are two columns: 'Available:' and 'Selected:'. The 'Available:' column is a list box containing dates from 2006-06 down to 2005-09, with '2006-01' highlighted. The 'Selected:' column is an empty list box. Between the columns are right and left arrow buttons. A blue arrow points from the '2006-03' date in the 'Selected:' column to the right arrow button. Below the list boxes is the text '1 - 30 of 36' with navigation arrows.

Below the date selection is a section titled 'RENAME YOUR REPORT'. It contains the text: 'If you would like to rename this report, type a new name into the text field below, and then click the **Rename Report** button.' There is a text input field containing 'My Report' and a 'Rename Report' button.

At the bottom of the page, there are two buttons: '1. Demonstration' and '2. Try It!'. To the right of these buttons is a large white box with a blue border containing the text 'Scroll down to continue.' Below the '2. Try It!' button, there is a small grey box with the text: 'Highlight Box (346 x 100) (X:0; Y:480)'. A vertical scrollbar is visible on the right side of the page.

Scroll down to continue.

**STEP 3: SELECT BOOK DATES (Required)**

Your report will be limited to claims **booked** (i.e., a payment was entered into the financial accounting system) during the months you select. The system maintains a rolling 36-months of booked claims. [Help](#)  
This option requires at least one selection.

Search for:   Match case

Available:   
2006-06  
2006-05  
2006-04  
2006-03  
2006-02  
2006-01  
2005-12  
2005-11  
2005-10  
2005-09

Selected:   
2006-06  
2006-05  
2006-04  
2006-03  
2006-02

1 - 30 of 36

**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.

My Report

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

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Click continue to process your report.

**Employer eServices®**

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

Reports Home > ECR > Custom Reports > Financial > Payments By Month

**Your request is processing... Please Wait.**

● ● ● ● ●

Report name: Payments By Month  
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)

The Processing page displays while the system generates the report. Some reports take longer to generate. You can start another report while one is processing by clicking the link above.

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**Customer Reporting – Running Custom Reports**

**Employer eServices®**

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

Reports Home > ECR > Custom Reports > Financial > Payments By Month

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

PAGE-BY: none Data rows: 7 Data columns: 4

Book Year/Month ▲	Benefit Payment Metrics	Medical	Managed Pharmacy	Capitation	Total
		Payments ▼	Payments ▼	Payments ▼	Payments ▼
2006-01		\$18,061	\$3,520	\$2,562	\$24,143
2006-02		\$14,612	\$4,519	\$2,491	\$21,623
2006-03		\$47,805	\$7,680	\$2,385	\$57,870
2006-04		\$78,386	\$3,523	\$2,244	\$84,153
2006-05		\$33,638	\$3,678	\$2,244	\$39,561
2006-06		\$13,044	\$3,858	\$2,279	\$19,182
<b>Total</b>		<b>\$205,546</b>	<b>\$26,779</b>	<b>\$14,207</b>	<b>\$246,532</b>

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

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

To learn more about how to manipulate your data in Report Results view please see the Manipulating Report Data Tutorial.

To learn more about how to manipulate your data in Report Results view please see the Manipulating Report Data Tutorial.

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

**Congratulations!**  
**You have completed the Running Custom Reports Tutorial**

At the bottom of the interface, there are two buttons: "1. Demonstration" and "2. Try It!". A grey highlight box is positioned over the "2. Try It!" button and the text below it. The text inside the highlight box reads:

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

To the right of the highlight box, there is a white box with a blue border containing the text:

Congratulations! You have completed the Running Custom Reports tutorial.

Congratulations! You have completed the Running Custom Reports tutorial.