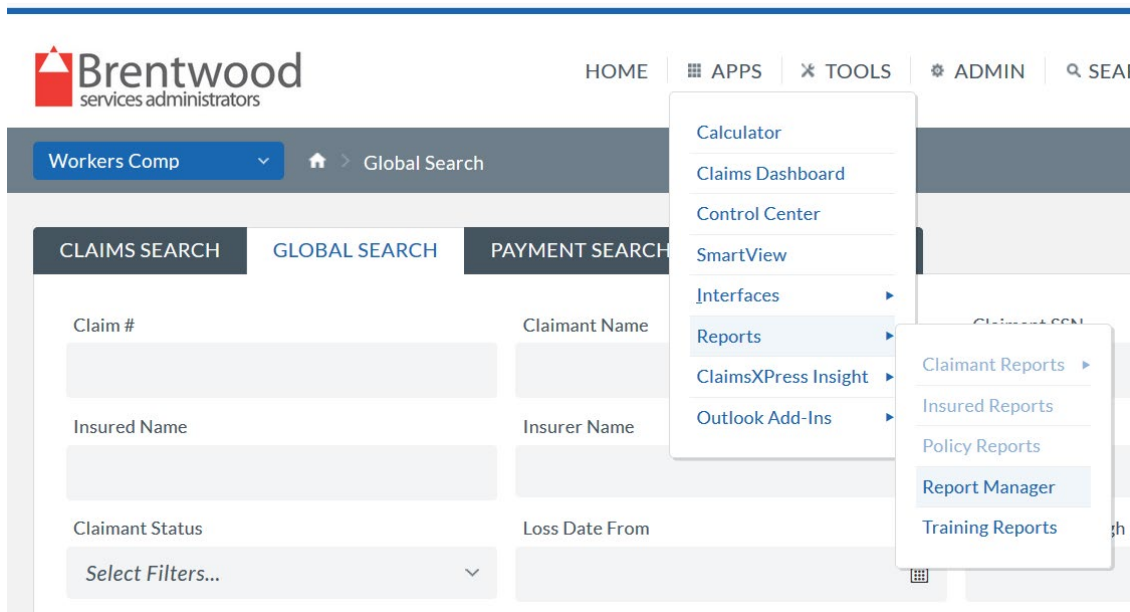


- 1) To get to the Reports section: Navigate to the Apps Menu Option, select Reports > then select Report Manager. This will open a new Internet Explorer window.



- 2) Select the folder for “BSA Reports”



- 3) For the purposes of this Procedure we are going to focus on the Claim Summary Reports. There are multiple versions of this report that sort data in different manners. Here is a brief breakdown of each report:
 - The claim summary report gives an overall summary, for a more detailed report that breaks it down by claim, see the Claim Cost Detail report

Report Name	Report Summary
Claim Summary by Member by Year	Displays a summary for all payment data for the given parameters, then sorts the data first by sub-location, then by Year
Claim Summary by Policy	Displays a summary for all payment data for the given parameters, then sorts the data based on the policy periods the payments occurred
Claim Summary by Year	Displays a summary for all payment data for the given parameters, then sorts the data by year
Claim Summary Excel	Displays a summary of all payment data for the given parameters and puts the information in a format that is easily read in Excel.

- 4) For this example I am going to run the Claim Summary by Year report, though the parameters for the report are the same for all of the Claim Cost Detail report options.
- 5) 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.
 - If you want to run a report for all payment data for the month of June 2015 for all claimants who were injured after January 1 of 2015 you would fill in the fields like this:

Home > BSA Reports > ClaimSummaryByYear

Organization Level: 1 Organization ID: Demo Level 2b

Activity Date From: 6/1/2015 Activity Date Through: 6/30/2015

Injury Date From: 1/1/2015 Injury Date Through: 6/30/2015

As Of Date: 7/9/2015 Fiscal Year Month: January

Fiscal Year Day: 1 Jurisdiction: -- All States --

Insurance Line: Workers Comp Subtype: -- All Subtypes --

- 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"

As Of Date: 6/30/2013

Fiscal Year Day

Claim Status

Incurred Min

Today is Wednesday, July 08, 2015

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

- 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:

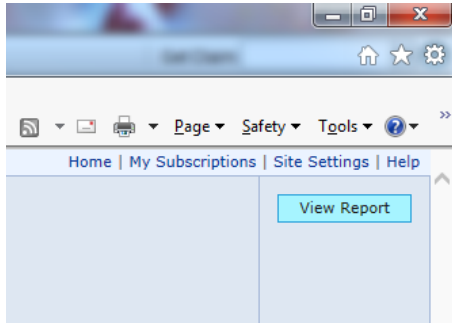
- 8) If you need an even more specific location you can choose Level 3.

- 9) 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
- Jurisdiction = The state you want to see results from
- Subtype (Ex. Medical Only, Temporary Total Disability, etc.)

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

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



11) The report results will appear in the bottom portion of the screen.

Home > BSA Reports > ClaimSummaryByYear

Organization Level: 2 Organization ID: Demo Level 2b

Activity Date From: 1/1/1990 Activity Date Through: 7/9/2015

Injury Date From: 1/1/1990 Injury Date Through: 7/9/2015

As Of Date: 7/9/2015 Fiscal Year Month: January

Fiscal Year Day: 1 Jurisdiction: -- All States --

Insurance Line: Workers Comp Subtype: -- All Subtypes --

1 of 1 100% Find | Next

Demo Level 2b
Claim Summary by Year - Workers Comp As of 7/9/2015 Fiscal period beginning 1/1/XX
Injury dates 1/1/1990 through 7/9/2015 Activity dates 1/1/1990 through 7/9/2015

	Reserve	Paid	Incurred	Incurred Change from Prior Period	Paid in Activity Period
Total for 2015					
Medical	10,000.00	0.00	10,000.00	10,000.00	0.00
Indemnity/Disability	0.00	0.00	0.00	0.00	0.00
Rehab/Case	0.00	0.00	0.00	0.00	0.00
Legal	0.00	0.00	0.00	0.00	0.00
Expense	0.00	0.00	0.00	0.00	0.00
Employers Liability	0.00	0.00	0.00	0.00	0.00
Total	10,000.00	0.00	10,000.00	10,000.00	0.00
Recovery					
Net Incurred			10,000.00		

Activity Period			To Date		
New	Closed		Open	Closed	Total
2	0	Med	2	0	2
1	0	Ind	1	0	1
0	0	Info	0	0	0
3	0	All	3	0	3

Reinsurance	Subrogation	Deductible	SIF	Other
0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00

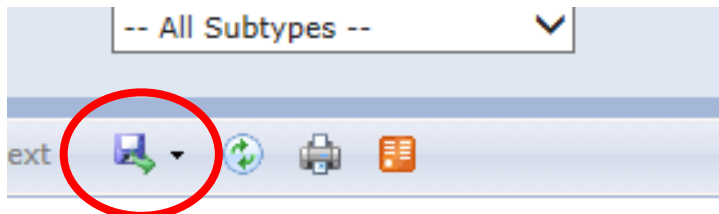
Total for All Years (2015-2015)

	Reserve	Paid	Incurred	Incurred Change from Prior Period	Paid in Activity Period
Medical	10,000.00	0.00	10,000.00	10,000.00	0.00
Indemnity/Disability	0.00	0.00	0.00	0.00	0.00
Rehab/Case	0.00	0.00	0.00	0.00	0.00
Legal	0.00	0.00	0.00	0.00	0.00
Expense	0.00	0.00	0.00	0.00	0.00
Employers Liability	0.00	0.00	0.00	0.00	0.00
Total	10,000.00	0.00	10,000.00	10,000.00	0.00
Recovery					
Net Incurred			10,000.00		

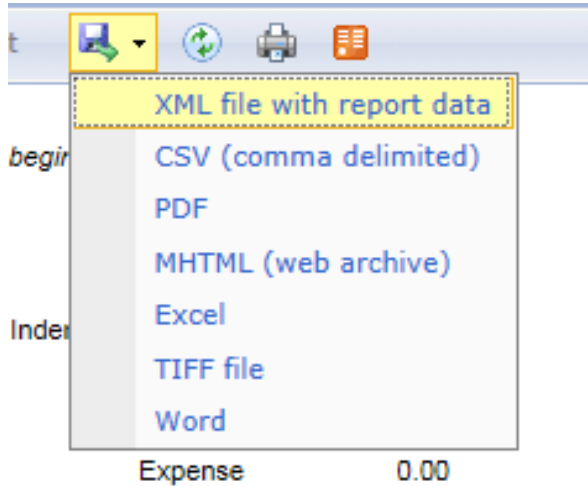
Activity Period			To Date		
New	Closed		Open	Closed	Total
2	0	Med	2	0	2
1	0	Ind	1	0	1
0	0	Info	0	0	0
3	0	All	3	0	3

Reinsurance	Subrogation	Deductible	SIF	Other
0.00	0.00	0.00	0.00	0.00
0.00	0.00	0.00	0.00	0.00

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



13) There are multiple file types to save the document as, you can use XML, CSV, PDF, MHTML, Excel, TIFF, or Word.



- It is recommended that you save this particular report in a PDF or Word Format as it may not display the way you are accustomed in other formats
- If you would like an Excel version run the ClaimSummaryExcel report as it has been designed to display better in an Excel format.

14) 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.

