

Enterprise Customer (EC) Reporting – Go365 Reports

Overview, Maintenance & Troubleshooting

Enterprise Customer reporting provides web users with several useful reports. These reports can be added by running the Business Function report to get the Enterprise Customer (EC) identifier and business functions that a **group** is authorized to and requesting them to be added to an active Employer SL app by security. The **agent of record** receives these reports through an automated process.

The **Wellness Engagement Incentive (WEI) report is NOT included in the EC functions**, it is not provided by customer reporting. WEI is a default function available to small medical groups and does not have to be requested. See [Wellness Engagement Incentive \(WEI\) Reporting - Overview, Navigation and Troubleshooting](#) for additional information.

Enterprise Customer Reporting (CRC@humana.com) is the business owner of several self-service reports available in the employer and agent portal. *Employers and Agents have different levels of authorization and access the reports in different ways.*

Enterprise Customer Reporting includes access to the below reports:

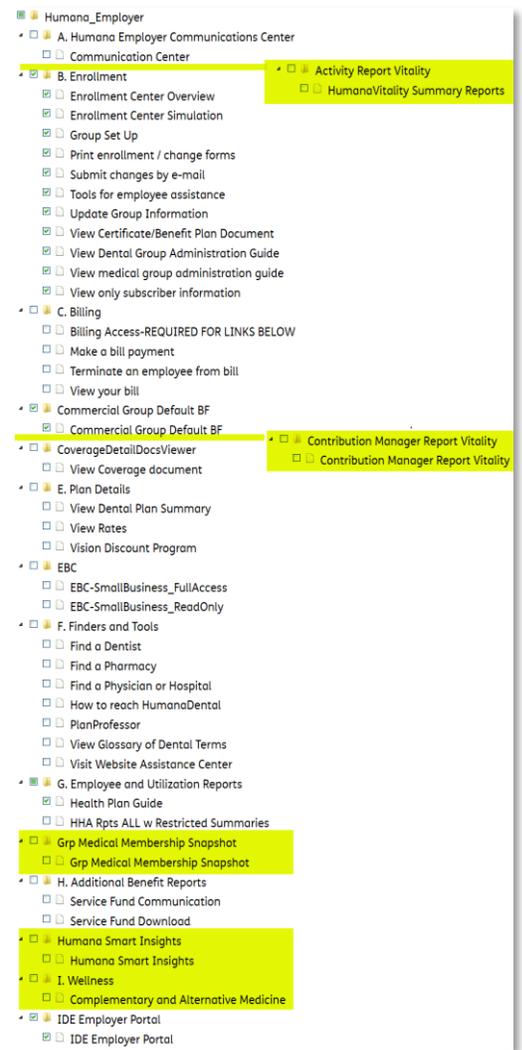
Employer Access

Employers have access to the below EC reports:

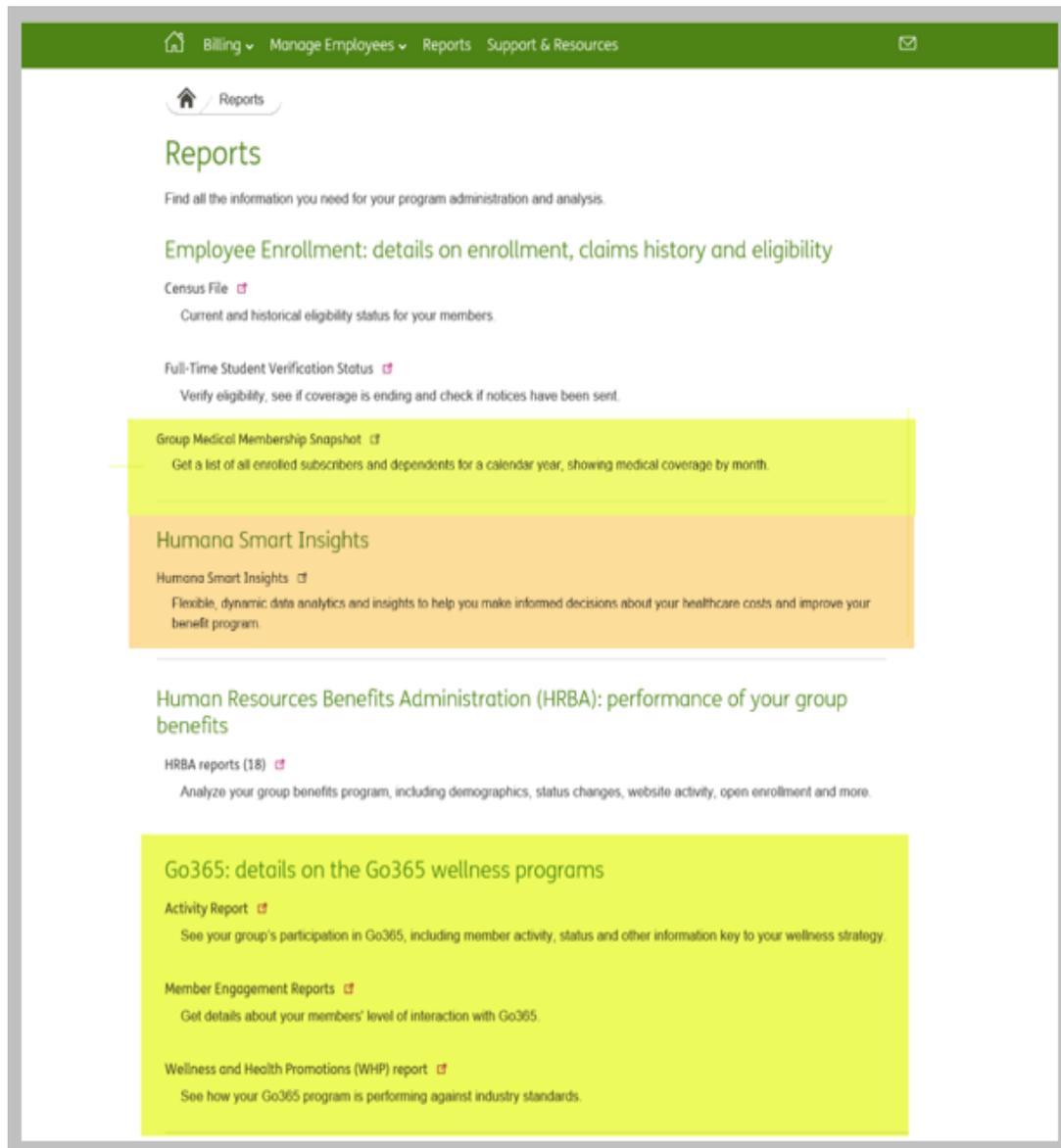
- Go365 Member Engagement Report
- Go365 Activity Report
- Go365 Taxable Redemption Report
- Go365 NCQA Report (National Committee on Quality Assurance)
- Humana Smart Insights (HSI)
- Group Medical Membership Snapshot

The **Go365 Summary Report** is only available for **internal self-service via go/CRExcellence**. Groups do not have direct access to this report. Someone within Humana must self-serve the report and provide to the group.

Employer Secondary users can be delegated access to these reports, the Employer PAA will assign the 'Activity Report Vitality', 'Grp Medical Membership Snapshot' and 'Wellness' functions on the **Assign Web Access Rights** page when delegating access to new users. Additional reporting functions are also available here.



Once assigned access to EC functions employer users will see the reports under the **Reports** tab of the Employer portal:



Agent Access

Agents are authorized to the following reports:

- Go365 Member Engagement Report
- Go365 Summary Report
- Go365 NCQA Report (National Committee of Quality Assurance)
- Humana Smart Insights (HSI)

NOTE: Only AOR is authorized to these reports, the WA will not see them in the agent portal. AOR PAA is able to delegate to secondary users if they wish.

Agents access these reports through the Agent Portal, within the **Quote, Enroll, and Manage** tab in the **Manage Active Groups** section. There are sections for **Humana Smart Insights** and **Go365 Reports**. **Agents DO NOT access these reports through Employer Self-Service**, if agents are following an incorrect path to access the reports please redirect them to the correct page.

Agent users do not access any EC functions from the employer portal. All the reports that they are authorized to are available within the agent portal. **Access management will not add the EC identifier/business functions to a pseudo application to change auto-delegation.** This would result in agents having access to data they are not authorized to.

The screenshot displays the Humana Agent Portal interface. At the top, the Humana logo is on the left, and navigation links for 'Manage Portal Access', 'Communication Center', and 'Logout' are on the right. Below this is a green navigation bar with a home icon and tabs for 'Quote, Enroll & Manage', 'Pay & Bonuses', 'Marketing & Products', 'Contact Us', and 'Education'. The main content area is titled 'Manage Active Groups' and is divided into two columns. The left column contains sections for 'Manage and View Group Details', 'Humana Smart Insights', '5-100 subscribers', and 'Go365 Reports'. The right column contains sections for 'Documents', 'View Late Pay Notices', and 'Late Pay Notices'. The 'Humana Smart Insights' section is highlighted in yellow. At the bottom, there is a footer with the Humana logo and a 'Contact us' link.

Humana Agent Portal

[Manage Portal Access](#) | [Communication Center](#) | [Logout](#)

[Home](#) | **Quote, Enroll & Manage** | [Pay & Bonuses](#) | [Marketing & Products](#) | [Contact Us](#) | [Education](#)

Manage Active Groups

Manage and View Group Details

Add or terminate employee coverage, order ID cards, and perform tasks on behalf of your groups.

[Access Employer Portal](#)

Humana Smart Insights

Flexible, dynamic data analytics and insights to help you consult and manage your client's healthcare cost and utilization.

[Humana Smart Insights](#)

Learn more about Humana Smart Insights.

[Introducing Humana Smart Insights](#)

[Navigating Humana Smart Insights](#)

5-100 subscribers

[Benefits Utilization Director \(BUD\)](#)

Go365 Reports

Monthly reports tracking member engagement and activity levels.

[Go365 Summary](#)

[Go365 Member Engagement](#)

Documents

[Applications and Enrollments Forms](#)

[Employer Self-Service Guide](#)

[Online Billing](#)

[Online Benefit Administration](#)

View Late Pay Notices

List of accounts within 14 days of termination due to nonpayment.

[Late Pay Notices](#)

Humana Do you have questions? [Contact us](#)

After selecting the report to run, agent users will be redirected to the report page and prompted to select the group from a customer drop down:



If the AOR is missing groups from MER dropdown or dropdown is not displaying correctly, create a **ServiceNow Incident**. Refer to [ServiceNow Groups](#) for the appropriate Service Now Group.

Verifying EC Access for Employers

To verify if a **group** has access to the Enterprise Customer (EC) Reports, first we need to verify the group has an **active Medical or Stand Alone GO365 (NIM)** product in MTV or CAS. You will then check that the group has **registered on the Employer Portal** and **verify if the EC Identifier have been added** to the groups **SL APP** by following the process below.

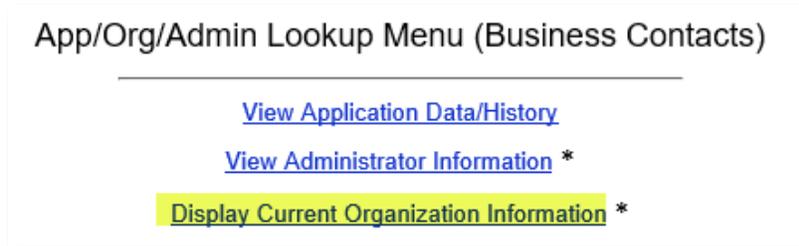
Open **IT Security Management Screens** in HSS.



Select **App/Org/Admin Lookup Menu (Bus Contact)**.



Select **Display Current Organizations Information**.



Select **Employer Group#** from **Access ID Type** drop down and enter **Group ID** in **Access ID** field and **Search**.

AKA Name:	<input type="text"/>
Access ID Type:	Employer Grp# ▾
Access ID:	112233 ✕
Access Identifiers Status:	Active ▾

Select the name of the group.

Verify **'EC'** has been added under **ID Type** field on the **Organization Information** screen.

Identifier	ID Type	Effective Date	End Date	Identifier Comments
786961	ME	8/31/2017	12/31/2999	
786961	EM	8/31/2017	12/31/2999	
786961001	BP	8/31/2017	12/31/2999	
1131095	EC	9/13/2017	12/31/2099	per CR email

If the **EC identifier is not on the SL App** for the group, follow the steps below on **Adding EC Identifiers and Business Functions**.

If the **EC identifier has already been added** on the Organization Information screen and the user indicates they are not able to see the reports, follow the **Troubleshooting** section of this document.

Adding EC Identifiers and Business Functions

Employers Only

***Do NOT add EC Identifiers to Agent SL applications or pseudo apps, ONLY employers.
Only ONE EC per SL application.***

If the Employer group has more than one group number, and each group number has a medical or Go365 (NIM) product, the group will need to register each group number individually.

Note: Access to EC functions are granted for **brand new groups** registered on the portal via an existing weekly process. This weekly process does not require an individual request be submitted for the access to be granted. (Spreadsheet sent to Access Management for processing on Monday)

For groups that require a **revoke and re-register** the below report will need to be ran after the group has re-registered. Groups that are registered for a second time are not included on the weekly report.

In the occasional instance a group's access has not been granted via the weekly process, HBS Web Specialists will run the EC identifiers and business functions self-service report to determine what access should be added for employers to have access to EC Reporting.

When a **CAS group** has an **MTV shell** the **EC identifiers are always going to be pulled with the MTV group ID**. For those that are not familiar, by "shell" I mean that the group level benefits are housed in MTV, but the membership is in CAS.

Business function access must be granted for the employer group PAA (primary access administrator) to access the following reports:

- Go365 Member Engagement Report (7125,7126)
- Go365 Activity Report (7125,7126)
- Go365 Taxable Redemption Report* (7125,7126)
- Go365 NCQA Report (7125,7126)
- Humana Smart Insights (HSI (6869)
- Group Medical Membership Snapshot* (8581)

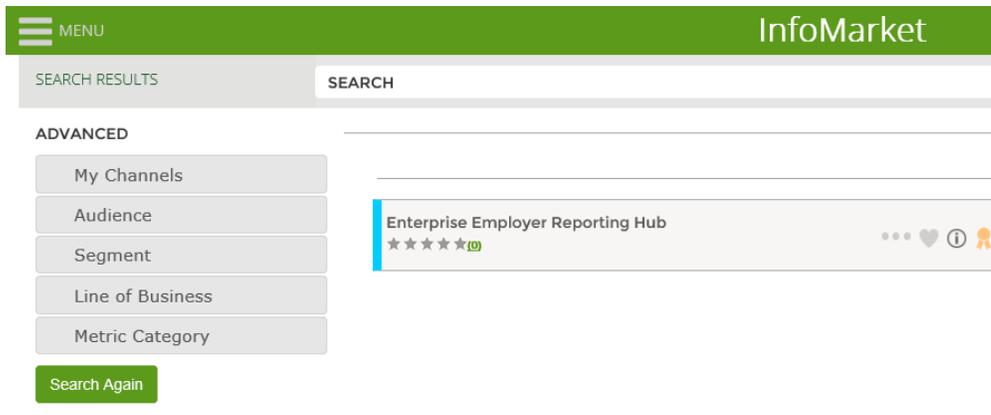
*only available for the employer group PAA

Enterprise Employer Reporting Hub should be access through the below website.

[GO/CREXCELLENCE](#) or

<https://ima.humana.com/InfoMarket/Finance/Search/Index?providedChannelId=504>

Select Enterprise **Employer Reporting Hub**.



Select the **Access Self-Service Reports** to navigate to the list of self-service reports.



On the Access Self-Service Reports screen click on **Business Function Assignment for Online Employer Reports** to access the self-service report. (If you need access to the self-service reports, follow the instructions to request through Go/RFA.)

****Note:** Reporting is down from the 1st-5th of every month for updates, so you will not be able to run any business function reports until the 6th of every month.

If a group was enrolled after the 5th of the month they will need to wait until the following month for EC reporting to be available.

Access Self-Service Reports Now

The self-serve report links are deactivated during enterprise-wide month-end processes (1st-5th). They will be reactivated by approximately the 6th each month.

Don't have access? [Request Access](#)

- [Accumulator Detail](#)
- [Accumulator Summary](#)
- [Biometric Screening Eligibility Roster](#)
- [Business Function Assignment for Online Employer Reports](#)
- [Census](#)

Enter the employer group's **Enterprise Number (Group Number)** and select **View Report**. (If the group has a CAS product with an MTV shell. Business function reports only have to be run for the MTV group number.)

Home > 13070 > Customer Reporting Self-Serv Reports > Business Function Report

Enterprise Nbr

After the report opens, select the Export Drop down Menu button (Save symbol) and export to PDF format. Save the file on your computer/desktop.

Home > 13070 > Customer Reporting Self-Serv Reports > Business Function Report

Enterprise Nbr [View Report](#)

1 of 1 100% Find | Next

BUSINESS FUNCTION ASSIGNMENT FOR ONLINE REPORTS

To gain access for the Employer Group PAA:
1. Save this report as a PDF.
2. Attach to an email request addressed to EmployerGroup@humana.com

Employer Group: Please grant the group's PAA access as follows: If duplicate or multiple EC# exists for the group, please remove.

EC#	Group #	Group Name	Platform	FIN BUS SEGMENT CD	Business Functions
1177334	824751	FUSION CONTROLS INC	EM	T	7125, 7126, 8581

If the report **does not display any numbers** under the business functions section, there are no identifiers or business functions to be added. Please review [When the EC report is blank](#) for additional troubleshooting on these situations.

Business Functions will not display if:

- The group has no active Go365 coverage
- The group has no active medical coverage
- If the group has medical and the report is blank data may be incorrect on customer reporting end.

If you experience issues with the self-serve business function report after the 5th of the month, you can contact customer reporting at crc@humana.com.

Once the report has been saved it can be sent to Access Management. The Access Management team will add the EC# and the business functions to the Employer SL App. **DO NOT send blank reports to Access Management.** Please see [When the EC report is blank](#) document for additional details.

The report is sent via email to employergroup@humana.com for processing. Include in the body of the email **“Please grant the PAA’s access as outlined in the attached report.” Also include the group number, name, and SL app# in the subject line.** Employer group will send a completion notification once the access is granted.

For expedited request for EC reporting:

Create an **Incident in ServiceNow** for identifiers stating **“Please grant the PAA’s access as outlined in the attached report.”** Attached the report to the ServiceNow Incident with the attachment icon at the top of the page.

In ServiceNow description include **SL App ID, Group ID and Group Name.**

Call Access Management and provide the Incident number to representative that answers. The representative will complete the request real time.

Troubleshooting

For security purposes employers can only access Enterprise Customer reports for one group in the portal. Other functions (HRBA, eBilling, etc.) are not restricted in this way. In order to access the EC reports for a second policy online the PAA will need to register each group number independently and maintain a separate logon.

Employer Options for Accessing Go365 reports:

- **Maintain independent logons for each medical group number**
 - Will require manual removal of additional group numbers from current SL application in order for user to register them independently.
 - User to register each group number will need to be added to Registration Reserve and therefore listed as a company contact.
 - Secondary group numbers can be added back to “primary” SL app after they are registered independently, so all other functions can be tied together.
- **CEC can provide Go365 reports for groups not accessible via the Employer Portal**
 - If the group seems interested in this option notify the CEC of the situation so they are aware of the group’s expectation. Send an email to crc@humana.com. Provide the group numbers and names along with the group contact/user information.

If an Employer is not able to view EC reports:

- Run the EC report by following the [Adding EC Identifiers and Business Functions](#) section of this document. Create a ServiceNow Incident with attached report and call Access Management to verify all business functions (BF) have been added correctly to the SL App.
 - Confirm what business functions are listed on the report.
 - Go365 Member Engagement Report (7125,7126)
 - Go365 Activity Report (7125,7126)
 - Go365 Taxable Redemption Report (7125,7126)
 - Go365 NCQA Report (7125,7126)
 - Humana Smart Insights (HSI (6869)
 - Group Medical Membership Snapshot (8581)
- If the Employer indicates they are missing one of the specific reports above, confirm that that business function for that report is on the EC report. If that business function is not on the report Access Management will not be able to add it.
 - **If a BF is missing from the report**, reach out to CRC@humana.com requesting insight as to why the group does not have this business functions on the report. Customer Reporting will provide additional information and add the business function if they are able to.

- If after confirming BFs with Access Management and Customer Reporting the Employer is still not able to see the reports, confirm you are speaking with the PAA and emulate the Employer PAA account. **This can be done by confirmed the username the user is logging in with.**
 - If you are speaking with a Secondary User, you will first need to confirm the PAA has given them the proper access required to access EC reporting which includes:
 - Activity Report Vitality
 - Contribution Manager Report Vitality
 - Grp Medical Membership Snapshot
 - Wellness

TIP: If the zoom is set to 110% or higher drop downs and links disappear or may not be available. Confirm the users zoom is set to 100%.

- Right click the mouse
- Select Display Settings from the drop down
- Locate Scale and layout in display settings
- Confirm Scale and Layout is set to 100%

TIP: Advise the Employer to try accessing the reports via Internet Explorer or an early version of Chrome or Edge as compatibility issues have been reported in the past.

- In Web Emulation 2.0, continue to the Report tab and verify whether the reports are displaying.
 - If reports are displaying correctly in emulation, but the Employer is still stating they are not able to see the reports, request the **username and password** for the user to see if you are able to **recreate the issue**.
 - If the Employer is not willing to share their username and password obtain **screen shots** of the reporting tab where the reports are not displaying that **include the URL**.
- **If the reports are NOT display in web emulation and/or you have confirmed the Employer does not have access to the reports** an **Incident in ServiceNow** can be sent to **SRE_WebPortals** (Web Portal Support) for resolution.

Please include in your ServiceNow Incident:

- Group Name and Number
- Employer PAA Name and AKA Name of effected user
- Detailed description of error or issue that is occurring
- URL for page on which the error is occurring
- Screen shots attached and documented in description

- Keep your case open until the issue has been resolved and follow up with the Employer when there is a resolution.

If an **Agent** is not able to view EC reports:

- **Confirm you are speaking with the AOR PAA.** If you are speaking with the WA advise they are not in scope to view these reports at this time.
 - If you are **unsure if the agent is logging in to the correct account**, obtain the **Username** from the Agent and verify Username is tied to Agency SL App via **IT Security Management Screens** in HSS.
 - If you are speaking with a **Secondary User**, you will first need to confirm the AOR PAA has given them the proper access required to access EC reports.
- **Confirm the agent is accessing reports within the Agent Portal** and is not attempting to find the reports within the Employer Self Service Portal
 - *Some Agents are able to see report links via the Employer Self-Service portal. This is due to EC identifiers being added to Pseudo apps in error in the past. If you encounter one of these applications please send an incident to Identify Access Management via ServiceNow and request the EC business functions be removed from the pseudo application.*

TIP: If the zoom is set to 110% or higher drop downs and links disappear or may not be available. Confirm the users zoom is set to 100%.

- Right click the mouse
- Select Display Settings from the drop down
- Locate Scale and layout in display settings
- Confirm Scale and Layout is set to 100%

TIP: Advise the Agent to try accessing the reports via Internet Explorer or an early version of Chrome or Edge as compatibility issues have been reported in the past

NOTE: Agent access to Humana Smart Insights (HSI) Report

- Please see [Humana Smart Insights \(HSI\)](#) for additional information on Humana Smart Insights (HSI).
- Humana Smart Insights (HSI) report is only available for groups over 100 Employees
 - If the group has less than 100 employees enrolled in coverage they will not see this group in the Humana Smart Insights (HSI) dropdown

- Since there is no way to validate access to Enterprise Customer Reports for Agents on our end through emulation, we will need to verify access on the agent side:
 - Request the **username and password** for the user to see if you are able to **recreate the issue**.
 - If the Agent is not willing to share their username and password obtain **screen shots** of the page where the reports are not displaying that **include the URL** and the path taken to access the reports.
 - Once you have confirmed the Agent does not have access to the reports an **Incident in ServiceNow** can be sent to **SRE_WebPortals** (Web Portal Support) for resolution.
Please include in your ServiceNow Incident:
 - Group Name and Number
 - Agent SAN ID
 - Agent PAA Name
 - AKA Name of effected user
 - Detailed description of error or issue that is occurring
 - URL for page on which the error is occurring
 - Screen shots attached and documented in description
- Keep your case open until the issue has been resolved and follow up with the Agent when there is a resolution.