

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)
(X:0; Y:480)

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.

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

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Employer eServices®

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Audience: Employers & Brokers

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1. Demonstration

2. Try It!

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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, Custom Reports, Recent Reports, Help & Training, News, Tools, and Logou. Below this is a sub-header for ECR (Employer Customer Reporting) with a 'Welcome Select Employer' message.

The main content area is divided into several sections:

- View Automated Reports:** A section for the month of April 2006, with a note that reports contain results through 3/31/2006. It lists several report types: PVC-Paid, Payments by Benefit Type, Claim Expenses by Size of Payment, Network Utilization, and Membership by Month. A text box on the left explains that users can view, print, and export reports, and that eServices Customer Reporting has been created for them.
- Run Custom Reports:** A section for Financial reports (Data Current Through May 31, 2006). It lists various report types: Claim Expenses by Size of Payment, Claim Lag Study, Detail Payment, Detail Payment - Non Confidential, Large Loss Claim Payments, and Payments by Benefit Type. A text box on the left explains that users can create, edit, export, and print their own reports using up-to-date data.
- Help & Training Resources:** A section providing contact information for the help desk (Maintenance Period: Nightly 10 p.m. - 7 a.m. (ET), Phone: 1-800-651-5465, E-mail: CustRept_Help@uhc.com) and links to various resources like 'Help with a Specific Report', 'Frequently Asked Questions', 'Glossary of Terms', 'Online Tutorials', and 'Printable Reference Materials'.
- Reporting News:** A section with dates and headlines such as '11/13/2006 Inpatient Event Data Unavailable', '10/20/2006 Membership Issue Affects Some Customers', and '10/02/2006 "Percent of Savings" and "Shared Savings" Reports Now Available via Automated Reporting'.
- Reporting Tools:** A section with a link to 'Create and Modify Group Segment Filters'.

At the bottom of the screenshot, there is a text box with two buttons: '1. Demonstration' and '2. Try It!'. The text box contains the following text: 'Highlight Box (346 x 100) (X:0; Y:480)'. To the right of this text box, there is a larger text box with a blue border containing the text: 'There are several ways an employer 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.'

There are several ways an employer 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 screenshot shows the Employer eServices interface. At the top, there are navigation tabs: Reports Home, Automated Reports, Custom Reports, Recent Reports, Help & Training, News, Tools, and Logout. Below this is the 'ECR' section with a 'Welcome Select Employer' message. The main content is divided into three columns. The left column is titled 'View Automated Reports' and lists reports for April 2006, including PVC-Paid, Payments by Benefit Type, Claim Expenses by Size of Payment, Network Utilization, and Membership by Month. The middle column is titled 'Run Custom Reports' and shows a folder for 'Financial (Data Current Through May 31, 2006)' containing reports like Claim Expenses by Size of Payment, Claim Lag Study, Detail Payment, Detail Payment - Non-Confidential, Large Loss Claim Payments, and Payments by Benefit Type. The right column contains 'Help & Training Resources' (Maintenance Period, Phone, E-mail, and various help links), 'Reporting News' (with dates and titles like 'Inpatient Event Data Unavailable' and 'Membership Issue Affects Some Customers'), and 'Reporting Tools' (with a link to 'Create and Modify Group Segment Filters'). At the bottom left, there are two buttons: '1. Demonstration' and '2. Try It!'. A text box below these buttons provides coordinates for a highlight box: 'Highlight Box (346 x 100) (X:0; Y:480)'. A blue-bordered text box on the right contains the instruction: '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.

The screenshot shows the Employer eServices website interface. At the top, there is a navigation bar with links: Reports Home, Automated Reports, Custom Reports (highlighted with a red box and a blue arrow), Recent Reports, Help & Training, News, Tools, and Logout. Below the navigation bar, the main content area is divided into several sections. On the left, there is a section for 'View Automated Reports' for April 2006, listing reports like PVC-Paid, Payments by Benefit Type, Claim Expenses by Size of Payment, Network Utilization, and Membership by Month. In the center, there is a 'Run Custom Reports' section with a list of report types such as Financial, Claim Expenses by Size of Payment, Claim Lag Study, Detail Payment, Detail Payment - Non Confidential, Large Loss Claim Payments, and Payments by Benefit Type. On the right, there are sections for 'Resources' (including phone and email contact info, and various help links), 'Reporting News' (with dates and headlines), and 'Reporting Tools' (with a link to 'Create and Modify Group Segment Filters'). At the bottom left, there are two buttons: '1. Demonstration' and '2. Try It!'. A text box at the bottom right explains that the third option is to click on the Custom Reports menu link.

Employer eServices®

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

ECR

Welcome Select Employer

View Automated Reports

April 2006 (reports contain results through 3/31/2006)

- PVC-Paid
- Payments by Benefit Type
- Claim Expenses by Size of Payment
- Network Utilization
- Membership by Month

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

Run Custom Reports

Financial (Data Current Through May 31, 2006)

- Claim Expenses by Size of Payment
- Claim Lag Study
- Detail Payment
- Detail Payment - Non Confidential
- Large Loss Claim Payments
- Payments by Benefit Type

1. Demonstration 2. Try It!

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

Select the Custom Reports 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.

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

Employer eServices®

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 Highlight 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 website 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 has a heading: "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." Below this heading are four instructions: "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 options. 1. "Claim Expenses by Size of Payment" with a help link that says "Provides counts of claimants and total claim payments within incremental, fixed dollar ranges." and export options "Export" and "PDF". 2. "Claim Lag Study" with a help link that says "Identifies the time lapse between the date a service was incurred and the date the claim was processed." and export options "Export" and "PDF". 3. "Detail Payment" with a help link that says "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." and export options "Export" and "PDF". 4. "Detail Payment - Non Confidential" with a help link that says "Provides check transaction information for payments of claims for all funding arrangements. No individually identifiable health information is visible on this report." and export options "Export" and "PDF". At the bottom left, there are two buttons: "1. Demonstration" and "2. Try It!". Below "2. Try It!" is a text box: "Highlight Box (346 x 100) (X:0; Y:480)". At the bottom right, there is a blue-bordered box with the text: "Click the Export link to select the report criteria and export as an Microsoft Excel, CSV or HTML document."

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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 all 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!", and "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.

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

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.

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

Large Loss Claim Payments
Help
Provides a detailed profile for a specific number of top above a chosen dollar threshold.
Export PDF

Payments by Benefit Type
Help
Provides reimbursement amounts based on services offered under a health plan.
Export PDF

Payments By Month
Help
Distributes reimbursement amounts based on the month they are booked to the financial

Premium vs Claims - Paid
Help
Provides a monthly comparison between the booked claim expenses and the billed

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

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

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

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

Employer eServices®

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

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

Highlight Box (758 x 403) (X:6; Y:74)

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

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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: **Highlight Box**
MSP05437
NTL081D96

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.

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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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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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Search for: Match case

Available: 0001P9529
MSP053387
NTL081096

Selected: 0001P9529

1 - 3 of 3

OR Select a Group Segment Filter
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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

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 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
(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

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

Highlight Box
(761 x 169)
(X:4; Y:139)

Select a Date Type

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 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.

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.

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).
(761 x 94)
(X:6; Y:311)

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

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.

Click **CONTINUE** to continue processing this 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 > 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 menu with links: Reports Home, Automated Reports, Custom Reports, Recent Reports, Help & Training, News, Tools, and Logout. Below the menu, the breadcrumb trail reads: Reports Home > ECR > Custom Reports > Financial > Payments By Month. The page content includes a section titled "STEP 2: SELECT A DATE TYPE* (Required)" with instructions on Service dates and Book dates. There are three radio button options: Service Dates, Book Dates (selected), and Service and Book Dates. Below this is a "SELECT ADVANCED OPTIONS" section with a "Show Advanced Options" button. The "RENAME YOUR REPORT" section contains a text input field with "My Report" and a "Rename" button. A "Microsoft Internet Explorer" dialog box titled "Rename Successful" is overlaid on the page, with a red box around the "Highlight" button. A blue callout box with an arrow points to the "Highlight" button, containing the text "Click the OK 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

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1 - 2 of 2

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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.

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.

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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.

The screenshot shows the 'Employer eServices' interface. The breadcrumb trail is 'Reports Home > ECR > Custom Reports > Financial > My Report'. The main section is titled 'STEP 3: SELECT BOOK DATES* (Required)'. It explains that the report will be limited to claims booked during the selected months and that a rolling 36-month period is maintained. Below this is a search field with a 'Match case' checkbox. There are two dropdown menus: 'Available:' and 'Selected:'. The 'Available:' dropdown is open, showing a list of dates from 2005-09 to 2006-06, with '2006-06' highlighted. A blue callout box labeled 'Select Book Dates' points to the '2006-06' option. The 'Selected:' dropdown is currently empty, showing '--- none ---'. A 'Highlight Box' is noted with coordinates (745 x 296) and (X:6; Y:75). Below the date selection is a 'RENAME YOUR REPORT' section with a text field containing 'My Report' and a 'Rename Report' button. At the bottom, there are two buttons: '1. Demonstration' and '2. Try It!'. A 'Highlight Box' is noted with coordinates (346 x 100) and (X:0; Y:480). A large blue callout box at the bottom right contains the text: 'Last, you will be asked to pick either specific Service Dates, Book Dates, or both, depending on what you selected as a Date Type.'

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.

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.

My Report

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.

At the bottom of the date selection area, it says '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)'.

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.

Click **Continue** to process your 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 |
| Total | | \$205,546 | \$26,779 | \$14,207 | \$246,532 |

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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 is a grey bar with two buttons: "1. Demonstration" and "2. Try It!". Below the "2. Try It!" button, the text "Highlight Box (346 x 100) (X:0; Y:480)" is visible. To the right of this bar, a white box with a blue border contains the text: "Congratulations! You have completed the Running Custom Reports tutorial."

Congratulations! You have completed the Running Custom Reports tutorial.