

Employer eServices®

**Welcome to the  
Importing Group Segment Filters Tutorial**

**Audience: Employers & Brokers**

**Module Length: Approximately 5 Minutes**

**Last Updated: July 11th, 2007**

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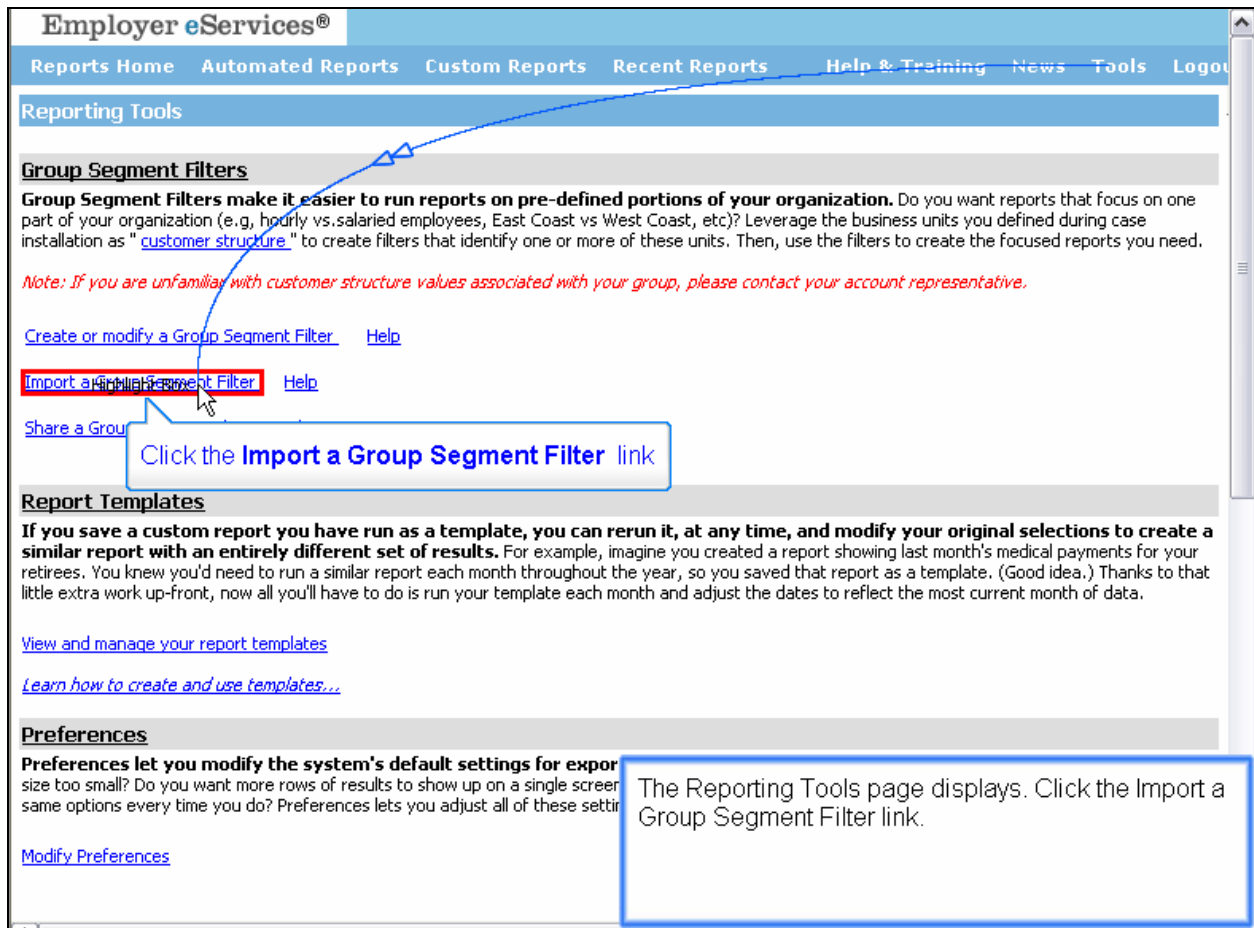
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The screenshot shows the Employer eServices website interface. At the top, the navigation menu includes 'Reports Home', 'Automated Reports', 'Custom Reports', 'Recent Reports', 'Help & Training', 'News', 'Tools', and 'Logout'. The 'Tools' menu item is highlighted with a red box. A callout box with a blue border and a white background points to the 'Tools' menu with the text 'Click the Tools menu option'. Below the navigation, the page is divided into several sections: 'View Automated Reports' with a 'Key Accounts' folder icon and a text box explaining report creation; 'Run Custom Reports' with a folder icon and a list of report categories such as 'Financial (Data Current Through November 30, 2006)', 'Claim Expenses by Size of Payment', 'Claim Lag Study', 'Detail Payment', 'Detail Payment - Confidential', 'Detail Payment - Non Confidential', 'Financial Managed Ad Hoc', 'Financial Managed Ad Hoc - Confidential', 'Group Summary Data', 'Group Summary Data - Rates', 'Health Care Costs by Month', 'Large Loss Claim Payments', and 'Large Loss Claim Payments (Confidential)'; 'Help &' with contact information and links like 'Maintenance Period', 'Frequently Asked Questions', 'Glossary of Terms', 'Online Tutorials', and 'Printable Reference Materials'; and 'Reporting News' with dates and headlines such as '5/14/2007 Issue in Healthcare Management Summary Report Resolved' and '5/4/2007 "Facility R & C" Reports Now Accessible via Automated Reports'. A second callout box with a blue border and white background is located at the bottom right of the screenshot, containing the text 'Let's get started. To begin, click the Tools menu option from the Reports Home page.'

Let's get started. To begin, click the Tools menu option from the Reports Home page.



The Reporting Tools page displays. Click the Import a Group Segment Filter link.

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

ECR > Import a Group Segment Filter [Group Segment Filter Home](#)

### Import a Group Segment Filter

This page lets you create a Group Segment Filter by importing a file that has been specially formatted to identify a subset of claimants. This process lets you define a segment of your population offline in Excel, and import them for your reporting needs. [Help](#)

#### Step 1: Locate the File to Import

Click the **Browse** button to locate the Excel (.xls) file containing the filter you have built. Filters must be built using the preformatted Excel template to import successfully. If your filter is not already setup, [download the template](#), enter your filter information, save the file, and click the Browser button to locate it. [Help](#)

\* Path:

#### Step 2: Name and Describe the Filter

Type a name and a brief description into the fields below to identify the filter, and then click the **Import** button to upload the file. Once imported, you can use the filter to run a report or you can edit it from the Group Segment Filter Screen. [Help](#)

\* Filter Name:

Filter Description:

\* *Required Field*

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The Import a Group Segment Filter page displays. This page allows you to import a Group Segment Filter previously created in Microsoft Excel.

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

ECR > Import a Group Segment Filter [Group Segment Filter Home](#)

### Import a Group Segment Filter

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#### Step 1: Locate the File to Import

Click the **Browse** button to locate the Excel (.xls) file containing the filter you have built. Filters must be built using the preformatted Excel template to import successfully. If your filter is not already setup, [Download Template](#), enter your filter information, save the file, and click the Browser button to locate it. [Help](#)

\* Path:

Click the **Download Template** link

#### Step 2: Name and Describe the Filter

Type a name and a brief description into the fields below to identify the filter, and then click the **Import** button to upload the file. Once imported, you can use the filter to run a report or you can edit it from the Group Segment Filter Screen. [Help](#)

\* Filter Name:

Filter Description:

\* *Required Field*

Note that filters must be built using a pre-formatted Excel template to import successfully. To access this template, click the Download Template link.

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Note that filters must be built using a pre-formatted Excel template to import successfully. To access this template, click the Download Template link.

The screenshot shows the 'Employer eServices' web interface. The main page is titled 'Import a Group Segment Filter' and contains two steps: 'Step 1: Locate the File to Import' and 'Step 2: Name and Describe Filter'. A 'File Download' dialog box is overlaid on the page, asking 'Do you want to open or save this file?'. The dialog displays file details: Name: gsftemplate.xls, Type: Microsoft Excel Worksheet, 26.0 KB, From: ecrbeta.ingenix.com. A red box highlights the 'Open' button, and a blue callout box points to it with the text 'Click the Open button'. The dialog also includes a warning about internet files and a 'Always ask before opening this type of file' checkbox.

A File Download dialog box will display. Click the Open button to continue.



The screenshot displays the Employer eServices interface with an Excel spreadsheet template open. The spreadsheet has the following columns:

Operator - Policy Number	Policy Number	Operator - Suffix	Suffix	Operator - Account	Account	Operator - PYC	Plan Variation	Operator - Report Code	Report Code

A blue box highlights the text: "An Excel spreadsheet template will load in a new window." Below the spreadsheet, there are "Import" and "Cancel" buttons. The footer of the software window reads: "© 2007 UnitedHealth Group ®, Inc. All Rights Reserved. Confidential."

An Excel spreadsheet template will load in a new window.

The screenshot shows an Excel spreadsheet with the following columns:

	A	B	C	D	E	F	G	H	I	J
1	Operator - Policy Number	Policy Number	Operator - Suffix	Suffix	Operator - Account	Account	Operator - PYC	Plan Variation	Operator - Report Code	Report Code
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
17										
18										
19										
20										
21										

The spreadsheet has two tabs: 'Sheet1' and 'Instructions'. The 'Import' and 'Cancel' buttons are visible at the bottom left. A blue callout box contains the text: "This template contains two tabs. The first contains series of columns where you will define your filter criteria."

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This template contains two tabs. The first contains series of columns where you will define your filter criteria.

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gsftemplate.xls [Read-Only]

	A	B	C	D	E	F	G	H	I	J
1										
2	<b>Operator</b>	<b>Definition</b>								
3	<	less than								
4	>	greater than								
5	<>	not equal to								
6	=	equal to								
7	>=	greater than or equal to								
8	<=	less than or equal to								
9	between*	between								
10	in*	in list								
11	not in*	not in list								
12	*Separate each value using a comma (i.e. 000123456,000123457, 000123458)									
13										
14	<b>Required Fields:</b>		1. Policy Number Operator							
15			2. Policy Number							
16	Note: You do not need to fill in every field. Fill in the Required Fields and only those that apply to the filter you are trying to create.									
17										
18										
19	<b>Sample #1</b>									
20	Operator - Policy Number	Policy Number	Operator - Suffix	Suffix	Operator - Account	Account	Operator - PVC	Plan Variation	Operator - Report Code	Report Code
21	=	000123456	=	X	=	0042	=	0042	=	0047
22	=	000456789	=	X	=	0034	=	0786	=	0786
23	=	000789123	=	Y	=	0014	=	0786	=	0786

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The second tab contains helpful instructions for filling out the template, including completed examples.

The second tab contains helpful instructions for filling out the template, including completed examples.

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Rep gsftemplate.xls [Read-Only]

	A	B	C	D	E	F	G	H	I	J
1	Operator - Policy Number	Policy Number	Operator - Suffix	Suffix	Operator - Account	Account	Operator - PYC	Plan Variation	Operator - Report Code	Report Code
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
17										
18										
19										
20										
21										

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Complete the template by entering information specific to your reporting population. Note that only the Policy Number and Policy Number Operator fields are required.

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## Customer Reporting – Importing Group Segment Filters

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Rep gsftemplate.xls [Read-Only]

	A	B	C	D	E	F	G	H	I	J
1	Operator - Policy Number	Policy Number	Operator - Suffix	Suffix	Operator - Account	Account	Operator - PYC	Plan Variation	Operator - Report Code	Report Code
2										
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
17										
18										
19										
20										
21										

Import Cancel

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Complete the template by entering information specific to your reporting population. Note that only the Policy Number and Policy Number Operator fields are required.

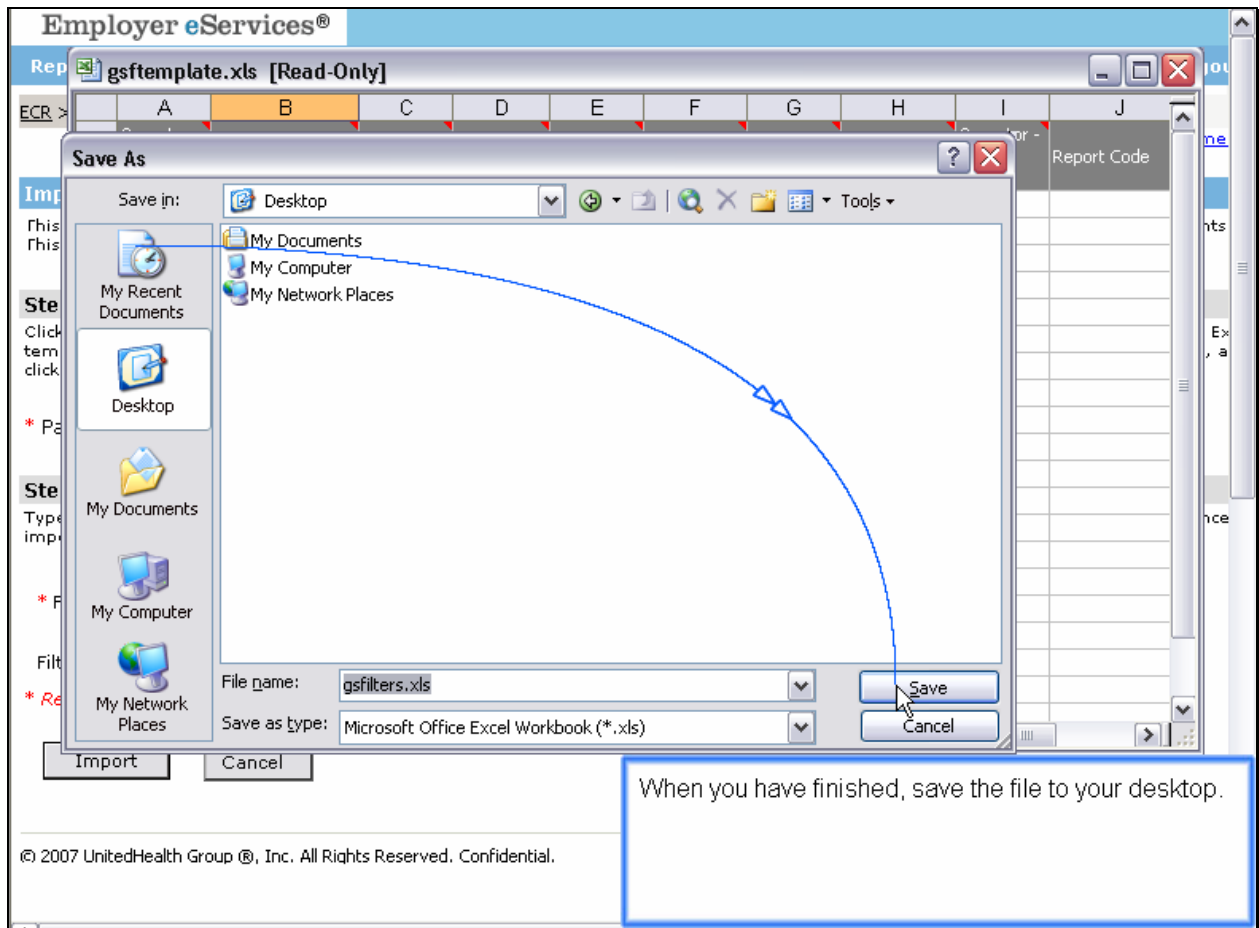
Complete the template by entering information specific to your reporting population. Note that only the Policy Number and Policy Number Operator fields are required.

The screenshot shows an Excel spreadsheet titled "gsftemplate.xls [Read-Only]" with the following column headers:

	A	B	C	D	E	F	G	H	I	J
1	Operator - Policy Number	Policy Number	Operator - Suffix	Suffix	Operator - Account	Account	Operator - PYC	Plan Variation	Operator - Report Code	Report Code
2	=									
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
17										
18										
19										
20										
21										

Instructions in the callout box: Complete the template by entering information specific to your reporting population. Note that only the Policy Number and Policy Number Operator fields are required.

Complete the template by entering information specific to your reporting population. Note that only the Policy Number and Policy Number Operator fields are required.



When you have finished, save the file to your desktop.

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gsftemplate.xls

	A	B	C	D	E	F	G	H	I	J
1	Operator - Policy Number	Policy Number	Operator - Suffix	Suffix	Operator - Account	Account	Operator - PYC	Plan Variation	Operator - Report Code	Report Code
2	=	000702664			between	0029,0063				
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
17										
18										
19										
20										
21										

Sheet1 / Instructions /

Import Cancel

Note that the file must be closed before it can be imported.

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Note that the file must be closed before it can be imported.



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

ECR > Import a Group Segment Filter [Group Segment Filter Home](#)

### Import a Group Segment Filter

This page lets you create a Group Segment Filter by importing a file that has been specially formatted to identify a subset of claimants. This process lets you define a segment of your population offline in Excel, and import them for your reporting needs. [Help](#)

#### Step 1: Locate the File to Import

Click the **Browse** button to locate the Excel (.xls) file containing the filter you have built. Filters must be built using the preformatted Excel template to import successfully. If your filter is not already setup, [download the template](#), enter your filter information, save the file, and click the Browser button to locate it. [Help](#)

\* Path:  **Browse**

#### Step 2: Name and Describe the Filter

Type a name and a brief description into the fields below to identify the filter, and then click the **Import** button to upload the file. Once imported, you can use the filter to run a report or you can edit it from the Group Segment Filter Screen. [Help](#)

\* Filter Name:

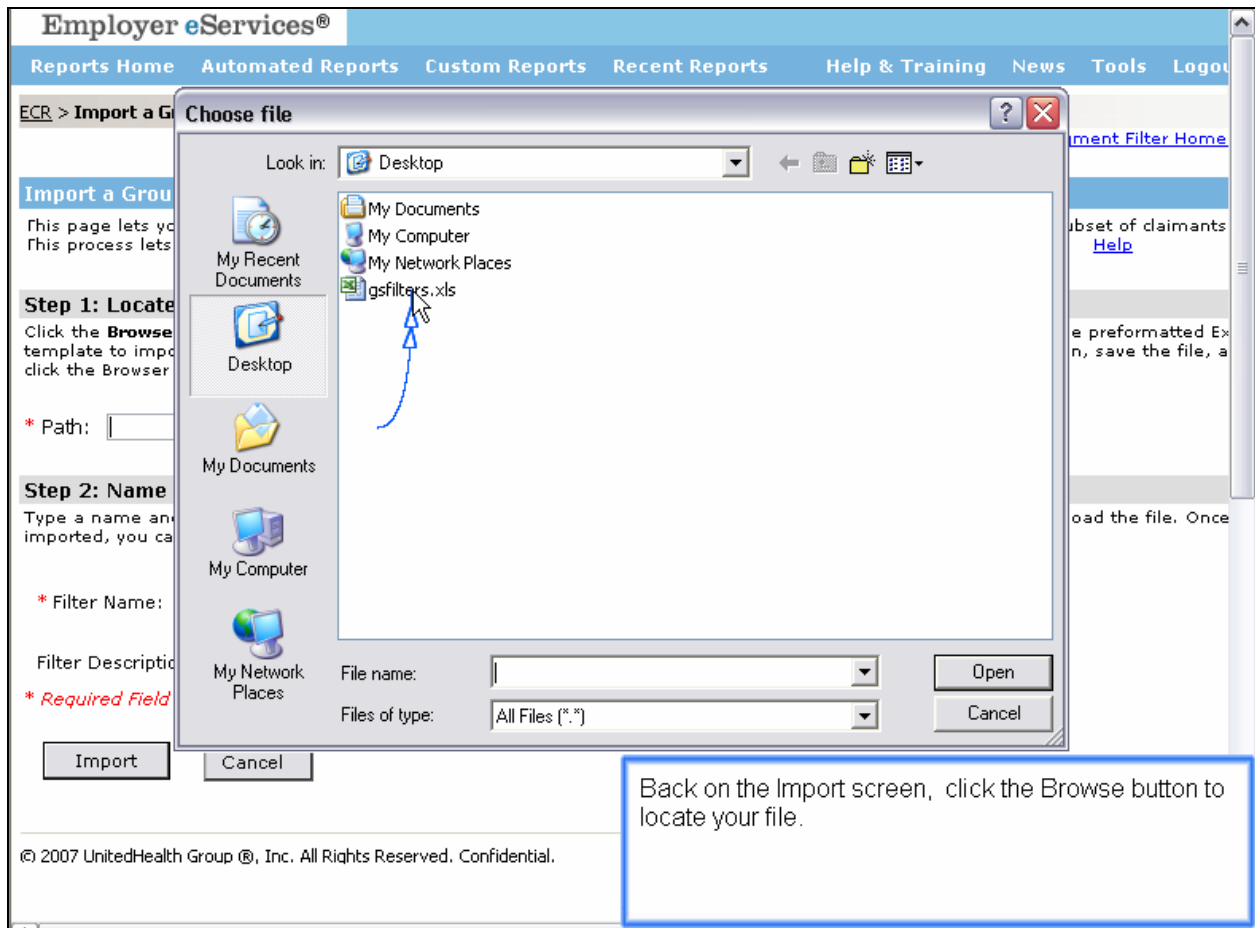
Filter Description:

\* *Required Field*

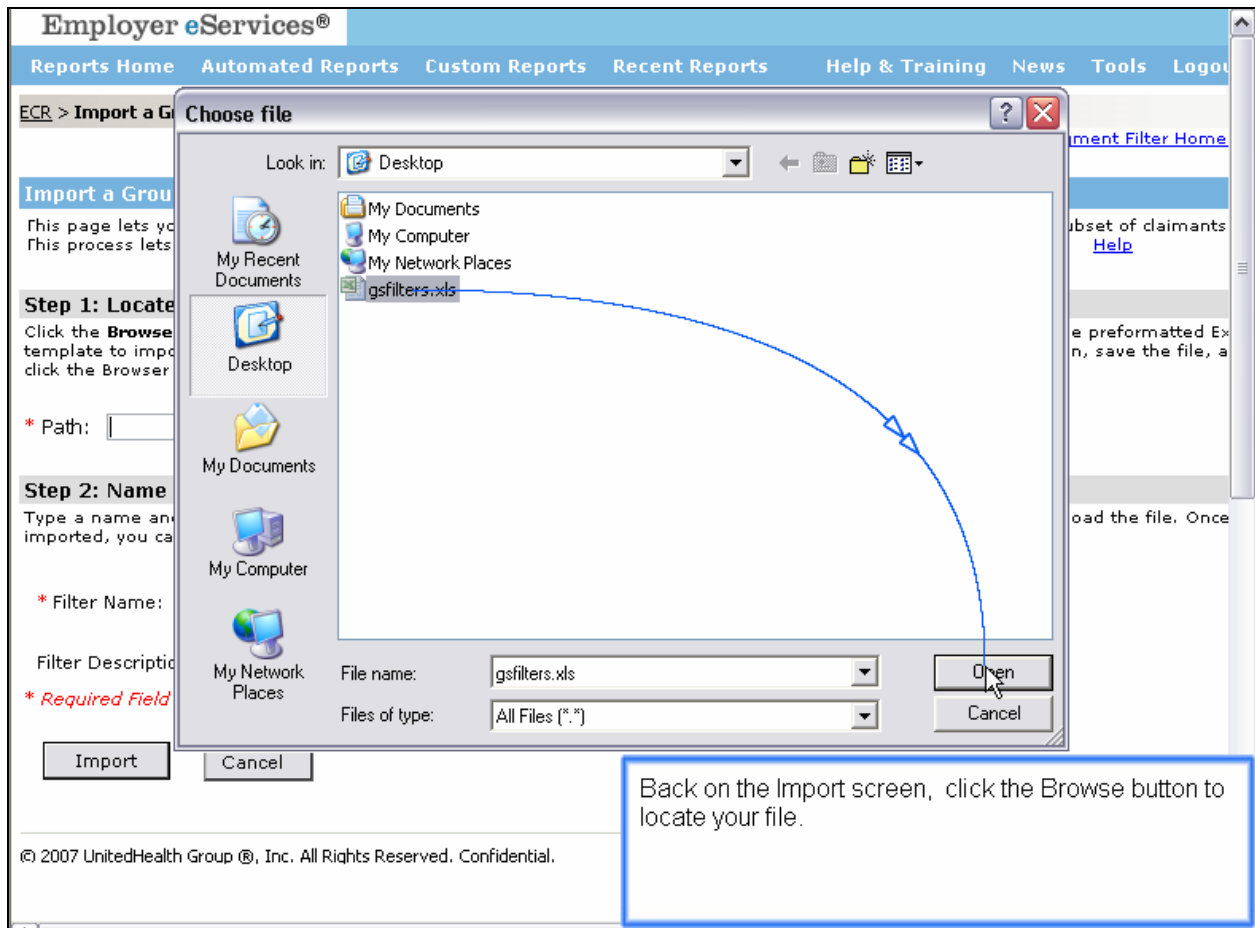
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Back on the Import screen, click the Browse button to locate your file.

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\* Path: C:\Documents and Settings\ [Browse...]

---

**Step 2: Name and Describe the Filter**

Type a name and a brief description into the fields below to identify the filter, and then click the **Import** button to upload the file. Once report or you can edit it from the Group Segment Filter Screen. [Help](#)

\* Filter Name:

Filter Description:

*\* Required Field*

---

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After selecting the file, enter a Filter Name.

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**Step 1: Locate the File to Import**

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\* Path: C:\Documents and Settings\ Browse...

---

**Step 2: Name and Describe the Filter**

Type a name and a brief description into the fields below to identify the filter, and then click the **Import** button to upload the file. Once report or you can edit it from the Group Segment Filter Screen. [Help](#)

\* Filter Name:

Filter Description:

*\* Required Field*

---

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Adding an optional filter description will help keep your filters organized.

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**Step 1: Locate the File to Import**

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\* Path: C:\Documents and Settings\ [Browse...]

---

**Step 2: Name and Describe the Filter**

Type a name and a brief description into the fields below to identify the filter, and then click the **Import** button to upload the file. Once report or you can edit it from the Group Segment Filter Screen. [Help](#)

\* Filter Name:

Filter Description:

\* *Required Field*

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Click the **Import** button

When you have finished, click the Import button.

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**Step 1: Locate the File to Import**  
Click the **Browse** button to locate the Excel (.xls) file containing the filter you have built. Filters must be built using the preformatted Excel template to import successfully. If your filter is not already setup, [download the template](#), enter your filter information, save the file, and click the Browser button to locate it. [Help](#)

\* Path: C:\Documents and Settings\ [Browse...]

**Step 2: Name and Describe the Filter**  
Type a name and a brief description into the fields below to identify the filter, and then click the **Import** button to upload the file. Once report or you can edit it from the Group Segment Filter Screen. [Help](#)

\* Filter Name:

Filter Description:

\* *Required Field*

**Congratulations! Your filter was successfully imported.**

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A message at the bottom of the page will confirm that your segment filter has been successfully imported.

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ECR > Import a Group Segment Filter

[Group Segment Filters Home](#)

### Import a Group Segment Filter

This page lets you create a Group Segment Filter by importing a file that... This process lets you define a segment of your population offline in Excel, and import them for your reporting needs. [Help](#)

#### Step 1: Locate the File to Import

Click the **Browse** button to locate the Excel (.xls) file containing the filter you have built. Filters must be built using the preformatted Excel template to import successfully. If your filter is not already setup, [download the template](#), enter your filter information, save the file, and click the Browser button to locate it. [Help](#)

\* Path: C:\Documents and Settings\ Browse...

#### Step 2: Name and Describe the Filter

Type a name and a brief description into the fields below to identify the filter, and then click the **Import** button to upload the file. Once imported, you can use the filter to run a report or you can edit it from the Group Segment Filter Screen. [Help](#)

\* Filter Name: Test Filter

Filter Description: Import Filter Test

\* Required Field

Import Cancel

Your newly imported filter can now be found on the Group Segment Filters Home page.

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Your newly imported filter can now be found on the Group Segment Filters Home page.



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ECR > Group Segment Filter

Create New Group Segment Filter

(\*)Name:  Description:

Search For Existing Filter:

My Filters	Description	Modified
<a href="#">Test Filter</a>	Highlight Report Filter Test	06/06/2007

\* Total Filters In This Folder: 1  
Sort list: Click on My Filters or Modified column labels to sort.

My Incomplete Filters	Description	Modified
Your Filter Inbox is empty.		

\* Total Filters In This Folder: 0  
Sort list: Click on My Filters or Modified column

Your newly imported filter can now be found on the Create and Modify Group Segment Filters page.

Your newly imported filter can now be found on the Create and Modify Group Segment Filters page.

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**Congratulations!**

**You have completed the Importing Group Segment Filters Tutorial**

Congratulations! You have completed the Importing Group Segment Filters tutorial.

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