

## REPORTS

Our portal allows you to create and download reports at your convenience, below is a list of reports and their descriptions that we believe you'll find useful.

Report Name	Report Description
<b>Disbursement and Payment Details</b>	
Billing Period Details	View the billing periods that have been disbursed within a specific date range, and their associated details, for a participant. <ul style="list-style-type: none"> <li>• <b>Filter by: Disbursement Date Range</b></li> </ul>
Disbursement Details	View the disbursements that have been disbursed within a specific date range, and their associated details, for a participant. <ul style="list-style-type: none"> <li>• <b>Filter by: Disbursement Date Range</b></li> </ul>
<b>Enrollments</b>	
Enrollment Census	View the enrollment for a specific billing due date range, and their associated details, for a participant. <ul style="list-style-type: none"> <li>• <b>Filter by: Billing Due Date Range</b></li> </ul>
Terminated Participants	View the enrollment for a specific billing due date range, and their associated details, for a participant whose is terminated. <ul style="list-style-type: none"> <li>• <b>Filter by: Billing Due Date Range</b></li> </ul>
<b>Letters</b>	
Letters Sent Count	View the letters, and their associated addressee details, sent out of WCC. <ul style="list-style-type: none"> <li>• <b>Filter by: Send Date Range</b></li> </ul>
<b>Participants</b>	
Elected and Enrolled	View the participant information for anyone whose status is 'Elected' or 'Enrolled'. <ul style="list-style-type: none"> <li>• <b>Filter by: Include Terminated and Pending Termination</b></li> </ul>
Pending Election	View the participant information for anyone whose status is 'Pending Election'. <ul style="list-style-type: none"> <li>• <b>Filter by: Include Terminated and Pending Termination</b></li> </ul>

## Running & Viewing Reports

1. Click **Reports** on the left side of the portal. You will see all delivered reports and any custom report view either created by yourself or another user grouped by category.
2. Either find your desired report by scrolling through the list or search for part of the name of the report in the **Search Reports** field.
3. Click **View Report**.
4. Most delivered reports will ask you to enter a starting and ending date range. If your user account has access to view all Employers (either because you are a TPA user or you are a Broker user with access to all Employer Groups), you will be prompted to select the Employer Group you want to run the report for. Enter the desired information (if applicable for that report) and click **View Report**.

**Billing Due Date Range**  
MM/DD/YYYY - MM/DD/YYYY

01/01/2023 – 02/06/2023

[View Report](#)

**Note:** The data viewable in a report is dependent on your user profile. For example, specific profiles will be able to view a participant’s social security number from a report. If you are viewing a report with the participant’s SSN field and your profile does not have access to this data, your fields will appear blank on the report.

## Formatting a Report

From any report within portal you can format the data by filtering, charting, resizing, regrouping, or changing the displayed columns.

1. From your desired report, hover your mouse over the data column you want to format.
2. Click on the report menu icon (three horizontal lines) that appear to the right of the column.
3. The top row of the window will show the report menu icon (three horizontal lines), a filter icon, and a column icon. View the options within each icon below:





- **Report Menu Icon:**
  - **Pin Column:** Select either **Pin Left** or **Pin Right** to move the selected column to its respective side on the report table. This column is now frozen in its spot and will be visible even when scrolling to the left or right of the report table (depending on which option you selected). A pinned column is indicated by a vertical line separating the pinned column from the remaining columns. All columns default to **No Pin**. **Example:** The ‘Carrier Name’ column has been pinned to the left in the below example.

CARRIER NAME	EMPLOYER NAME	ELECTION PERIOD
	<input type="text"/> ▾	<input type="text"/> ▾
▾ Cigna	Kayla Orr Employer	60
	Kayla Orr Employer	60

- Value Aggregation:** Select either **avg** (average the data set), **count** (display the number of instances in a data set), **first** (display the first chronological value in a data set), **last** (display the last chronological value in a data set), **max** (display the largest value in a data set), **min** (display the smallest value in a data set), or **sum** (summarize the data set) to change how the column's data is being calculated or displayed. This option is only available if there is at least one column name in the **Row Groups** options on the right panel. Most delivered reports with grouped rows will use the **sum** aggregation option.
  - Autosize This Column:** If the selected column had been manually resized, click this option to change the column's size (width) back to the default.
  - Autosize All Columns:** If multiple columns had been manually resized, click this option to change the columns' size (width) back to the default.
  - Group by [XXX] (Replace [XXX] with the selected column's name):** Select this option to group the rows of the report by the selected column. You can also do this by dragging and dropping a data element into the **Row Groups** option on the right panel. Once a row has been grouped this option within the report menu icon will appear as Un-Group by [XXX] (replace [XXX] with the selected column's name). You can un-group a column by selecting Un-Group by [XXX] or by dragging the data element out of the **Row Groups** option on the right panel.
  - Reset Columns:** Reset all column settings back to the default.
  - Expand All:** Expand all collapsed columns.
  - Collapse All:** Collapse all expanded columns.
- Filter Icon:** Click the filter icon (icon in the middle) to view all available values to display or not display. Either click on a checked value to deselect it or click on an empty box to select it. If desired, click **(Select All)** to select and display all available values.
- Column Icon:** Click the column icon (icon on the right) to view all available data elements to display. Either click on a checked value to deselect it or click on an empty box to select it. If desired, click the top check box next to the search box to select and display all available values. You can type your desired column in the search box to find it. You can do this by selecting to deselecting the data element on the right panel.

4. To chart the data, select a data range within the report table and right-click. Click **Chart Range**.

New Disburse...	Adjustments	Net Disburse...	Name
\$125.81	\$45.00	\$170.81	Kayla Orr Emplo...
\$125.81	\$0.00	\$125.81	Orange County ...
\$251.62	\$45.00	\$296.62	
\$5.04	\$0.90	\$5.94	Kayla Orr TPA - ...
\$5.04	\$0.90	\$5.94	

-  Copy Ctrl+C
-  Copy with Headers
-  Chart Range ▶
-  Export Report ▶

5. Click one of the following chart options: **Column, Bar, Pie, Line, X Y (Scatter), Area, and Histogram**. Each option except the Line and Histogram will present further options to display the data within the respective chart.