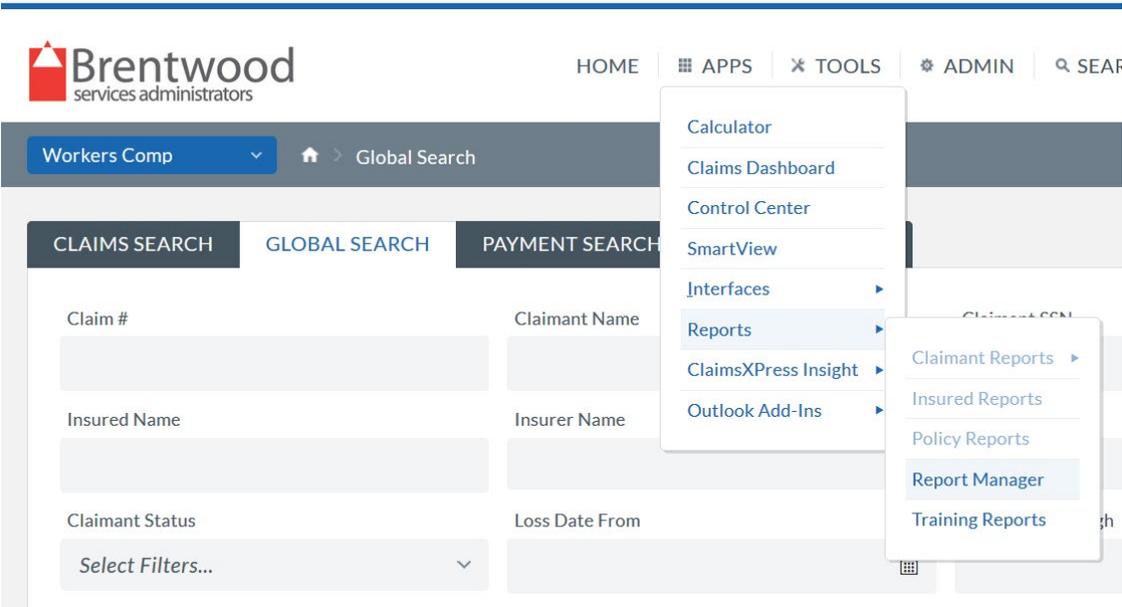


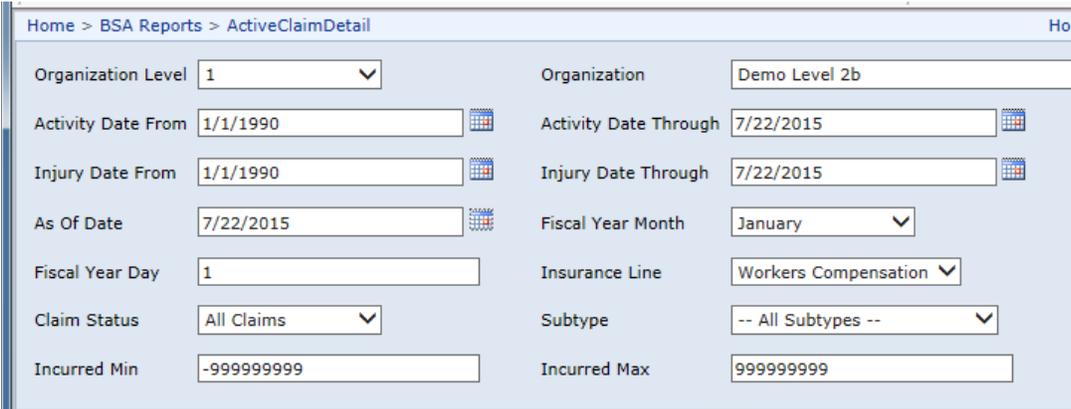
- 1) To get to the Reports section: Navigate to the Apps Menu Option, select Reports > then select Report Manager. This will open a new Internet Explorer window.



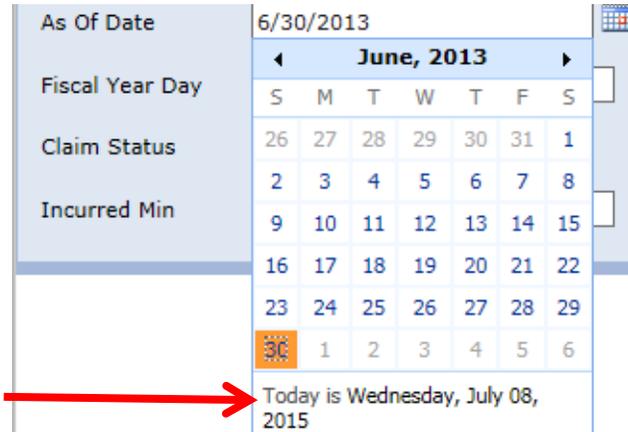
- 2) Select the folder for “BSA Reports”



- 3) For this procedure we are going to focus on the Active Claim Detail report. This report provides detailed information on claims that have had activity performed on them during a specified time period. It details claimant name, claim description, and payment information.
- 4) The fields that must include data for the report to run against are: Organization, Activity Date From, Activity Date Through, Injury Date From, Injury Date Through, and As of Date.

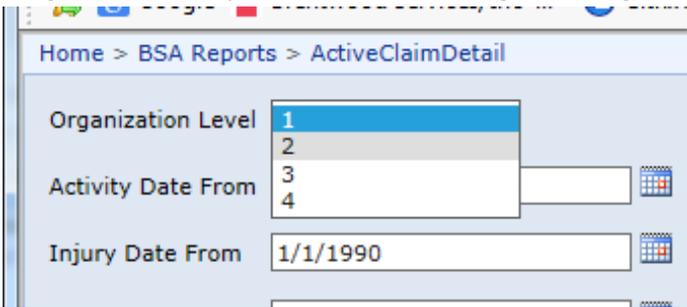


5) If you want to select the current date, you can click the calendar to the right of the field and select where it says "Today is"

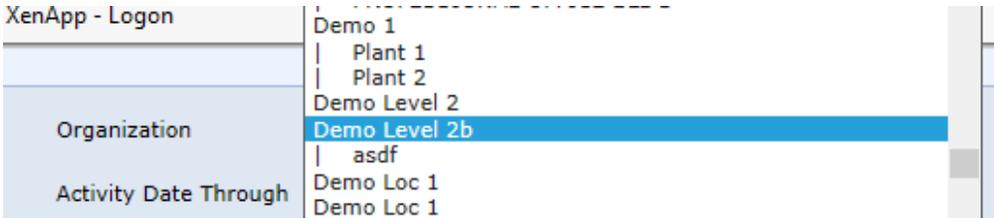


➤ You can also use the calendar to select the date, but this process may be tedious depending on the date range you need.

6) If you want to run the report for a specific location, you must first select the Company from the "Organization" drop down list. Then Change the "Organization Level" to Level 2



7) Then you can hit the drop down list under "Organization" to find the Sub location you are looking for:



➤ If you need an even more specific location you can choose Level 3.

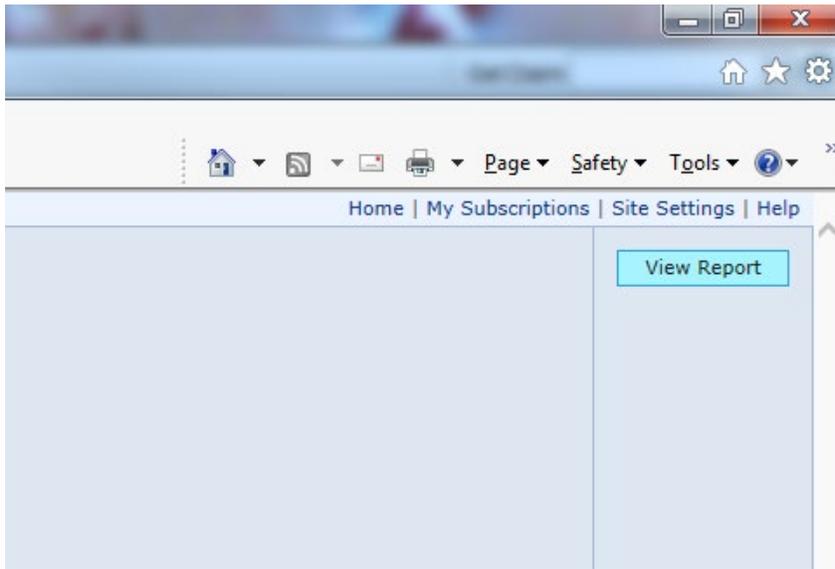
8) Optional parameters you can select are:

- Fiscal Year Month, Fiscal Year Day (January 1 is the default start of the Fiscal Year)
- Insurance Line = this defaults to Workers Comp
- Claim Status (Ex. Open, Reopened, etc.)

- Subtype (Ex. Medical Only, Temporary Total Disability, etc.)
- Incurred Min and Incurred Max amount in dollars
- These options will further narrow down the report data based on the specific results you are trying to generate.

These options will further narrow down the report data based on the specific results you are trying to generate.

- 9) Once you are totally satisfied with these parameters, hit the View Report button in the upper Right hand corner of the screen.



- 10) The report results will appear in the bottom portion of the screen. (Since I'm using demo data there isn't anything to display)

Home > BSA Reports > ActiveClaimDetail

Organization Level: 1 Organization: Demo Loc 1

Activity Date From: 1/1/1990 Activity Date Through: 7/22/2015

Injury Date From: 1/1/1990 Injury Date Through: 7/22/2015

As Of Date: 7/22/2015 Fiscal Year Month: January

Fiscal Year Day: 1 Insurance Line: Workers Compensation

Claim Status: All Claims Subtype: -- All Subtypes --

Incurred Min: -999999999 Incurred Max: 999999999

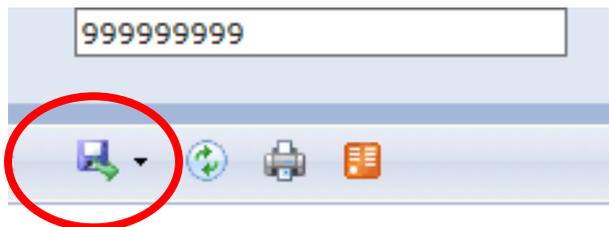
1 of 1 100% Find | Next

Demo Loc 1
 Active Claim Detail - Workers Compensation As of 7/22/2015 Status: All Claims
 Injury dates 1/1/1990 through 7/22/2015 Activity dates 1/1/1990 through 7/22/2015 Incurred between -999,999,999 and 999,999,999

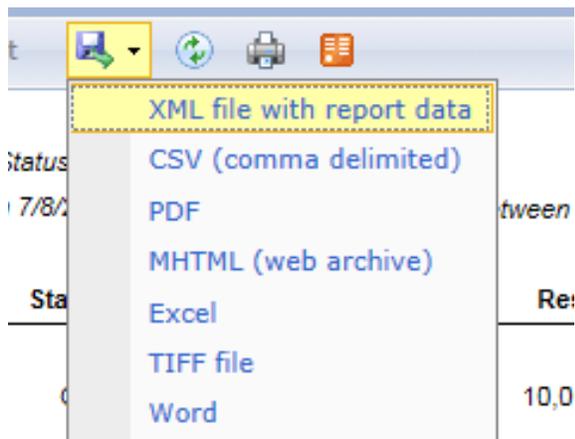
Claim Number	Claim Type	Claimant	Status	Reserve	Paid	Incurred	Paid in Activity Period
Report Totals							
Number		Number Open		Number			
0							
Recovery							Total (Gross)
Excess		Subrogation		Deductible		SIF	Other
To Date							
Activity Period							Total (Net)

Report Date: 7/22/2015 Page 1 of 1

11) To save the report, click the icon that looks like a tiny floppy disk with a green arrow:



12) You can save it as an XML file (to view in internet browser), CSV, PDF, MHTML, Excel, TIFF, or Word.



13) You can also print the report, but note that your browser will need an Active X plugin installed to do so, this can be handled by your local IT administrator.

The screenshot shows a web browser window displaying a claim detail page. The browser's address bar and navigation icons are visible at the top. The page content includes a table with columns for 'Status' (with values 'All Claims', '2/2015', 'Incurred between \$099,999,999 and \$999,999,999', 'atus', 'Reserve', 'Paid') and a summary section with rows for 'Other', 'Total (Gross)', 'Recovery', and 'Total (Net)'. The BSA logo and 'Page 1 of 1' are at the bottom of the page content.

A modal dialog box titled 'Message from webpage' is overlaid on the page. It contains a yellow warning triangle icon and the text 'Unable to load client print control.' with an 'OK' button below it. A blue arrow points from the print icon in the browser's navigation bar to the modal dialog, and another blue arrow points from the modal dialog to the 'OK' button.

A red arrow points from the 'OK' button in the modal dialog to a download bar at the bottom of the browser window. The download bar contains the text: 'This website wants to install the following add-on: 'SQL Server Reporting Services 2008 R2' from 'Microsoft Corporation'. [What's the risk?](#) [Install] x