

- 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.

- 2) Select the folder for “BSA Reports”



- 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 during a specified date range for a specified jurisdiction. Results show payment descriptions and total payments.
 - a. It does **NOT** provide detailed information on individual claims that the payments were made on.



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

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

Home > BSA Reports > TotalPayments

Organization Level

Begin Date

Citrix XenApp - Logon

Organization ID

- Demo 1
 - Plant 1
 - Plant 2
- Demo Level 2
 - Demo Level 2b**
 - asdf

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 | 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.

Home > BSA Reports > TotalPayments

Organization Level Organization ID

Begin Date End Date

Ins Line State

Demo Level 2b

Workers Compensation Payments 1/1/1990 through 12/31/2015

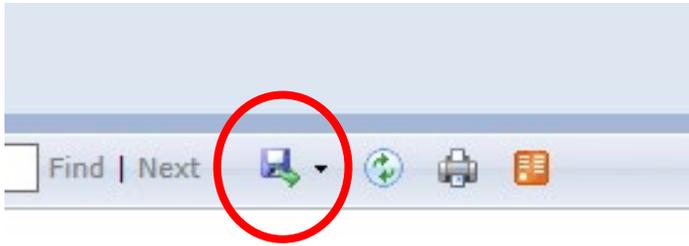
Tennessee Jurisdiction Claims

Category	Payment Code	Payment Description	Payments	Tennessee Stats									
				<table border="0"> <tr> <td>Reporting Category</td> <td>Payments</td> <td>Assumed to Include:</td> </tr> <tr> <td>Indemnity Paid</td> <td></td> <td>all indemnity</td> </tr> <tr> <td>Total Paid in 2015</td> <td>0.00</td> <td></td> </tr> </table>	Reporting Category	Payments	Assumed to Include:	Indemnity Paid		all indemnity	Total Paid in 2015	0.00	
Reporting Category	Payments	Assumed to Include:											
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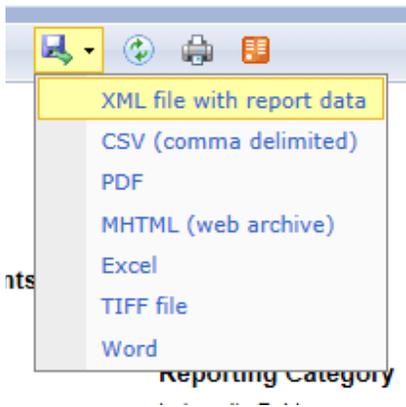
Report Date: 1/7/2016

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



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.