1

 To get to the Reports section: Navigate to the Apps Menu Option, select Reports > then select Report Manager. This will open a new window or tab in your web browser.

	HOME	III APPS X TOOLS	& ADMIN & SEAF
Workers Comp 🗸 🏚 🤇 Global Sea	Calculator Claims Dashboard		
CLAIMS SEARCH GLOBAL SEARCH	PAYMENT SEARCH	Control Center SmartView	
Claim #	Claimant Name	Interfaces Reports	Claiment CCN
Incured Name	Insurer Name	ClaimsXPress Insight  Outlook Add-Ins	Claimant Reports  Insured Reports
			Policy Reports Report Manager
Claimant Status	Loss Date From		Training Reports ;h
Select Filters	~		

2) Select the folder for "BSA Reports"



These are for clients and internal staff

- 3) For this procedure we are going to focus on the Total Payments report. This report gives a brief over-view of the types of payments made dureing a specified date range for a specified jurisdiction. Results show payment descriptions and total payments.
  - a. It does **<u>NOT</u>** provide detailed information on individual claims that the payments were made on.

TotalPayments	,	10

4) The fields that must include data for the report to run against are: Organization, the date range, Insurance Line type, and State.

[	Home > BSA Report	s > TotalPayments				
	Organization Level	1	~	Organization ID	Demo Level 2b	~
	Begin Date	1/1/1990		End Date	12/31/2015	
	Ins Line	СОМР	~	State	Tennessee	

5) You can also select sublocations by changing the Organization Leven to 2 or 3 then going back to the Organization Field and selecting the sublocation.

2

Home > BSA Report	s > TotalPayn	nents
Organization Level	1	
	2	
Begin Date	4	
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🤈 Сітгіх хепарр - і	.ogon	Demo 1
		Plant 1
		Plant 2
		Demo Leve
Orgar	nization ID	Demo Leve
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6) Once you are satisfied with these parameters, hit the View Reports button in the upper right hand corner of your screen.

Home   My Subscriptions	Home   My Subscriptions   Site Settings   Help			
	View Report			

- 7) Depending on the size of the data, it may take a few seconds to generate the report. Once it is finished it will appear at the bottom of your screen.
  - Note: since I am using the demo account there won't be any results to show for an example.

Organization Begin Date	1 Level 1 1/1/1990		Organization ID End Date	Demo Level 2b		~	
Ins Line	COMP	~	State	Tennessee	~		
I4 4 1	of 1 🕨 🕅	100% 🗸	Find   Ne	xt 🛃 - 📀	ê 📒		
Demo Level	2b						
Workers Com	pensation Payments	s 1/1/1990 through 12/31/	2015				
Tennessee Ju	urisdiction Claims						
Category	Payment Code	Payment Description	Payn	nents	Tennessee Stats		
Category	Payment Code	Payment Description	Payn	nents	Tennessee Stats Reporting Category Indemnity Paid	Payments	Assumed to Include: all indemnity
Category	Payment Code	Payment Description	Payn	nents	Tennessee Stats Reporting Category Indemnity Paid Total Paid in 2015	Payments	Assumed to Include: all indemnity

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

3



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



10) 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.