

# IVOS Settlement Report Instructions

## Navigation

ivos - Microsoft Internet Explorer

File System Administration Options Help

Reporter

Claimant Search | Payment Search | Employee Search | Guest Link Search | User Diary | User Mail | Vendor Search | Patch Write-off Approval | Reset Search

Reset Search Generate Correspondence View

Claim #:  Claimant Name:  Incident From:

SSN:  Employee #:  Incident Through:

Insured:  Policy:

Examiner:  Affiliate Claim #:

Injured Party:  Medical Record #:  Insurance Type:

Claim#	Claimant Name	Incident	SSN	Body Part	Type	Status	Examiner	Office	Acc
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Figure 1: Creating Report

1. Single click on the reporter button

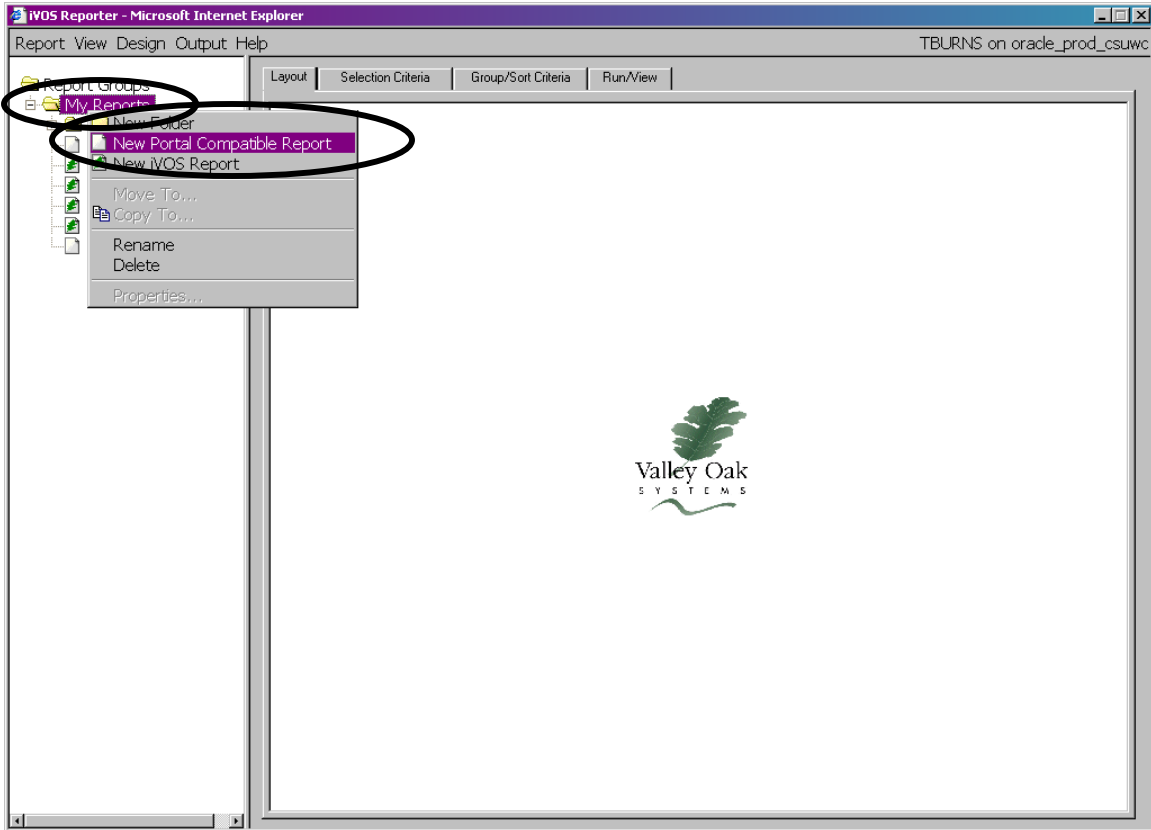


Figure 2: Report Menu

2. Right click "My Reports"
3. Single click "Portal Compatible"

### Name Report

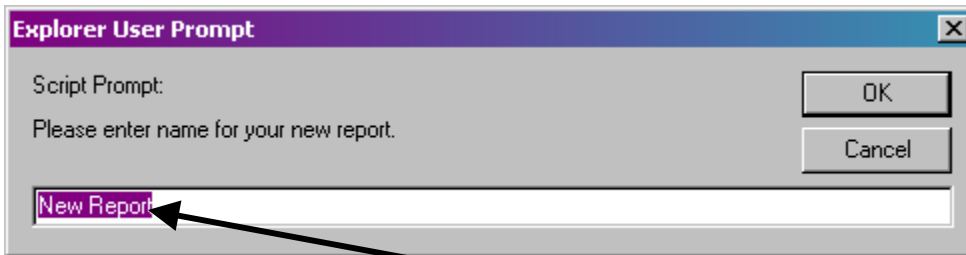


Figure 3: Name Report

4. Enter a name for your report

This is where you enter the name of your report

## Select Type of Report

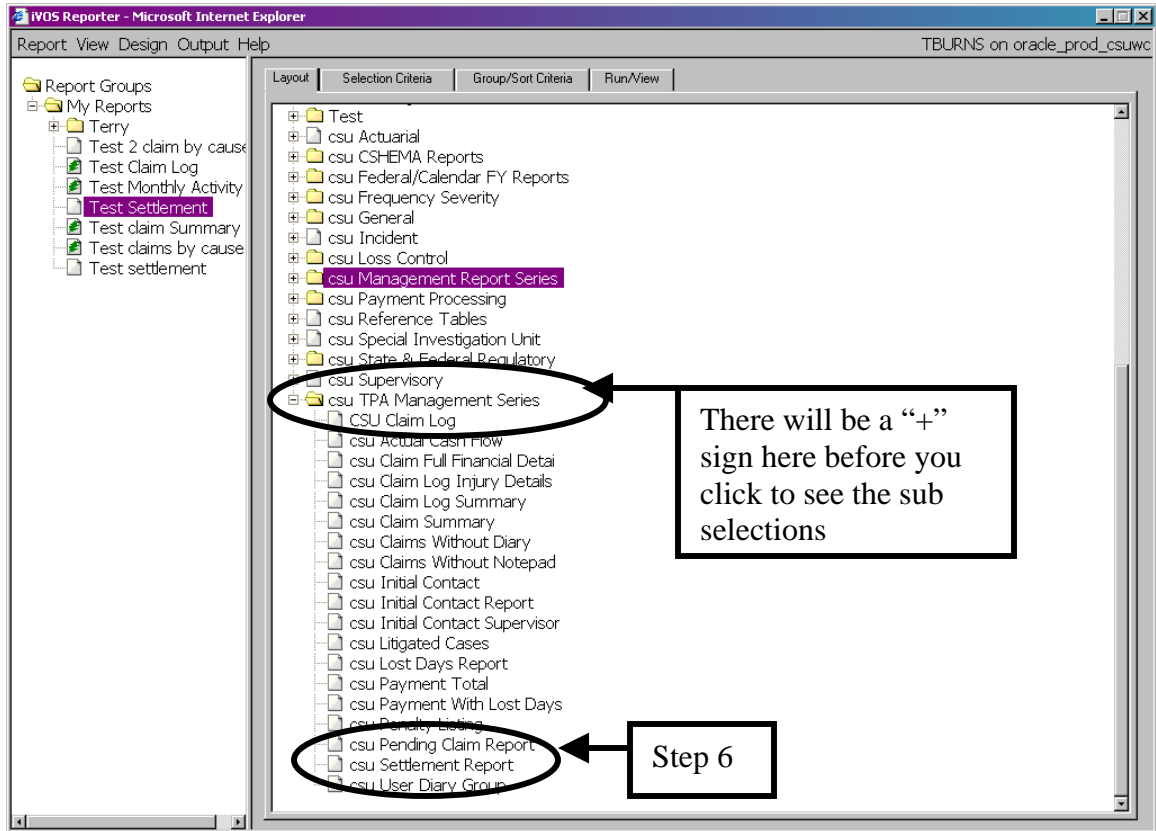


Figure 4: Select type of report

5. In the web page dialogue box single click on the report group “CSU TPA Management Series”  
(You need to click on the plus sign not on the folder symbol)
6. Double click on “CSU Settlement Report”

## Selecting Report Criteria

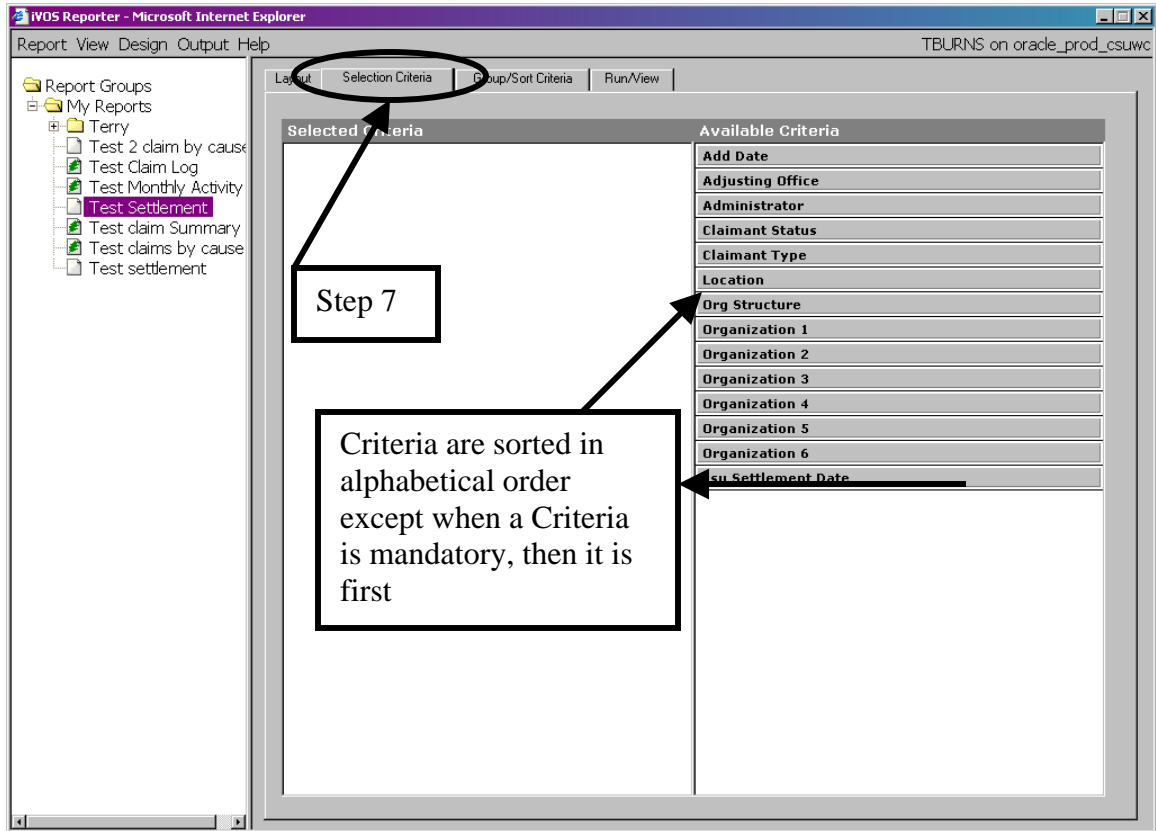
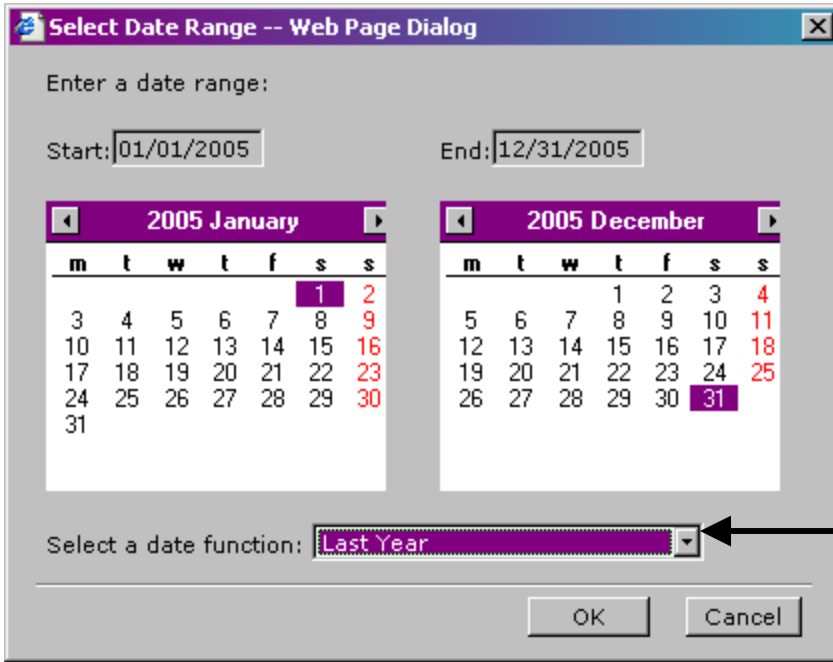


Figure 5: Selection Criteria

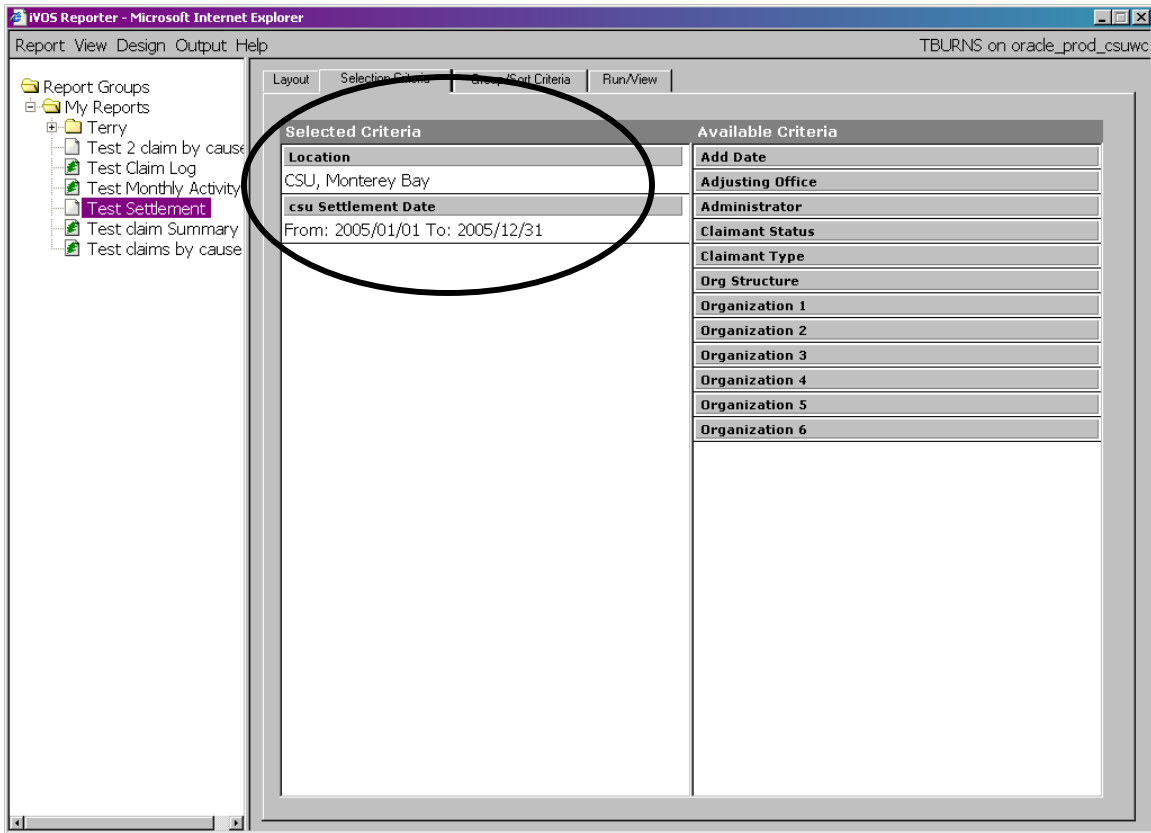
7. Single click the selection criteria tab
8. Double click on "CSU Settlement Date"



Drop down of dates or you can enter your own above calendars

Figure 6: Selecting Date Range

9. Select a range of dates then click “OK”



**Figure 7: Selection Criteria Selected**

10. Double click "Location"

11. Double click on your location then click "OK"

(Do this even if your location is the only one listed for selection)

## Run and View Report

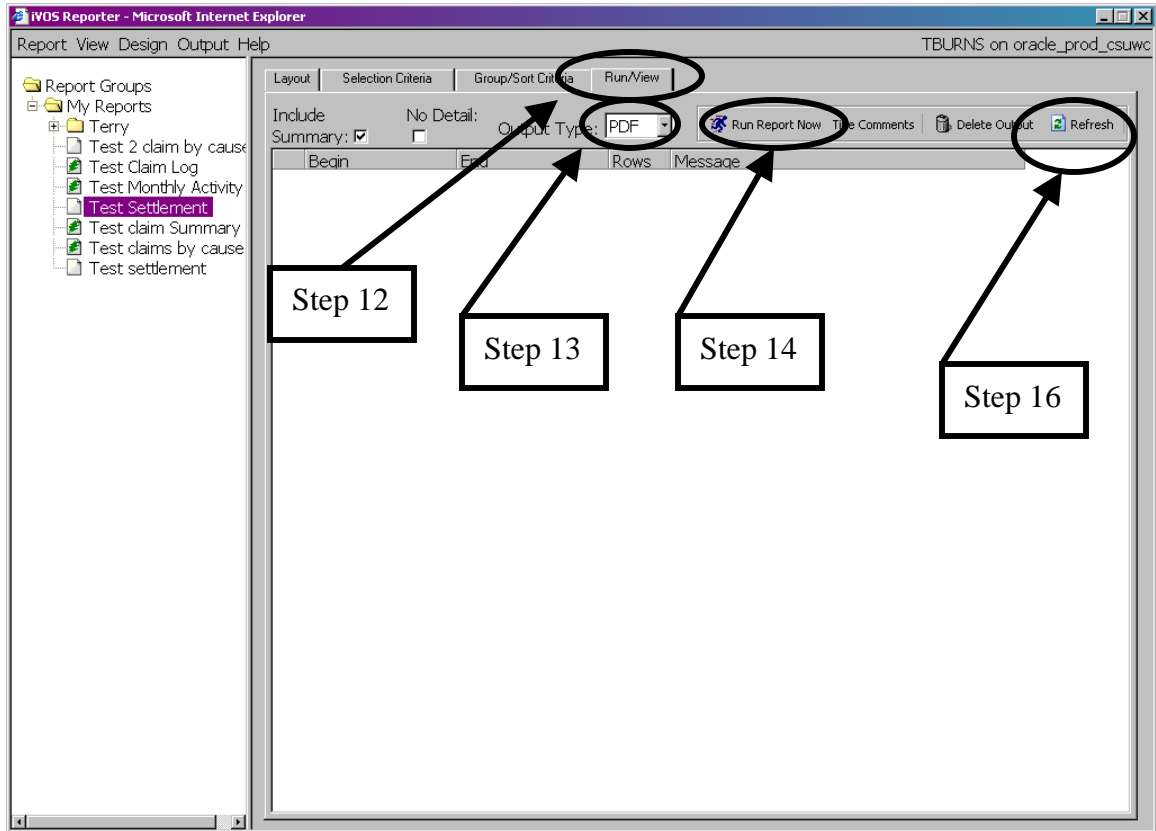
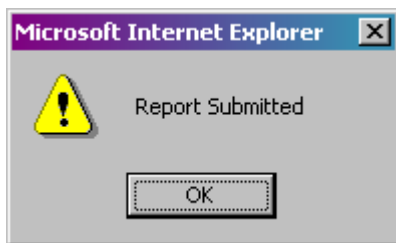


Figure 8: Run report

12. Click “Run/View” Tab

13. In file output type select “PDF”

14. Single click on “Run report now” (the little blue person)



15. A box pops up that says, “Report submitted” click “OK”

16. Click “Refresh” button until report is listed

17. Once your report is listed, double click on it

18. From here you can print and/or save it