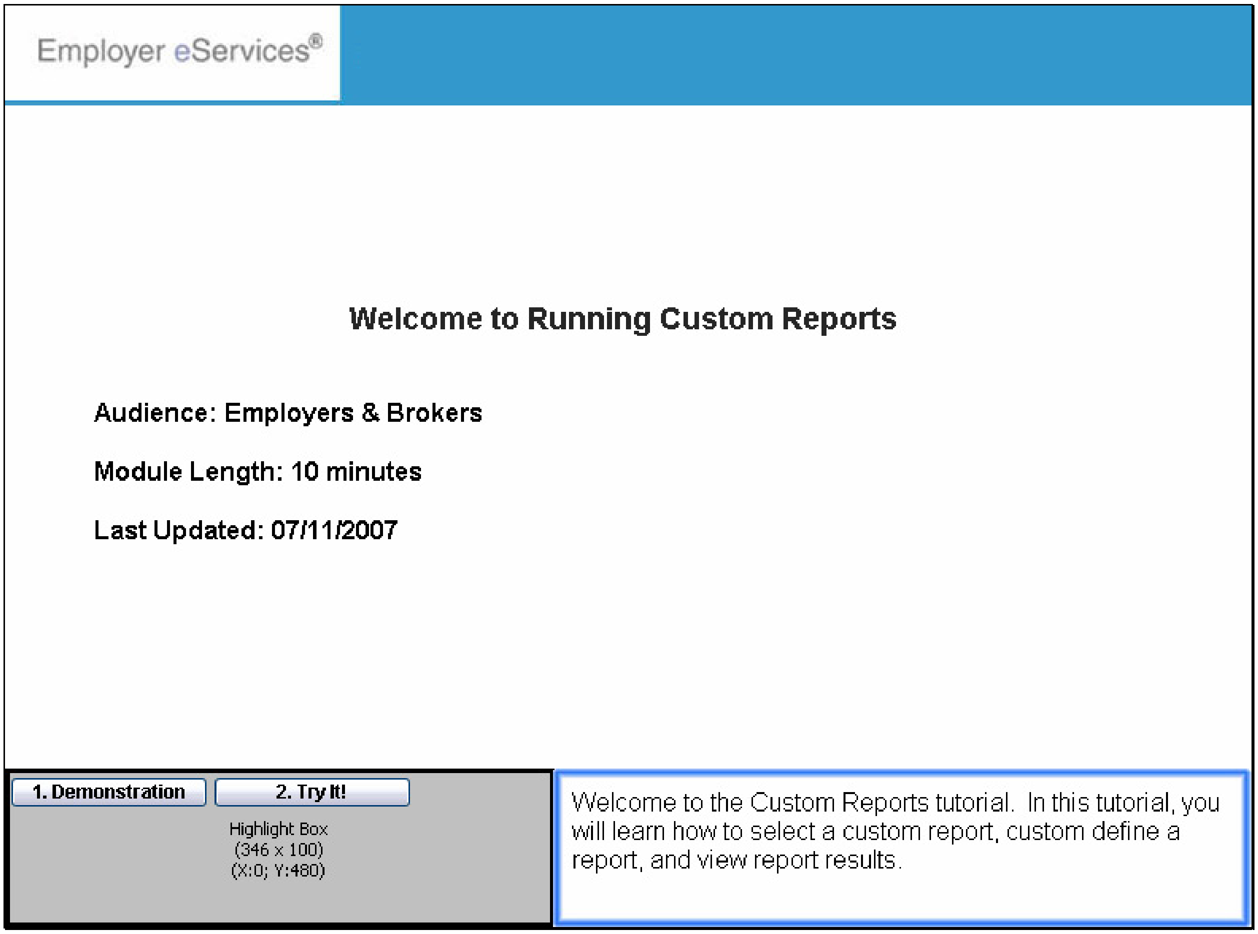
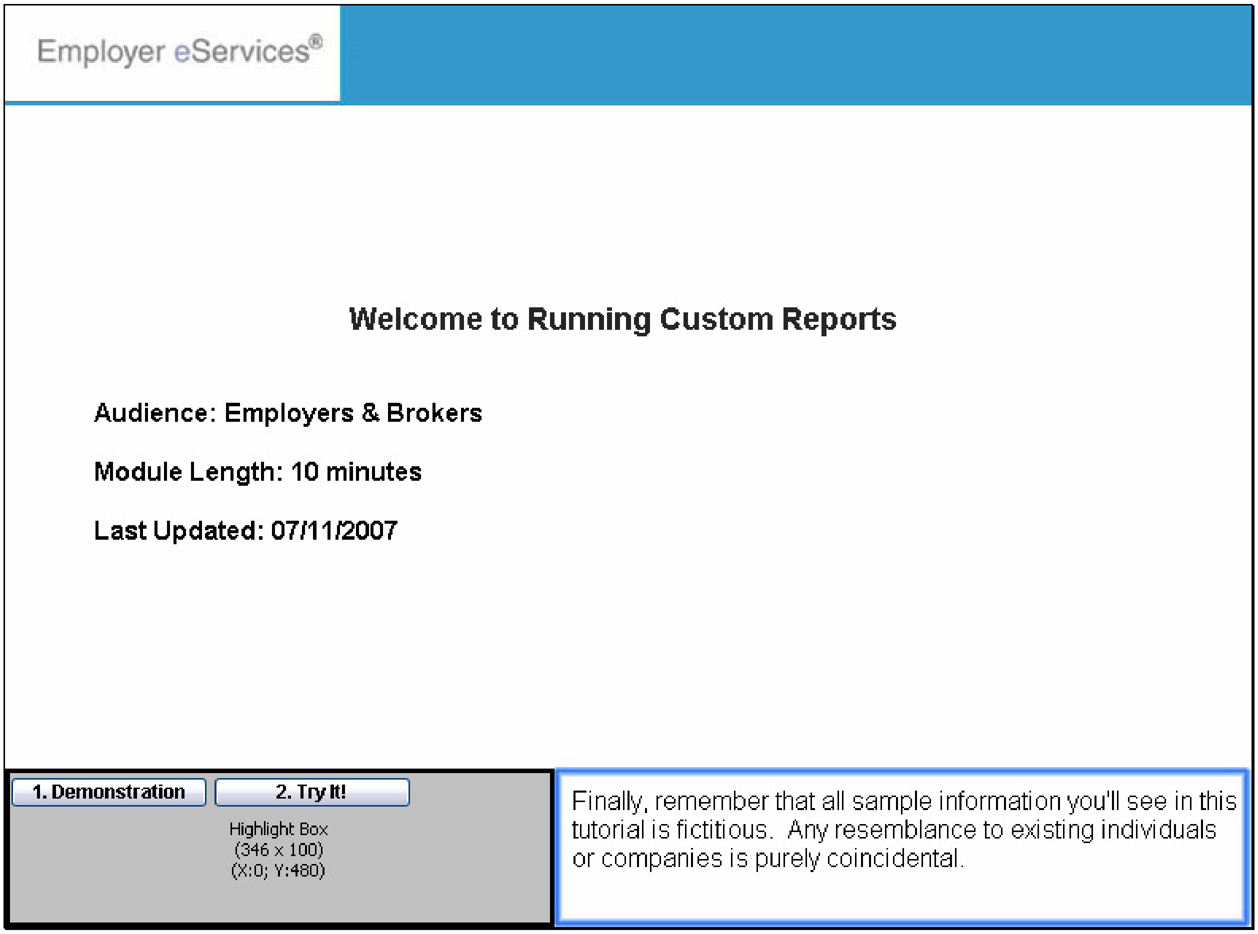
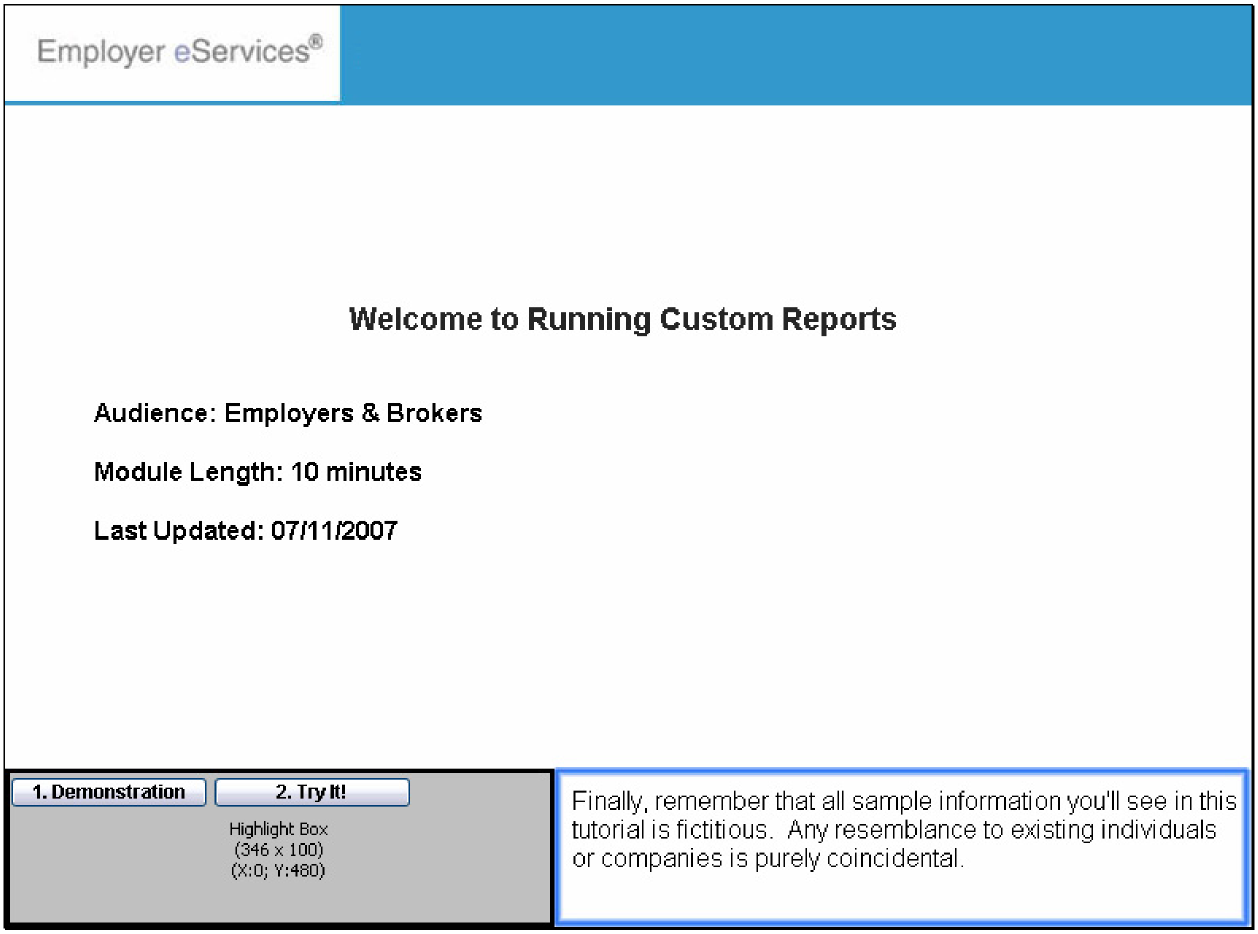


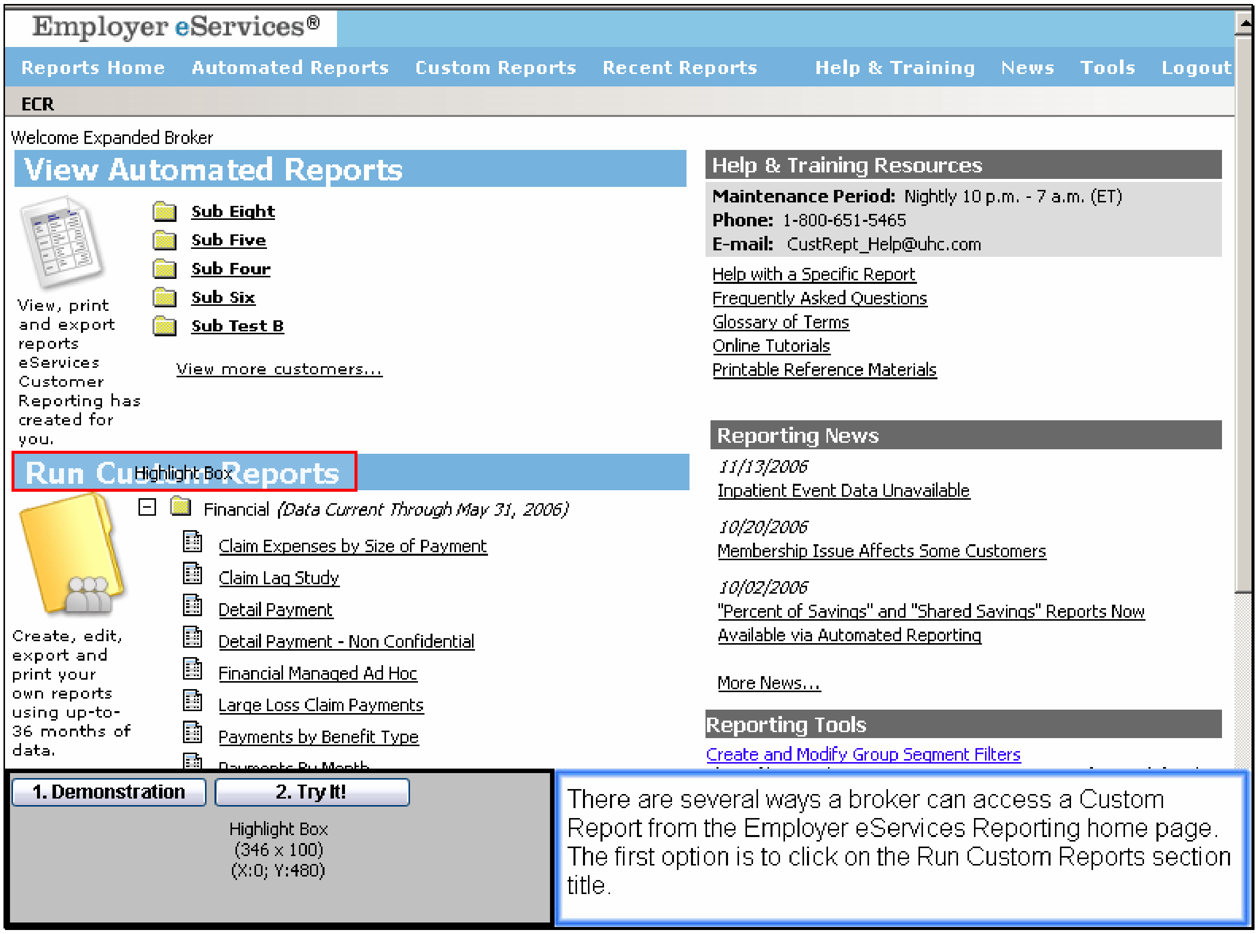
Welcome to the Custom Reports tutorial. In this tutorial, you will learn how to select a custom report, custom define a report, and view report results.



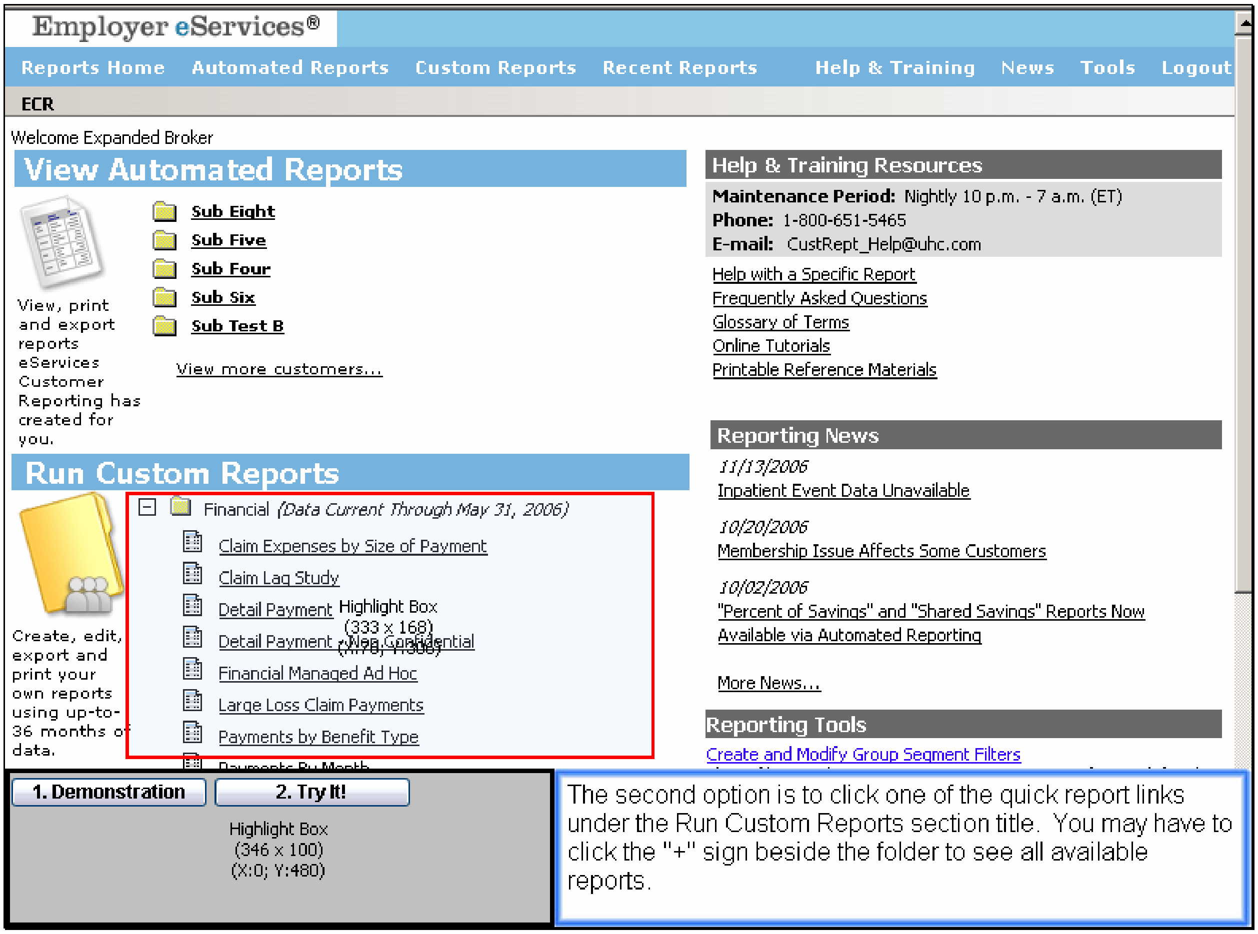
Also, please note that your screens may be a bit different from the ones you'll see in this tutorial. The difference depends on your contractual agreement.



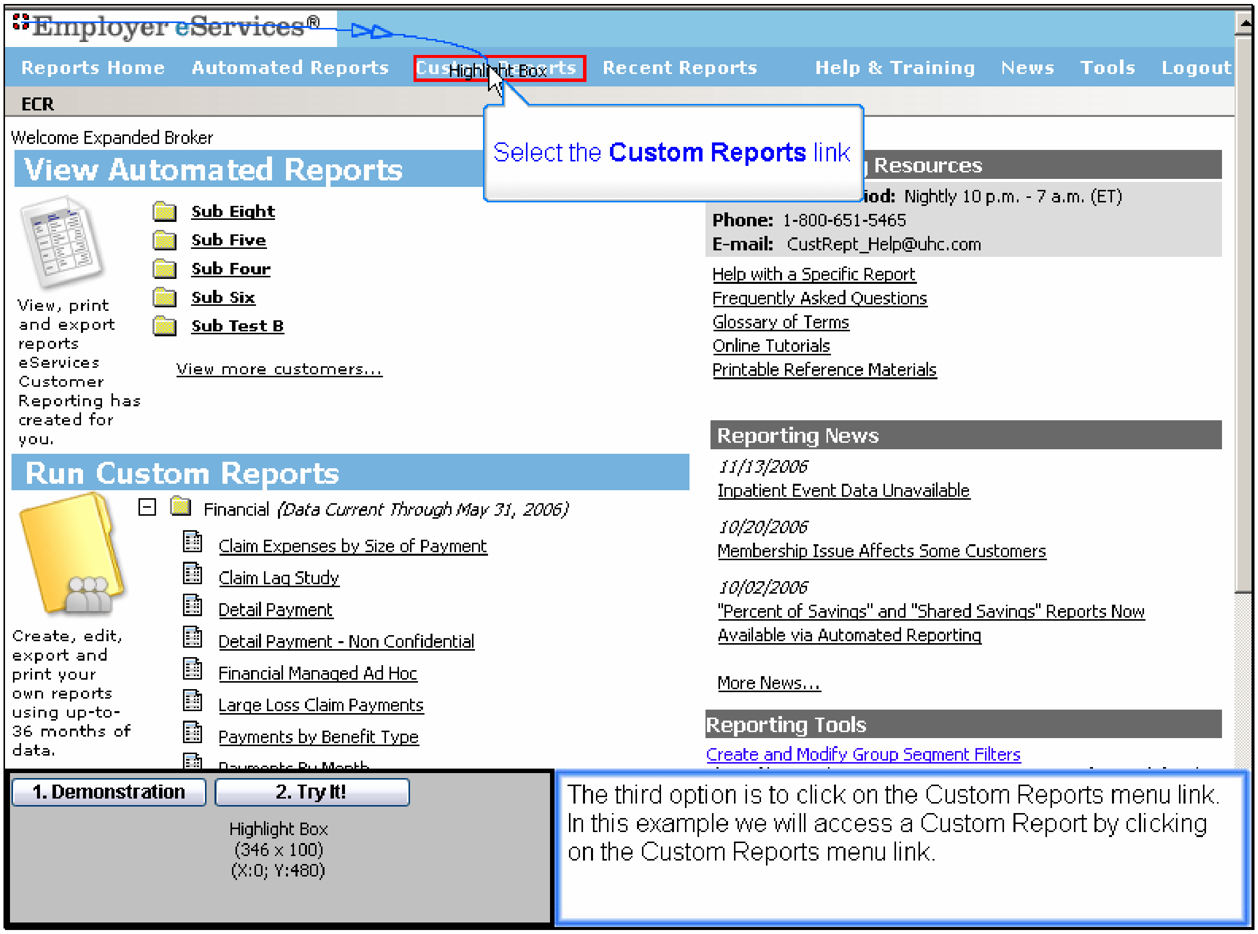
Finally, remember that all sample information you'll see in this tutorial is fictitious. Any resemblance to existing individuals or companies is purely coincidental.



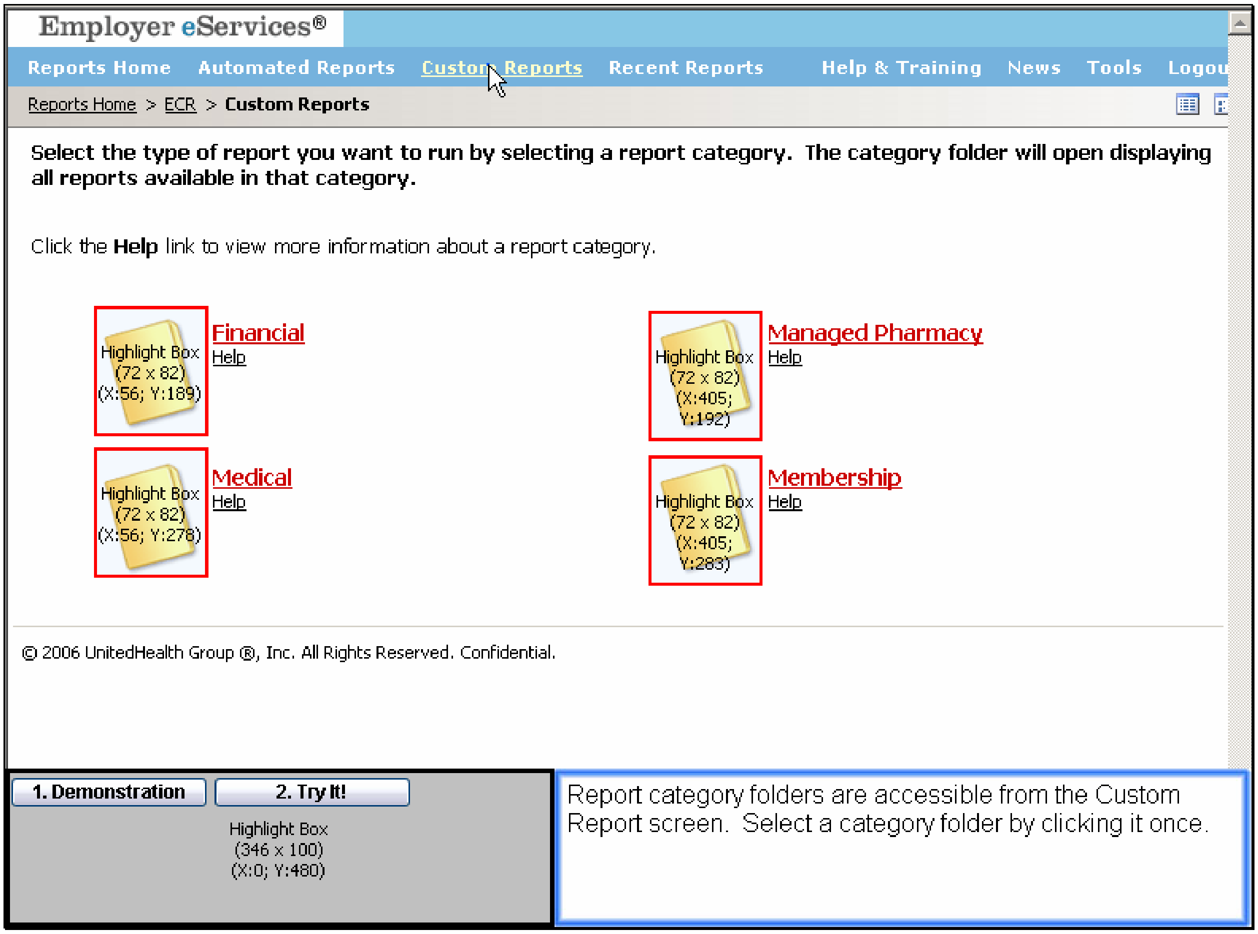
There are several ways a broker can access a Custom Report from the Employer eServices Reporting home page. The first option is to click on the Run Custom Reports section title.



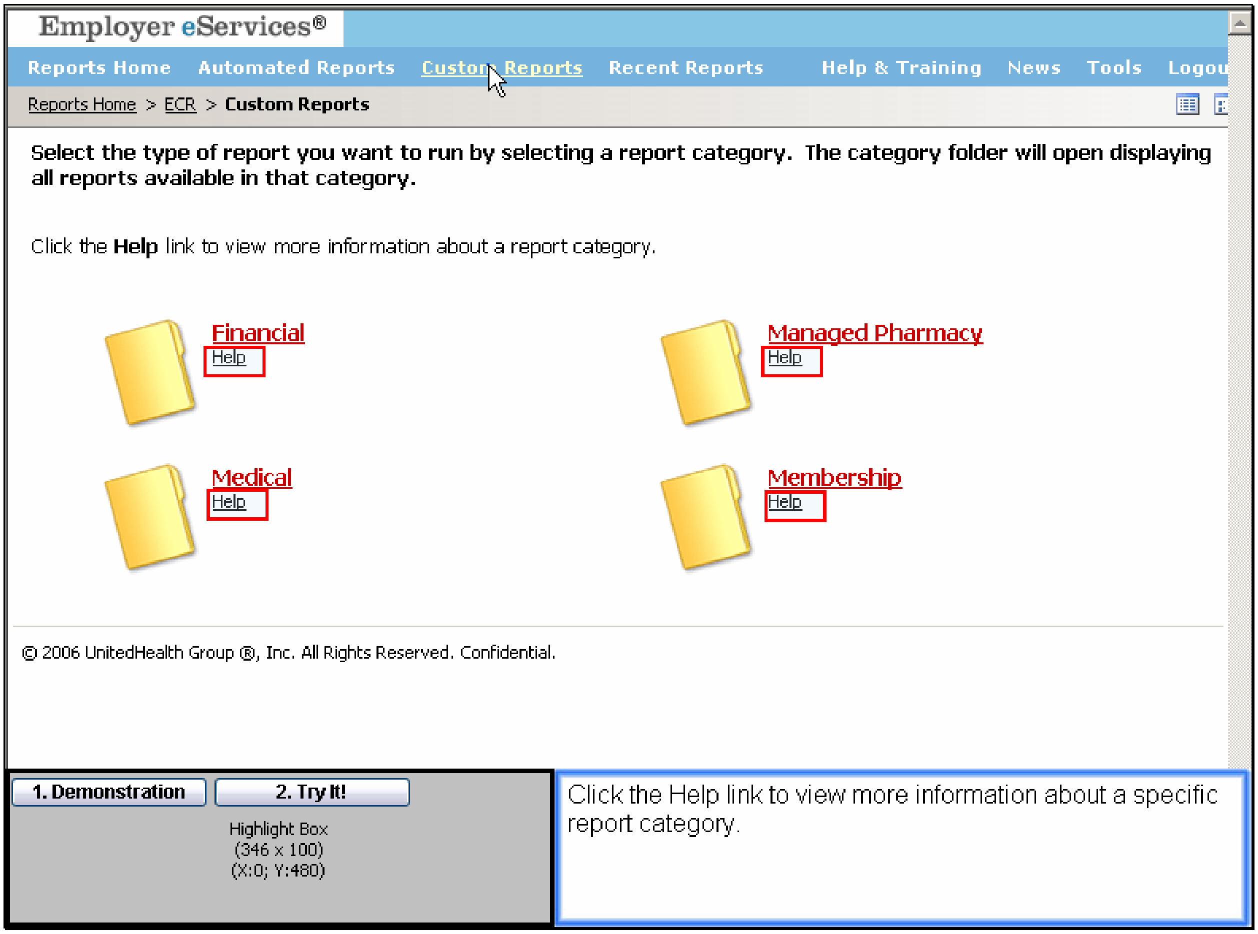
The second option is to click one of the quick report links under the Run Custom Reports section title. You may have to click the "+" sign beside the folder to see all available reports.



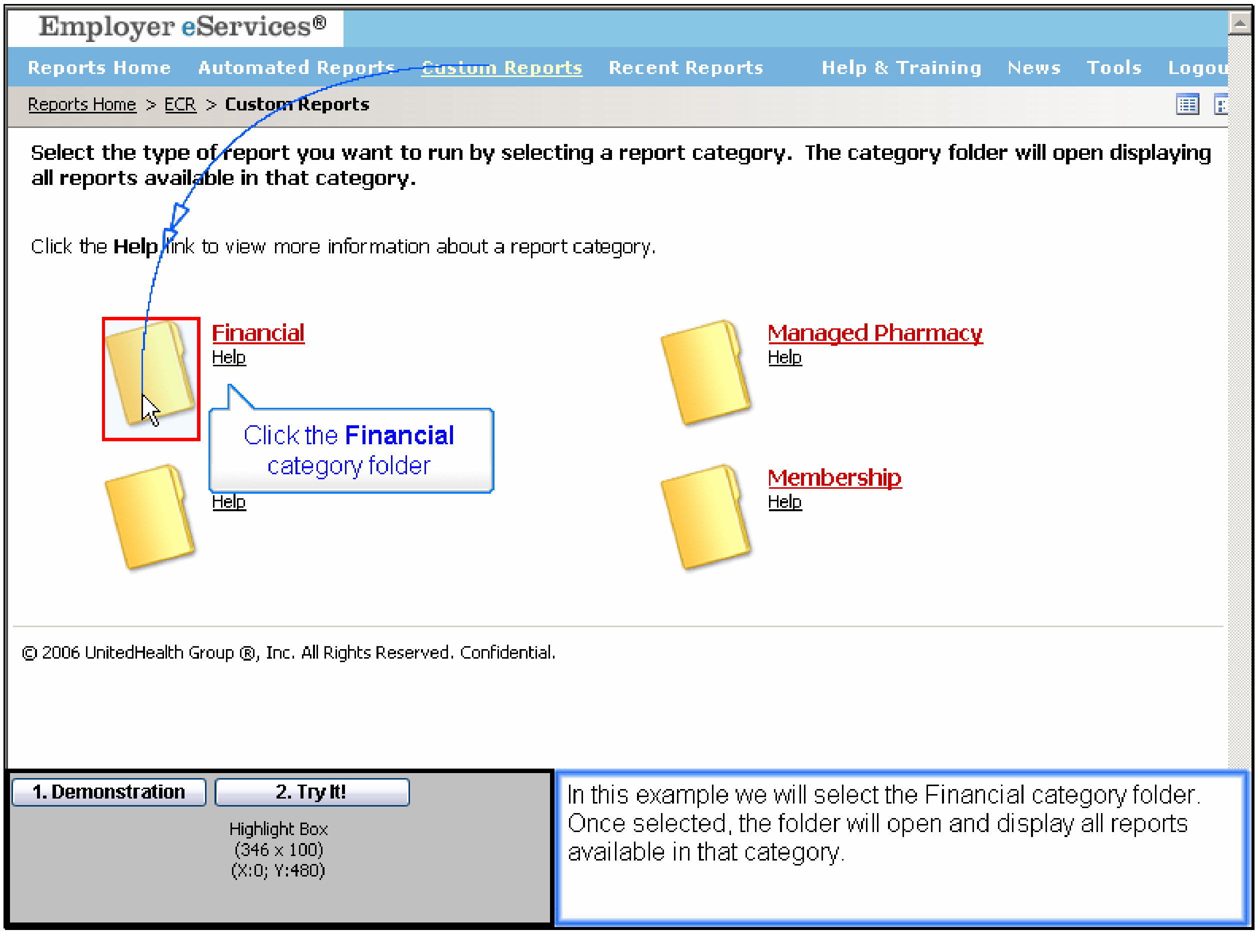
The third option is to click on the Custom Reports menu link. In this example we will access a Custom Report by clicking on the Custom Reports menu link.



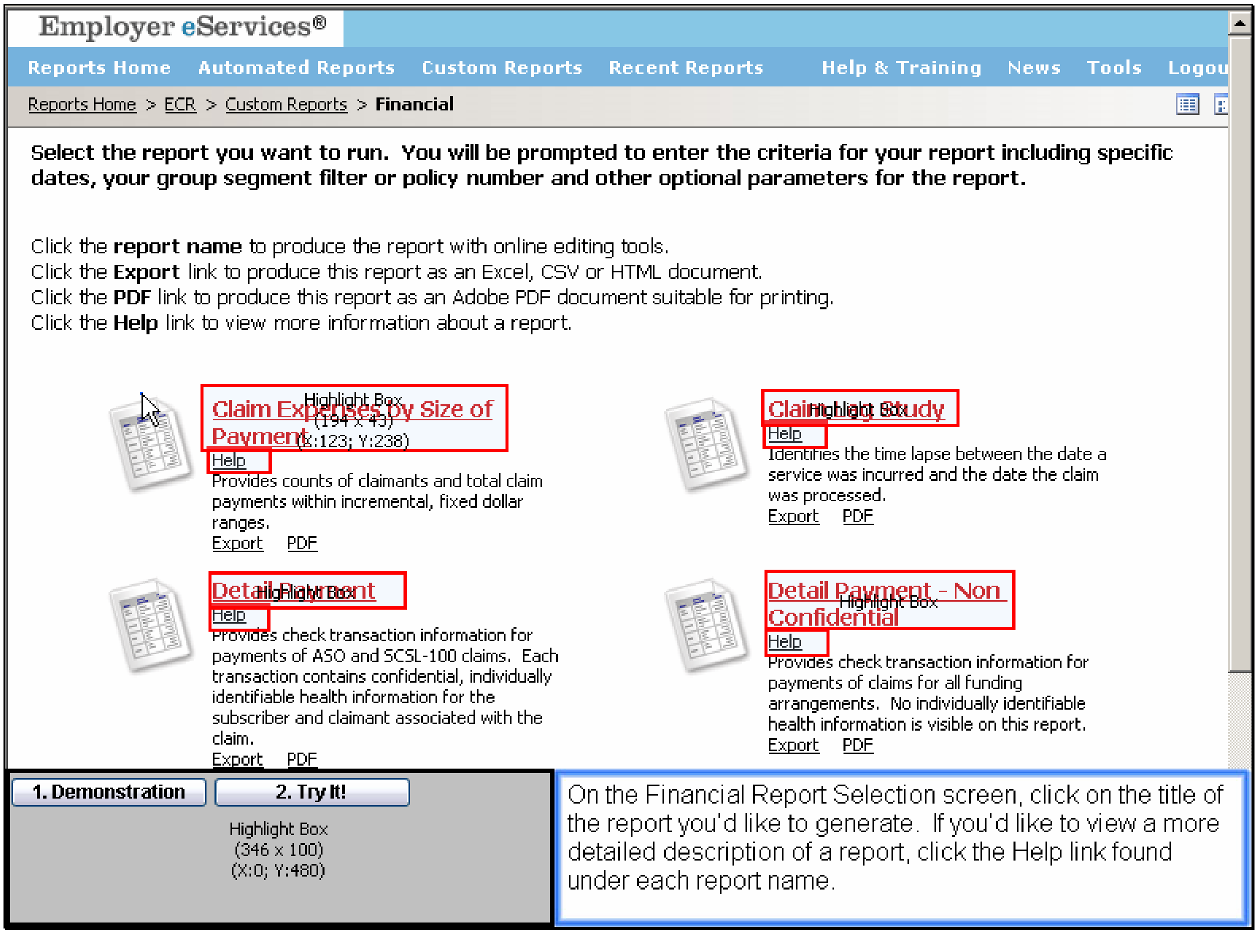
Report category folders are accessible from the Custom Report screen. Select a category folder by clicking it once.



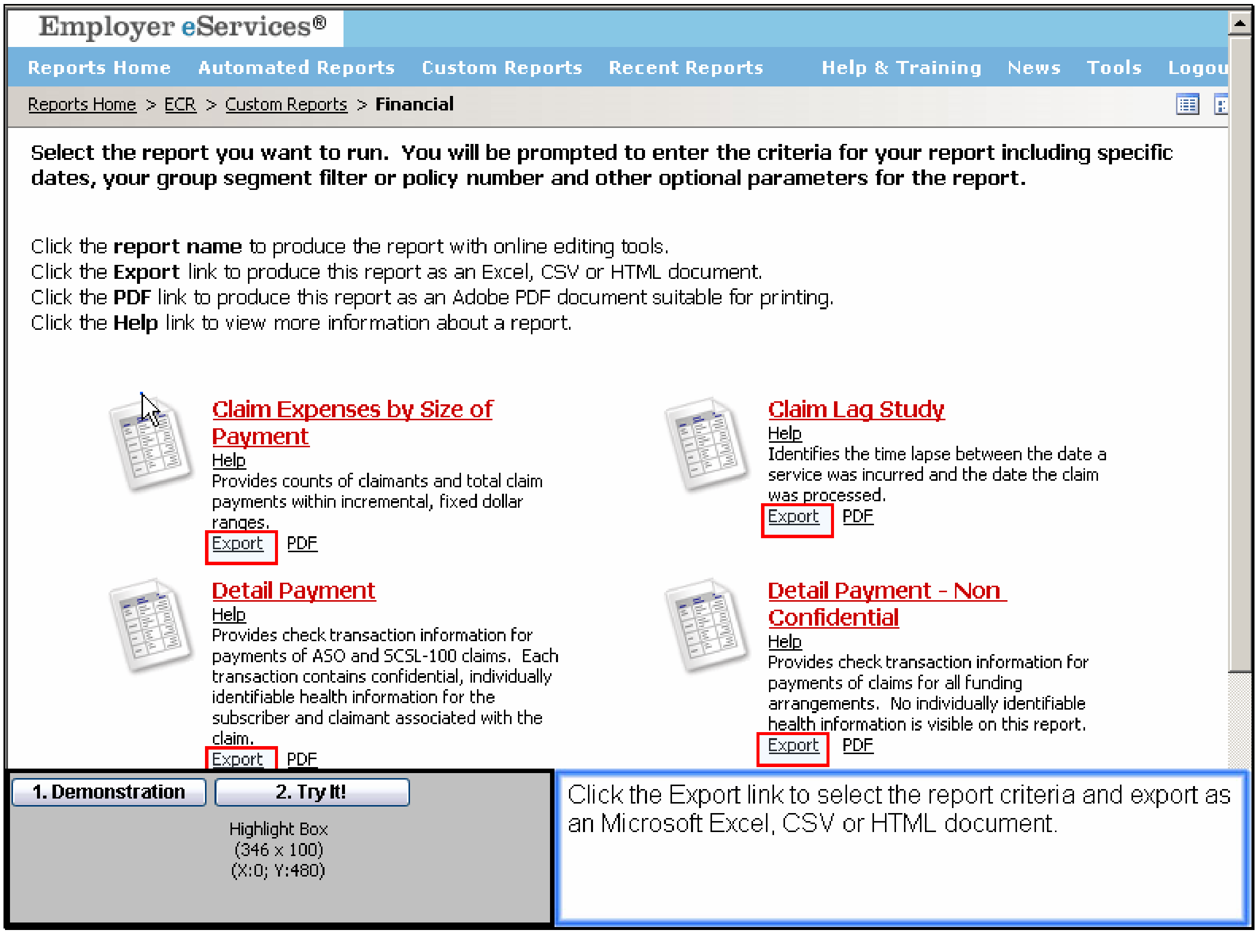
Click the Help link to view more information about a specific report category.



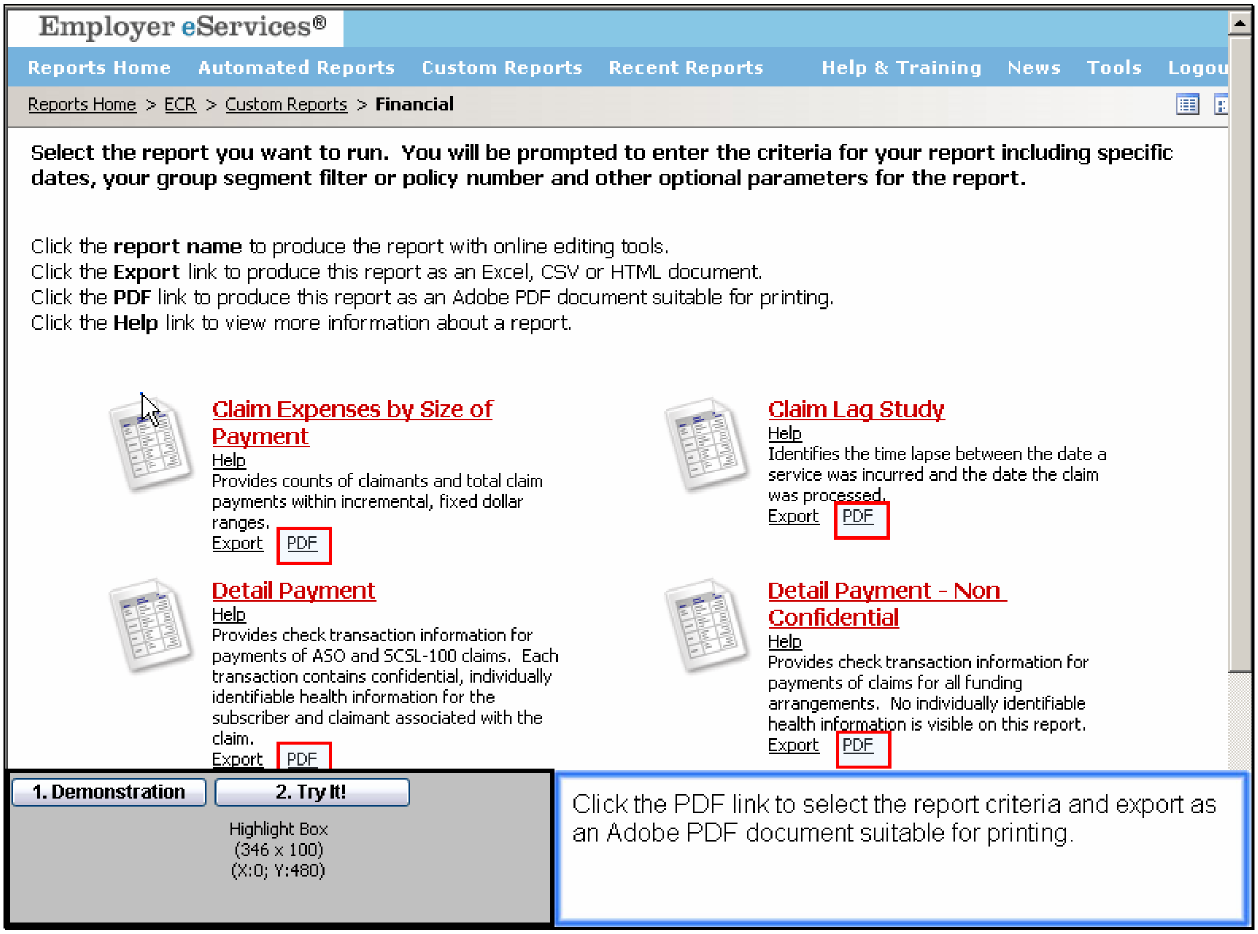
In this example we will select the Financial category folder. Once selected, the folder will open and display all reports available in that category.



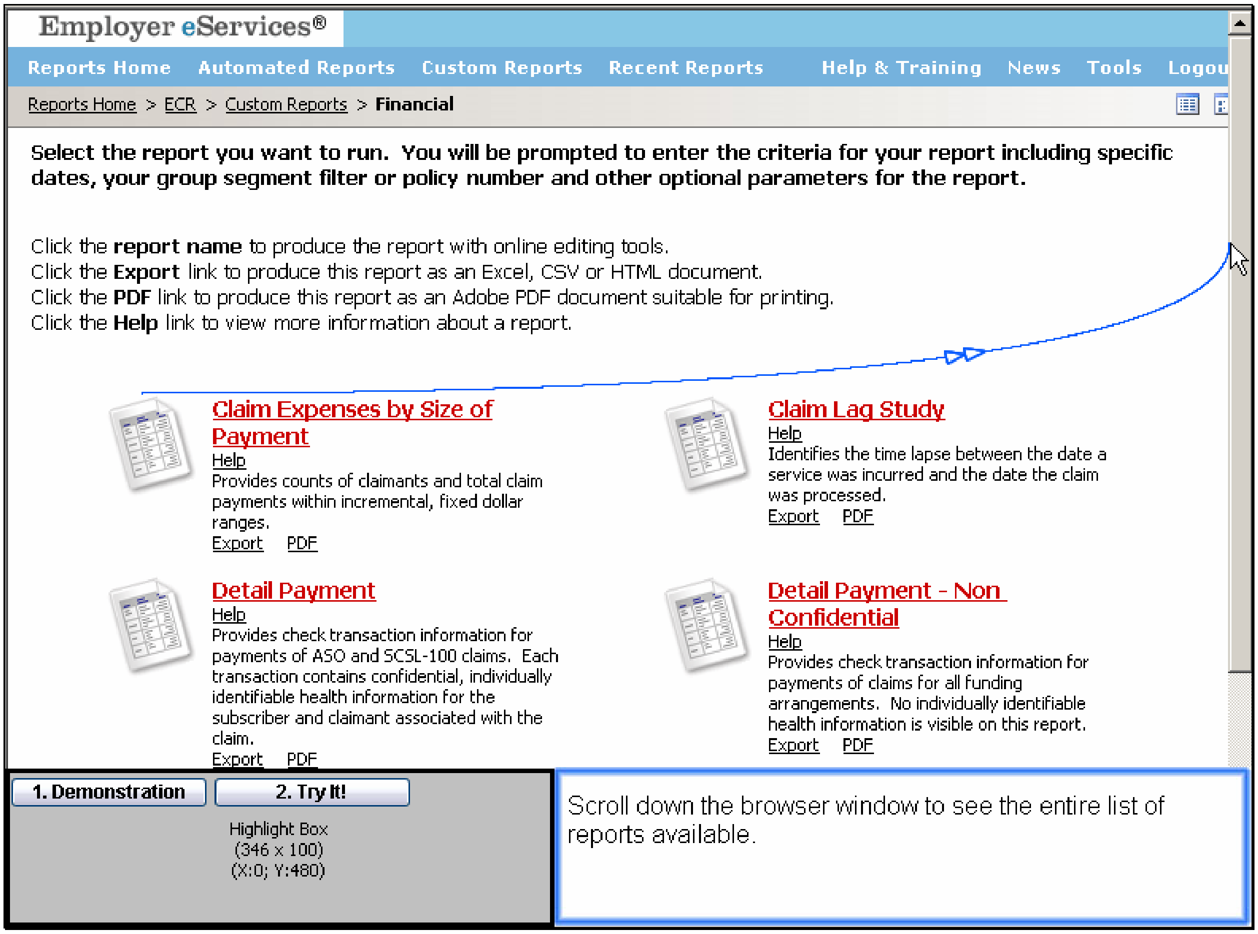
On the Financial Report Selection screen, click on the title of the report you'd like to generate. If you'd like to view a more detailed description of a report, click the Help link found under each report name.



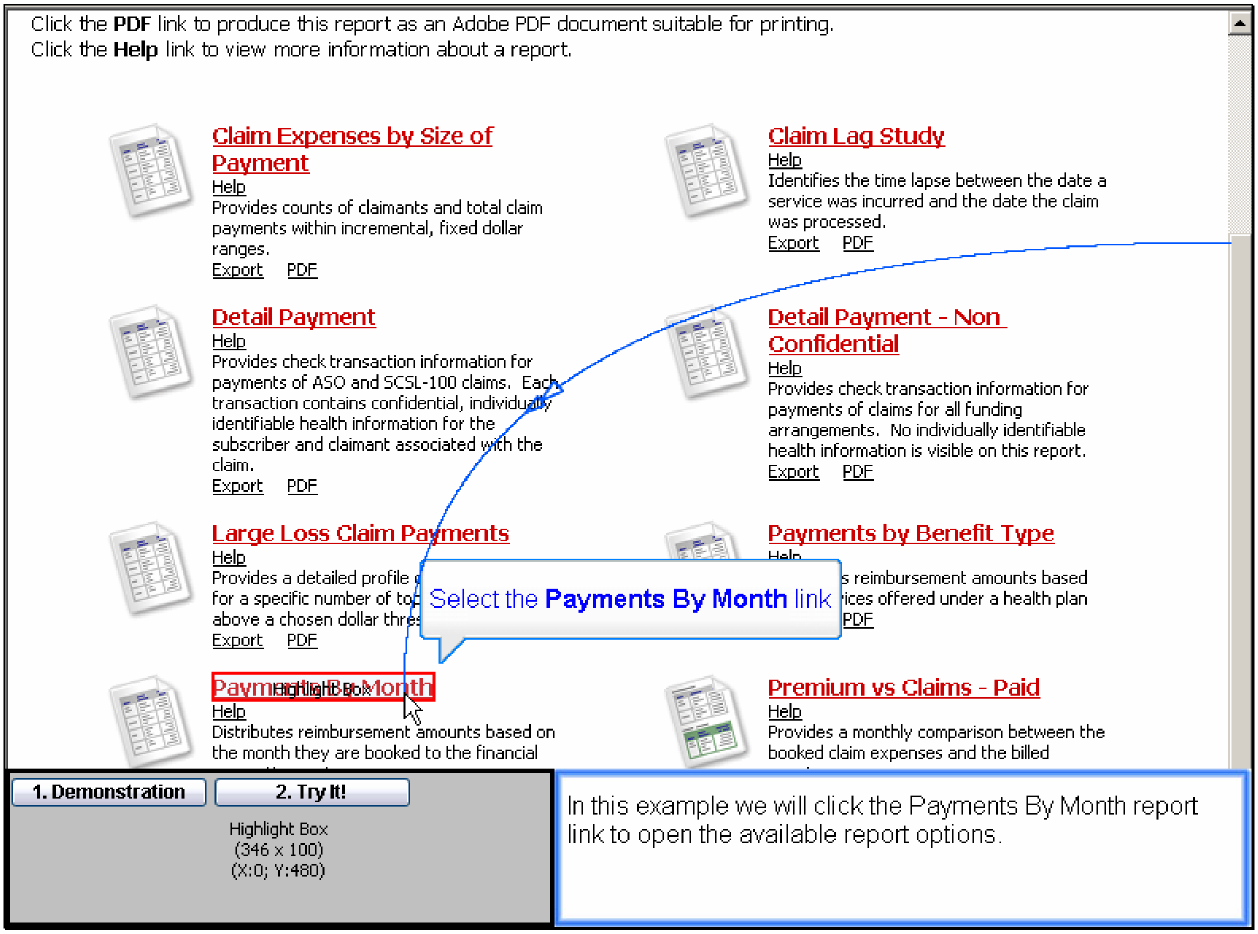
Click the Export link to select the report criteria and export as an Microsoft Excel, CSV or HTML document.



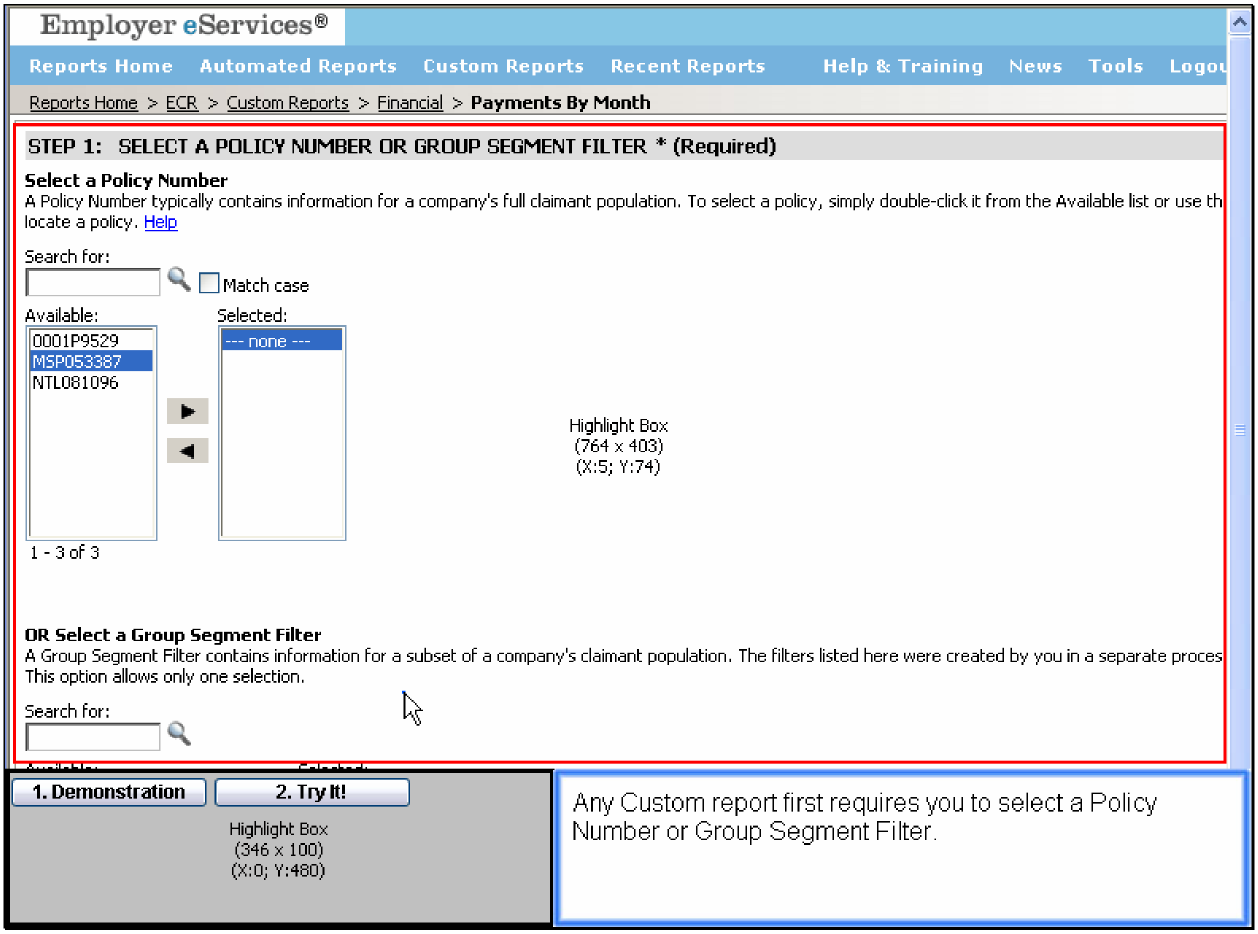
Click the PDF link to select the report criteria and export as an Adobe PDF document suitable for printing.



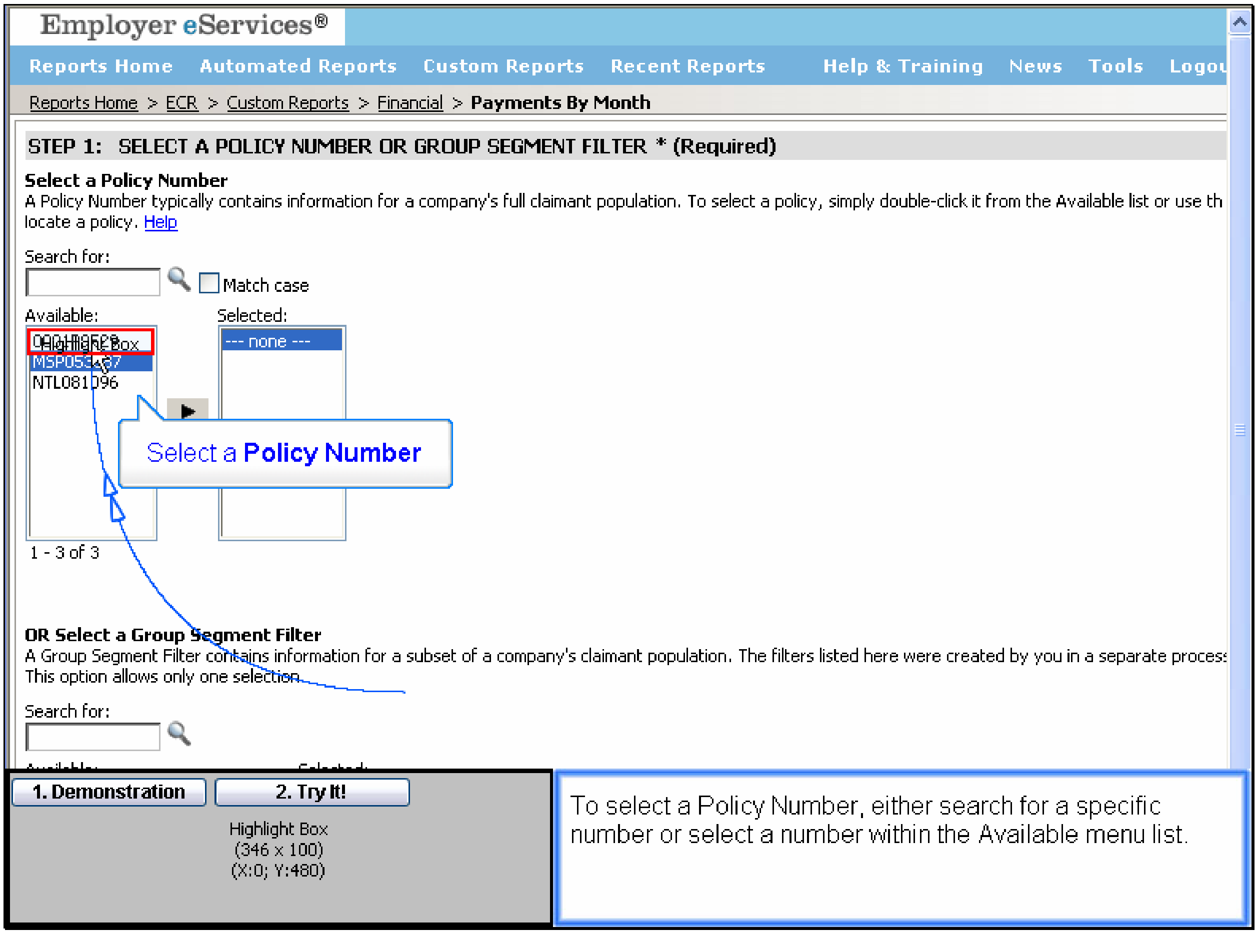
Scroll down the browser window to see the entire list of reports available.



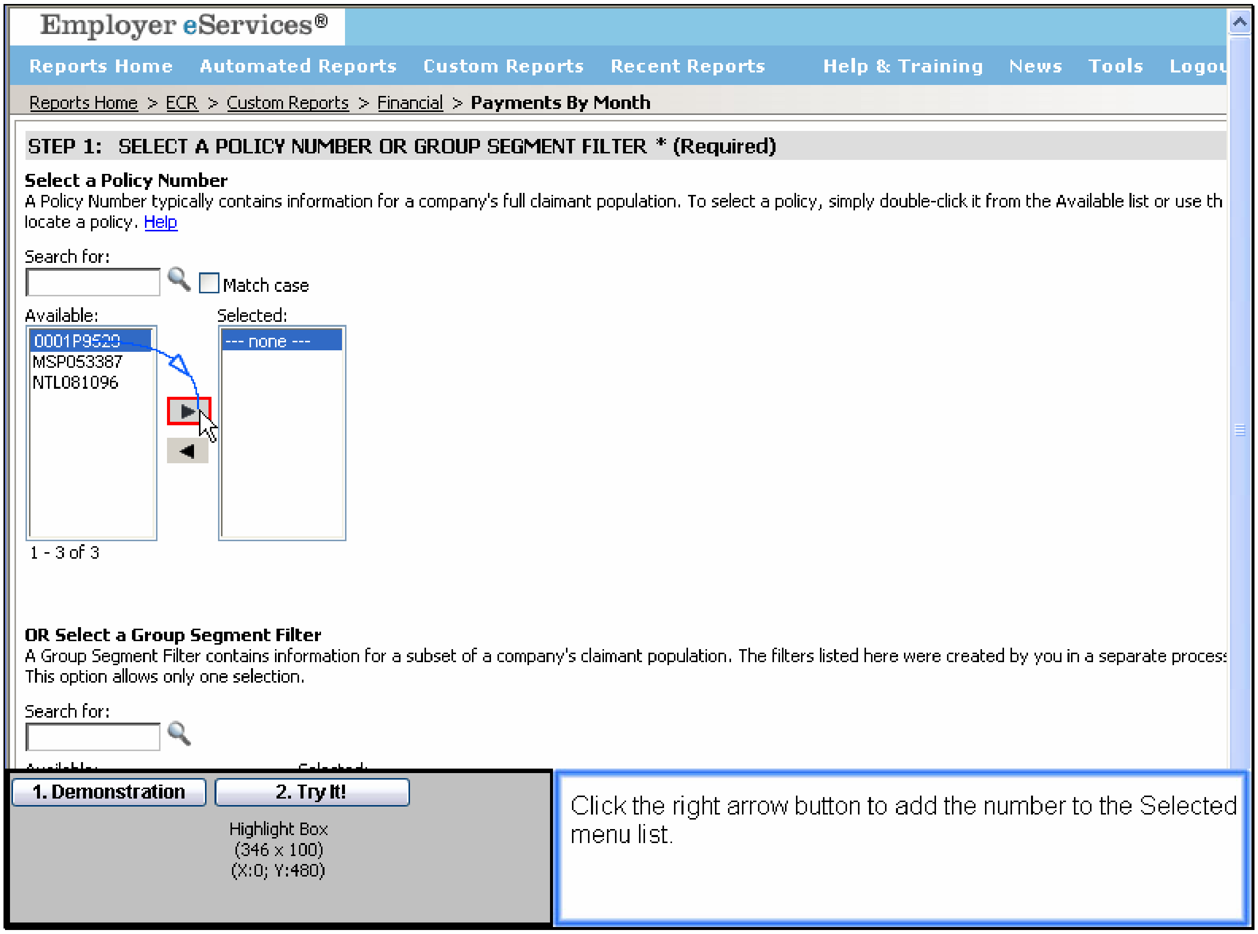
In this example we will click the Payments By Month report link to open the available report options.



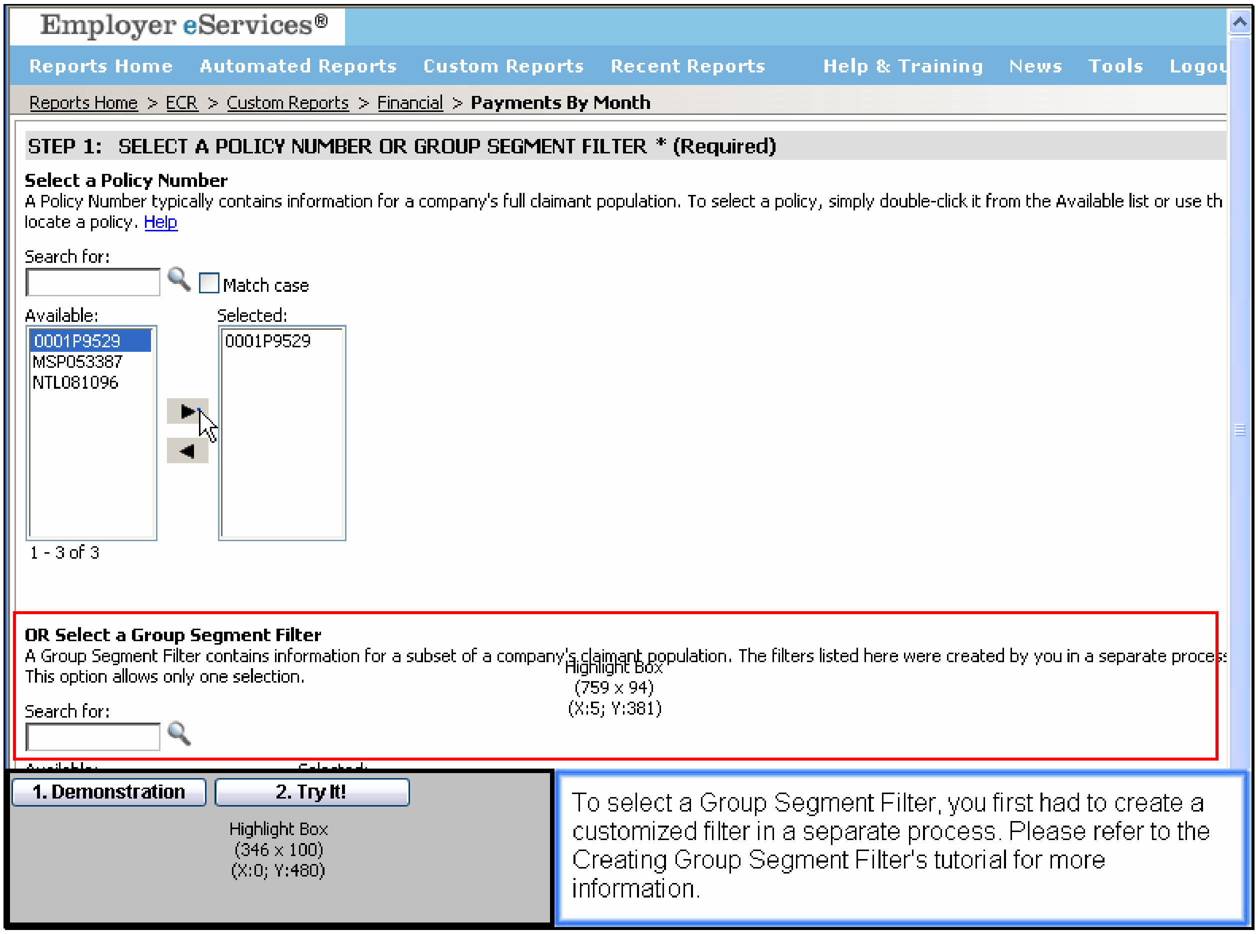
Any Custom report first requires you to select a Policy Number or Group Segment Filter.



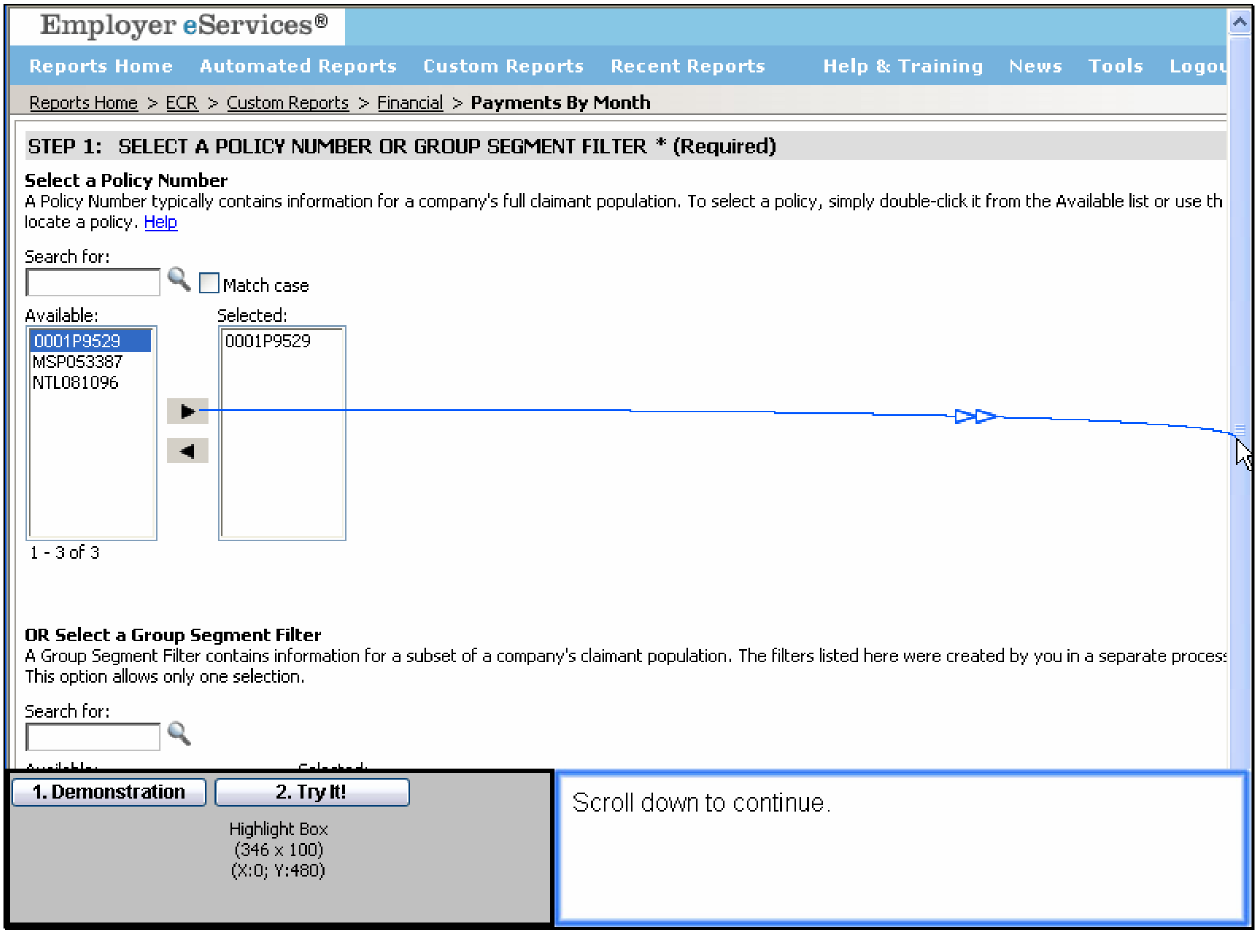
To select a Policy Number, either search for a specific number or select a number within the Available menu list.



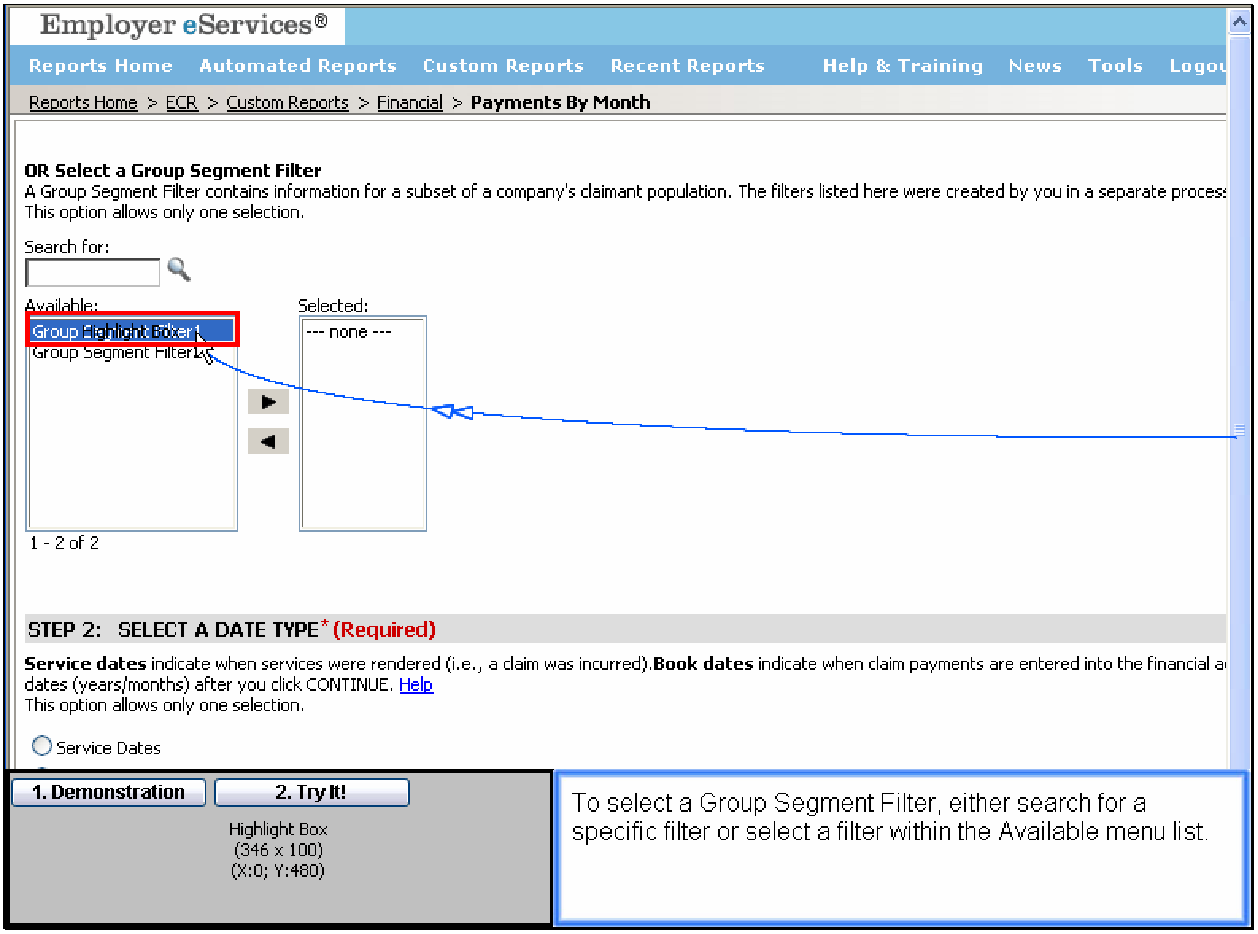
Click the right arrow button to add the number to the Selected menu list.



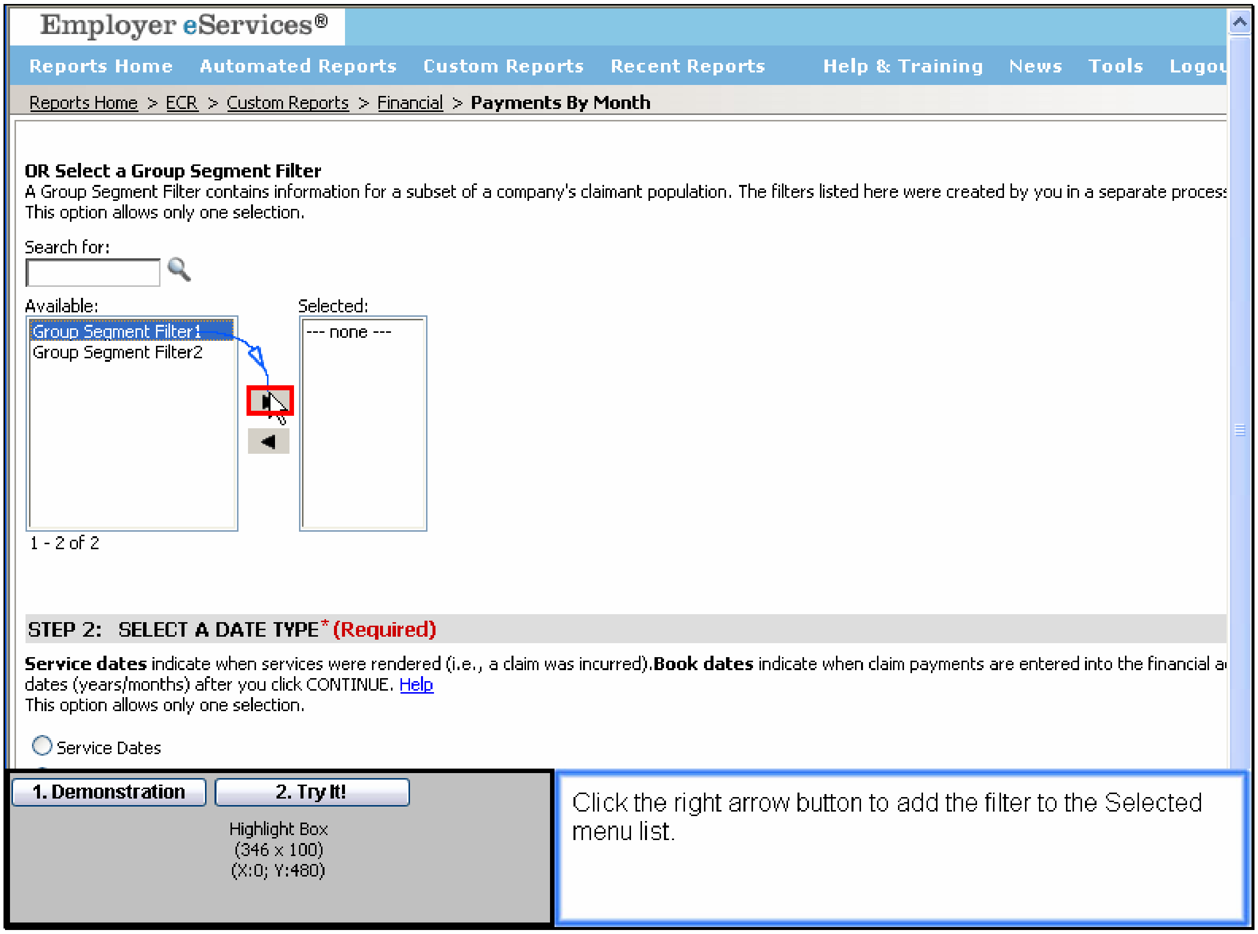
To select a Group Segment Filter, you first had to create a customized filter in a separate process. Please refer to the Creating Group Segment Filter's tutorial for more information.



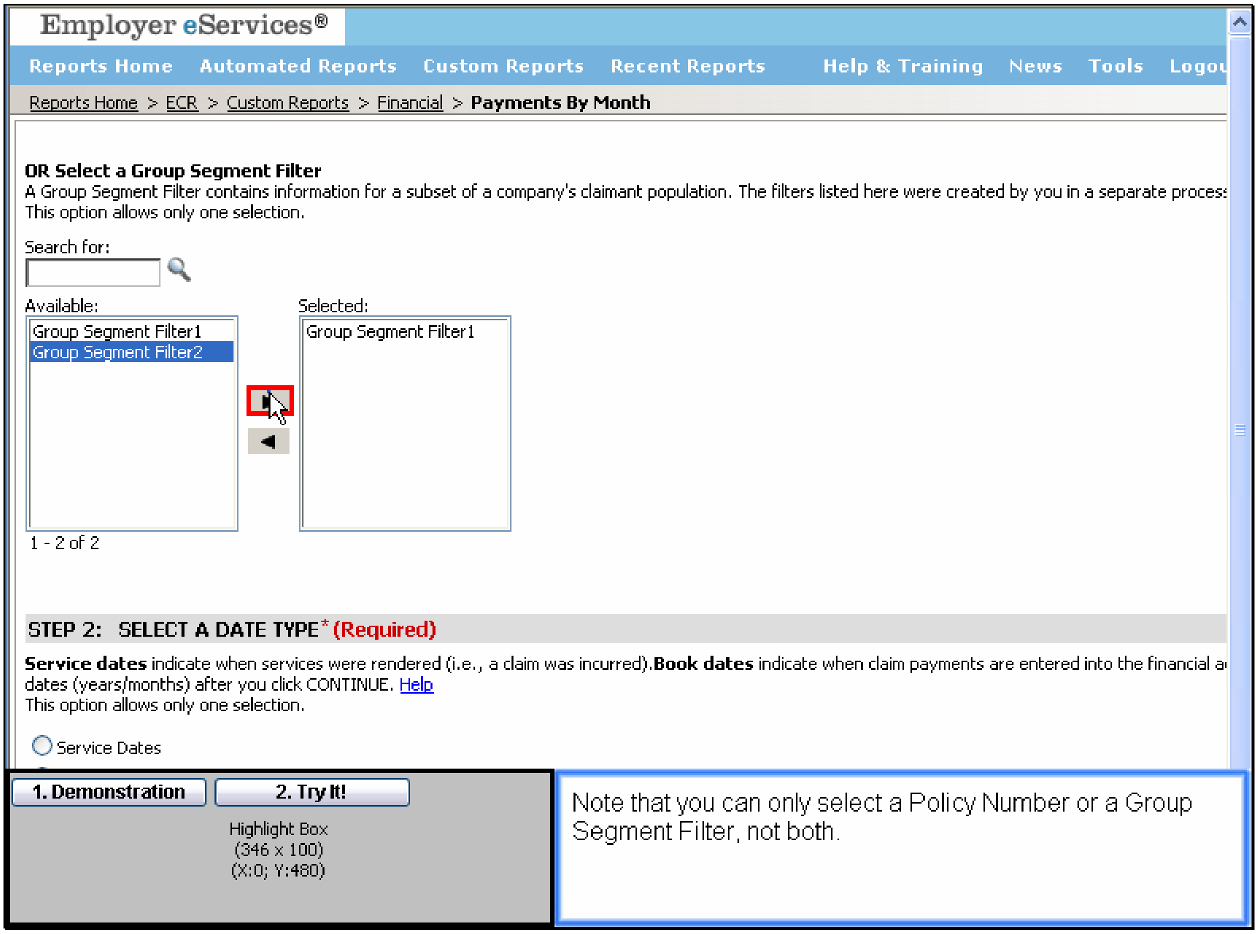
Scroll down to continue.



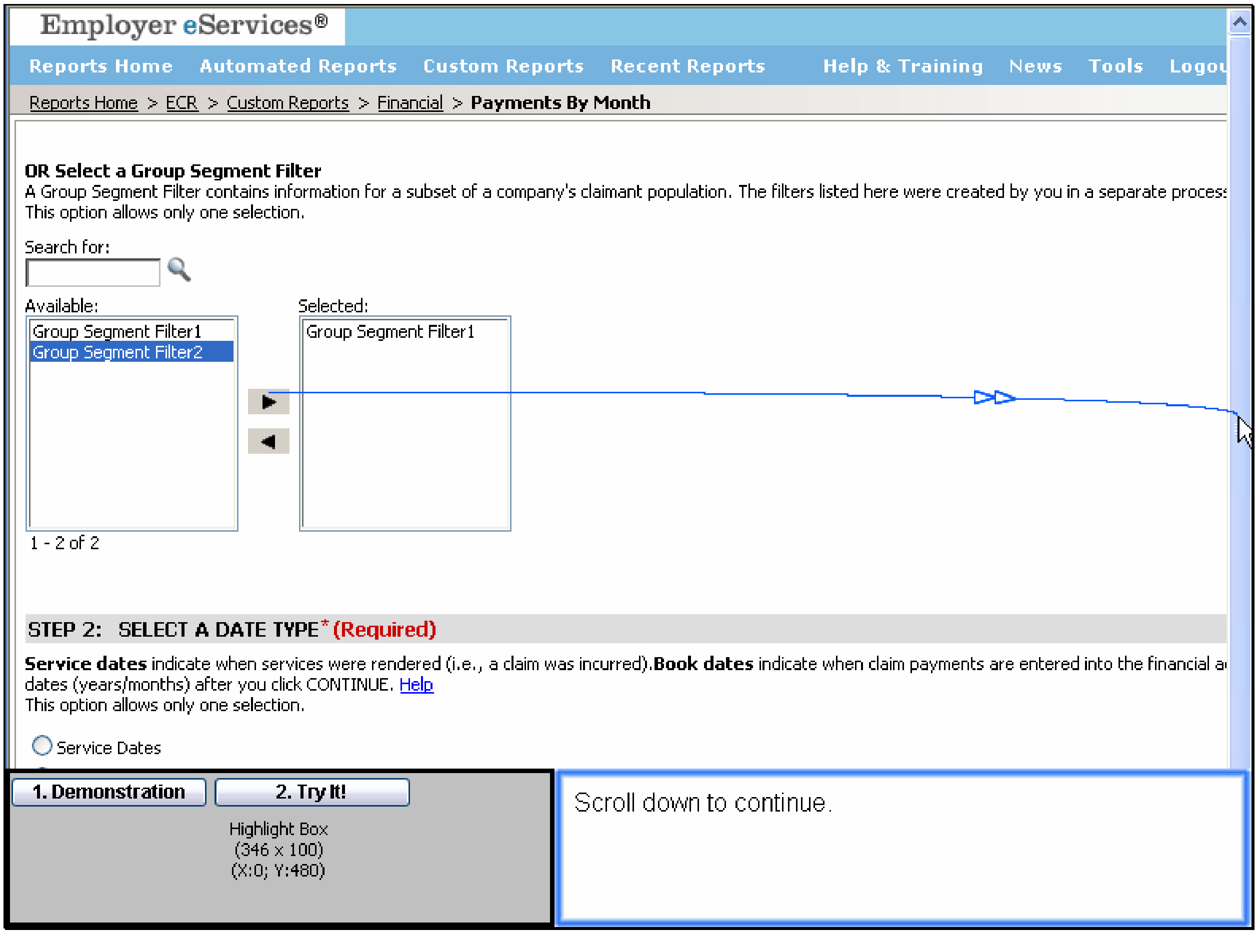
To select a Group Segment Filter, either search for a specific filter or select a filter within the Available menu list.



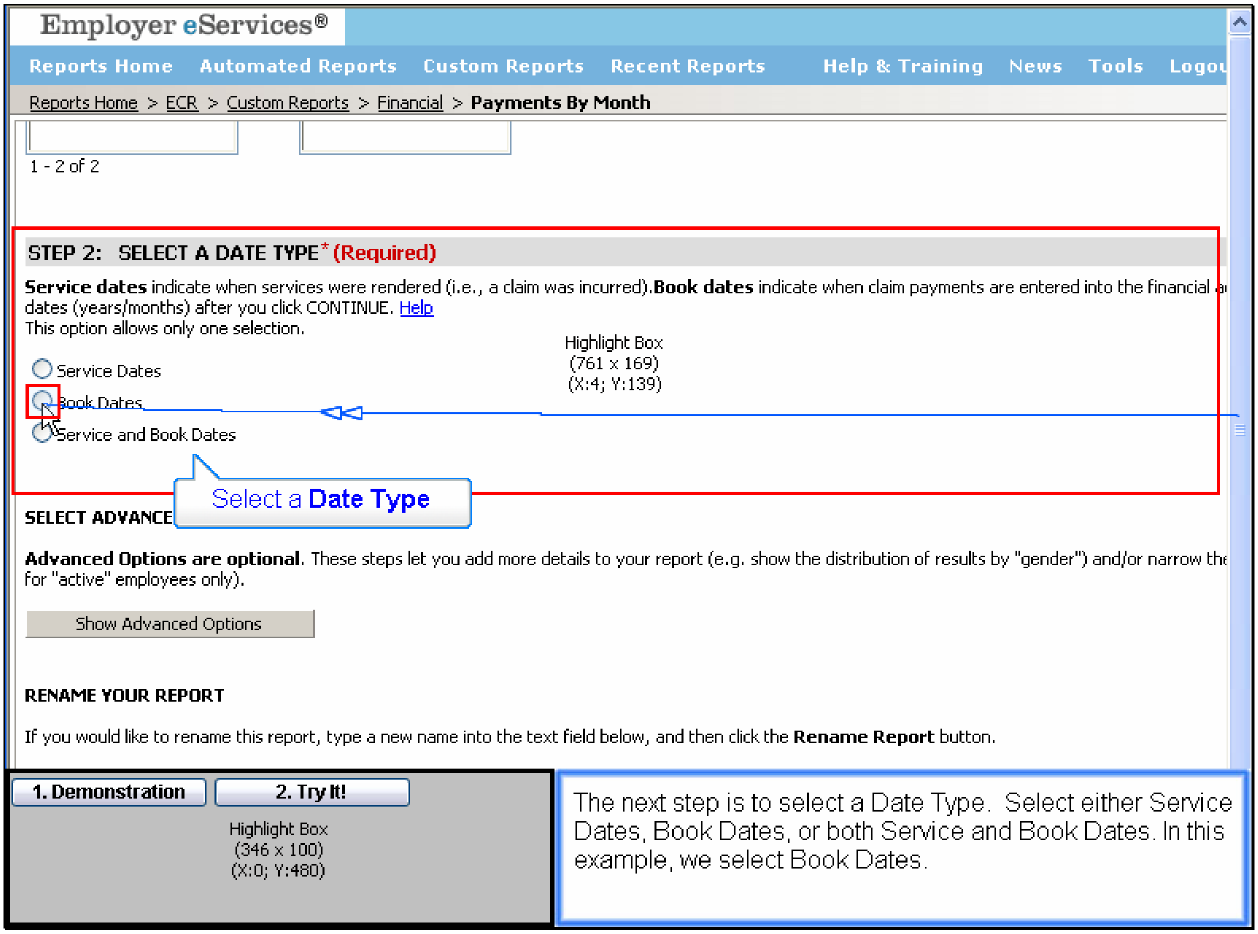
Click the right arrow button to add the filter to the Selected menu list.



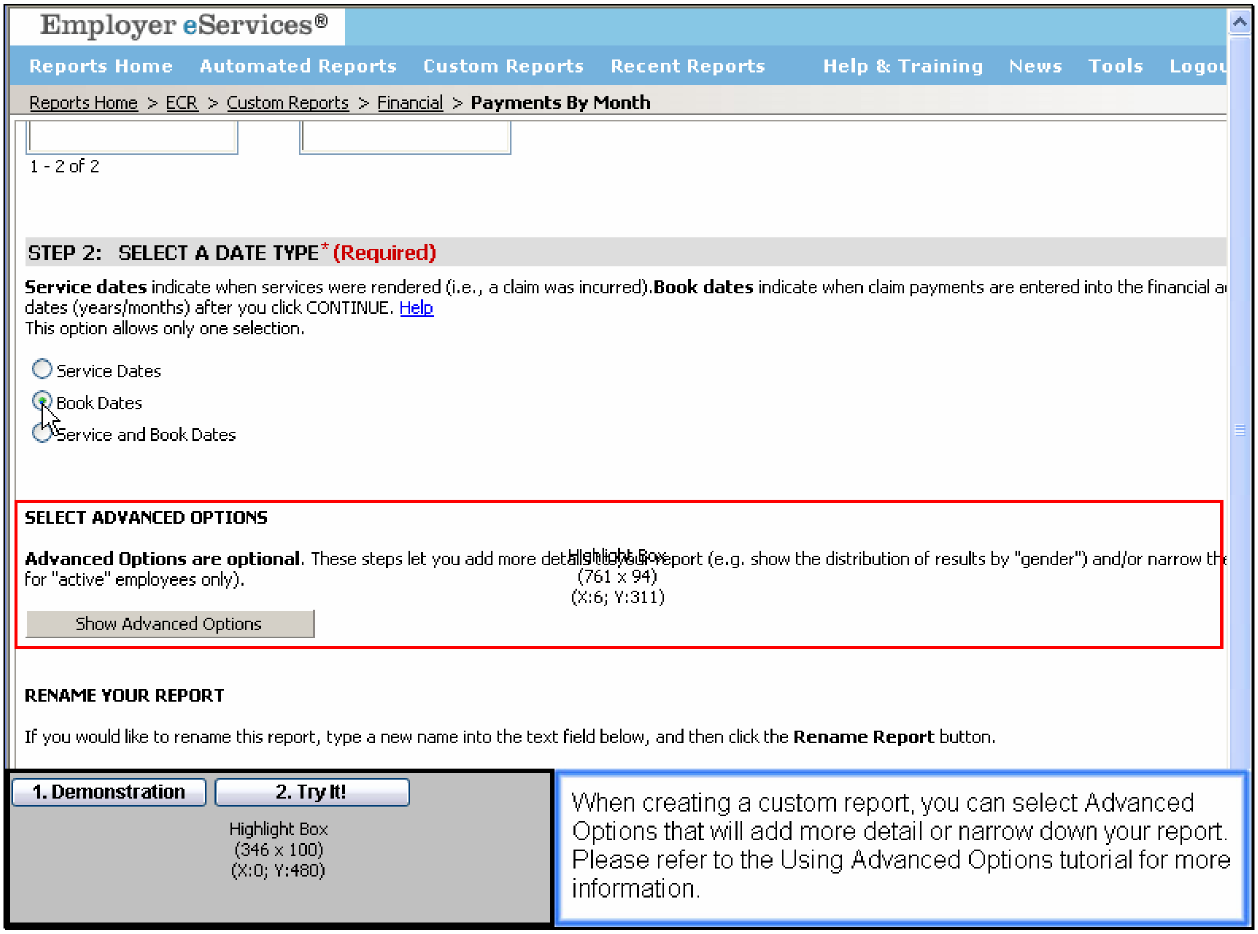
Note that you can only select a Policy Number or a Group Segment Filter, not both.



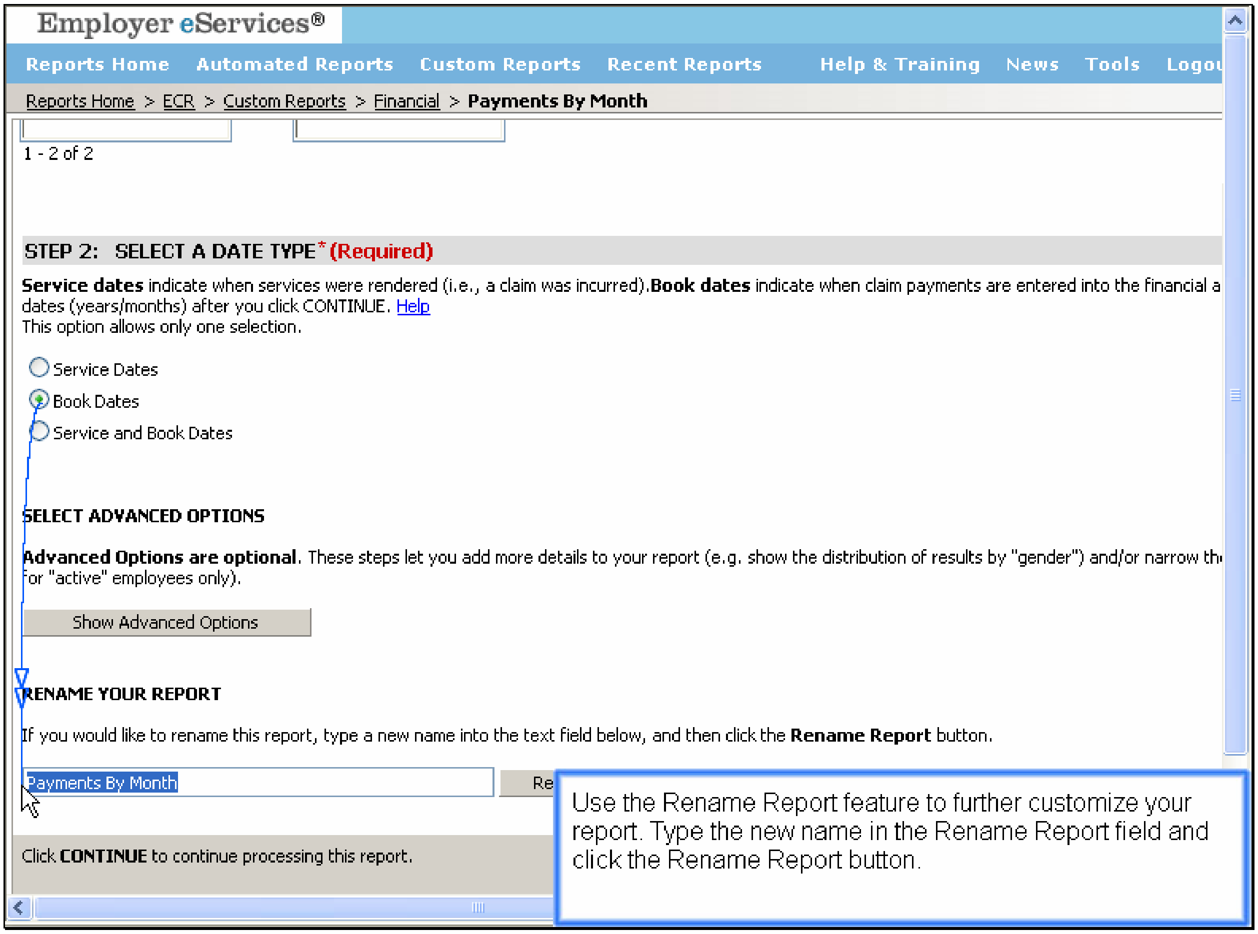
Scroll down to continue.



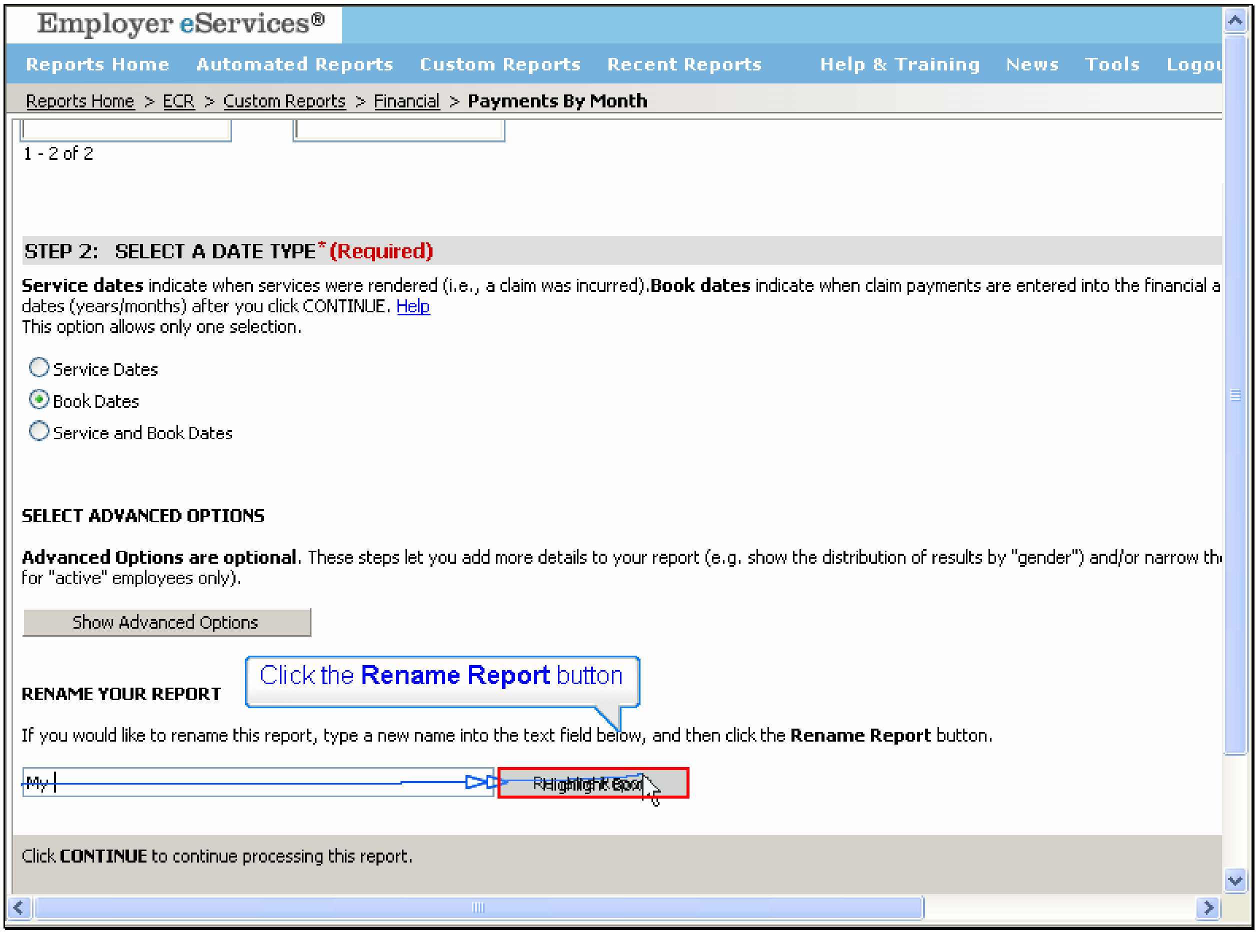
The next step is to select a Date Type. Select either Service Dates, Book Dates, or both Service and Book Dates. In this example, we select Book Dates.

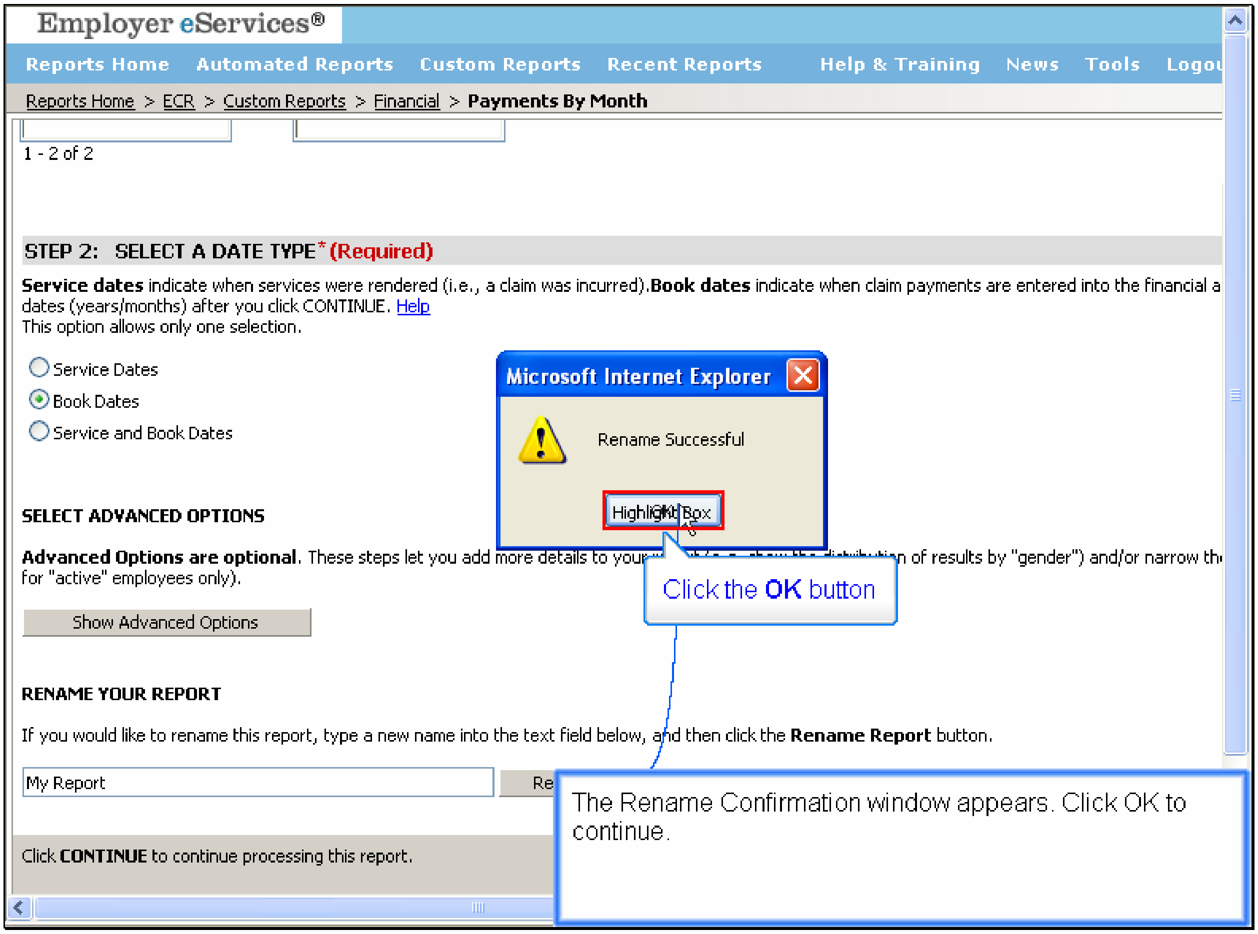


When creating a custom report, you can select Advanced Options that will add more detail or narrow down your report. Please refer to the Using Advanced Options tutorial for more information.

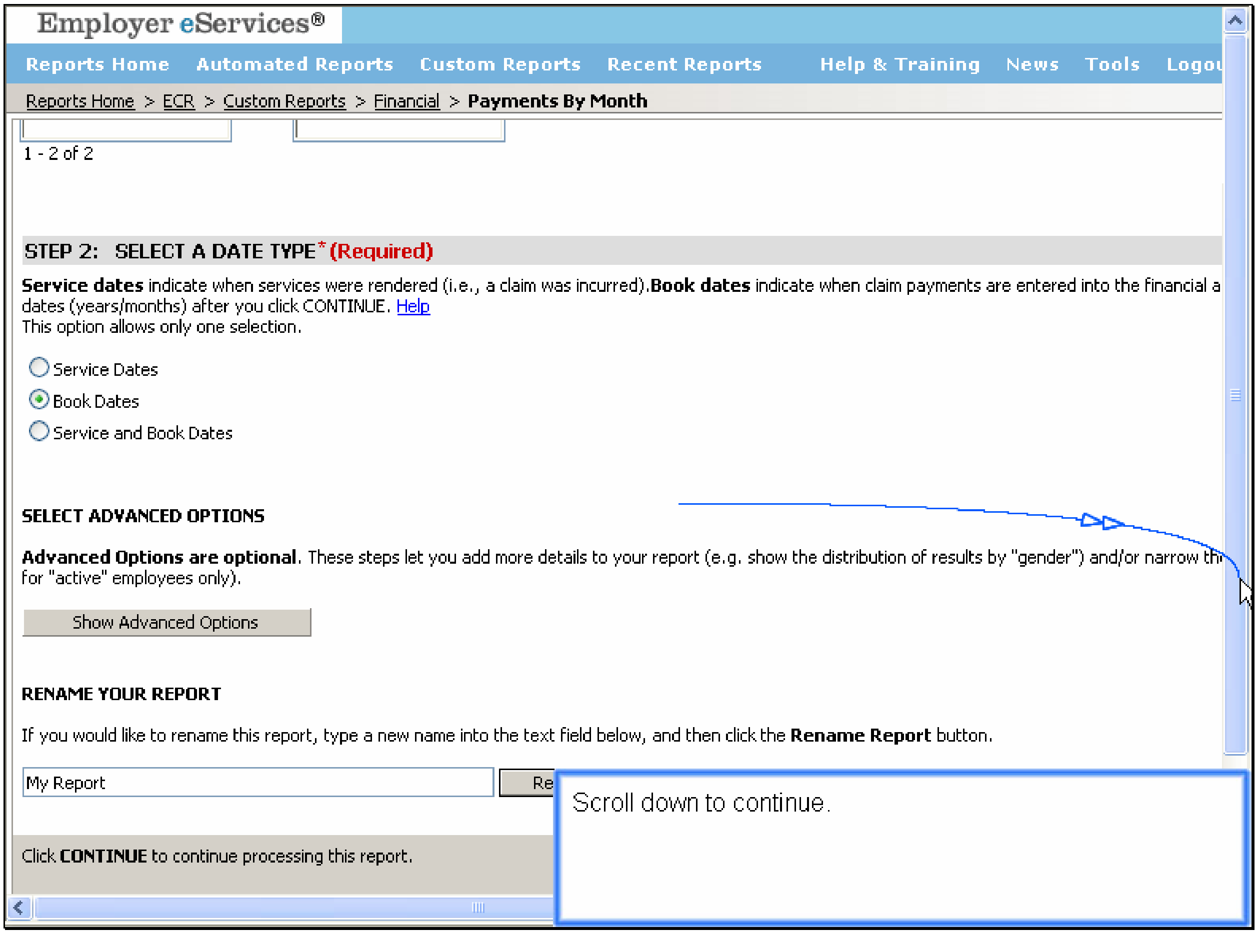


Use the Rename Report feature to further customize your report. Type the new name in the Rename Report field and click the Rename Report button.

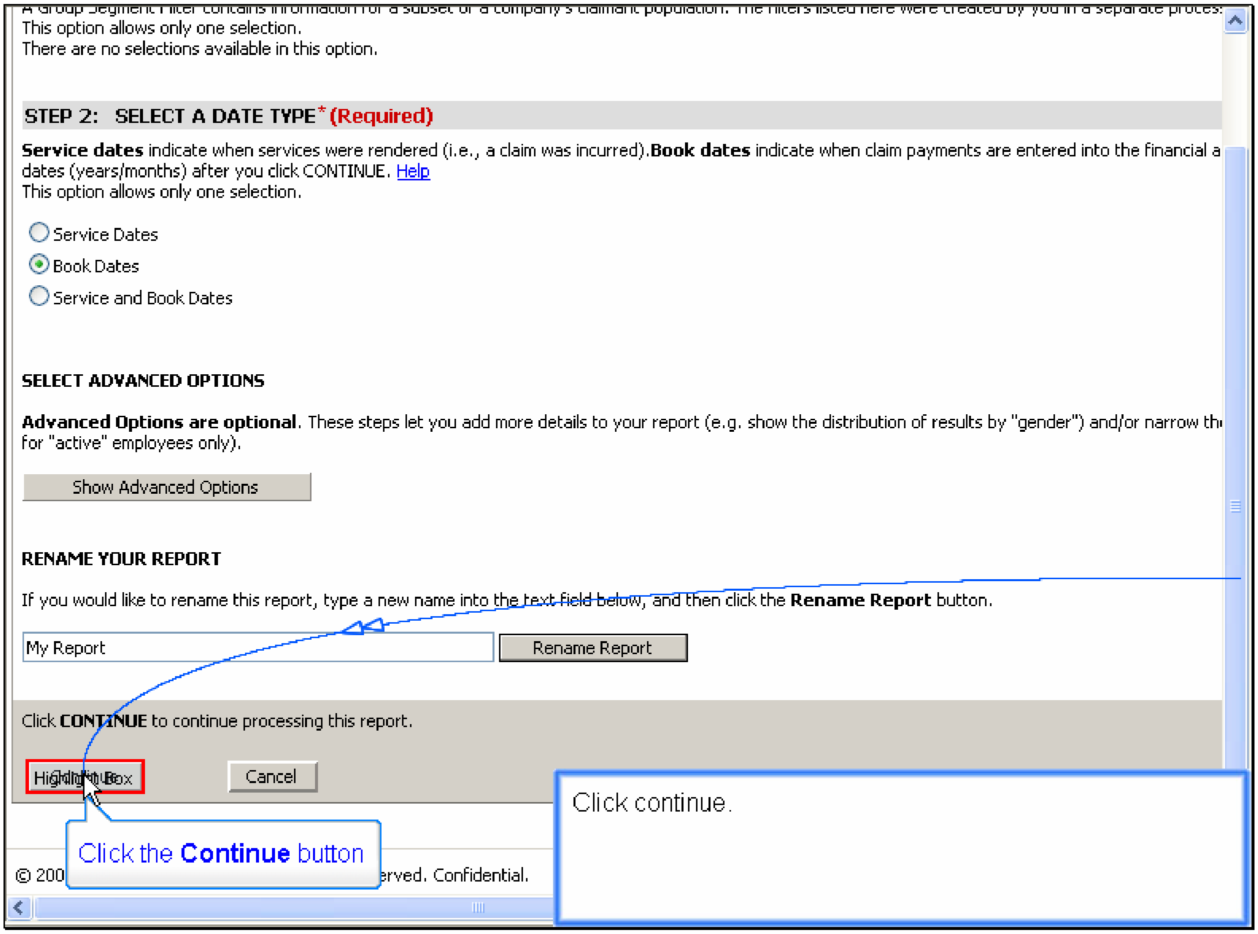

Employer eServices®
Reports Home Automated Reports Custom Reports Recent Reports Help & Training News Tools Logou
Reports Home > ECR > Custom Reports > Financial > Payments By Month
1 - 2 of 2
STEP 2: SELECT A DATE TYPE* (Required)
Service dates indicate when services were rendered (i.e., a claim was 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 th
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.



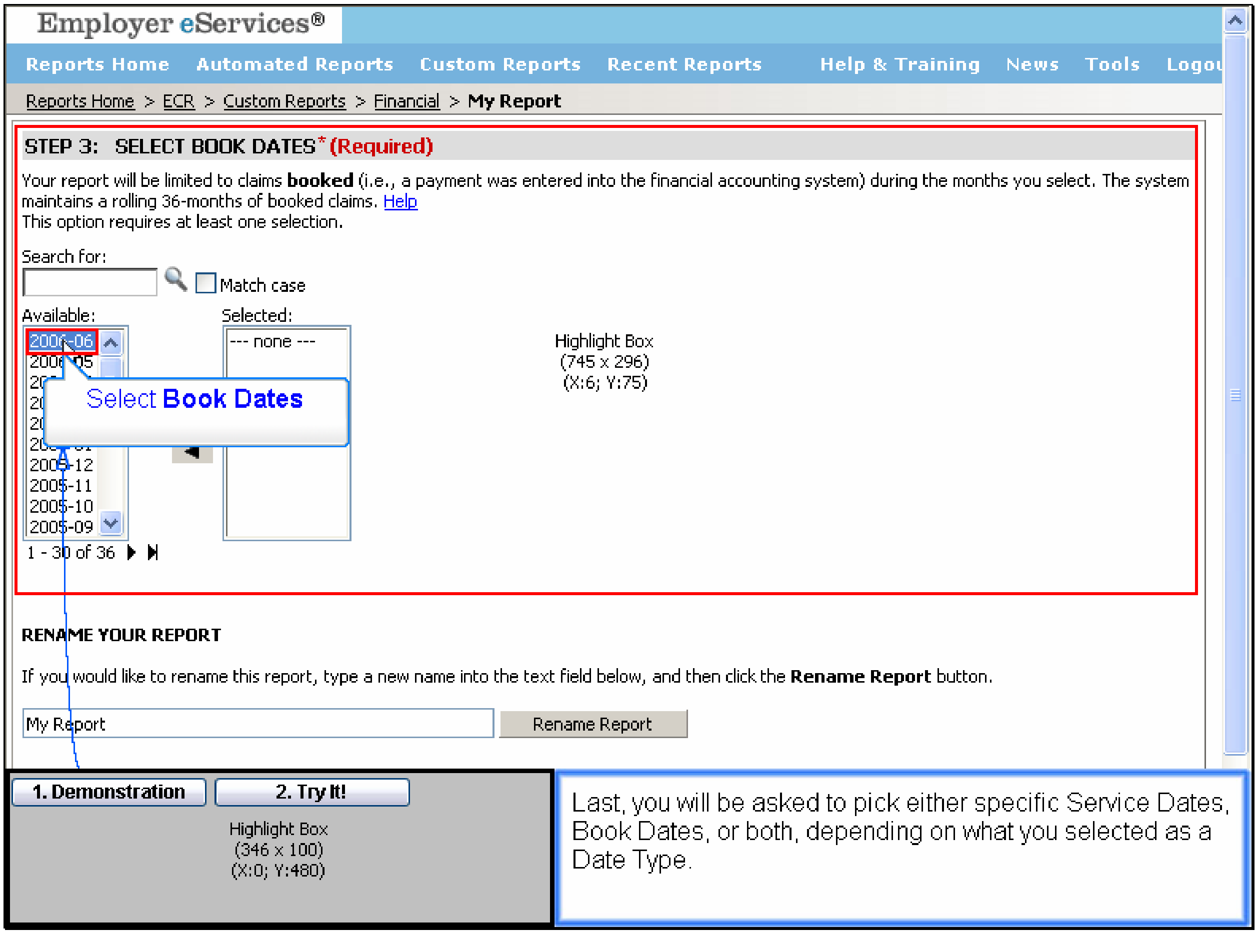
The Rename Confirmation window appears. Click OK to continue.



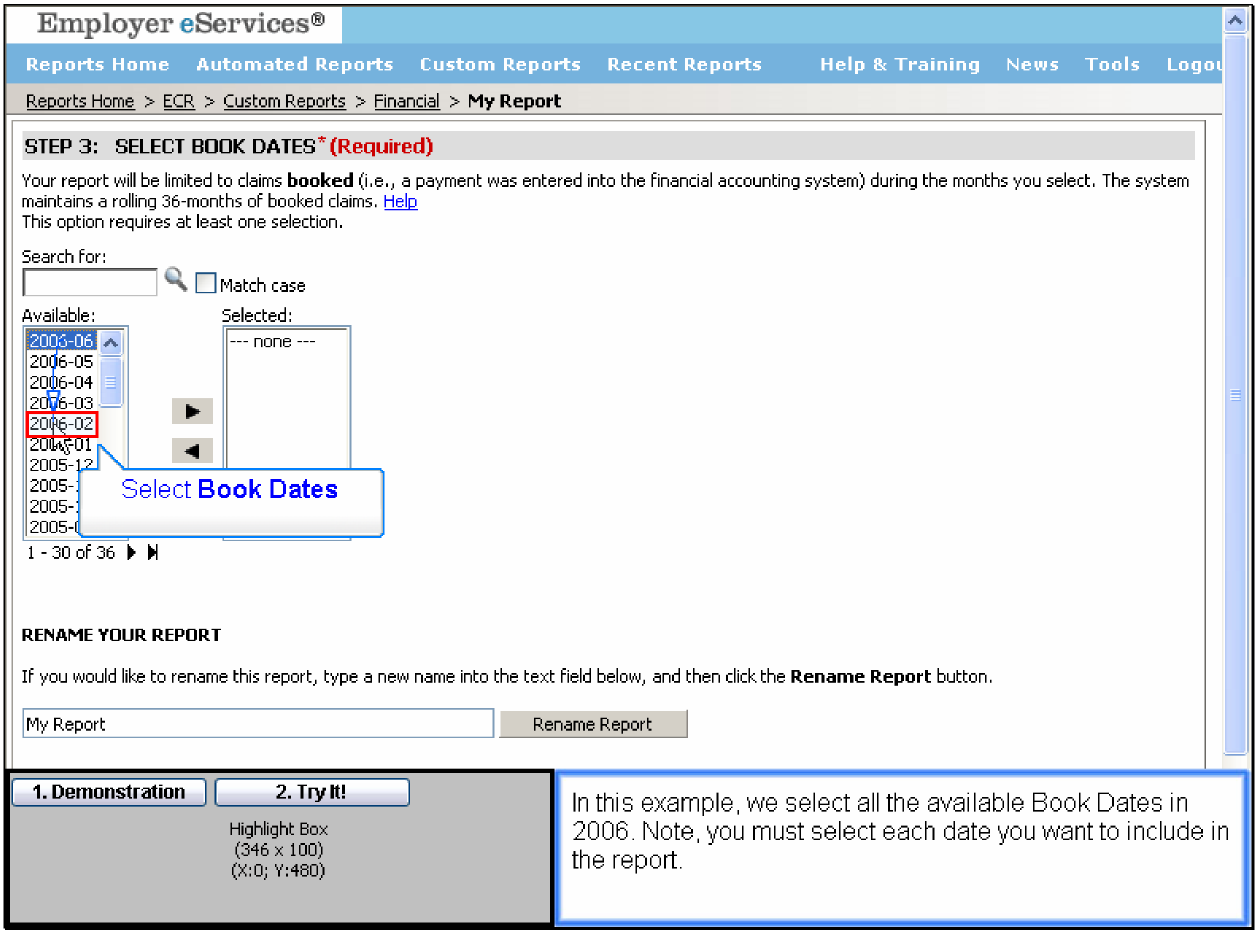
Scroll down to continue.



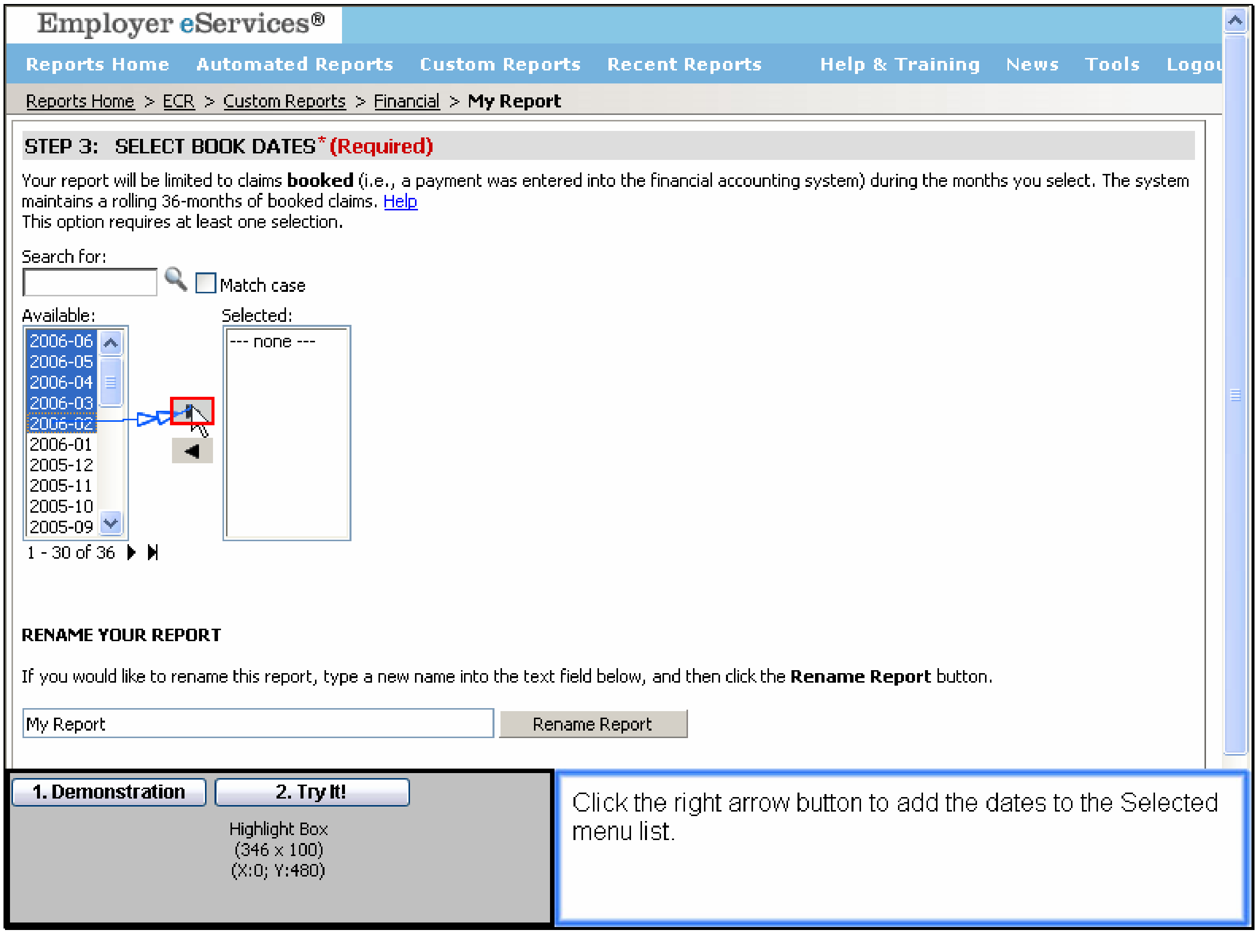
Click continue.



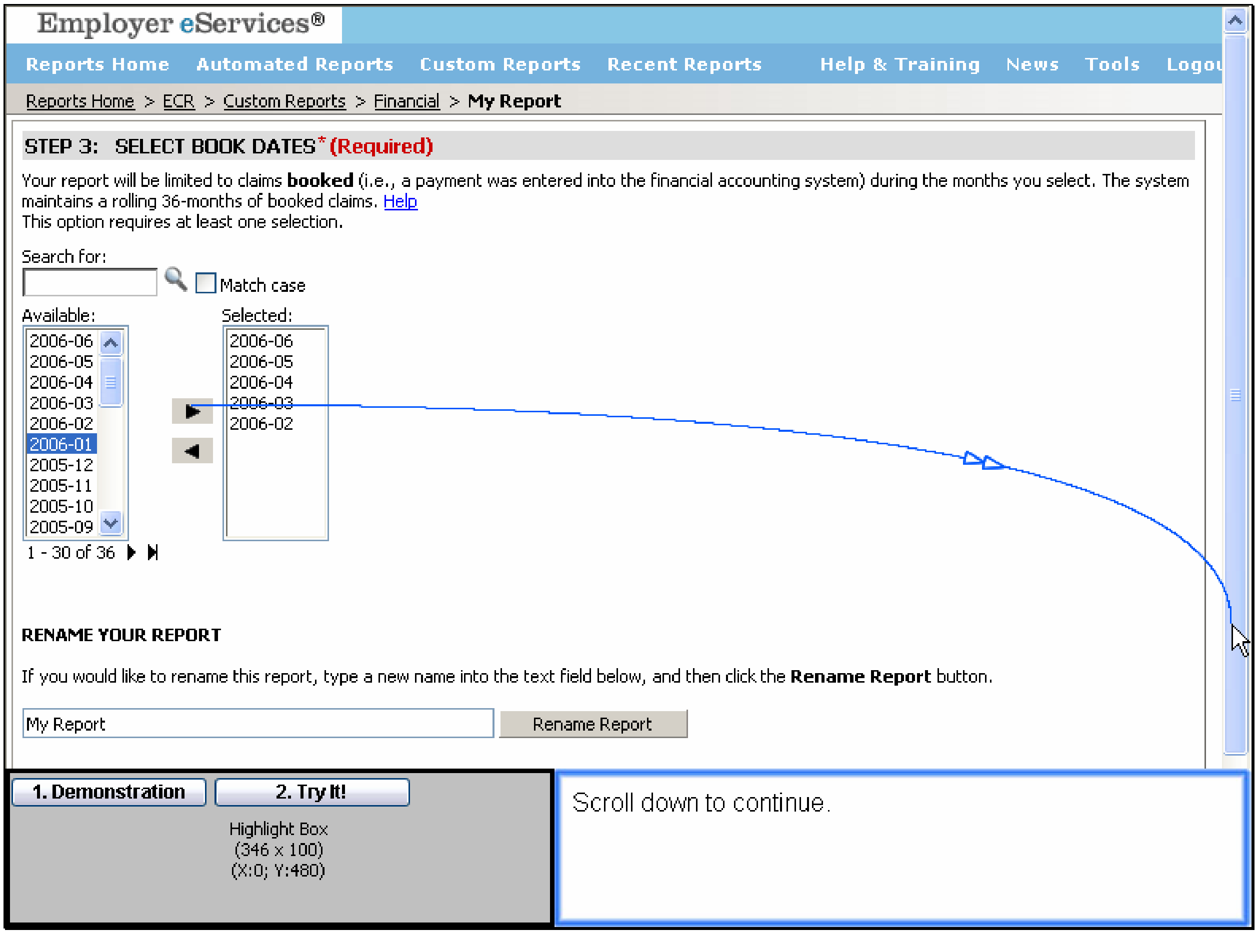
Last, you will be asked to pick either specific Service Dates, Book Dates, or both, depending on what you selected as a Date Type.



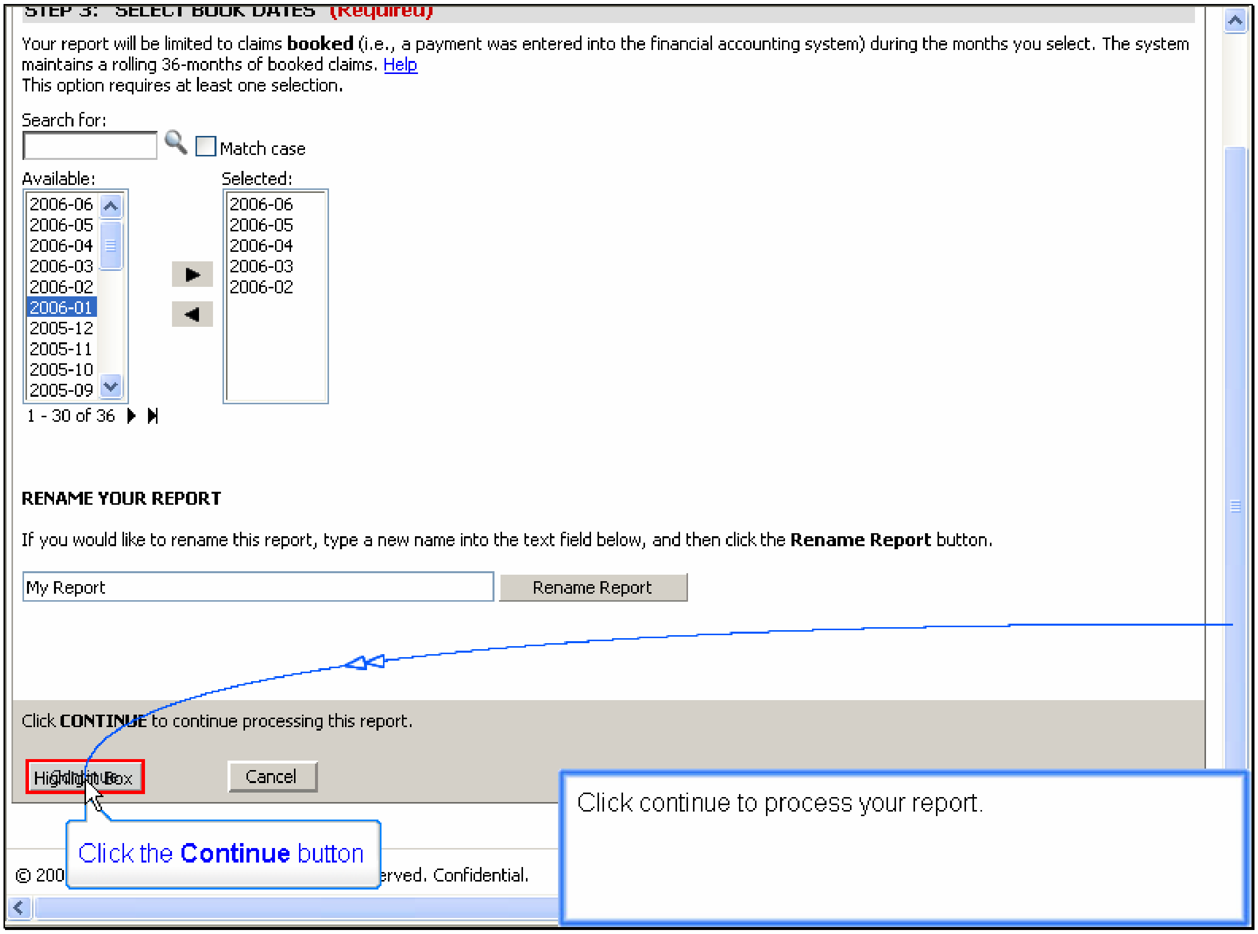
In this example, we select all the available Book Dates in 2006. Note, you must select each date you want to include in the report.



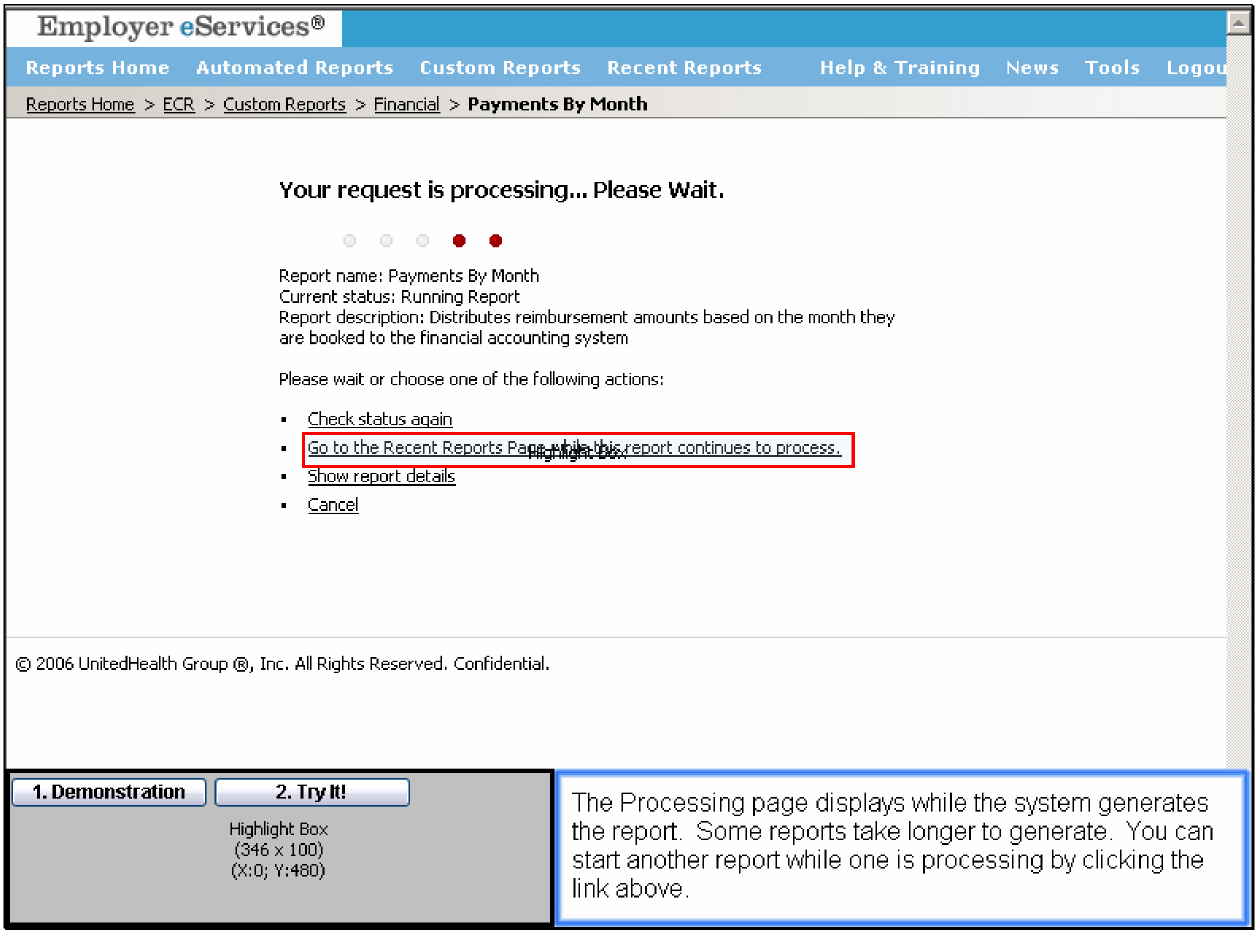
Click the right arrow button to add the dates to the Selected menu list.



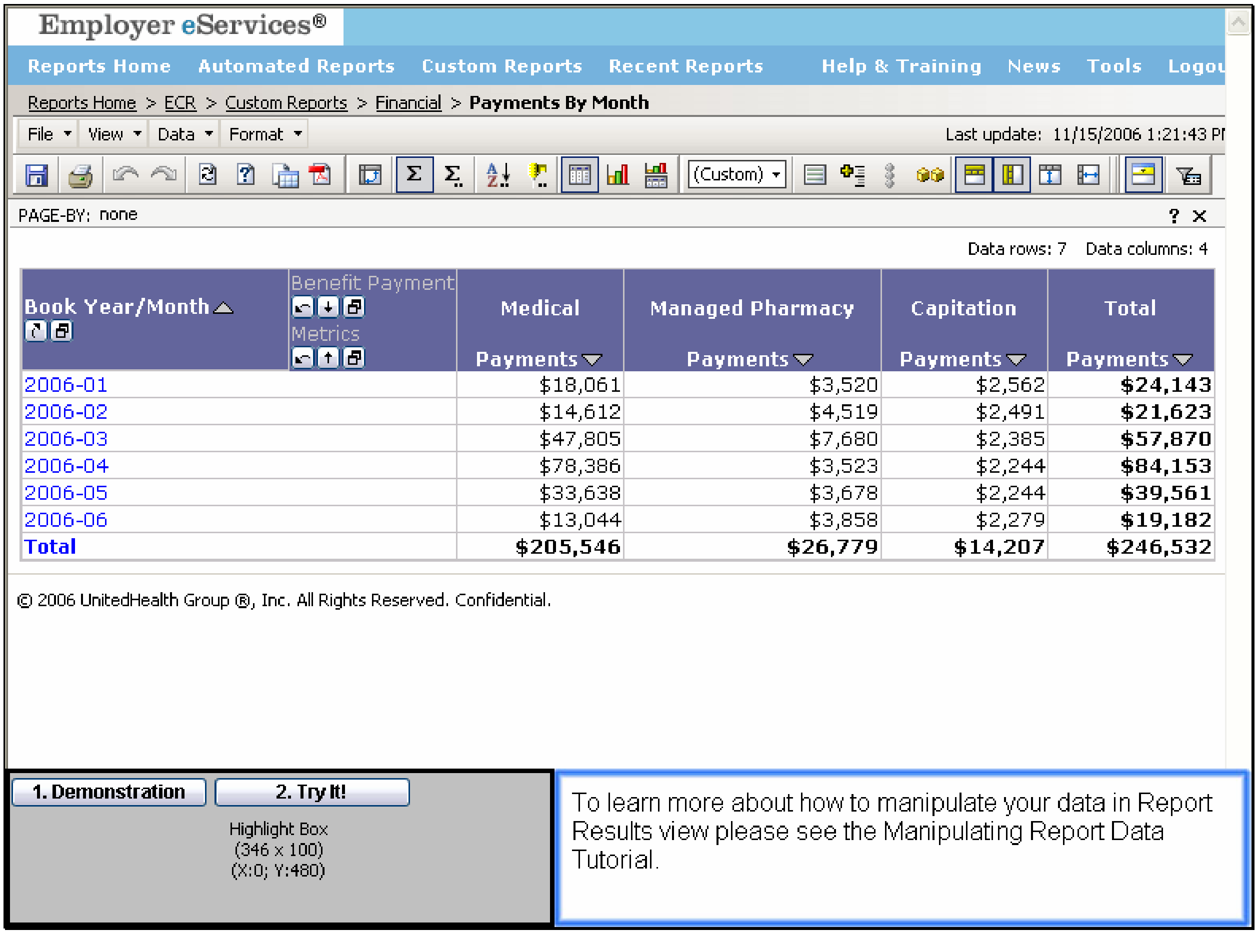
Scroll down to continue.



Click continue to process your report.

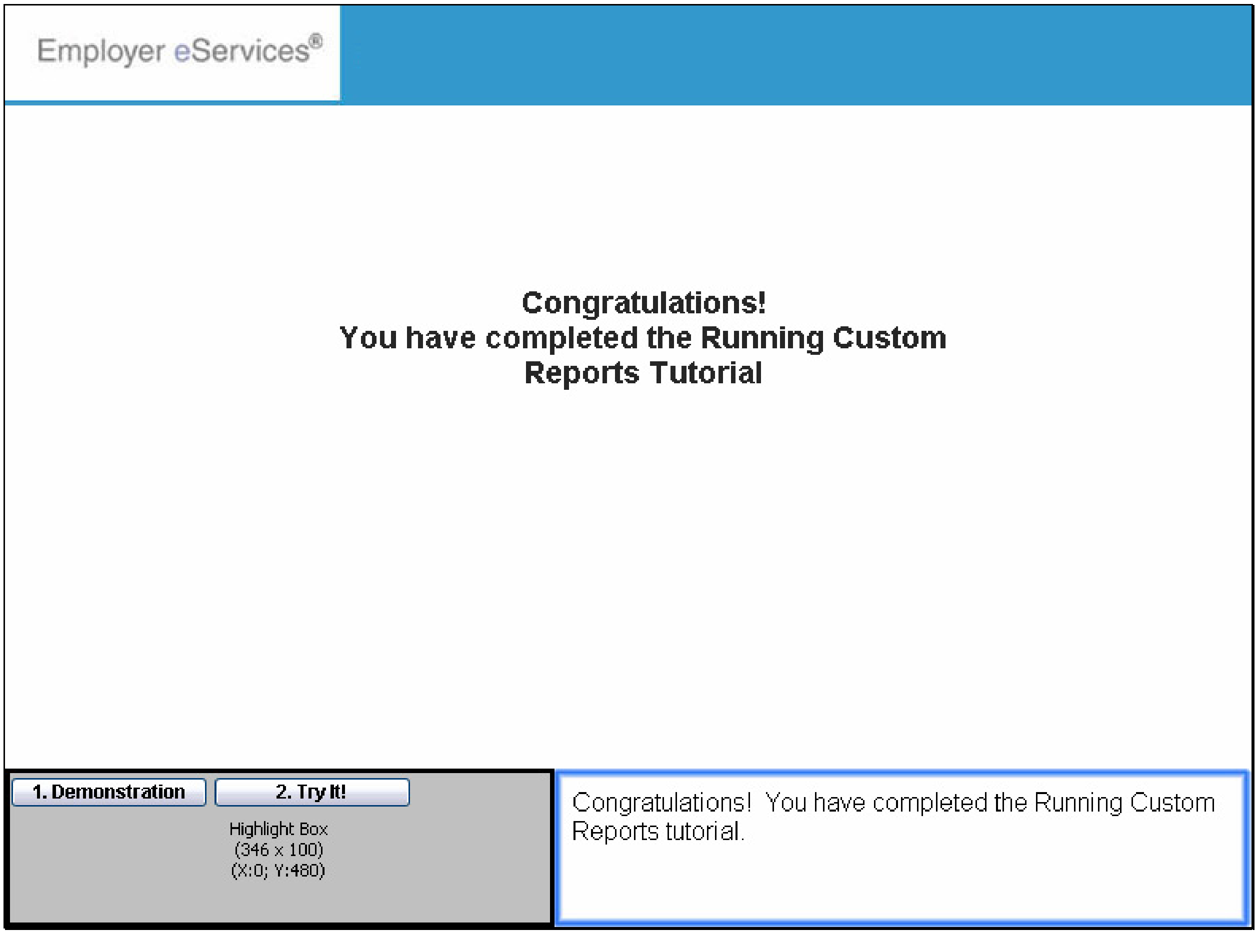


The Processing page displays while the system generates the report. Some reports take longer to generate. You can start another report while one is processing by clicking the link above.



Book Year/Month	Medical Payments	Managed Pharmacy Payments	Capitation Payments	Total 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**
Total	**$205,546**	**$26,779**	**$14,207**	**$246,532**

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



Congratulations! You have completed the Running Custom Reports tutorial.