

Employer eServices®

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

Audience: Employers & Brokers

Module Length: Approximately 3 Minutes

Last Updated: July 11th, 2007

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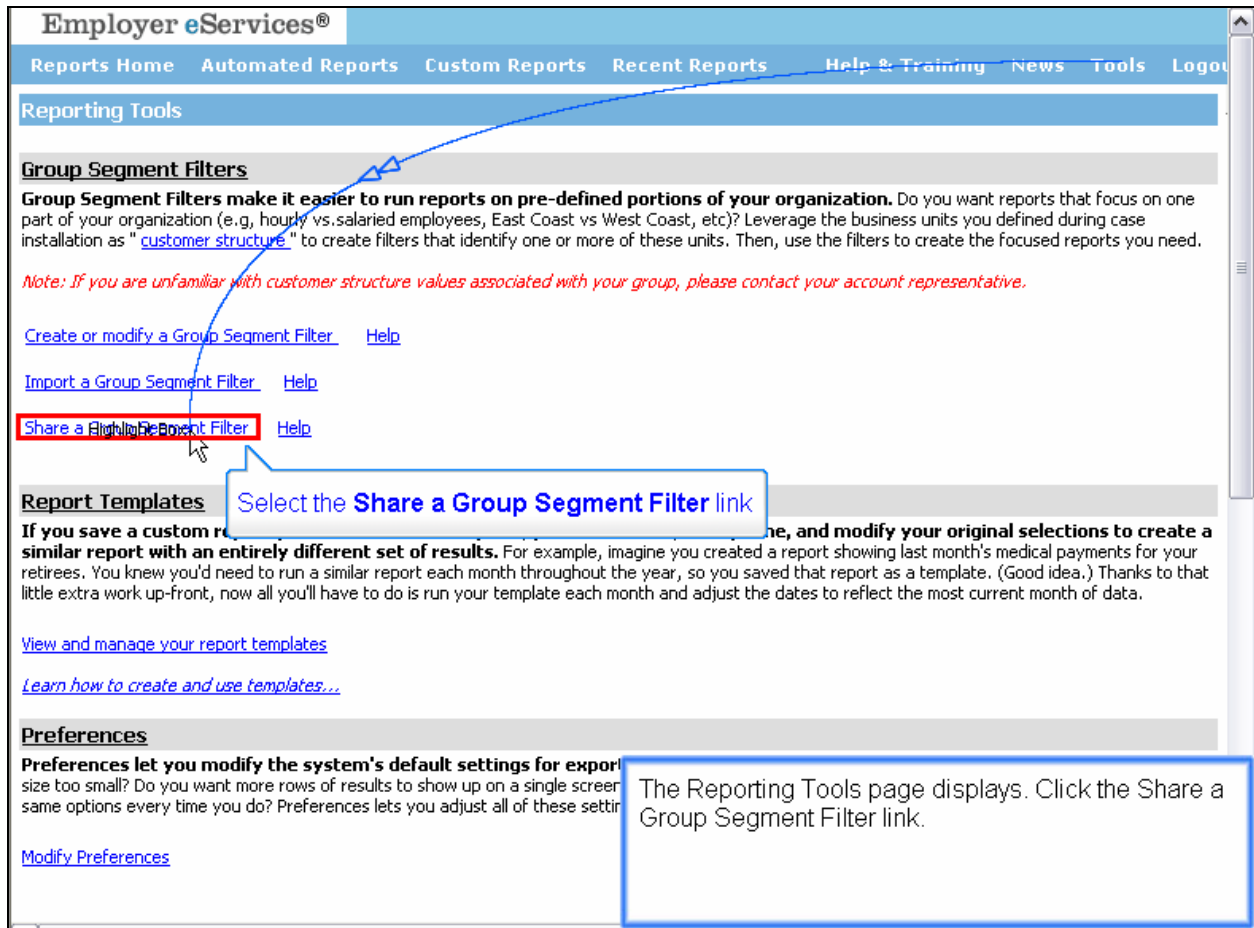
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The screenshot displays the Employer eServices website interface. At the top, a navigation bar includes links for Reports Home, Automated Reports, Custom Reports, Recent Reports, Help & Training, News, Tools, and Logout. The 'Tools' link is highlighted with a red box and a callout bubble that says 'Click the Tools menu option'. Below the navigation bar, the page is divided into several sections. On the left, there is a 'View Automated Reports' section with a 'Key Accounts' folder icon and a description: 'View, print and export reports eServices Customer Reporting has created for you.' Below this is a 'Run Custom Reports' section with a folder icon and a list of report options: 'Claim Expenses by Size of Payment', 'Claim Laq 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)'. On the right side, there is a 'Help &' section with contact information: 'Maintenance Period: Nightly 10 p.m. - 7 a.m. (ET)', 'Phone: 1-800-651-5465', and 'E-mail: CustRept_Help@uhc.com'. Below this are links for 'Help with a Specific Report', 'Frequently Asked Questions', 'Glossary of Terms', 'Online Tutorials', and 'Printable Reference Materials'. Further down is a 'Reporting News' section with dates and headlines: '5/14/2007 Issue in Healthcare Management Summary Report Resolved', '5/4/2007 "Facility R & C" Reports Now Accessible via Automated Reports', and '4/30/2007 Health Reimbursement Account (HRA) Data Now Available on Medical and Managed Pharmacy Reports'. A 'More News...' link is also present. A large blue-bordered box at the bottom right of the screenshot contains the text: 'Let's get started. To begin, click the Tools menu option from the Reports Home page.'

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

Share a Group Segment Filter

This page lets you share a Group Segment Filter (GSF) with anyone who uses eServices Customer Reporting. Sharing filters alleviates the risk of duplicate work efforts, and lets you work more collaboratively across your team. [Help](#)

Step 1: Select a Group Segment Filter to Share

Click the name of the filter you want to share from the list below. The filter you choose will appear in the **Selected GSF** field. Only 1 selection is permitted. [Help](#)

Test Filter	Import Filter Test
Home Office Employees	Testing #2
Sales & Marketing	Divisions 2 and 3 Only

Selected GSF:

Step 2: Identify the Person to Share this Filter With

Type a User ID into the field below, and click the **Find User** button. The name of the person associated with the ID will appear in the **Selected User** field. To confirm this is the person with whom you want to share the filter. If it is correct, click the **Share** button. IDs are case sensitive. To obtain a User ID, you must contact that person directly. [Help](#)

User ID:

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The Share a Group Segment Filter page displays.

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Test Filter	Import/Export
Home Office Employees	Testing #2
Sales & Marketing	Divisions 2 and

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User ID:

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Select the filter you would like to share with another Customer Reporting user from the list in Step 1. Note that only one filter may be selected at a time.

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User ID:

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User ID: **Find User**

Selected User:

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When you have finished, click the Find User button.

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User ID:

Selected User: Shannon Demeulemeester

Your filter is shared. Please wait while the System shares the filter.

Click the **Share** button

The user's full name appears in the Selected User field. If this is the correct individual, click the Share button.

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User ID:

Selected User:

Congratulations! Your filter was successfully sent to sdemeul4

A message appears at the bottom of the screen to confirm that your filter has been shared. The filter you have shared will now appear in the My Filters list for the receiving user.

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