

Filtering

While reviewing information in DataPoint, you can filter reports to show only the data you would like to see. Filtering can be used to highlight a portion of the data or focus on a specific dimension.

For reference, when using the following guide, below are key definitions to understand:

- Summary Reports are dynamic reports which allow you to use a predefined template. The template allows you to add and/or narrow information as needed. Summary reports are found under the Utilization, Financial, and Enrollment drop downs on your DataPoint home page.
- **Presentation Reports** are static reports which have predefined format and metrics. These reports provide a year-over-year comparison of financial, utilization, and enrollment data for your account. Presentation reports are found under the **Presentation Reports** drop down on your DataPoint home page.
- **Dimensions** are the parameters that form the rows and columns of the summary reports and allow you to build or filter the reports. The dimensions you choose define how the data is categorized and vary based on the report you are customizing. For presentation reports, dimensions are pre-determined. Examples of the most used dimensions are described further in this document.

Basic Filtering

You can create different filters depending on the report type (Summary vs. Presentation) and the data you would like to see. Outlined below are common dimensions used when using filters for summary reports and presentation reports.

Summary Reports Filters

The most common dimensions used when filtering summary reports are **Account/Group** and **Date Parameter** filters. Below is an overview of the dimensions, which will be reviewed in more detail in Summary Report Filter Selection Tips.

1. Account and Group Filters

a. Account – You can select the account name, account type, or enter the account number (please note that account number is your master account number and may not be an active group number).
 Tip: If you are an employer user, you likely only have one account and therefore may

not have to filter. In rare occasions, due to change in funding, there may be more than one account for a given client.

b. When selecting an account, the master account number will appear; however, reports will reflect data for <u>all</u> associated group numbers (group filter) and subgroups (subgroup filter).



Group – Once you have selected your account filter, if applicable, then you can select from the included group numbers within that account. If no group filter is selected, data from all groups and subgroups will populate.

2. Date Parameter Filters

- a. **Incurred Date** You can filter to the month an expense was incurred. You can also leave this blank to view all incurred dates.
- b. **Paid Date** You can filter for the month that the claim was paid. You can also leave this blank to view all paid dates.
- c. **Enrollment Month** You can filter for the desired enrollment month(s), which is based on members enrolled and billed for a given month.
- d. **Premium Month** You can filter for the desired premium month(s), which is based on billed premium for a given month

Locate the **Fully-Funded Dashboard** by selecting **Favorites** in the toolbar and then selecting **Organizational**.

Q Search	
Utilization • Financial • Enrollment • Presentation Reports • Explore •	Favorites •
← Home	Personal
	Organizational TOP 5 VISITED FAVORITES
Welcome, John Doe	Self-Funded Dashboard
Note! The landing page is still being configured for you. Please contact support for details or he	View All & Manage Fully-Funded Dashboard
Note: The landing page is suit being configured for you. Please contact support for details of her	COVID Positive & Testing Dashboard
Alerts	Ti Clinical Risk Summary

Fully-Funde	d Dashb	ooard				
Group Summary	Enrollment	Total Paid	Inpatient Analysis	Outpatient Analysis	Pharmacy Analysis	
Account: All Gr	oup: All f	Paid Date: All	Incurred Date: All	Enrollment Month:	All Premium Month: All	

Tip: Filters for reports are different than filters for dashboards. Below are the most common reports for self-funded and fully-funded groups. You can see that the filter options are different depending on the type of report/dashboard.



Dashboard Filters

1. For fully-funded groups, the most used report under the **Financial** dropdown menu is **Loss Ratio**. By clicking **All Filters**, you can view the dimensions for the loss ratio report.

★ ▼ Loss Ratio				C	Data Posted 1	Chrough: 09-30-20
Loss Ratio			ldd	★ Favorite	🕑 Export	Options -
Account: All					[▼ All Filters 1 in use ^
Type: Basic Advanced		Overvi	ew			
	+ Add Filter 📋 Clear All	Premi	um Mo	onth trend last	12 Months	
Premium Month	Select Values					
Update Cancel						

2. For self-funded groups, the most used report under the **Financial** dropdown menu is **Medical Claim Lag**. By clicking **All Filters**, you can view the dimensions for the medical claim lag report.

Medical Claim Lag	☐ 🔠 🕍 🛧 Favorite 🖄 Export 🌣 Options
Account: All	▼ All Filters 2 in use
Type: Basic Advanced	Overview
	+ Add Filter Clear All Incurred Month trend last 12 Months Paid Month trend last 12 Months
Incurred Month	Select Values
Paid Month Includes	Select Values
Update Cancel	

Presentation Reports Filters

The most common dimensions for presentation reports are Account, Group, Incurred and Paid Date, Pharmacy Flag, HCC Threshold, and Benchmark Cohort. These filters are explained in more detail below.

1. Account and Group Filters

- a. Account You <u>must</u> select the account name, account type, or enter the account number (please note that account number is your master account number and may not be an active group number).
 When selecting an account, the master account number will appear; however, reports will reflect data for <u>all</u> associated group numbers (group filter) and subgroups (subgroup filter).
- b. Group Once you have selected your account filter, if applicable, then you can select from the included group numbers within that account. If no group filter is selected, data from all groups and subgroups will populate.



2. Date Parameter Filters

- **a. Incurred Date** You can filter for the exact date when the expense was incurred. You can also leave this blank to view all incurred dates.
- b. Paid Date You must select a filter for the date range desired
- c. Pharmacy Flag You must select Yes/No based on your preference and/or your group's set up.

 HCC Threshold (High Cost Claimants) – You can select your desired dollar amount HCC threshold. \$50,000 is the default value.

4. Benchmark Cohort – Commercial will be your default.

High Co	ost Claima	ant Overview.				2 Up	odate 🕑 Export
Account *:	Not Selected	Group: Not Selected	Incurred Date: No Selection	Paid Date *: Not Selected	Pharmacy Flag *: Not Selected	HCC Threshold *: \$50,0	00
Benchmark	Cohort: Comme	Product: Not S	elected Claim Status: Not Se	elected 🗙 Reset Filters			

Tip: Filters with an asterisk * next to them are required fields (e.g., **Account***, **Paid Date***, **Pharmacy Flag***, and **HCC Threshold***) are all required fields. Only HCC Threshold has a default value and for all others you must select a filter.

Summary Report Filter Selection Tips

Now that we covered the basic dimensions above, we will dive into more detail on how to apply filters with summary reports.

Note: In the below sections, we will be focusing on the **Includes** filter option. We will cover other filter options in the Advanced/Expert User Guides.

Account Filters

If you are a broker overseeing multiple accounts, an Account filter will be beneficial if you want



to look at one account or a subset of accounts. As a reminder, if you are an employer user, you likely only have one account and therefore may not have to filter. In rare occasions, due to change in funding, there may be more than one account for a given client. There are two ways you can filter by an account.

1. The first way is to use a quick filter. The quick filter will auto-populate results as you begin typing. Leave the filter on **Includes**.

Account	Reset filter
Includes	v
123	
123 4 - ABC 123 4	
Apply	Cancel

2. Alternatively, you can search for group name by clicking on **Select values**.



Once you click **Select values**, you can select the accounts you would like to add or remove.

- Click on each account you would like to add in the left frame (you can select multiples at once by holding the Ctrl button while you click) and click the Add > button to add them to your filter.
- 2. To remove accounts, click on each account in the right frame and click the **< Remove** button.
- 3. You can quickly remove all accounts from your selection by clicking the **< Clear** button.
- 4. When you're finished with your selections, click the **Apply** button.



DataPoint – Overall Basic Functionality – Basic Filtering

Account			×
This dimension is global and will rema	in filtered in other pages you visit.		
Select values			
Search	±	1234 - ABC1234	
View levels: All	Add>		
1234 - ABC1234	2 < Remove		
	3 « Clear		
	4 Apply Cance	cel	

Date Parameters

Understanding data by incurred date or paid date may be an important dimension for what you need. Follow the steps below to apply this filter. In the examples below, we walk through how to set date parameter filters for **Incurred Date** (fully-funded groups) or **Paid Date** (self-funded groups).

Example 1: Incurred Date for Fully-Funded Dashboard

You must select an incurred date by clicking **All** next to **Incurred Date**. For the Fully-Funded dashboard, once you select an incurred date, you do not need to filter by **Paid Date**.

Fully-Funde	ed Dashboard				★ Favorite	🖻 Export	Options -
Group Summary	Enrollment Total Paid	Inpatient Analysis	Outpatient Analysis	Pharmacy Analysis			
Account: All C	Group: All Paid Date: All	Incurred Date All	Enrollment Month:	All Premium Month: All			

Click on **Select values**.

Incurred Date	Reset filter
Includes	v
t.	Select values
Apply	Cancel



On the **Select values** tab, you can click into the year to choose specific quarters or months. Follow instructions above to add the quarters or months you have selected and click **Apply**.

Incurred Date		×
Select values Rolling date		
Search		
View levels: All 1st 2nd 3rd		
 ■ 2020 ■ 2021 	Add>	
■ 2021Q1	Add	2
2021/01	< Remove	- 0
2021/02	< Remove	
2021/03		
2021Q2	« Clear	
2021/04		
2021/05		
2021/06		
2021Q3		
2021/07		
2021/08 2021/09		
2021/09		
	Apply Cancel	



Alternatively, you can set a date parameter by clicking the **Rolling Date** tab.

Enter **12 months** and, to stay in alignment with our Underwriting standards, all fully-funded groups should enter a lag of **2 months**. Click **Add** and then click **Apply**.

Incurred Dat	e			×
Select values	Rolling date			
Show last 12	Months	÷.	~	
☑ Lag by 2	Months		~	
				Add >
				< Remove
				«Clear
				Apply Cancel

Example #2: Paid Date for Self-Funded Dashboard

Click All next to Paid Date.

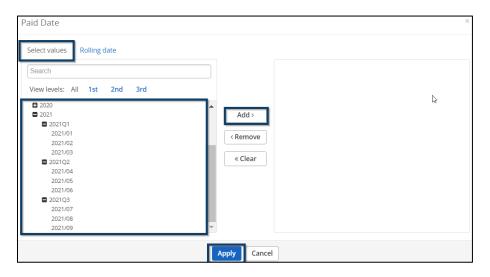
elt-Funde	d Dashboard				★ Favorite	E Export	Options
Group Summary	Enrollment Tota	l Paid Inpatient Analysis	Outpatient Analysis	Pharmacy Analysis			
Account: All (Group: All Paid Da	te All Enrollment Month	· All Premium Mon	th: All			
			. All Tremanimon				

Click Select values.

Paid Date	Reset filter
Includes	¥
	Select values
Apply	Cancel



On the **Select values** tab, you can click into the year to choose specific quarters or months. Follow instructions above to add the quarters or months you have selected and click **Apply**.



Example #3: Premium Month for Fully-Funded Groups in Loss Ratio Report

Click **All Filters** in the right-hand corner.

Loss Ratio	■ 🔟 ★ Favorite & Export ♦ Options -
Account: All	▼ All Filters 1 in use

To filter by premium month, keep **Premium Month** and **Trend** in the first two drop downs, select number of months (typically 12 or 24), and then click **Enable Lag Period**.

Loss Ratio	Image: Barbar and State and Stat
Account: All	▼ All Filters ∧ 1 in use
Type: Basic Advanced	Overview
+ Add Filter 🗎 Clear All	Premium Month trend last 12 Months
Premium Month	
Update Cancel	

Insert 2 next to lag by and select Months in the drop down. Click Update.



Account: All		
Type: Basic Advanced		Over
		+ Add Filter 🛍 Clear All Prem
Premium Month	last 12 Months Select Values	D
	lag by 2 Months 🗸 🗙	
	Update Cancel	

Presentation Report Filter Selection Tips

As stated above, the most common dimensions for presentation reports are **Account**, **Group**, **Incurred and Paid Date**, **Pharmacy Flag**, **HCC Threshold**, and **Benchmark Cohort**. These filters are explained in more detail below.

1. Account and Group Filters

a. Account – You <u>must</u> select the account name, account type, or enter the account number (Note that account number is your master account number and may not be an active group number).

When selecting an account, the master account number will appear; however, reports will reflect data for <u>all</u> associated group numbers (group filter) and subgroups (subgroup filter).

b. Group – Once you have selected your account filter, if applicable, then you can select from the included group numbers within that account. If no group filter is selected, data from all groups and subgroups will populate.

2. Date Parameter Filters

- **a. Incurred Date** You can filter for the exact date when the expense was incurred. You can also leave this blank to view all incurred dates.
- **b.** Paid Date You can filter for the date that the claim was paid.
- 3. **Pharmacy Flag** You can select **Yes/No** based on your preference and/or your group's set up.
- HCC Threshold You can select your desired dollar amount HCC threshold; the default is \$50,000.
- 5. Benchmark Cohort Commercial will be your default.

Like summary reports, you can set filters within presentation reports. For presentation reports, you must select an option for the filters that have a red asterisk next to them. For filter options that do not have a red asterisk you can still set a filter for these, but you are not required to do so.

Below are a few filtering tips for presentation reports. Please refer to the Presentations Report User Guide for detailed instructions on how to run a comprehensive presentation report.



Account Filters

When you open a presentation report, you need to set an **Account** filter as the option is preset to **Not Selected**. To apply an **Account** filter, click **Not Selected** next to Account.

Financial Key Indicators.	C Update Export
Account * Not Selected Group: Not Selected Incurred Date: No Selection Paid Date *: Not Selected Pharmacy Flag *: Not Selected HCC	Threshold *: \$50,000
Benchmark Cohort: Commercial Product: Not Selected Claim Status: Not Selected x Reset Filters	

There are two ways you can filter by an account.

1. The first way is to use a quick filter. The quick filter will auto-populate results as you begin typing. Leave the filter on **Includes**.

Account	t	Peset filter
Includ	es	
1234 -	ABC1234 >	¢
		Select values
	Apply	Cancel

2. Alternatively, you can search for group name by clicking on Select values.

Account	사 Reset filter
Includes	v
	Select values
Apply	Cancel

Once you click **Select values**, you can select the accounts you would like to add or remove.

- Click on each account you would like to add in the left frame (you can select multiples at once by holding the Ctrl button while you click) and click the Add > button to add them to your filter.
- 2. To remove accounts, click on each account in the right frame and click the **< Remove** button.
- 3. You can quickly remove all accounts from your selection by clicking the **< Clear** button.
- 4. When you're finished with your selections, click the **Apply** button.



DataPoint – Overall Basic Functionality – Basic Filtering

Account		
This dimension is global and will remain filtered in other	r pages you visit.	
Select values		
	1234 - ABC1234	
View levels: All All	1 Add>	
1234 - ABC1234	2 < Remove	
	3 «Clear	
(4 Apply Cancel	

Group Filter

Click Not Selected next to Group.

Financial Key Indicators.	C Update Export
Account *: 1234 - ABC1234 Group: Not Selected Incurred Date: No Selection Paid Date *: Not Selected Pharmacy Flag *: Not Selected HCC The	reshold *: \$50,000
Benchmark Cohort: Commercial Product: Not Selected Claim Status: Not Selected X Reset Filters	

Click on **Select values** to choose your group numbers.

Group	Reset filter
Includes	v
	Select values
Apply	Cancel

Choose your account number(s) on the left-hand side, click Add and then click Apply.

Group	×
Select values	
Search	
View levels: All	
All 1234567 - GroupName1234567	Add>
	< Remove
	« Clear
	Apply Cancel



Tip: An account may have one or more group/plan numbers. This group filter is available if you want information for one or a few group numbers, but not all. This filter is not required to generate a report. As indicated above, with presentation reports, selecting no group filter will pull data from all related group/plan numbers.

Incurred Date Filter – Fully-Funded Groups

To set incurred date, click **No Selection** next to **Incurred Date**.

Financial Key Indi	icators.				C Update C Export
Account *: 1234 - ABC1234	Group: 1234567 - GroupName123456	Incurred Date: No Selection	Paid Date *: Not Selected	Pharmacy Flag *: Not Selected	
HCC Threshold *: \$50,000	Benchmark Cohort: Commercial Produc	t: Not Selected Claim Status	Not Selected 🗙 Reset I	Filters	

Click Select values.

Incurred Date	Reset filter
Includes	¥
	Select values
Apply	Cancel

Tip: When setting the incurred date, keep in mind that a 2-month lag should be applied. If you want the most recent 12 months of data, you will need to begin your selection 14 months prior and choose the next 12 months. For example, if it is currently October 2021, you will choose August 2020 – July 2021 for your incurred date selection and August 2020 – September 2021 for your paid date selection. We will review the paid date filter starting on page 26.

Once your incurred dates are selected, click Add to add the dates and then click Apply.

Incurred Date	×
Select values Rolling date Search	Add> <remove <clear<="" th=""></remove>
	Apply Cancel



Paid Date Filter – Fully-Funded Groups

To set the paid date, click Not Selected next to Paid Date.

Account *: 1234 - ABC1234	Group: 1234567 - GroupName123456 Incurred Date: Aug 2020, Sep 2020, Oct 2 Paid Date * Not Selected Pharmacy Flag *: Not Selected
ACCOUNT -: 1234 - ABC1234	Group. 1234307 - Groupivamerz3430 incurred Date: Aug 2020, Sep 2020, Oct 2 Faid Date _ Not Selected _ Fraimaty Frag -: Not Selected
HCC Threshold *: \$50,000	Benchmark Cohort: Commercial Product: Not Selected Claim Status: Not Selected 🗙 Reset Filters

Click Select values.

Paid Date		Reset filter
Includes		*
		Select values
Apply	Canc	el

Choose the paid dates you want to view, click Add and then click Apply.

Paid Date	x
Select values Rolling date Search	Add> <remove «Clear</remove
Aug 2021 Sep 2021	
	Apply Cancel



Paid Date Filter – Self Funded Groups

To set the paid date, click **Not Selected** next to **Paid Date**.

Financial Key Ind	cators.			C Update C Export
Account *: 1234 - ABC1234	Group: 1234567 - GroupName123456	Incurred Date: No Selection	Paid Date *: Not Selected Pharmacy Flag *: Not S	elected
HCC Threshold *: \$50,000	Benchmark Cohort: Commercial Product:	: Not Selected Claim Status:	Not Selected 🗙 Reset Filters	

Click Select values.

Paid Date	Reset filter
Includes	v
	Select values
Apply	Cancel

Tip: When setting the paid date, you want to select the most recent 12 months of data. For example, if it is currently October 2021, you will leave **No Selection** as the incurred date and you would select October 2020 – September 2021 for your paid date selection.

Choose the paid dates you want to view, click Add and then click Apply.

Paid Date	×
Select values Rolling date Search View levels: All	
Aug 2020 Sep 2020 Oct 2020	
Oct 2020 Nov 2020 Dec 2020 jan 2021 Feb 2021 May 2021 May 2021 Jul 2021 Jul 2021 Aug 2021 Sep 2021	
Mar 2021 Apr 2021 May 2021	
jun 2021 jul 2021 Aug 2021	
Sep 2021	



Pharmacy Flag Filter

Continuing with the fully-funded example, to set a pharmacy flag filter, click **Not Selected** next to **Pharmacy Flag**.

Financial Key Indicators.	C Update	🕑 Export
Account *: 1234 - ABC1234 Group: 1234567 - GroupName123456 Incurred Date: Aug 2020, Sep 2020, Oct 2 Paid Date *: Aug 2020, Sep 2020, Oct 2		
Pharmacy Flag * Not Selected HCC Threshold *: \$50,000 Benchmark Cohort: Commercial Product: Not Selected Claim Status: Not Selected x Res	set Filters	

A display box will open, and you can choose to include or exclude the pharmacy flag. Once selected, click **Apply**.

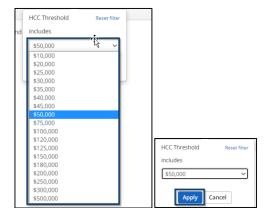
Pharmacy Flag	Reset filter
Includes	v
Yes 🗙	
	Select values
Apply	Cancel

HCC Threshold Filter

To set an HCC threshold filter, click **\$50,000**, which is the default amount, next to **HCC Threshold**.

Financial Key Ind	icators.	C Update C Export
Account *: 1234 - ABC1234	Group: 1234567 - GroupName123456 Incurred Date: Aug 2020, Sep 2020, Oct 2 Paid Date *: Aug 2020, Sep 2020, Oct 2	Pharmacy Flag *: Yes
HCC Threshold * \$50,000	Benchmark Cohort: Commercial Product: Not Selected Claim Status: Not Selected X Reset Filters	

A display box will open, and you can choose your desired threshold from the drop down. For the HCC threshold, there are pre- determined values available. Once chosen, click **Apply**.





Benchmark Filter

The default will be **Commercial**. This filter should not be changed. In the future, there may be additional filter options.

Financial Key Ind	cators.	C Update	🔁 Export
Account *: 1234 - ABC1234	Group: 1234567 - GroupName123456 Incurred Date: Aug 2020, Sep 2020, Oct 2 Paid Date *: Aug 2020, Sep 2020, Oct 2	Pharmacy Flag *:	Yes
HCC Threshold *: \$50,000	Benchmark Cohort: Commercial Product: Not Selected Claim Status: Not Selected × Reset Filters		

Once you have selected your filters, click Update in the top right corner.

Financial Key Indi	cators.	C Update
Account *: 1234 - ABC1234	Group: 1234567 - GroupName123456 Incurred Date: Aug 2020, Sep 2020, Oct 2 Paid Date *: Aug 2020, Sep 2020, Oct 2	Pharmacy Flag *: Yes
HCC Threshold *: \$50,000	Benchmark Cohort: Commercial Product: Not Selected Claim Status: Not Selected X Reset Filters	

Your presentation report will generate with the filter selections you have chosen.

