

Employer eServices®

Welcome to the Using Advanced Options Tutorial

Audience: Employers & Brokers

Module Length: 8 minutes

Last Updated: 07/11/2007

1. Intro

2. Adding Details

3. Limiting Results

4. Display Report

5. Try It!

(X:0; Y:470)

Welcome to the Using Advanced Options tutorial. In this tutorial, you will learn how to add details to and limit the results of a report using the Advanced Options.

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Employer eServices®

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

Reports Home > ECR > Manage Your Report Templates > Payments by Benefit Type Template > **Payments by Benefit Type**

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. There are no selections available in this option.

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 (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 results (e.g. show results for "active" employees only).

Show Advanced Options

RENAME YOUR REPORT

1. Intro
2. Adding Details
3. Limiting Results
4. Display Report
5. Try It!
(X:0; Y:470)

In this section of the tutorial, you'll learn to add more details to a report using Advanced Options. This section is available on a number of reports, but for this example we'll use a Payments by Benefit Type report.

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Reports Home > ECR > Manage Your Report Templates > Payments by Benefit Type Template > **Payments by Benefit Type**

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There are no selections available in this option.

STEP 2: SELECT A DATE TYPE* (Required)

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This option allows only one selection.

Service Dates
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 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

Click the **Show Advanced Options** button

RENAME YOUR REPORT

1. Intro
2. Adding Details
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To begin, click the Show Advanced Options button below Step 2.

To begin, click the Show Advanced Options button below Step 2.

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 is a breadcrumb trail: Reports Home > ECR > Manage Your Report Templates > Payments by Benefit Type Template > Payments by Benefit Type.

The main content area is titled 'OR Select a Group Segment Filter'. It explains that a Group Segment Filter contains information for a subset of a company's claimant population and that there are no selections available in this option.

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 accounts (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 report for "active" employees only.

Hide Advanced Options

STEP 3: ADD MORE DETAILS TO THIS REPORT

At the bottom, there is a navigation bar with five buttons: 1. Intro, 2. Adding Details, 3. Limiting Results, 4. Display Report, and 5. Try It!. The '2. Adding Details' and '4. Display Report' buttons are highlighted in blue. Below the buttons, the coordinates '(X:0; Y:470)' are visible.

A blue box on the right side of the screenshot contains the text: 'The Advanced Options now display as the next two steps. Now scroll down to view the first of these two steps.'

The Advanced Options now display as the next two steps. Now scroll down to view the first of these two steps.

STEP 3: ADD MORE DETAILS TO THIS REPORT

Adding details lets you view results for topics beyond the original scope of this report. For example, selecting "Gender" lets you see how results are distributed. This option cannot accept more than 6 selections.

Available:

- Master Group Number
- Policy Number
- Suffix
- Account
- Plan Variation
- Report Code
- Franchise Code 1
- Franchise Code 2
- Policy Number&Suffix
- Policy Number&Account

Selected:

--- none ---

STEP 4: LIMIT THE REPORT'S RESULTS

Limiting your report's results lets you target selected data values. For example, if you select "Employment Status" from the list below, you can limit results to a specific value. The actual values after you click CONTINUE. No answer is required for this option.

Available:

- Master Group Number - Include
- Benefit Type Hierarchy
- Customer Specific Identifier 1 - Include
- Customer Specific Identifier 1 - Exclude
- Customer Specific Identifier 2 - Include
- Customer Specific Identifier 2 - Exclude
- Employment Status - Include
- Funding Arrangement Category - Include

Selected:

--- none ---

1. Intro

2. Adding Details

3. Limiting Results

4. Display Report

5. Try It!

(X:0; Y:470)

The Add More Details to This Report section displays allowing you to include additional information to your report without affecting the grand total.

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Available:

- Master Group Number
- Policy Number
- Suffix
- Account
- Plan Variation
- Report Code
- Franchise Code 1
- Franchise Code 2
- Policy Number&Suffix
- Policy Number&Account

Selected:

--- none ---

STEP 4: LIMIT THE REPORT'S RESULTS

Limiting your report's results lets you target selected data values. For example, if you select "Employment Status" from the list below, you can limit results to the actual values after you click CONTINUE. No answer is required for this option.

Available:

- Master Group Number - Include
- Benefit Type Hierarchy
- Customer Specific Identifier 1 - Include
- Customer Specific Identifier 1 - Exclude
- Customer Specific Identifier 2 - Include
- Customer Specific Identifier 2 - Exclude
- Employment Status - Include
- Funding Arrangement Category - Include

Selected:

--- none ---

1. Intro

2. Adding Details

3. Limiting Results

4. Display Report

5. Try It!

(X:0; Y:470)

Let's add details to our report. Select a variable from the Available field then click the right arrow button to move it to the Selected field.

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STEP 3: ADD MORE DETAILS TO THIS REPORT

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Available:

- Master Group Number
- Policy Number
- Suffix
- Account
- Plan Variation
- Report Code
- Franchise Code 1
- Franchise Code 2
- Policy Number&Suffix
- Policy Number&Account

Selected:

--- none ---

STEP 4: LIMIT THE REPORT'S RESULTS

Limiting your report's results lets you target selected data values. For example, if you select "Employment Status" from the list below, you can limit results to a specific value. The actual values after you click CONTINUE. No answer is required for this option.

Available:

- Master Group Number - Include
- Benefit Type Hierarchy
- Customer Specific Identifier 1 - Include
- Customer Specific Identifier 1 - Exclude
- Customer Specific Identifier 2 - Include
- Customer Specific Identifier 2 - Exclude
- Employment Status - Include
- Funding Arrangement Category - Include

Selected:

--- none ---

1. Intro

2. Adding Details

3. Limiting Results

4. Display Report

5. Try It!

(X:0; Y:470)

You can select up to six variables in most reports. Note that your choices here are defined by the report parameters you selected.

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STEP 3: ADD MORE DETAILS TO THIS REPORT

Adding details lets you view results for topics beyond the original scope of this report. For example, selecting "Gender" lets you see how results are distributed. This option cannot accept more than 6 selections.

Available:

- Benefit Type Category
- Benefit Type Detail
- Customer Specific Identifier1
- Customer Specific Identifier2
- Employment Status
- Funding Arrangement Category
- Gender** (highlighted with a red box and a callout: "Select the appropriate variable")
- Healthcare Cost Category
- HMO Account Division
- Market Number

Selected: --- none ---

STEP 4: LIMIT THE REPORT'S RESULTS

Limiting your report's results lets you target selected data values. For example, if you select "Employment Status" from the list below, you can limit results to the actual values after you click CONTINUE. No answer is required for this option.

Available:

- Master Group Number - Include
- Benefit Type Hierarchy
- Customer Specific Identifier 1 - Include
- Customer Specific Identifier 1 - Exclude
- Customer Specific Identifier 2 - Include
- Customer Specific Identifier 2 - Exclude
- Employment Status - Include
- Funding Arrangement Category - Include

Selected: --- none ---

1. Intro
2. Adding Details
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(X:0; Y:470)

In this example, we'll select two variables, with gender as the first variable.

In this example, we'll select two variables, with gender as the first variable.

STEP 3: ADD MORE DETAILS TO THIS REPORT

Adding details lets you view results for topics beyond the original scope of this report. For example, selecting "Gender" lets you see how results are distributed. This option cannot accept more than 6 selections.

Available:

- Benefit Type Category
- Benefit Type Detail
- Customer Specific Identifier1
- Customer Specific Identifier2
- Employment Status
- Funding Arrangement Category
- Gender**
- Healthcare Cost Category
- HMO Account Division
- Market Number

Selected:

--- none ---

Click the **right arrow** button

STEP 4: LIMIT THE REPORT'S RESULTS

Limiting your report's results lets you target selected data values. For example, if you select "Employment Status" from the list below, you can limit results to the actual values after you click CONTINUE. No answer is required for this option.

Available:

- Master Group Number - Include**
- Benefit Type Hierarchy
- Customer Specific Identifier 1 - Include
- Customer Specific Identifier 1 - Exclude
- Customer Specific Identifier 2 - Include
- Customer Specific Identifier 2 - Exclude
- Employment Status - Include
- Funding Arrangement Category - Include

Selected:

--- none ---

1. Intro

2. Adding Details

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5. Try It!

(X:0; Y:470)

Highlight Gender in the Available field and then click the right arrow button to move that variable to the Selected field.

Highlight Gender in the Available field and then click the right arrow button to move that variable to the Selected field.

STEP 3: ADD MORE DETAILS TO THIS REPORT

Adding details lets you view results for topics beyond the original scope of this report. For example, selecting "Gender" lets you see how results are distributed. This option cannot accept more than 6 selections.

Available:

- Market Name
- Market Number&Name
- Medicare Status
- Payee
- Payment Type Category
- Payment Type
- LHC Product Name
- Traditional Product Name
- Product** Highlight Box
- Industry/Product

Selected:

- Gender

Select the appropriate variable

STEP 4: LIMIT THE REPORT'S RESULTS

Limiting your report's results lets you target selected data values. For example, if you select "Employment Status" from the list below, you can limit results to the actual values after you click CONTINUE. No answer is required for this option.

Available:

- Master Group Number - Include
- Benefit Type Hierarchy
- Customer Specific Identifier 1 - Include
- Customer Specific Identifier 1 - Exclude
- Customer Specific Identifier 2 - Include
- Customer Specific Identifier 2 - Exclude
- Employment Status - Include
- Funding Arrangement Category - Include

Selected:

- none ---

1. Intro

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To add the next variable, scroll down and highlight it. In this example, we will highlight Product.

To add the next variable, scroll down and highlight it. In this example, we will highlight Product.

STEP 3: ADD MORE DETAILS TO THIS REPORT

Adding details lets you view results for topics beyond the original scope of this report. For example, selecting "Gender" lets you see how results are distributed. This option cannot accept more than 6 selections.

Available:

- Market Name
- Market Number&Name
- Medicare Status
- Payee
- Payment Type Category
- Payment Type
- LHC Product Name
- Traditional Product Name
- Product
- Industry Product

Selected:

- Gender

Click the **right arrow** button

STEP 4: LIMIT THE REPORT'S RESULTS

Limiting your report's results lets you target selected data values. For example, if you select "Employment Status" from the list below, you can limit results to the actual values after you click CONTINUE. No answer is required for this option.

Available:

- Master Group Number - Include
- Benefit Type Hierarchy
- Customer Specific Identifier 1 - Include
- Customer Specific Identifier 1 - Exclude
- Customer Specific Identifier 2 - Include
- Customer Specific Identifier 2 - Exclude
- Employment Status - Include
- Funding Arrangement Category - Include

Selected:

- none ---

1. Intro

2. Adding Details

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(X:0; Y:470)

Click the right arrow button to move that variable to the Selected field.

Click the right arrow button to move that variable to the Selected field.

STEP 3: ADD MORE DETAILS TO THIS REPORT

Adding details lets you view results for topics beyond the original scope of this report. For example, selecting "Gender" lets you see how results are distribute. This option cannot accept more than 6 selections.

Available:

- Market Name
- Market Number&Name
- Medicare Status
- Payee
- Payment Type Category
- Payment Type
- LHC Product Name
- Traditional Product Name
- Product
- Industry Product

Selected:

- Gender
- Product

STEP 4: LIMIT THE REPORT'S RESULTS

Limiting your report's results lets you target selected data values. For example, if you select "Employment Status" from the list below, you can limit results to the actual values after you click CONTINUE. No answer is required for this option.

Available:

- Master Group Number - Include
- Benefit Type Hierarchy
- Customer Specific Identifier 1 - Include
- Customer Specific Identifier 1 - Exclude
- Customer Specific Identifier 2 - Include
- Customer Specific Identifier 2 - Exclude
- Employment Status - Include
- Funding Arrangement Category - Include

Selected:

- none ---

1. Intro

2. Adding Details

3. Limiting Results

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5. Try It!

(X:0; Y:470)

You've completed the Add More Details to this Report section. Now scroll down to move on to the next section.

You've completed the Add More Details to this Report section. Now scroll down to move on to the next section.

The screenshot displays a software interface for configuring a report. At the top, there are several dropdown menus for filtering: 'Payment Type', 'UHC Product Name', 'Traditional Product Name', 'Product', and 'Industry Product'. Below these is a section titled 'STEP 4: LIMIT THE REPORT'S RESULTS'. The text explains that limiting results allows targeting specific data values and that no answer is required for this option. It features two lists: 'Available:' and 'Selected:'. The 'Available:' list includes items like 'Master Group Number - Include', 'Benefit Type Hierarchy', and 'Employment Status - Include'. The 'Selected:' list currently contains '--- none ---'. Below this is a 'RENAME YOUR REPORT' section with a text input field containing 'Payments by Benefit Type' and a 'Rename Report' button. At the bottom left, a navigation bar shows five steps: '1. Intro', '2. Adding Details', '3. Limiting Results', '4. Display Report', and '5. Try It!'. A tooltip box on the right side of the interface contains the text: 'In this section of the tutorial, you'll learn how to limit the report's results.'

In this section of the tutorial, you'll learn how to limit the report's results.

Payment Type
UHC Product Name
Traditional Product Name
Product
Industry Product

STEP 4: LIMIT THE REPORT'S RESULTS

Limiting your report's results lets you target selected data values. For example, if you select "Employment Status" from the list below, you can limit results to the actual values after you click CONTINUE.
No answer is required for this option.

Available:
Master Group Number - Include
Benefit Type Hierarchy
Customer Specific Identifier 1 - Include
Customer Specific Identifier 1 - Exclude
Customer Specific Identifier 2 - Include
Customer Specific Identifier 2 - Exclude
Employment Status - Include
Funding Arrangement Category - Include
Gender - Include
Healthcare Cost Category - Include

Selected:
--- none ---

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 Benefit Type Rename Report

1. Intro
2. Adding Details
3. Limiting Results
4. Display Report
5. Try It!

(X:0; Y:470)

The Limit the Report's Results section displays. This section allows you to narrow the focus of the custom report by selecting the items to be included in the report, like selecting gender and then limiting to males.

The Limit the Report's Results section displays. This section allows you to narrow the focus of the custom report by selecting the items to be included in the report, like selecting gender and then limiting to males.

The screenshot shows a web-based report configuration interface. At the top, there are dropdown menus for 'Payment Type' (set to 'Industry Product'), 'UHC Product Name', 'Traditional Product Name', and 'Product'. Below this is a section titled 'STEP 4: LIMIT THE REPORT'S RESULTS'. The text explains that limiting results allows targeting specific data values and provides an example of selecting 'Employment Status'. Below the text are two lists: 'Available:' and 'Selected:'. The 'Available:' list includes options like 'Master Group Number - Include', 'Benefit Type Hierarchy', and 'Employment Status - Include'. The 'Selected:' list currently contains '--- none ---'. Below this is a 'RENAME YOUR REPORT' section with a text input field containing 'Payments by Benefit Type' and a 'Rename Report' button. At the bottom left, there is a navigation bar with buttons for '1. Intro', '2. Adding Details', '3. Limiting Results', '4. Display Report', and '5. Try It!'. A callout box on the right side of the interface contains the text: 'Like the Add More Details to this Report section, your choices are defined by the required report parameters selected. Since you're limiting the results, the grand total is typically less.'

Like the Add More Details to this Report section, your choices are defined by the required report parameters selected. Since you're limiting the results, the grand total is typically less.

Payment Type
UHC Product Name
Traditional Product Name
Product
Industry Product

STEP 4: LIMIT THE REPORT'S RESULTS

Limiting your report's results lets you target selected data values. For example, if you select "Employment Status" from the list below, you can limit results to the actual values after you click CONTINUE.
No answer is required for this option.

Available:
Master Group Number - Include
Benefit Type Hierarchy
Customer Specific Identifier 1 - Include
Customer Specific Identifier 1 - Exclude
Customer Specific Identifier 2 - Include
Customer Specific Identifier 2 - Exclude
Employment Status - Include
Funding Arrangement Category - Include
Gender - Include
Healthcare Cost Category - Include

Selected:
--- none ---

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 Benefit Type Rename Report

1. Intro
2. Adding Details
3. Limiting Results
4. Display Report
5. Try It!

(X:0; Y:470)

Each variable ends with Include, Exclude, or Hierarchy. Refer to the Glossary for definitions of these terms. When you choose any of these variables, you will have to make additional selections.

Each variable ends with Include, Exclude, or Hierarchy. Refer to the Glossary for definitions of these terms. When you choose any of these variables, you will have to make additional selections.

The screenshot shows a software interface for configuring a report. At the top, there are dropdown menus for 'Payment Type' (set to 'Industry Product'), 'UHC Product Name', 'Traditional Product Name', and 'Product'. Below this is a section titled 'STEP 4: LIMIT THE REPORT'S RESULTS'. It contains explanatory text: 'Limiting your report's results lets you target selected data values. For example, if you select "Employment Status" from the list below, you can limit results to the actual values after you click CONTINUE. No answer is required for this option.' Below the text are two columns: 'Available:' and 'Selected:'. The 'Available:' list includes items like 'Master Group Number - Include', 'Benefit Type Hierarchy', 'Customer Specific Identifier 1 - Include', 'Customer Specific Identifier 1 - Exclude', 'Customer Specific Identifier 2 - Include', 'Customer Specific Identifier 2 - Exclude', 'Employment Status - Include', 'Funding Arrangement Category - Include', 'Gender - Include', 'Healthcare Cost Category - Include', and 'Highlight Box'. The 'Selected:' column currently shows '--- none ---'. A blue callout box with arrows points to the 'Available:' list and contains the text 'Select the appropriate variable'. Below this is a 'RENAME YOUR REPORT' section with a text field containing 'Payments by Benefit Type' and a 'Rename Report' button. At the bottom left, there is a navigation bar with buttons for '1. Intro', '2. Adding Details', '3. Limiting Results', '4. Display Report', and '5. Try It!'. A blue callout box on the right side of the interface contains the text: 'In this example, we will select two choices. Highlight Gender - Include.'

In this example, we will select two choices. Highlight Gender - Include.

The screenshot shows a web-based report configuration interface. At the top, there are dropdown menus for 'Payment Type' (set to 'Industry Product'), 'UHC Product Name', 'Traditional Product Name', and 'Product'. Below this is a section titled 'STEP 4: LIMIT THE REPORT'S RESULTS'. It contains explanatory text and two lists: 'Available:' and 'Selected:'. The 'Available:' list includes various categories like 'Master Group Number - Include', 'Benefit Type Hierarchy', and 'Gender - Include'. A red box highlights the right arrow button next to 'Gender - Include', with a callout box saying 'Click the right arrow button'. The 'Selected:' list currently contains '--- none ---'. Below this is the 'RENAME YOUR REPORT' section, which has a text input field containing 'Payments by Benefit Type' and a 'Rename Report' button. At the bottom left, there is a navigation bar with buttons for '1. Intro', '2. Adding Details', '3. Limiting Results', '4. Display Report', and '5. Try It!'. A callout box on the right side of the bottom section says 'Click the right arrow button to move that variable to the Selected field.'

Click the right arrow button to move that variable to the Selected field.

The screenshot shows a web-based report configuration interface. At the top, there are dropdown menus for 'Payment Type' (set to 'Industry Product') and 'Product' (set to 'Industry Product'). Below this is a section titled 'STEP 4: LIMIT THE REPORT'S RESULTS'. The text explains that limiting results allows targeting specific data values. A list of 'Available' variables is shown on the left, with 'Product Hierarchy' highlighted in red. A 'Selected' list on the right contains 'Gender - Include'. A blue callout box with an arrow points to 'Product Hierarchy' and contains the text 'Select the appropriate variable'. Below this is the 'RENAME YOUR REPORT' section, which includes a text input field containing 'Payments by Benefit Type' and a 'Rename Report' button. At the bottom left, there is a navigation bar with five buttons: '1. Intro', '2. Adding Details', '3. Limiting Results', '4. Display Report', and '5. Try It!'. A blue callout box on the right side of the interface contains the text: 'Scroll down and highlight the other appropriate variable. In this example, we'll select Product Hierarchy.'

Scroll down and highlight the other appropriate variable. In this example, we'll select Product Hierarchy.

The screenshot displays a web-based report configuration tool. At the top, there are dropdown menus for 'Payment Type' (set to 'Industry Product') and 'Product' (set to 'Industry Product'). Below this is a section titled 'STEP 4: LIMIT THE REPORT'S RESULTS'. It contains explanatory text and two columns: 'Available:' and 'Selected:'. The 'Available:' column lists various variables like 'HMO Account Division - Include', 'Market Hierarchy', and 'Product Hierarchy'. The 'Selected:' column currently contains 'Gender - Include'. A red box highlights the right-pointing arrow button between the two columns, with a callout box that says 'Click the right arrow button'. Below this is the 'RENAME YOUR REPORT' section, which has a text input field containing 'Payments by Benefit Type' and a 'Rename Report' button. At the bottom left, there is a navigation bar with buttons for '1. Intro', '2. Adding Details', '3. Limiting Results', '4. Display Report', and '5. Try It!'. A callout box on the right side of the bottom section says 'Click the right arrow button to move that variable to the Selected field.'

Click the right arrow button to move that variable to the Selected field.

STEP 4: LIMIT THE REPORT'S RESULTS

Limiting your report's results lets you target selected data values. For example, if you select "Employment Status" from the list below, you can limit results to the actual values after you click CONTINUE.
No answer is required for this option.

Available:

- HMO Account Division - Include
- HMO Account Division - Exclude
- Market Hierarchy
- Medicare Status - Include
- Payee - Include
- Payment Type Hierarchy
- Product Hierarchy
- RR-AOFO - Include
- Relationship Hierarchy
- Transaction Type Hierarchy

Selected:

- Gender - Include
- Product Hierarchy

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 Benefit Type

Click **CONTINUE** to continue processing this report.

Click the **Continue** button

1. Intro
2. Adding Details
3. Limiting Results
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5. Try It!

Click the Continue button.

Click the Continue button.

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Reports Home > ECR > Manage Your Report Templates > Payments by Benefit Type Template > **Payments by Benefit Type**

STEP 5: Choose Gender(s) - Include* (Required)

This option requires at least one selection.

Search for: Match case

Available: Male Female Unknown

Selected: --- none ---

1 - 3 of 3

STEP 6: Select Product* (Required)

This option allows only one selection.

Available: UHC Product Name - Include Traditional Product Name - Include Industry Product - Include

Selected: --- none ---

1. Intro

2. Adding Details 4. Display Report

3. Limiting Results 5. Try It!

(X:0; Y:470)

In this section of the tutorial, you'll learn to select additional choices triggered by the selections you made in the previous two steps. Then you'll display the report results that you have added and limited.

In this section of the tutorial, you'll learn to select additional choices triggered by the selections you made in the previous two steps. Then you'll display the report results that you have added and limited.

The screenshot shows the 'Employer eServices' web application. The breadcrumb trail is: Reports Home > ECR > Manage Your Report Templates > Payments by Benefit Type Template > Payments by Benefit Type. The main content area is divided into two steps:

- STEP 5: Choose Gender(s) - Include* (Required)**
This option requires at least one selection.
Search for: [input] Match case
Available: [List Box] Selected: [Dropdown: --- none ---]
Available list items: Highlight Box (highlighted in red), Male, Unknown.
A blue callout box points to the 'Highlight Box' item with the text: "Select the the appropriate variable".
- STEP 6: Select Product* (Required)**
This option allows only one selection.
Available: [List Box] Selected: [Dropdown: --- none ---]
Available list items: UHC Product Name - Include, Traditional Product Name - Include, Industry Product - Include.

At the bottom of the interface, there is a navigation bar with buttons: 1. Intro, 2. Adding Details, 3. Limiting Results, 4. Display Report, 5. Try It! Below these buttons is the text: (X:0; Y:470).

A blue callout box at the bottom right of the screenshot contains the text: "Because we selected the Gender - Include variable we have to select which genders should be included in this list. In this example, we will highlight Male."

Because we selected the Gender - Include variable we have to select which genders should be included in this list. In this example, we will highlight Male.

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 is a breadcrumb trail: Reports Home > ECR > Manage Your Report Templates > Payments by Benefit Type Template > Payments by Benefit Type.

STEP 5: Choose Gender(s) - Include* (Required)
This option requires at least one selection.
Search for: Match case

Available: Male, Female, Unknown
Selected: --- none ---

1 - 3 of 3

STEP 6: Select Product* (Required)
This option allows only one selection.
Available: UHC Product Name - Include, Traditional Product Name - Include, Industry Product - Include
Selected: --- none ---

Navigation buttons: 1. Intro, 2. Adding Details, 3. Limiting Results, 4. Display Report, 5. Try It!

Callout boxes:
- One points to the right arrow button in Step 5 with the text: "Click the right arrow button".
- Another points to the right arrow button in Step 6 with the text: "Click the right arrow button to move that variable to the Selected field."

Click the right arrow button to move that variable to the Selected field.

The screenshot shows the Employer eServices interface. The breadcrumb trail is: Reports Home > ECR > Manage Your Report Templates > Payments by Benefit Type Template > Payments by Benefit Type. The main content area is divided into two steps:

- STEP 5: Choose Gender(s) - Include* (Required)**
This option requires at least one selection.
Search for: [input] Match case
Available: [List: Male, Female, Unknown] Selected: [List: Male]
1 - 3 of 3
- STEP 6: Select Product* (Required)**
This option allows only one selection.
Available: [List: UHC Product Name - Include, Traditional Product Name - Include, Industry Product - Include] Selected: [List: --- none ---]

At the bottom, there is a navigation bar with buttons: 1. Intro, 2. Adding Details, 3. Limiting Results, 4. Display Report, 5. Try It!. A callout box on the right side of the interface contains the text: "Scroll down to view the next step."

Scroll down to view the next step.

The screenshot shows the 'Employer eServices' web application. The breadcrumb trail is: Reports Home > ECR > Manage Your Report Templates > Payments by Benefit Type Template > Payments by Benefit Type. The main content area is titled 'STEP 6: Select Product* (Required)'. Below this, it says 'This option allows only one selection.' There are two columns: 'Available:' and 'Selected:'. The 'Available:' list includes 'UHC Product Name - Include', 'Traditional Product Name - Include', 'Industry Product - Include', 'Product - Include', and 'Product - Exclude'. The 'Product - Include' item is highlighted with a red box. A blue callout box with an arrow points to this item, containing the text 'Select the appropriate variable'. The 'Selected:' column currently shows '--- none ---'. Below Step 6 is 'STEP 7: SELECT SERVICE DATES* (Required)'. It says 'Your report will be limited to **services rendered** (i.e., claims incurred) during the months you select. [Help](#)'. Below this, it says 'This option requires at least one selection.' There is a search field and a 'Match case' checkbox. The 'Available:' list shows '2006-06' and '2006-05'. The 'Selected:' list also shows '2006-06' and '2006-05'. At the bottom of the page, there are five buttons: '1. Intro', '2. Adding Details', '3. Limiting Results', '4. Display Report', and '5. Try It!'. A text box at the bottom right of the screenshot contains the text: 'We also selected the Product Hierarchy variable. Now we have to select the hierarchy to be included in the report. Here, we'll select the Product - Include variable. This will trigger another choice selection.'

We also selected the Product Hierarchy variable. Now we have to select the hierarchy to be included in the report. Here, we'll select the Product - Include variable. This will trigger another choice selection.

The screenshot shows the 'Employer eServices' web application. The breadcrumb trail is: Reports Home > ECR > Manage Your Report Templates > Payments by Benefit Type Template > Payments by Benefit Type. The main content area is divided into two steps:

- STEP 6: Select Product* (Required)**
This option allows only one selection.
Available: LHC Product Name - Include, Traditional Product Name - Include, Industry Product - Include, Product - Include, Product - Exclude.
Selected: --- none ---
A red box highlights the right arrow button between the Available and Selected lists. A callout box says 'Click the right arrow button'.
- STEP 7: SELECT SERVICE DATES* (Required)**
Your report will be limited to **services rendered** (i.e., claims incurred) during the months you select. [Help](#)
This option requires at least one selection.
Search for: [input] [magnifying glass] Match case
Available: 2006-06, 2006-05
Selected: 2006-06, 2006-05

At the bottom, there is a navigation bar with buttons: 1. Intro, 2. Adding Details, 3. Limiting Results, 4. Display Report, 5. Try It!. A callout box on the right says: 'Click the right arrow button to move that variable to the Selected field.'

Click the right arrow button to move that variable to the Selected field.

The screenshot shows the 'Employer eServices' web application. The breadcrumb trail is: Reports Home > ECR > Manage Your Report Templates > Payments by Benefit Type Template > Payments by Benefit Type. The main content area is divided into two steps:

- STEP 6: Select Product* (Required)**
This option allows only one selection.
Available: LHC Product Name - Include, Traditional Product Name - Include, Industry Product - Include, Product - Include, Product - Exclude.
Selected: Product - Include.
- STEP 7: SELECT SERVICE DATES* (Required)**
Your report will be limited to **services rendered** (i.e., claims incurred) during the months you select. [Help](#)
This option requires at least one selection.
Search for: Match case
Available: 2006-06, 2006-05
Selected: 2006-06, 2006-05

At the bottom, there is a navigation bar with buttons: 1. Intro, 2. Adding Details, 3. Limiting Results, 4. Display Report, 5. Try It!. A red box highlights the scroll bar on the right side of the main content area. A blue callout box with a speech bubble points to the scroll bar and contains the text: 'Use the scroll bar to view more options'. Another blue callout box at the bottom right contains the text: 'Scroll down to view the next step.'

Scroll down to view the next step.

Employer eServices®

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

Reports Home > ECR > Manage Your Report Templates > Payments by Benefit Type Template > **Payments by Benefit Type**

STEP 7: SELECT SERVICE DATES* (Required)

Your report will be limited to **services rendered** (i.e., claims incurred) during the months you select. [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, 2006-01, 2005-12, 2005-11, 2005-10, 2005-09

1 - 30 of 247

STEP 8: 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.

1. Intro | 2. Adding Details | 3. Limiting Results | 4. Display Report | 5. Try It!

(X:0; Y:470)

Use the scroll bar to view more options

Since this report was originally generated from a template, the remaining choice selections have been saved. You could edit these options for this report, but for this example we'll keep these selections.

Since this report was originally generated from a template, the remaining choice selections have been saved. You could edit these options for this report, but for this example we'll keep these selections.

The screenshot shows the 'Employer eServices' web application. The breadcrumb trail is: Reports Home > ECR > Manage Your Report Templates > Payments by Benefit Type Template > Payments by Benefit Type. The main heading is 'STEP 8: SELECT BOOK DATES* (Required)'. Below this, there is explanatory 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.' There is a search field with a magnifying glass icon and a 'Match case' checkbox. Below the search field are two columns of date lists: 'Available:' and 'Selected:'. The 'Available:' list contains dates from 2006-06 down to 2005-09. The 'Selected:' list contains dates from 2006-06 down to 2005-09. A red box highlights the scroll bar on the right side of the 'Available:' list, with a callout bubble that says 'Use the scroll bar to view more options'. Below the date lists is a 'RENAME YOUR REPORT' section with a text field and a 'Rename Report' button. At the bottom of the page, there is a navigation bar with buttons for '1. Intro', '2. Adding Details', '3. Limiting Results', '4. Display Report', and '5. Try It!'. A note box on the right side of the page contains the text: 'Please note that if you had not used a template to generate this report, then you would have to choose from these available options. Again, we'll keep these selections from the template.'

Please note that if you had not used a template to generate this report, then you would have to choose from these available options. Again, we'll keep these selections from the template.

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, 2006-01, 2005-12, 2005-11, 2005-10, 2005-09

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.

Payments by Benefit Type

Click **CONTINUE** to continue processing this report.

Click the **Continue** button

1. Intro
2. Adding Details
3. Limiting Results
4. Display Report
5. Try It!
(X:0; Y:470)

Most of the choice selections have been made, but we will still have to select the final variable for the Product choice selection. Click the continue button.

Most of the choice selections have been made, but we will still have to select the final variable for the Product choice selection. Click the continue button.

Employer eServices®

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

Reports Home > ECR > Manage Your Report Templates > Payments by Benefit Type Template > **Payments by Benefit Type**

STEP 9: Choose from Product(s) - Include* (Required)

This option requires at least one selection.

Search for: Match case

Available:

- UnitedHealth Basics (UHB)
- HMO Select (HM1)
- GATED HMO Single Contract (HML)
- HMO Select, Small Group (HM2)
- EPO Select (EPO)
- EPO Select (NPP)
- EPO Select (TSP)
- HMO Choice (HM6)**
- HMO Choice, Small Group (HM8)**
- EPO Choice (EV1)

Selected: --- none ---

1 - 30 of 65

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 Benefit Type

1. Intro **2. Adding Details** **3. Limiting Results** **4. Display Report** **5. Try It!**

(X:0; Y:470)

You can select multiple variables by pressing the Shift + Ctrl keys. Here, we'll select HMO Choice and HMO Choice, Small Group.

You can select multiple variables by pressing the Shift + Ctrl keys. Here, we'll select HMO Choice and HMO Choice, Small Group.

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Reports Home > ECR > Manage Your Report Templates > Payments by Benefit Type Template > **Payments by Benefit Type**

STEP 9: Choose from Product(s) - Include* (Required)

This option requires at least one selection.

Search for: Match case

Available:

- UnitedHealth Basics (UHB)
- HMO Select (HM1)
- GATED HMO Single Contract (HML)
- HMO Select, Small Group (HM2)
- EPO Select (EPO)
- EPO Select (NPP)
- EPO Select (TSP)
- HMO Choice (HM6)
- HMO Choice, Small Group (HM8)
- EPO Choice (EP1)

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Selected: --- none ---

Click the **right arrow** button

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 Benefit Type

1. Intro | 2. Adding Details | 3. Limiting Results | 4. Display Report | 5. Try It!

(X:0; Y:470)

Highlight the appropriate products from the Available field. Click the right arrow button to move them to the Selected field.

Highlight the appropriate products from the Available field. Click the right arrow button to move them to the Selected field.

Available:

- UnitedHealth Basics (UHB)
- HMO Select (HM1)
- GATED HMO Single Contract (HML)
- HMO Select, Small Group (HM2)
- EPO Select (EPO)
- EPO Select (NPP)
- EPO Select (TSP)
- HMO Choice (HM6)
- HMO Choice, Small Group (HM8)
- EPO Choice (EP1)

Selected:

- HMO Choice (HM6)
- HMO Choice, Small Group (HM8)

1 - 30 of 651

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 Benefit Type

Click **CONTINUE** to continue processing this report.

Click the **Continue** button

1. Intro

2. Adding Details

3. Limiting Results

4. Display Report

5. Try It!

(X:0; Y:470)

Click the Continue button to generate a report using the adding and limiting definitions we've selected.

Click the Continue button to generate a report using the adding and limiting definitions we've selected.

The screenshot shows the Employer eServices interface. At the top, there is a blue navigation bar with links: Reports Home, Automated Reports, Custom Reports, Recent Reports, Help & Training, News, Tools, and Log out. Below this is a breadcrumb trail: Reports Home > ECR > Custom Reports > Financial > Payments by Benefit Type. The main content area displays a 'Your request is processing... Please Wait.' message with a progress indicator (one grey dot, four red dots). Below the message, it provides report details: Report name: Payments by Benefit Type, Current status: Running Report, and Report description: Distributes reimbursement amounts based upon services offered under a health plan. A section titled 'Please wait or choose one of the following actions:' lists four options: Check status again, Go to the Recent Reports Page while this report continues to process., Show report details, and Cancel. At the bottom left, there is a copyright notice: © 2006 UnitedHealth Group ®, Inc. All Rights Reserved. Confidential. At the bottom of the screenshot, there is a grey navigation bar with buttons for 1. Intro, 2. Adding Details, 3. Limiting Results, 4. Display Report, and 5. Try It!. A blue-bordered box on the right side of the screenshot contains the text: 'The Processing page displays while the system generates your report. Some reports take longer to execute.'

The Processing page displays while the system generates your report. Some reports take longer to execute.

Customer Reporting – Using Advanced Options

Employer eServices®

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

Reports Home > ECR > Custom Reports > Financial > **Payments by Benefit Type**

File View Data Format Last update: 5/1/2006 12:23:04

PAGE-BY: none Data rows: 13

Gender ▲	Product ▲	Benefit Type ▲	Relationship Group Metrics	Subscriber Payments ▼	Spouse Payments ▼	Dependent/Other Payments ▼
Male	HMO Choice (HM6)	200	Medco Health	\$4,776.69	\$309.08	\$721.45
		260	Inpatient Hospital Room & Board	\$2,105.00	\$0.00	\$0.00
		270	Inpatient Hospital Miscellaneous	\$1,725.00	\$0.00	\$0.00
		300	Outpatient Hospital Miscellaneous	\$327.60	\$0.00	\$2,858.00
		310	Emergency Room	\$3,996.15	\$4,381.80	\$1,110.05
		320	Surgery	\$258.93	\$229.29	\$1,673.34
		330	Anesthesia	\$0.00	\$0.00	\$2,822.16
		360	Inpatient Medical	\$538.50	\$0.00	\$0.00
		370	Outpatient/Professional Medical	\$7,229.66	\$1,625.45	\$2,163.84
		410	Outpatient X-Ray and Lab	\$7,787.18	\$1,672.74	\$1,392.58
		420	Outpatient Psychiatric	\$0.00	\$0.00	\$320.00
		490	Pharmacy - Health	\$11.15	\$19.91	\$40.65
		Total				\$28,755.86

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1. Intro

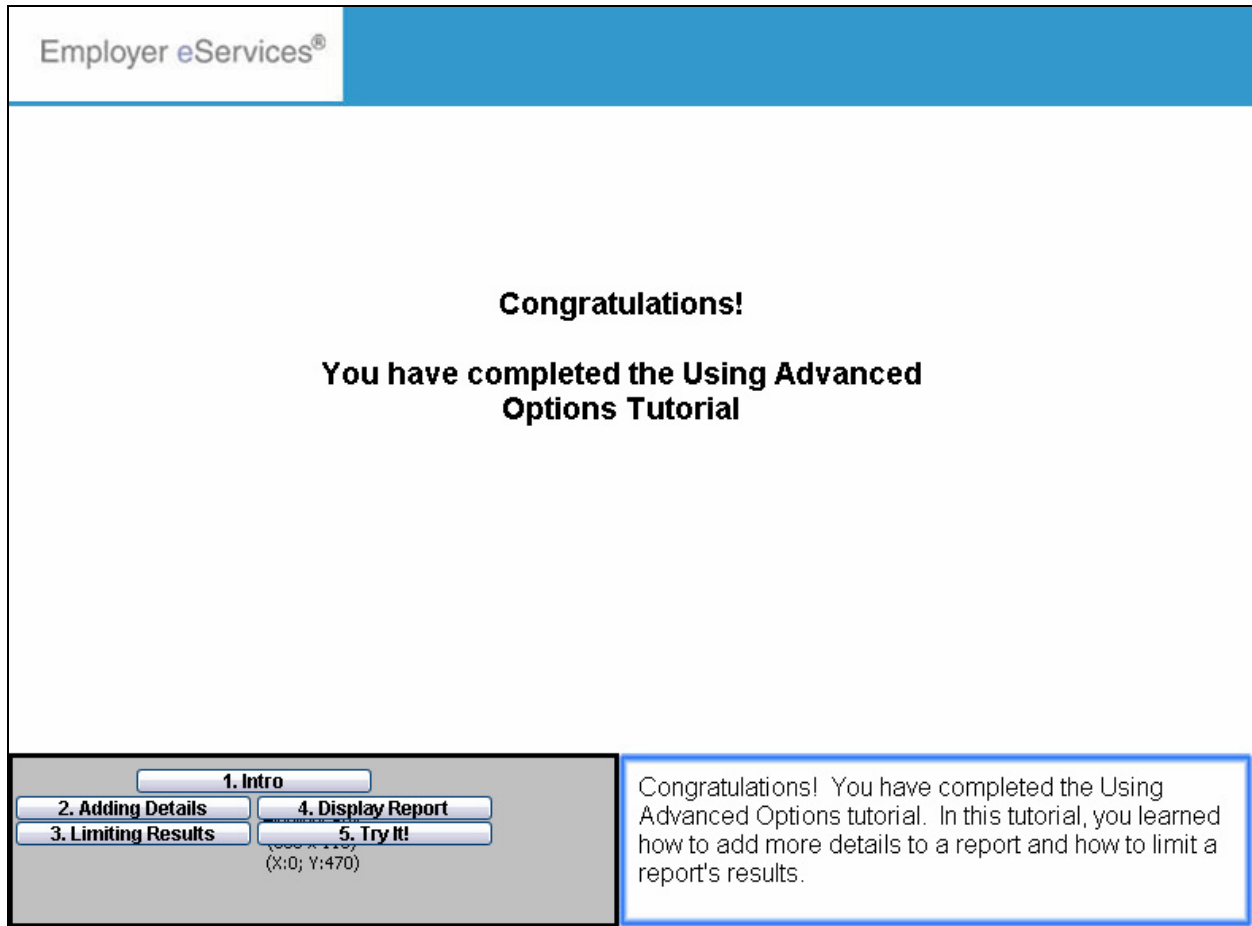
2. Adding Details **4. Display Report**

3. Limiting Results **5. Try It!**

(X:0; Y:470)

The updated Payments by Benefit Type report is displayed. The results are less due to the Advanced Options we selected.

The updated Payments by Benefit Type report is displayed. The results are less due to the Advanced Options we selected.



Employer eServices®

Congratulations!

You have completed the Using Advanced Options Tutorial

1. Intro

2. Adding Details

3. Limiting Results

4. Display Report

5. Try It!

(X:0; Y:470)

Congratulations! You have completed the Using Advanced Options tutorial. In this tutorial, you learned how to add more details to a report and how to limit a report's results.

Congratulations! You have completed the Using Advanced Options tutorial. In this tutorial, you learned how to add more details to a report and how to limit a report's results.