Optum

Assurance Reimbursement Management™

Enterprise Set Membership XML report

This document covers a summary of the usage of the Enterprise Set Membership report, a data source table, how to create and download, and how to import the report into Microsoft® Excel 2016 (or later).

Report usage

This report provides information about how your associated sites (CIDs) are configured. Two types of configuration settings can be enabled to allow enterprise-level access between associated CIDs:

- **Link clients:** When CIDs are linked, all users can switch between CIDs to perform daily activities as defined by each CID's group master access for a user.
- **Client set:** When CIDs are a member of a set, only configured admin users can switch between CIDs and have specific power-user settings across CIDs in the set.

Data source table

This table includes each informational item cross-referenced to the ANSI 835 5010 information or other source with a description. In the report, multiple lines represent a payment since there can be claim level and/or service-line level remarks and adjustments. The XML file includes claim and file information for each line to maintain data integrity.

Item	Description
This information will be populated in the report for Link Clients.	
Name	Assurance Configuration Name
MemberCID	Each CID associated with this configuration
CID	The CID value used as a logon
Username	User name
LastLogin	Last login date for this user
LinkUserName	Last name, first name of this user
LinkLastLogin	Last login date for this user
MatchTypeMsg	This can be used to identify and resolve any user conflicts – No Conflicts, User Name, User Password or User Name and User Password
This information will be populated in the report for Client Sets.	
Name2	Assurance Configuration Name
MemberCIDList	Each CID associated with this configuration
GroupFunctionsForPowerUsers	A list of power user group rights configured for this client set
PowerUserList	Configured users that are a member of this set.

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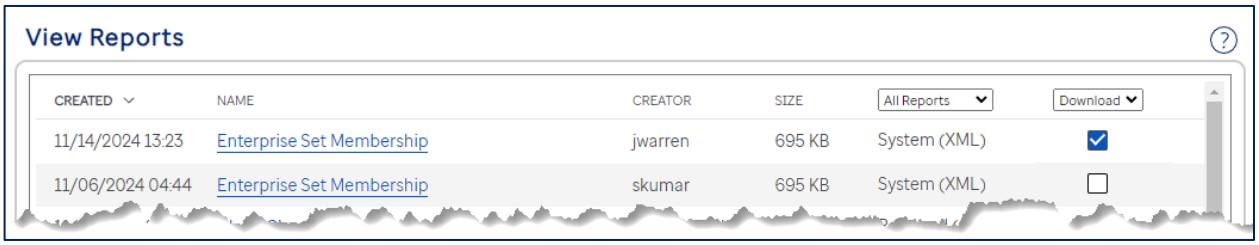
Create the Enterprise Set Membership XML report

1. Follow this path: **Reports** > **Create Reports**. Assurance opens the Create Reports page.
2. Select **System** in the TYPE drop-down list.
3. Select the **Enterprise Set Membership (1704) checkbox**.
4. Click **OK**.

Download the Enterprise Set Membership XML report

Follow these steps to download and review the Enterprise Set Membership XML report:

1. Follow this path: **Reports** > **View Reports**. Assurance opens the View Reports page.
2. In the last column heading drop-down list, select **Download**.
3. Select the **Download checkbox** for the report you need.

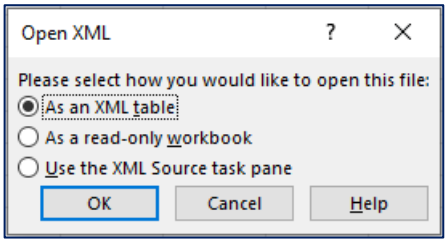


4. Click **OK**.
   The system will zip one or more files.
5. Follow your browser prompts to download and save the .zip file.

Import XML into Excel 2016 (or later)

While you can use any third-party software application compatible with XML formatted data, these instructions describe how to use Excel 2016 (or later).

1. **Create** and **download** the XML file.
2. **Open** a new Excel spreadsheet.
3. **Navigate to** and **choose** the XML file.
   The Open XML dialog box appears.



4. Click **OK** to use the default **As an XML table** option as the method for opening the file.

Note: If Excel shows “The specified XML source data does not refer to a schema. Excel will create a schema based on the XML source data.” message, click **OK**.

Excel opens a spreadsheet with the XML data in table format.

Tip: For more targeted control over the content, select the *Use the XML Source task pane* option when opening the XML file in Excel.

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