

Excel Reports for Disability Management

Parklane's new Excel reports are designed, formatted and print-ready. They may also be edited as the user sees fit. Below is a list of reports currently available in **Disability Management**. *Please read descriptions carefully.*

We recommend viewing the [video](#) provided on Parklane's Resource Page for information on the reports.

Special notes:

- Instruction on the use of Microsoft Excel is *not* available through Parklane Support, however, many helpful tutorials can be found online.

Report Name	Report Code	Report Details
YTD Claims by Type	AHA First Day Off Key Number Type Last Name Department Group Status Desc Emp Status Managing staff Union Supervisor	Reports the details of claims types occurring in the CURRENT year. <ul style="list-style-type: none"> • Main sheet: Chart of number of claims by each type and by month YTD. Table of number of claims by month and type YTD.
YTD Claims by Reason	AHB First Day Off Emp Key Reason Description Last Name Department Group Status Desc Emp Status Managing staff Union Supervisor	Reports the details of the reasons for claims occurring in the CURRENT year. <ul style="list-style-type: none"> • Main sheet: Chart of number of claims by reason YTD. Chart of claim reasons by month YTD. Table of claims by reason and month.
YTD Claims Types & Reason	AHC First Day Off Emp Key Last Name Department Group Type Reason Description Status Desc Emp Status Managing staff Union Supervisor	Reports the details of the reasons and types of claims occurring in the CURRENT year. <ul style="list-style-type: none"> • Main sheet: Pie charts of short and long term disability with percentage of each reason for claim YTD. Bar chart of claim reason and type with totals YTD.
Days Lost Analysis	AHD First Day Off Emp Key Last Name Reason description Type	Analysis of the total days lost of claims occurring for the date range. <ul style="list-style-type: none"> • Main sheet: Chart of total days lost by status. Chart of total days lost by claim reason. Chart of total days lost by type of claim. Chart of total days lost by union.

	Department Group Days Lost Status Desc Emp Status Managing staff Union Supervisor	<ul style="list-style-type: none"> Second sheet: Table of total days lost detail by Dept/Group and Reason. Third sheet: Table of total days lost detail by Dept/Group and Type.
Costs Analysis	AHE First Day Off Emp Key Last Name Department Group Reason Type Cost Status Desc Insurance Company Emp Status Managing staff Union Cost 1 Cost 2 Cost 3 Cost 4 Cost 5 Supervisor	Analysis of the total costs of claims occurring for the date range. <ul style="list-style-type: none"> Main sheet: Pie chart of total costs of claims by type. Pie chart of total costs of claims for reason. Bar chart of total detailed costs for claims occurring in date range. Chart of total costs of claims by month. Second sheet: Table of detailed costs by claim type. Third sheet: Table of detailed costs and claim information by Group/Dept. Fourth sheet: Table of details costs summarized by Group/Dept and type.
Actual Days Lost & Costs Report	AHF Month Department Desc Insurance Company Cost applied Lost days entered Cost 1 Cost 2 Cost 3 Cost 4 Cost 5	Reports actual days lost and costs generated by claims each month <i>(regardless of the start date of claim)</i> . <ul style="list-style-type: none"> Main sheet: Charts of costs applied each month and days lost applied each month. Second sheet: Table of detailed costs and days lost by month. Third sheet: Table of detailed costs and days lost by Dept/Group and month.
Claim Reason and Attributes	AHG First Day Off Key Number Department Group Last Name Reason Attribute Status Desc Type Emp Status Managing staff Year End Union Supervisor	Analysis of the claim reason and attributes <i>(1 reason, up to 10 attributes)</i> <ul style="list-style-type: none"> Main sheet: Chart of number of that claim reason by year. Pie chart of percentage of attributes selected applied to that claim reason. Chart with number of attributes by claim type. Second sheet: Table of number of claims by type occurring with selected attributes by Dept/Group.
Claim Stats by Reason	AHH First Day Off Key Number Department Group Last Name Status Desc Type Reason Emp Status Managing staff	Reason statistics for date range. <ul style="list-style-type: none"> Main sheet: Chart of reasons for claim by claim type. Pie charts of each claim type with percentage of reasons. Second sheet: Table of totals of claim reasons by Dept/Group.
Claim Stats by Medical Profile	AHI First Day Off Key Number Department Group Last Name	Medical profile statistics for date range. <ul style="list-style-type: none"> Main sheet: Chart of medical profile totals by type of claim. Pie charts of each claim type with percentage of medical profiles.

	Status Desc Type Medical Profile Emp Status Managing staff Union Position Supervisor	<ul style="list-style-type: none"> Second sheet: Table of totals of medical profiles by Dept/Group.
Claim Stats by Condition	AHJ First Day Off Key Number Department Group Last Name Status Desc Type Condition Emp Status Managing staff Union Position Supervisor	Condition statistics for date range. <ul style="list-style-type: none"> Main sheet: Chart of number of claim conditions by type of claim. Pie charts of claim types and percentage of conditions. Second sheet: Table of totals of claim conditions by Dept/Group.
Attributes Report	AHK First Day Off Key Number Department Group Last Name Status Desc Type Reason Attribute Emp Status Managing staff Year End Union Employee ID Email Address Position Supervisor Key Supervisor Name Date Returned Case Closure Outcome Case Closure Outcome Date Close Close Date Modified Duties Start Date Modified Duties Stop Date REO REO 1st day off REO RTW date REO Comments	Contains a variety of graphs and totals of up to 30 attributes in a time period. <ul style="list-style-type: none"> Main sheet: Chart of totals of attributes. Chart of attribute totals by type. Chart of attribute totals by reason. Pie chart of percentage of attributes applied to claims within the range. Second sheet: Totals of attributes by Dept/Group. Third sheet: Table of attributes occurring by month. Table of attributes occurring by year (if date range permits).
Claim Trend	AHL First Day Off Key Number Department Group Last Name Status Desc Type Active employees in Dept or Group Reason Emp Status Managing staff Year End Union Was Occupational Claim Supervisor (PD) Emp ID	Up to 3 year analysis of claims. <ul style="list-style-type: none"> Main sheet: Chart of claim totals by type and year. Line chart of LTD and STD totals by month over all years. Claim reason totals by year. Second sheet: Count of all claim types and status by year. Third sheet: NEW Count of all claims by dept/group by reason and year. Fourth sheet: NEW count of all claims by dept/group by year and type.

Position		
Costs and Days Trend	AHM First Day Off Key Number Department Group Last Name Status Desc Type No active employees in Dept Group Total COSTS associated with that claim Total DAYS associated with that claim Reason Insurance Year Month Emp Status Managing staff Year End Was Occupational Claim Reference Cost 1 Cost 2 Cost 3 Cost 4 Cost 5 Supervisor (PD) Emp Number	3 year* analysis of ACTUAL days and costs generated within that time frame (regardless of when the claim occurred). <ul style="list-style-type: none"> Main sheet: Costs - Total costs per year of claims. Costs by claim type and year. Costs by month and year. Days – Total days per year of claims. Days by claim type and year. Days lost totals by month and year. Second sheet: Table of days and detailed costs by year and month. Third sheet: Total days and detailed costs of claims by Dept/Group by year. Fourth Sheet: NEW – Total days and costs details by year and type of claim. (*up to 3)
	Who's Off Report <i>(formerly Open Claims Report)</i>	AHN Key Number Department Group Last Name First Position Acc Date First Day Off Guideline RTW date Expected RTW date Med Review User Comments Type Status Desc Reason Managing staff Lost Time Days Age of claim in days Age of claim in months Reference Emp Status Union Review Date Activity REO REO First Day Off Dept Description Supervisor (PD) Emp ID Effective Date End of benefit period Additional Dept 1 Additional Dept 2 Nature Ben Submitted Date Ben Commencement Date
		Statistics of current disability claims as of the date of report. This report includes only those who have not returned to work. <ul style="list-style-type: none"> Main sheet: Chart of total claims currently by claim type, pie charts of claim reasons and status. Bar chart of total claims existing by reason and claim type. Second sheet: Table claim details including type, reason, claim number, name, dept/group, first day off, REO first day off (if applicable), age of claim in days, age in months, lost time days associated. Third sheet: Table of dept/group, name, position, type of claim, REO indicator, accident date, first day off, expected RTW date and totals by dept/group. Fourth sheet: Table claim details by Managing staff and includes emp name, accident date, REO?, type, reason, status, expected RTW, last review date and associated activity. Fifth sheet: Table detailed by managing staff and includes name, REO?, type, status, reason, age of claim in days, age of claim in months and count of claims by managing staff.

Claim Report	AHP Key Number Department Group Dept Description Last Name First Position Acc Date First Day Off Expected RTW date Date Returned Reference No Med Review User Comments Type Status Desc Reason Nature Medical Profile Conditions 1 Conditions 2 Conditions 3 Conditions 4 Conditions 5 Case Closure Outcome Managing staff Lost Time Days Emp Status Closed Closed Date Year End Union Was Occupational Claim Returned to Mod Duties Limitation Period Mod Duties Start Mod Duties Stop Supervisor Emp ID Insurance Company Additional Dept 1 Additional Dept 2 REO Date Range Entered More Info Department Code Inactive Guideline RTW Date Guideline Code Age of emp time of Claim	<p>Statistics of all disability claims that <i>occurred within date range</i>.</p> <ul style="list-style-type: none"> • Main sheet: Bar graph of claims that have started and returned by reason. Bar graph of claims started and returned by type. Bar graph of claims started and returned by year. Pie charts of active claims by type and reason. Bar charts of number of active claims by type and reason. Bar charts of number of claims by medical profile, condition and insurance company. • Second sheet: Table of <u>all</u> claim details by year, name, insurance company, type, first day off, date returned, REO indicator, reason, return to mod duties, closed indicator, closed date, lost time days and count of claims. • Third sheet: Active claims by type, name, first day off, status, REO indicator, reason, condition, return to mod duties indicator, lost time days and claim count. • Fourth sheet: Currently off by type, name, first day off, status, REO indicator, reason, condition, return to mod duties indicator, lost time days and count of claims. • Fifth sheet: Currently on modified duties, type, name, first day off, date returned, reason, condition, mod duties start date and count of claims. • Sixth sheet: Table of claim started by type, year and department. REOs not included in count. • Seventh sheet: Table of claims started by type and year. REOs are not included. Table of claims started by type, year and reason. REOs are not included.
Statistics and Averages	AHQ Key Number Department Group Dept Description Last Name First Position Acc Date First Day Off Expected RTW date Date Returned Reference No Med Review User Comments Type Status Desc Reason Nature Medical Profile	<p>Report of statistics and averages. Report auto calculates days lost by business days <i>or</i> calendar days. Choice to calculate all claims (using today's date for those not returned) or just those who have returned to work. Also included is the calculation of days to a threshold number – this is a number of the users' choosing. Eg. <i># of days when STD becomes LTD, or # of days when benefits expire</i>.</p> <ul style="list-style-type: none"> • Main sheet: Column chart of – Average # days between First day off and RTW date, Average # days between claim start & first day off, Average # days between first day off and medical review date, Average LTD & STD days lost by year, Average # days lost by

	Conditions 1 Conditions 2 Conditions 3 Conditions 4 Conditions 5 Total days off Num Days Delay Acc Ill and First Day Num Days Delay Med Rev Date of Acc Ill Emp Status Closed Closed Date Year End Date Range Entered Month of First Day Off Year of First Day Off Month of Date Returned Year of Date Returned Emp ID Claims In Range Modified Duties Start Modified Duties Stop Num Days Modified Duties Num of days btwn First day off and Close Num Days btwn First day off and RTW Indicator Days off up to Threshold Percentage Num Days btw Acc Ill and DtEnter Num Days btw Med Rev and Date entered Num Days btw Exp RTW and Actual RTW Case Closure Outcome Case Closure Outcome Date Status Date Date Entered Threshold Number Business Calendar Days Guideline RTW Date Guideline Code Age of emp time of Claim Num of days from Guideline RTW Dt & RTW Dt	Reason, Claims started and RTW, Claims started by type, % of claims approved vs. denied, claims currently off vs RTW, % of claims RTW, % of claims returned to modified duties, % of claims currently on modified duties, claims started by month and year, claim returned by month and year. <ul style="list-style-type: none"> • Second sheet: Table sorted by Reasons including - # claims started, # of claims returned, # of claims closed, # of claims started on modified, average days lost, average days lost up to threshold, % of claims that reached threshold, average days between Accident date and First day off, average days between Accident date and Medical review date, average number of days on modified duties. • Third sheet: As above by Medical profile • Fourth sheet: As above by Department or Group • Fifth sheet: As above by Year
Disability Dashboard	AHR Emp Key Last First Name Date of Birth Dept Group Emp ID Status Position Union Date Acc/Sick Type Reason Medical Profile Condition RTW Date Days Lost Total Costs Managing staff Close Indicator Closed Date	Report pulls up to 4 years of data by dept/group and provides option to exclude Employee name and ID. Reports high level view of Incident Reporting activity. <ul style="list-style-type: none"> • Click sample to view data included in the dashboard. Days lost are auto-calculated by business days. Mid-term data included on separate tab. <p>Note: Source data also includes column containing manually recorded days lost, should you wish to customize the report to display this information instead.</p>

First Day off
DM year
Status Desc
REO
Reference
Insurance Company
Expected Return
No days between First day
and RTW
Returned to Modified Duties
Modified Start Date
Modified Stop Date
Claim Approval Date
Inactive Flag
Month
Year End
Year Num
Nature
Supervisor Name