

Employer eServices®

Welcome to the Navigation Tutorial

Audience: Brokers

Module Length: Approximately 5 Minutes

Last Updated: December 12, 2006

Welcome to the Navigation tutorial. In this tutorial, you'll learn how to access the tools and resources available on the Customer Reporting site.

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

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Let's get started. We'll begin by looking at the sections of the Reporting Home screen.

The screenshot displays the Employer eServices website interface. At the top, there is a blue navigation bar with the logo and several menu items: Reports Home, Automated Reports, Custom Reports, Highlight Box Reports, Help & Training, News, Tools, and Logout. Below this is a grey bar with the text 'ECR' and 'Welcome Expanded Broker'. The main content area is divided into several sections: 'View Automated Reports' with a list of customer folders (Acme Inc, Customer 9, Doe & Sons, Test Co) and a 'View more customers...' link; 'Run Custom Reports' with a list of report types (Financial, Claim Expenses, Claim Lag Study, Detail Payment, etc.) and a 'Managed Pharmacy' report; 'Help & Training Resources' with contact information and links to help resources; 'Reporting News' with dates and headlines; and 'Reporting Tools' with a link to 'Create and Modify Group Segment Filters'. A blue-bordered box highlights the text: 'The Navigation Bar is located at the top of each screen. This bar contains links to the main areas of the reporting site.'

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The screenshot displays the Employer eServices website 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 Logout. Below this is a sub-header for ECR (Expanded Broker) with a welcome message. The main content area is divided into several sections: 'View Automated Reports' with a list of customer folders (Acme Inc, Customer 9, Doe & Sons, Test Co) and a 'View more customers...' link; 'Run Custom Reports' with a list of report types such as 'Financial', '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', 'Premium Managed Ad Hoc', 'Premium vs Claims - Paid', and 'Managed Pharmacy'; 'Help & Training Resources' with contact information and links for help, frequently asked questions, glossary, tutorials, and reference materials; 'Reporting News' with dates and titles of recent news items; and 'Reporting Tools' with a link to create and modify group segment filters. A blue-bordered box highlights the text: 'Below the Navigation Bar, you'll find convenient, one-stop access to commonly used site features.'

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The screenshot displays the Employer eServices website 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 Logout. Below this is a sub-header for ECR (Expanded Broker) with a welcome message. The main content area is divided into several sections:

- View Automated Reports:** A section highlighted with a red border. It features a folder icon and lists reports for three customers: Acme Inc, Customer 9, and Test Co. The Test Co. report is further detailed with dimensions (436 x 194) and coordinates (X:2; Y:87). A link to "View more customers..." is provided. A text box on the left explains that users can view, print, and export reports.
- Run Custom Reports:** A section with a folder icon and a list of report types such as "Financial", "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", "Premium Managed Ad Hoc", "Premium vs Claims - Paid", and "Managed Pharmacy". A text box on the left explains that users can create, edit, export, and print their own reports.
- Help & Training Resources:** A section with a dark header containing contact information (Maintenance Period, Phone, E-mail) and links for "Help with a Specific Report", "Frequently Asked Questions", "Glossary of Terms", "Online Tutorials", and "Printable Reference Materials".
- Reporting News:** A section with a dark header listing news items with dates: "11/20/2006 Data Issues Affecting Some Report Results", "11/13/2006 Inpatient Event Data Unavailable", and "10/20/2006 Membership Issue Affects Some Customers". A "More News..." link is also present.
- Reporting Tools:** A section with a dark header containing a link for "Create and Modify Group Segment Filters".

A blue-bordered text box on the right side of the screenshot contains the following text: "The View Automated Reports section provides quick access to system-generated reports. Your reports are grouped in folders by customer."

The View Automated Reports section provides quick access to system-generated reports. Your reports are grouped in folders by customer.

The Run Custom Reports section allows you to select and create interactive custom reports.

To access custom reports you've run in the past 60 days, see the Recent Reports section. This view displays your two most recent reports.

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

ECR

Welcome Expanded Broker

View Automated Reports

Acme Inc
Customer 9
Doe & Sons
Test Co

[View more customers...](#)

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

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](#)
- [Financial Managed Ad Hoc](#)
- [Large Loss Claim Payments](#)
- [Payments by Benefit Type](#)
- [Payments By Month](#)
- [Premium Managed Ad Hoc](#)
- [Premium vs Claims - Paid](#)

Managed Pharmacy (Data Current Through May 31, 2006)

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

Help & Training Resources

Maintenance Period: Nightly 10 p.m. - 7 a.m. (ET)
Phone: 1-800-651-5465
E-mail: CustRept_Help@uhc.com
[Help with a Specific Report](#) (335 x 172)
[Frequently Asked Questions](#) (447; Y:85)
[Glossary of Terms](#)
[Online Tutorials](#)
[Printable Reference Materials](#)

Reporting News

11/20/2006
[Data Issues Affecting Some Report Results](#)

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

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

[More News...](#)

Reporting Tools

[Create and Modify Group Segment Filters](#)

The Help and Resources section provides at-a-glance access to Customer Support contact information, as well as links to other online help and training resources.

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In the Reporting News section, you'll see breaking headlines that may affect your reporting experience.

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
 - Premium Managed Ad Hoc
 - Premium vs Claims - Paid
- Managed Pharmacy (Data Current Through May 31, 2006)
- Medical (Data Current Through May 31, 2006)
- Membership (Data Current Through May 31, 2006)

[View All Report Types...](#)

Reporting Tools

[Create and Modify Group Segment Filters](#)
These filters make it easier to run reports on specific, predefined portions of your organization. [Learn how to create and use Group Segment Filters](#)

[Manage Your Report Templates](#)
Save and adjust your custom reports parameters (e.g., add the most current month of data) to quickly run reports you have modified to better meet your reporting needs. [Learn how to create and use templates](#)

[Review and change your preferences](#)
Modify your settings for exporting, printing and viewing your custom reports. [Learn more about Preferences](#)

Recent Reports

[Managed Pharmacy Cost and Utilization by Month](#)

[Payments By Month](#)

[View reports you created in the past 60 days...](#)

View, modify or delete reports you created in the past 60 days.

Inpatient Event Data Unavailable
10/20/2006
[Membership Issue Affects Some Customers](#)
[More News...](#)

The Reporting Tools section provides links to the Group Segment Filter editor, the Reporting Templates folder, and the User Preferences screen.

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The Reporting Tools section provides links to the Group Segment Filter editor, the Reporting Templates folder, and the User Preferences screen.

Let's move beyond the Reports Home screen. We'll use the links on the Navigation Bar to visit other areas of the site, beginning at the Automated Reports screen.

Employer eServices®

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

Automated Reports

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

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

	Name	Created Date	Type	TotalSize
Help	<u>Acme Inc</u>		Folder	
Help	<u>Customer 9</u>		Folder	
Help	<u>Doe & Sons</u>		Folder	
Help	<u>Test Co</u>		Folder	

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Click **Customer Folder**



The Automated Reports screen provides full access to system-generated reports. These reports are organized in folders by customer.


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

Automated Reports > Test Co

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

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

	Name	Created Date	Type	TotalSize
Help 	October 2006 (reports contain results through 9/30/2006)		Folder	
Help 	July 2006 (reports contain results through 6/30/2006)		Folder	
Help 	April 2006 (reports contain results through 3/31/2006)		Folder	
			Folder	

Click the **Month Folder**

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Reports for each customer are organized by month.




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

Automated Reports > Test.Co > April 2006 (Reports contain results through 10/31/2006)

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

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

	Name	Created Date	Type	TotalSize
Help 	PVC-Paid Test Co 000254256 21747	3/29/2006 8:14:34 AM	Report	799 KB
Help 	Payments by Benefit Type Test Co 000254256 21747	3/29/2006 8:23:17 AM	Report	238 KB
Help 	Claim Expenses by Size of Payment Test Co 000254256 21747	3/29/2006 8:27:44 AM	Report	182 KB
Help 	Network Utilization Test Co 000254256 21747	3/29/2006 8:30:57 AM	Report	362 KB
Help 	Membership by Month Test Co 000254256 21747	3/29/2006 8:32:56 AM	Report	204 KB
Help 	Managed Pharmacy Plan Performance Test Co 000254256 21747	3/29/2006 8:39:56 AM	Report	489 KB
Help 	Health Care Cost Management Summary Test Co 000254256 21747	3/29/2006 8:48:20 AM	Report	571 KB
Help 	Claim Experience Report Test Co 000254256 21747	3/29/2006 8:57:23 AM	Report	213 KB
Help 	Group Summary Data Test Co 000254256 21747	3/29/2006 9:00:35 AM	Report	49 KB
Help 	PVC-Incurred Test Co 000254256 21747	3/29/2006 9:02:45 AM	Report	636 KB

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Note that the "Breadcrumb" navigation at the top of the screen displays your location within the site. You may click any of these links to revisit previous screens.


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

[Automated Reports](#) > [Test Co](#) > **April 2006** (reports contain results through 10/31/2006)



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

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

	Name	Created Date	Type	TotalSize
Help 	PVC-Paid Test Co 000254256 21747	3/29/2006 8:14:34 AM	Report	799 KB
Help 	Payments by Benefit Type Test Co 000254256 21747	3/29/2006 8:23:17 AM	Report	238 KB
Help 	Claim Expenses by Size of Payment Test Co 000254256 21747	3/29/2006 8:27:44 AM	Report	182 KB
Help 	Network Utilization Test Co 000254256 21747	3/29/2006 8:30:57 AM	Report	362 KB
Help 	Membership by Month Test Co 000254256 21747	3/29/2006 8:32:56 AM	Report	204 KB
Help 	Managed Pharmacy Plan Performance Test Co 000254256 21747	3/29/2006 8:39:56 AM	Report	489 KB
Help 	Health Care Cost Management Summary Test Co 000254256 21747	3/29/2006 8:48:20 AM	Report	571 KB
Help 	Claim Experience Report Test Co 000254256 21747	3/29/2006 8:57:23 AM	Report	213 KB
Help 	Group Summary Data Test Co 000254256 21747	3/29/2006 9:00:35 AM	Report	49 KB
Help 	PVC-Incurred Test Co 000254256 21747	3/29/2006 9:02:45 AM	Report	636 KB

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For more information on working with automated reports, see the Viewing Automated Reports tutorial.

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Customer Reporting Navigation

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

Automated Reports > Test Co > April 2006 (reports generated through 10/31/2006)

These folders contain the reports eServices. To view these reports, select the appropriate folder then use one of the following 3 options:

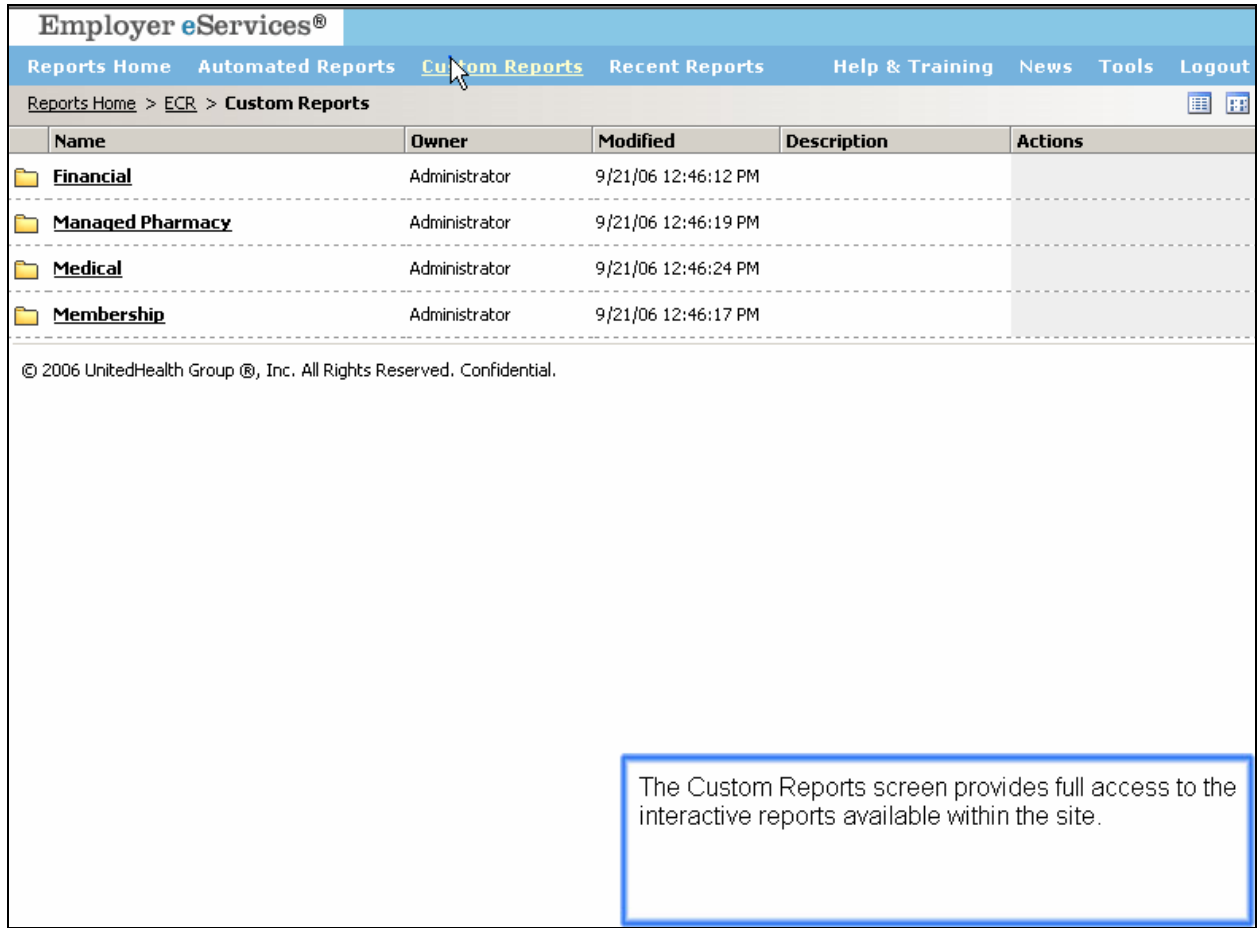
Click a report's name to open the report as a document suitable for viewing or printing.
Click to open a report as a Microsoft Excel spreadsheet.
Click the Help link to learn more about the reports.

	Name	Created Date	Type	Total Size
Help	PVC-Paid Test Co 000254256 21747	3/29/2006 8:14:34 AM	Report	799 KB
Help	Payments by Benefit Type Test Co 000254256 21747	3/29/2006 8:23:17 AM	Report	238 KB
Help	Claim Expenses by Size of Payment Test Co 000254256 21747	3/29/2006 8:27:44 AM	Report	182 KB
Help	Network Utilization Test Co 000254256 21747	3/29/2006 8:30:57 AM	Report	362 KB
Help	Membership by Month Test Co 000254256 21747	3/29/2006 8:32:56 AM	Report	204 KB
Help	Managed Pharmacy Plan Performance Test Co 000254256 21747	3/29/2006 8:39:56 AM	Report	489 KB
Help	Health Care Cost Management Summary Test Co 000254256 21747	3/29/2006 8:48:20 AM	Report	571 KB
Help	Claim Experience Report Test Co 000254256 21747	3/29/2006 8:57:23 AM	Report	213 KB
Help	Group Summary Data Test Co 000254256 21747	3/29/2006 9:00:35 AM	Report	49 KB
Help	PVC-Incurred Test Co 000254256 21747	3/29/2006 9:02:45 AM	Report	636 KB

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Next, let's move on to the Custom Reports screen.

Next, let's move on to the Custom Reports screen.



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

Reports Home > ECR > Custom Reports

Name	Owner	Modified	Description	Actions
Financial	Administrator	9/21/06 12:46:12 PM		
Managed Pharmacy	Administrator	9/21/06 12:46:19 PM		
Medical	Administrator	9/21/06 12:46:24 PM		
Membership	Administrator	9/21/06 12:46:17 PM		

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The Custom Reports screen provides full access to the interactive reports available within the site.

The Custom Reports screen provides full access to the interactive reports available within the site.

The screenshot shows the 'Employer eServices' interface. At the top, there is a navigation bar with links: Reports Home, Automated Reports, Custom Reports (highlighted), Recent Reports, Help & Training, News, Tools, and Logout. Below this is a breadcrumb trail: Reports Home > ECR > Custom Reports. The main content is a table with the following columns: Name, Owner, Modified, Description, and Actions. The table lists reports organized into folders: 'Financial' (with a folder icon), 'Membership' (with a folder icon), and an unlabeled folder containing three reports. A callout box with a blue border and arrow points to the 'Financial' folder icon, containing the text 'Click the Category folder'. At the bottom of the page, there is a copyright notice: '© 2006 UnitedHealth Group ®, Inc. All Rights Reserved. Confidential.' and a separate box containing the text 'These reports are organized in folders by category.'

Name	Owner	Modified	Description	Actions
Financial	Administrator	9/21/06 12:46:12 PM		
[Unlabeled Folder]	Administrator	9/21/06 12:46:19 PM		
[Unlabeled Folder]	Administrator	9/21/06 12:46:24 PM		
Membership	Administrator	9/21/06 12:46:17 PM		

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These reports are organized in folders by category.

These reports are organized in folders by category.

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

Reports Home > ECR > Custom Reports > Financial

Name	Owner	Modified	Description	Actions
 Claim Expenses by Size of Payment	Administrator	9/27/06 1:52:52 PM	Provides cou claimants an payments wi incremental, fixed dollar ranges.	
 Claim Lag Study	Administrator	9/21/06 12:46:14 PM	Identifies the time lapse between the date a service was incurred and the date the claim was processed.	 
 Detail Payment	Administrator	9/21/06 12:46:13 PM	Provides check transaction information for payments of ASO and SC5L-100 claims. Each transaction contains confidential, individually identifiable health information for the subscriber and claimant associated with the claim.	 
 Detail Payment - Non Confidential	Administrator	9/21/06 12:46:12 PM	Provides check transaction information for payments of claims for all funding arrangements. No individually identifiable health information is visible on this report.	 
 Financial Managed Ad Hoc	Administrator		Allows users to develop	
 Large Loss Claim Payments	Administrator			

Click the **Icon View** icon

Note that you may toggle between "list" and "icon" views by clicking the appropriate icon at the top right of the screen.

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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 customer segment 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 SCCL-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
	Financial Managed Ad Hoc Help Allows users to develop customized reports using specific Financial attributes Export PDF	<p>For more information on working with custom reports, see the Running Custom Reports tutorial.</p>	

For more information on working with custom reports, see the Running Custom Reports tutorial.





Employer eServices®

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 dates, your group segment filter or customer segment number and a specific 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.

 <u>Claim Expenses by Size of Payment</u> <u>Help</u> Provides counts of claimants and total claim payments within incremental, fixed dollar ranges. <u>Export</u> <u>PDF</u>	 <u>Claim Lag Study</u> <u>Help</u> Identifies the time lapse between the date a service was incurred and the date the claim was processed. <u>Export</u> <u>PDF</u>
 <u>Detail Payment</u> <u>Help</u> Provides check transaction information for payments of ASO and SCCL-100 claims. Each transaction contains confidential, individually identifiable health information for the subscriber and claimant associated with the claim. <u>Export</u> <u>PDF</u>	 <u>Detail Payment - Non Confidential</u> <u>Help</u> Provides check transaction information for payments of claims for all funding arrangements. No individually identifiable health information is visible on this report. <u>Export</u> <u>PDF</u>
 <u>Financial Managed Ad Hoc</u> <u>Help</u> Allows users to develop customized reports using specific Financial attributes <u>Export</u> <u>PDF</u>	

Let's continue on to the Recent Reports screen.

Let's continue on to the Recent Reports screen.

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

[Reports Home](#) > [ECR](#) > .. > [Custom Reports](#) > **Recent Reports**

Name ▲	Status ▲	Message Creation Time ▼		Remove
Managed Pharmacy Cost and Utilization by Month	Ready	9/3/06 12:22:40 PM		<input type="checkbox"/>
Payments By Month	Ready	9/3/06 10:38:11 AM		<input type="checkbox"/>
Managed Pharmacy Cost and Utilization by Month	Ready	9/1/06 8:10:52 AM		<input type="checkbox"/>
Detail Payment	Ready	8/28/06 12:41:03 PM		<input type="checkbox"/>
Claim Expenses by Size of Payment	Ready	8/28/06 12:39:50 PM		<input type="checkbox"/>
Detail Payment	Ready	8/28/06 12:29:50 PM		<input type="checkbox"/>
Claim Expenses by Size of Payment	Ready	8/28/06 9:00:49 AM		<input type="checkbox"/>
Claim Expenses by Size of Payment	Ready	8/28/06 8:42:31 AM		<input type="checkbox"/>
Claim Lag Study	Ready	8/28/06 8:39:07 AM		<input type="checkbox"/>




The Recent Reports screen displays a full listing of custom reports you have run within the last 60 days.





































The Recent Reports screen displays a full listing of custom reports you have run within the last 60 days.

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

[Reports Home](#) > [ECR](#) > .. > [Custom Reports](#) > **Recent Reports**

Name ▲	Status ▲	Message Creation Time ▼		Remove
 Managed Pharmacy Cost and Utilization by Month	Ready	9/3/06 12:22:40 PM	  	<input type="checkbox"/>
 Payments By Month	Ready	9/3/06 10:38:11 AM	  	<input type="checkbox"/>
 Managed Pharmacy Cost and Utilization by Month	Ready	9/1/06 8:10:52 AM	  	<input type="checkbox"/>
 Detail Payment	Ready	8/28/06 12:41:03 PM	  	<input type="checkbox"/>
 Claim Expenses by Size of Payment	Ready	8/28/06 12:39:50 PM	  	<input type="checkbox"/>
 Detail Payment	Ready	8/28/06 12:29:50 PM	  	<input type="checkbox"/>
 Claim Expenses by Size of Payment	Ready	8/28/06 9:00:49 AM	  	<input type="checkbox"/>
 Claim Expenses by Size of Payment	Ready	8/28/06 8:42:31 AM	  	<input type="checkbox"/>
 Claim Lag Study	Ready	8/28/06 8:39:07 AM	  	<input type="checkbox"/>

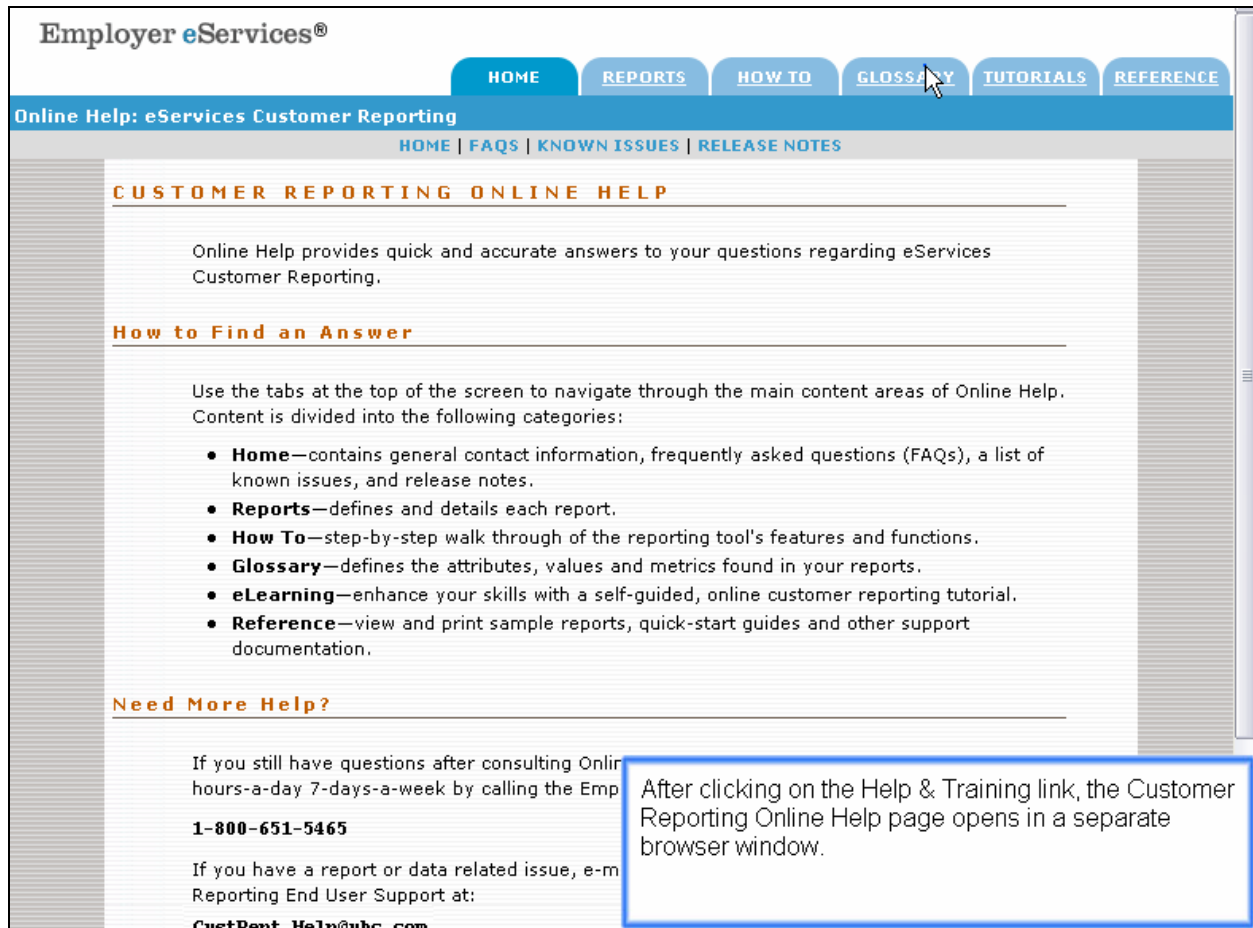
To update the status of the reports in this list, click the Refresh icon at the top right of the screen.

To update the status of the reports in this list, click the Refresh icon at the top right of the screen.

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, **Highlight Boxed**, News, Tools, and Logout. Below this is a breadcrumb trail: Reports Home > ECR > .. > Custom Reports > Recent Reports. A table lists various reports, all with a status of 'Ready'. A callout box points to the 'Highlight Boxed' link in the navigation bar, stating 'Click the Help & Training link'. Another callout box at the bottom right says 'Next, let's take a closer look at the Help & Training page.'

Name	Status					Remove
Managed Pharmacy Cost and Utilization by Month	Ready	9/3/06 12:22:40 PM				<input type="checkbox"/>
Payments By Month	Ready	9/3/06 10:38:11 AM				<input type="checkbox"/>
Managed Pharmacy Cost and Utilization by Month	Ready	9/1/06 8:10:52 AM				<input type="checkbox"/>
Detail Payment	Ready	8/28/06 12:41:03 PM				<input type="checkbox"/>
Claim Expenses by Size of Payment	Ready	8/28/06 12:39:50 PM				<input type="checkbox"/>
Detail Payment	Ready	8/28/06 12:29:50 PM				<input type="checkbox"/>
Claim Expenses by Size of Payment	Ready	8/28/06 9:00:49 AM				<input type="checkbox"/>
Claim Expenses by Size of Payment	Ready	8/28/06 8:42:31 AM				<input type="checkbox"/>
Claim Lag Study	Ready	8/28/06 8:39:07 AM				<input type="checkbox"/>

Next, let's take a closer look at the Help & Training page.



Employer eServices®

HOME | REPORTS | HOW TO | GLOSSARY | TUTORIALS | REFERENCE

Online Help: eServices Customer Reporting

HOME | FAQs | KNOWN ISSUES | RELEASE NOTES

CUSTOMER REPORTING ONLINE HELP

Online Help provides quick and accurate answers to your questions regarding eServices Customer Reporting.

How to Find an Answer

Use the tabs at the top of the screen to navigate through the main content areas of Online Help. Content is divided into the following categories:

- **Home**—contains general contact information, frequently asked questions (FAQs), a list of known issues, and release notes.
- **Reports**—defines and details each report.
- **How To**—step-by-step walk through of the reporting tool's features and functions.
- **Glossary**—defines the attributes, values and metrics found in your reports.
- **eLearning**—enhance your skills with a self-guided, online customer reporting tutorial.
- **Reference**—view and print sample reports, quick-start guides and other support documentation.

Need More Help?

If you still have questions after consulting Online Help, you can contact our support team 24 hours-a-day 7-days-a-week by calling the Employer eServices Customer Reporting End User Support at:

1-800-651-5465

If you have a report or data related issue, e-mail your question to:

CustRpt_Help@uhc.com

After clicking on the Help & Training link, the Customer Reporting Online Help page opens in a separate browser window.

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For more information on using this page, see the Help & Resources tutorial.

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Back on the Reports home screen, let's continue to the News page.

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[close window](#)

[Go to Online Help](#)

eServices Customer Reporting

News Archives

[2006](#) | [2005](#) | [2004](#)

November 13, 2006 — **[Inpatient Event Data Unavailable](#)**

Although the medical report category indicates data is current through October 31, 2006, inpatient event data from October 2006 is not yet available for custom reporting purposes. Until it the inpatient event data is refreshed, reports which rely on this data will likely yield incomplete results.

The refreshed inpatient event data is scheduled to be available on Tuesday, 14-November.

Until the inpatient data is refreshed, please refrain from running the following medical reports:

- Claim Experience
- Cost and Utilization Summary
- Inpatient Utilization and Costs by Admission Type
- Inpatient Utilization by Diagnosis*
- Inpatient Event Ad Hoc*
- Top Hospitals Ranked by Total Net Paid*

If you ran any of the above listed reports on Monday, 13-November, the inpatient data is available.

November 10, 2006 — **System Unavailable A**

The reporting application will be unavailable from m

As with Online Help, the Reporting News page also opens in a separate window. This page contains a historical list of alerts which have impacted the reporting site.

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The screenshot displays the Employer eServices website interface. At the top, a navigation bar includes links for Reports Home, Automated Reports, Custom Reports, Recent Reports, Help & Training, News, **Tools** (highlighted with a red box and a callout bubble saying "Click the Tools link"), and Logout. Below the navigation bar, the page is divided into several sections. On the left, there is a "View Automated Reports" section with a list of customer folders: Acme Inc, Customer 9, Doe & Sons, and Test Co. Below this is a "Run Custom Reports" section with a list of report types such as Claim Expenses by Size of Payment, Claim Lag Study, Detail Payment, and Financial Managed Ad Hoc. On the right side, there is a "Help" section with contact information (Maintenance Period, Phone, E-mail) and links to various help resources. Below that is a "Reporting News" section with dates and headlines like "Data Issues Affecting Some Report Results". At the bottom right, there is a "Reporting Tools" section with a link to "Create and Modify Group Segment Filters". A blue callout box points to the "Reporting Tools" section with the text: "The final section of the site accessible from the Navigation Bar is the Reporting Tools screen."

The final section of the site accessible from the Navigation Bar is the Reporting Tools screen.

Employer eServices®

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

Reporting Tools

Group Segment Filter

Group Segment Filters make it easier to run reports on pre-defined portions of your organization. Do you want reports that focus on one part of your organization (e.g. hourly vs. salaried employees, East Coast vs West Coast, etc)? Leverage the business units you defined during case installation as "[customer structure](#)" to create filters that identify one or more of these units. Then, use the filters to create the focused reports you need.

Note: If you are unfamiliar with customer structure values associated with your group, please contact your account representative.

[Create or modify a Group Segment Filter](#)

[Learn how to create and use Group Segment Filters...](#)

Report Templates

If you save a custom report you have run as a template, you can rerun it, at any time, and modify your original selections to create a similar report with an entirely different set of results. For example, imagine you created a report showing last month's medical payments for your retirees. You knew you'd need to run a similar report each month throughout the year, so you saved that report as a template. (Good idea.) Thanks to that little extra work up-front, now all you'll have to do is run your template each month and adjust the dates to reflect the most current month of data.

[View and manage your report templates](#)

[Learn how to create and use templates...](#)

Preferences

Preferences let you modify the system's default settings for exporting, printing and viewing your custom reports. Is the screen's font size too small? Do you want more rows of results to show up on a single screen of your custom report? How about exporting without having to fill out the same options every time you do? Preferences lets you adjust all of these settings...and many more...to best suit your needs.

[Modify Preferences](#)

[Learn more about preferences...](#)

On this screen, you'll find a collection of resources designed to make your reporting efforts more efficient.

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

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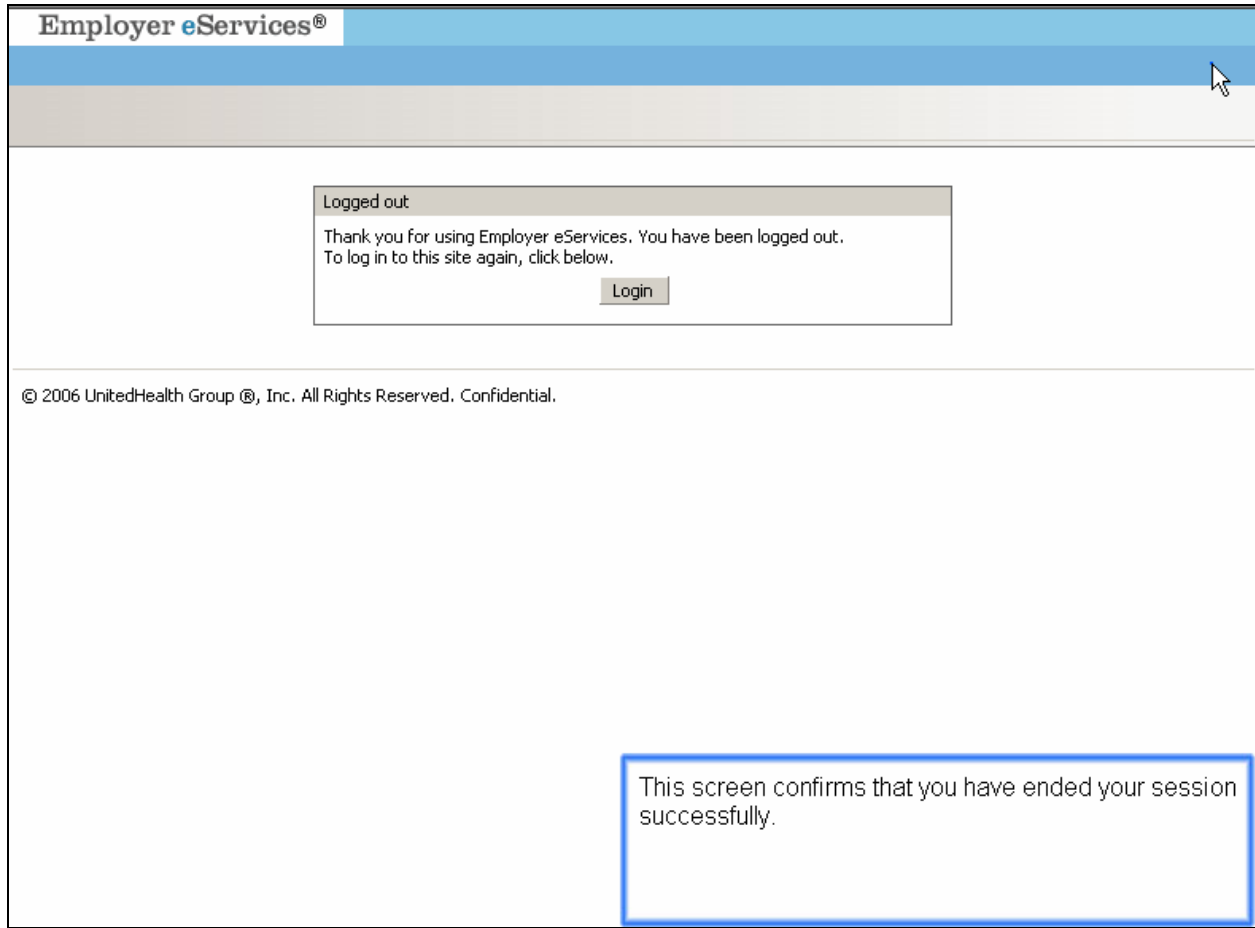
[Learn more about preferences...](#)

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Separate tutorials are available covering the use of Group Segment Filters and Report Templates.

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When you've finished your work within the Customer Reporting site, remember to click the Logout link.



This screen confirms that you have ended your session successfully.

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Congratulations!
You have completed the Navigation Tutorial.

Congratulations! You have completed the Navigation tutorial. In this tutorial, you learned how to access the tools and resources available on the Customer Reporting site.

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