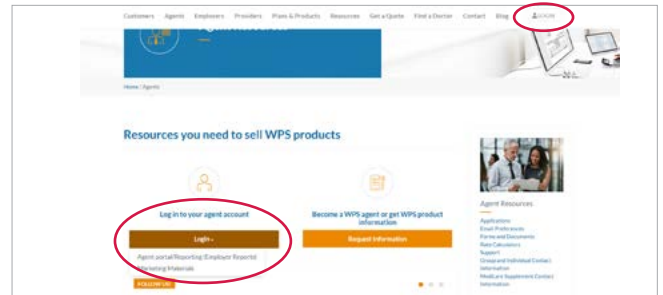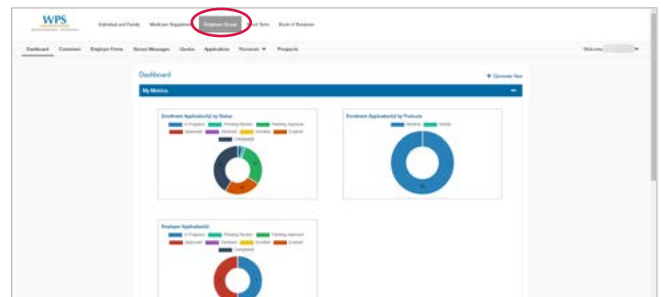# How to use the WPS Agent Reporting

Using the WPS Reporting tool is easy! You can navigate to, generate, and export your reports by going to wpshealth.com, and following these steps.
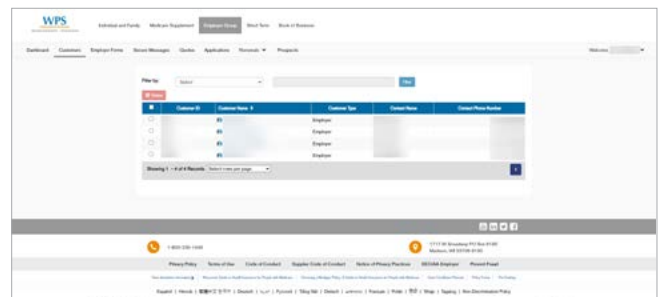
1 Log in to your account via the **Agents** tab on **wpshealth.com**.
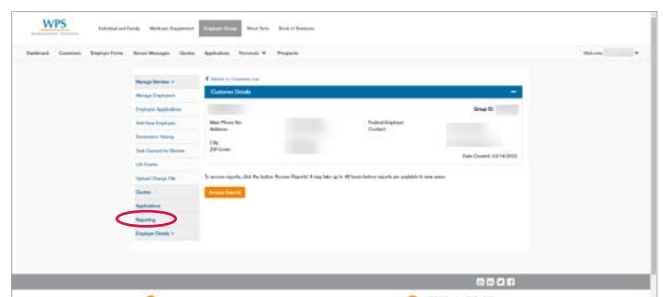

2 Once logged into your agent portal, select **Employer Groups** to see your dashboard

3 In the top navigation of your dashboard you will see **Customers**, your customer list will appear, select the customer in which you would like to look at their reports.
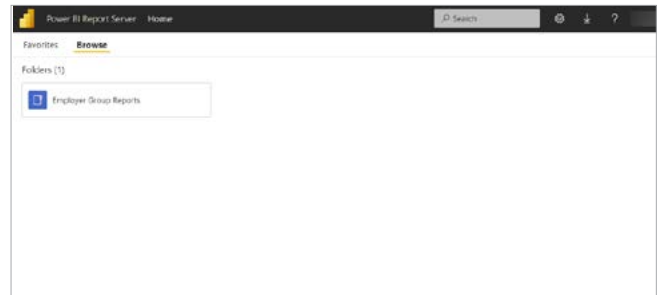

4 The customer's details will appear, in the left navigation menu, select **Reporting**.

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5 The Reporting link will take you to the customers reports. Select the folder named **Employer Group Reports**.
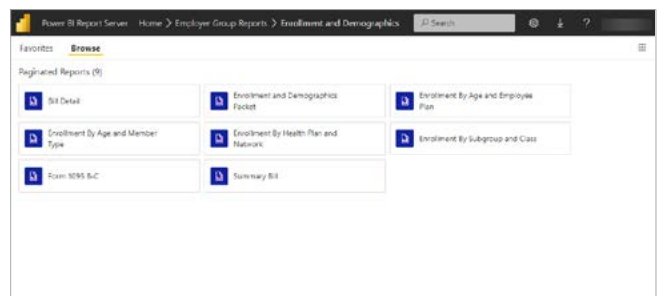

6 There will then be the option to select either the **Claims and Utilization** or the **Enrollment and Demographics** reports.
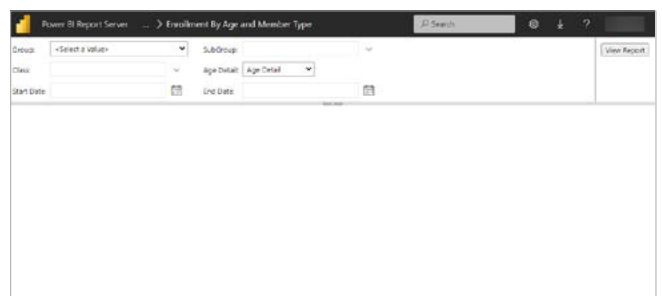

7 If you select, **Enrollment and Demographic**, below will be the option of reports


8 You will be able to select information to generate your report. For example, if you select Enrollment **By Age and Member**, you will be able to set the parameters you would like to see and select **View Report**.

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9 The report will then be generated to the parameters you set. You are able to download the report using the downward arrow in the upper right tool bar.
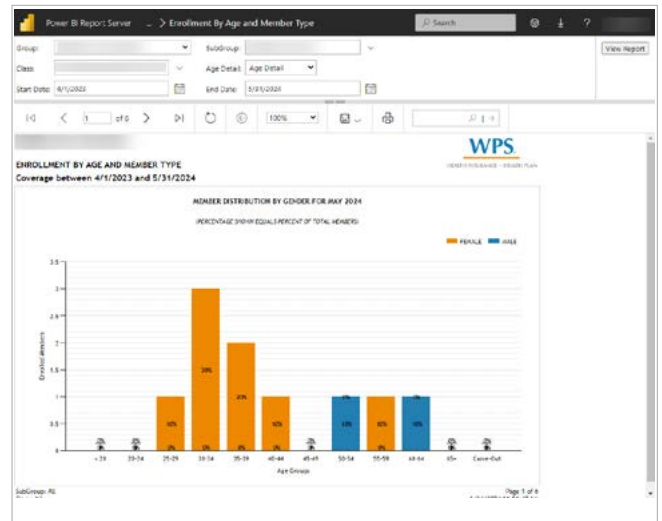
10 To exit your reporting **close** the Power BI Report Server and **Log Off** of your agent portal account by using the drop down in the right corner – Welcome, [Your Name]!

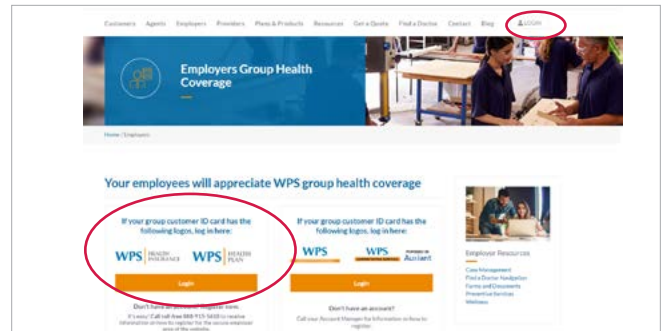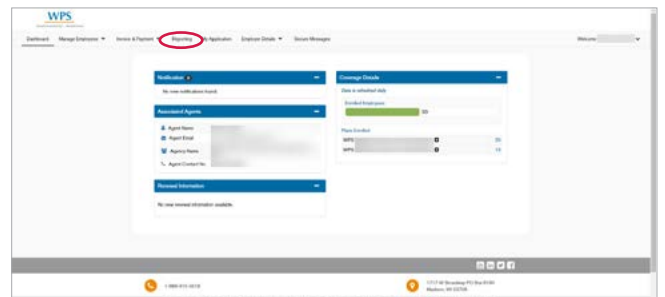**WPS** | **HEALTH INSURANCE**

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How to use the WPS Employer Reporting

Using the WPS Reporting tool is easy! You can navigate to, generate, and export your reports by going to wpshealth.com, and following these steps.
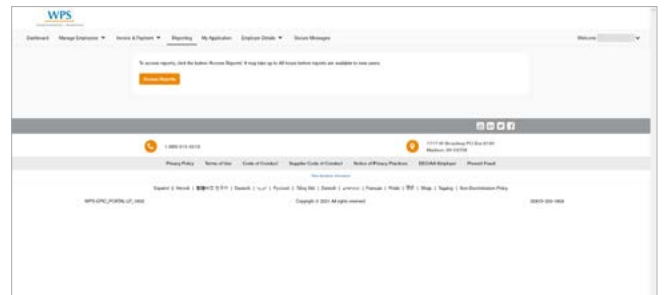
1 Log in to your account via the **Employer** tab on **wpshealth.com**.

2 Once logged into your Employer portal, select **Reporting** on the top navigation.

3 Next, you will need to select **Access Reports**. Note it may take up to 48 hours before reports are available for new users.

4 The Reporting link will take you to your reports. Select the folder named **Employer Group Reports**.

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How to use the WPS Employer Reporting

5 There will then be the option to select either the **Claims and Utilization** or the **Enrollment and Demographics** reports.

6 Next, you will set the parameters of the information you would like generated in the report. Then, select **View Report** in the upper right corner.

7 The report will then be generated to the parameters you set. You are able to download the report using the downward arrow in the upper right tool bar.

8 To exit your reporting **close** the Power BI Report Server and **Log Off** of your employer portal account by using the drop down in the right corner – Welcome, [Your Name]!

Need Help?
Call us toll-free at 888-915-5477,
Monday–Friday, 7:30 a.m.–5 p.m. CT.

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