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.

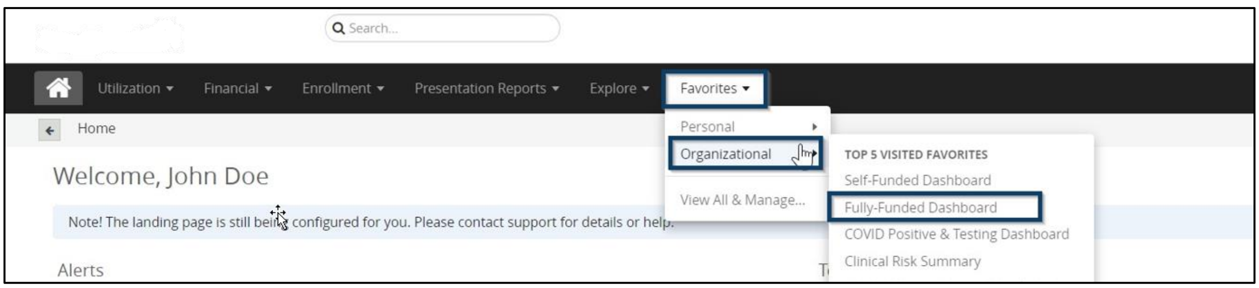
   b. When selecting an account, the master account number will appear; however, reports will reflect data for <u>all</u> associated group numbers (group filter) and subgroups (subgroup filter).

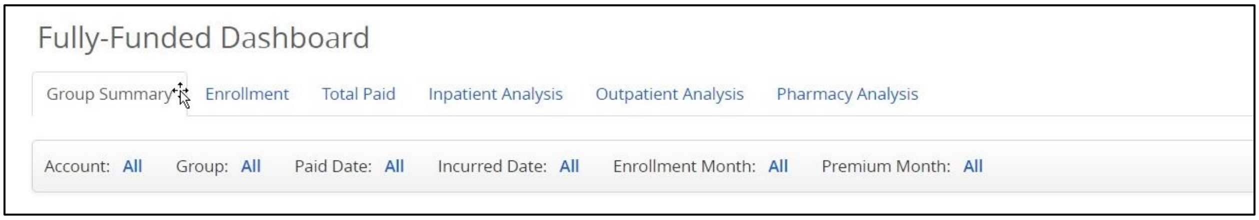
Group – Once you have selected your account filter, if applicable, then you can select from the included group numbers within that account. If no group filter is selected, data from all groups and subgroups will populate.

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.**

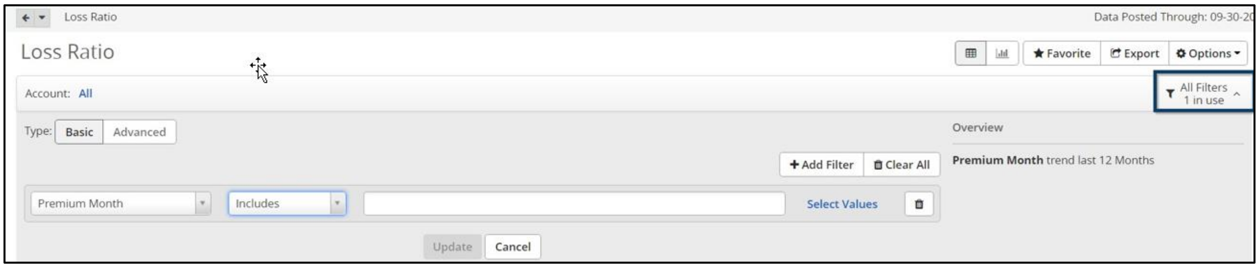




Tip: Filters for reports are different than filters for dashboards. Below are the most common reports for self-funded and fully-funded groups. You can see that the filter options are different depending on the type of report/dashboard.

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.



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.

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.

3. **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.

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

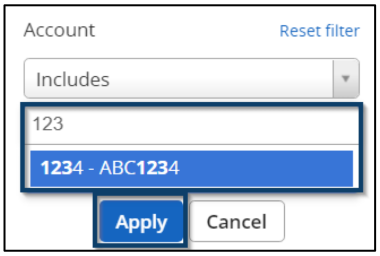
Now that we covered the basic dimensions above, we will dive into more detail on how to apply filters with summary reports.

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.

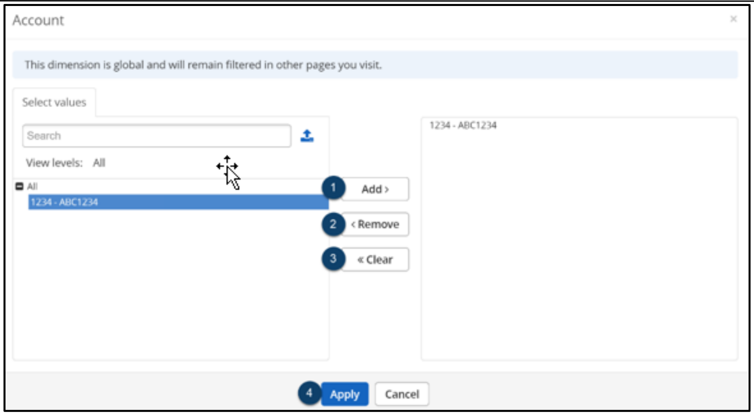
1. The first way is to use a quick filter. The quick filter will auto-populate results as you begin typing. Leave the filter on **Includes**.



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.

1. 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.



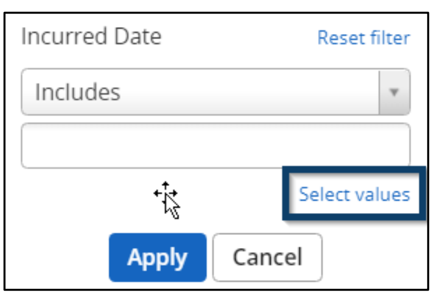
Date Parameters

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).

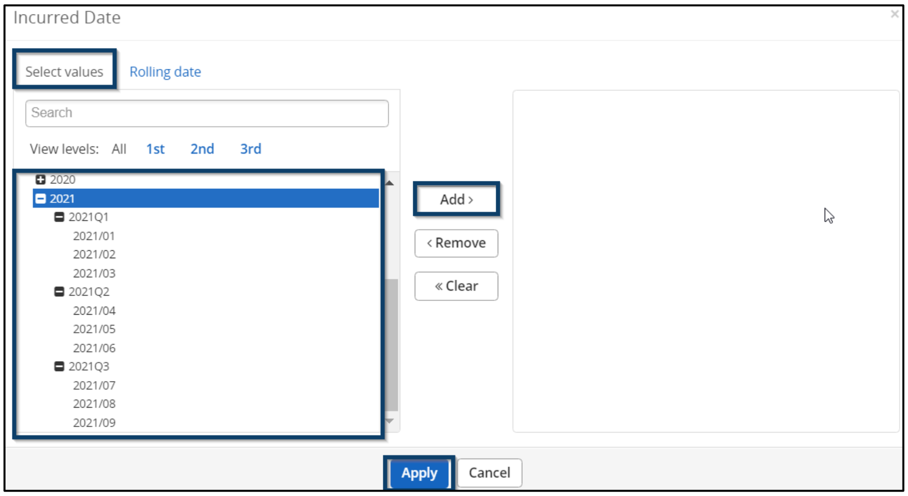
Example 1: Incurred Date for Fully-Funded Dashboard

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**.

Click on **Select values**.

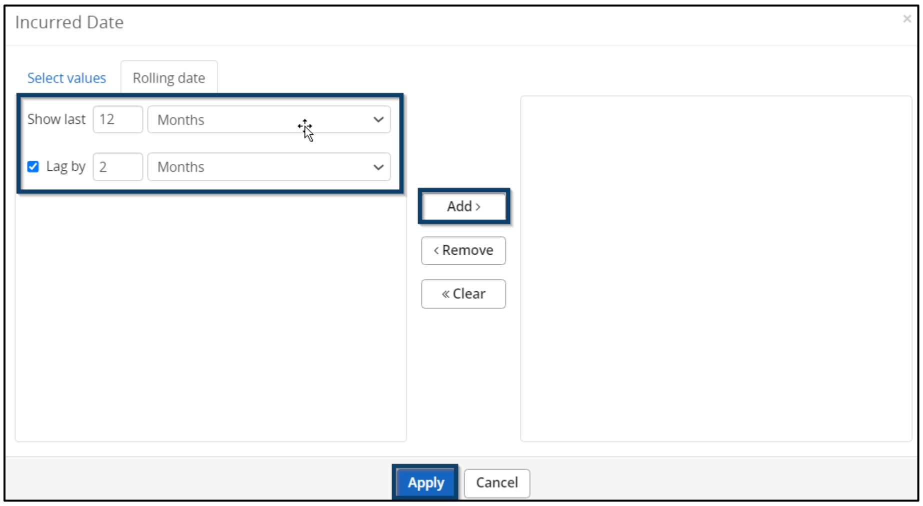


On the **Select values** tab, you can click into the year to choose specific quarters or months. Follow instructions above to add the quarters or months you have selected and click **Apply**.



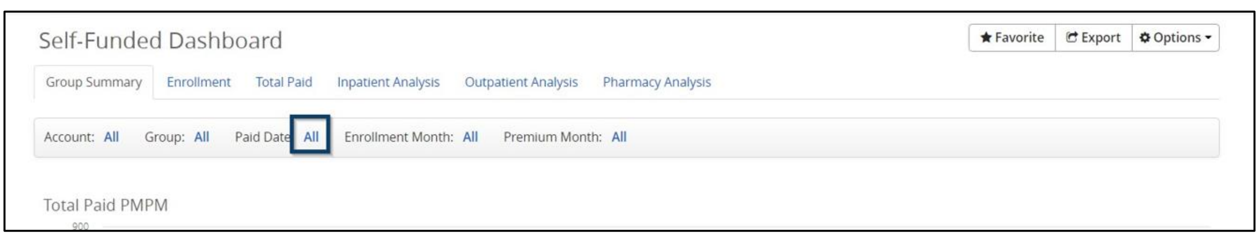
Alternatively, you can set a date parameter by clicking the **Rolling Date** tab.

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**.

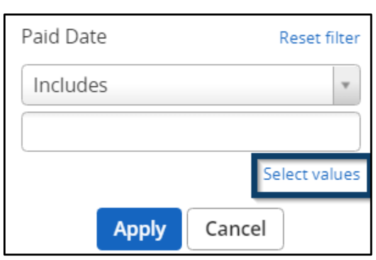


Example #2: Paid Date for Self-Funded Dashboard

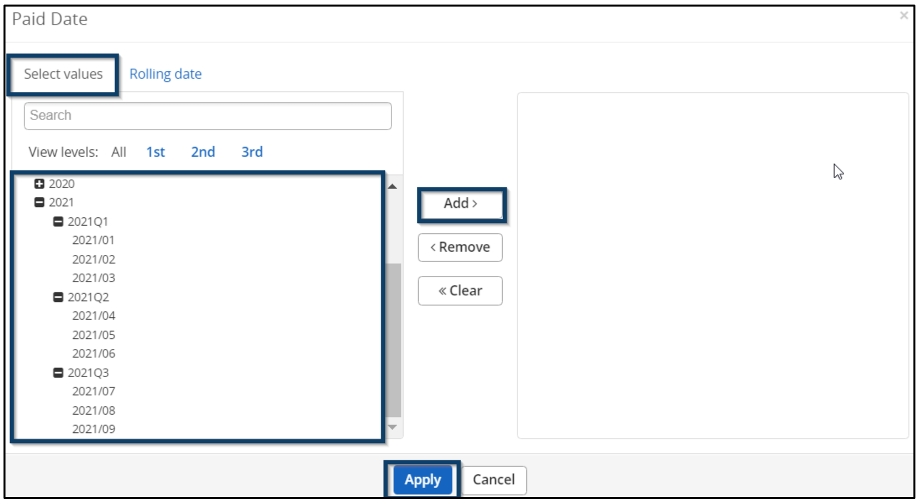
Click **All** next to **Paid Date**.



Click **Select values**.



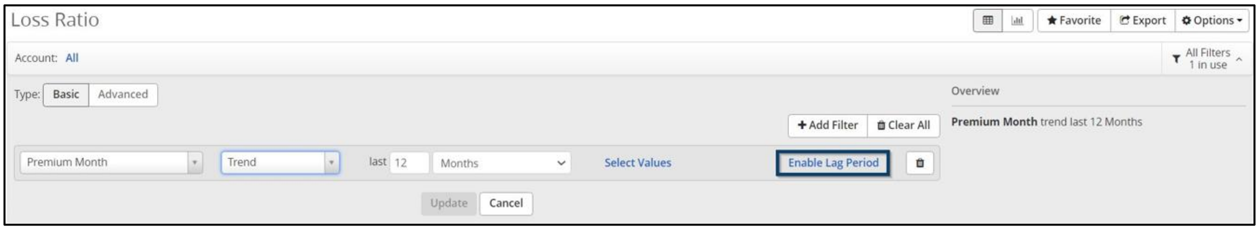
On the **Select values** tab, you can click into the year to choose specific quarters or months. Follow instructions above to add the quarters or months you have selected and click **Apply**.



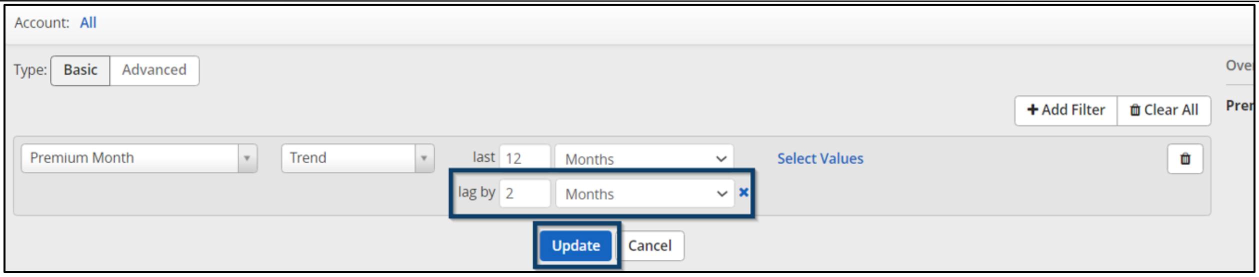
Example #3: Premium Month for Fully-Funded Groups in Loss Ratio Report

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

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**.



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



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.

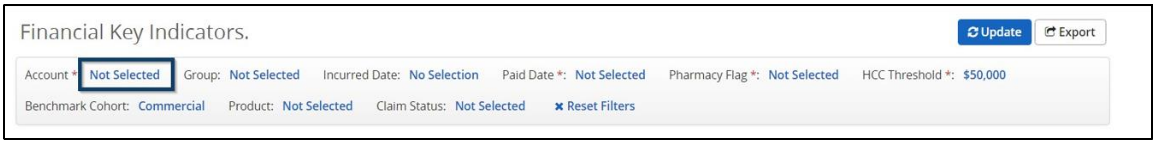
1. **Account and Group Filters**
   - **a. Account –** You <u>must</u> select the account name, account type, or enter the account number (Note that account number is your master account number and may not be an active group number).
     When selecting an account, the master account number will appear; 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.
4. **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.

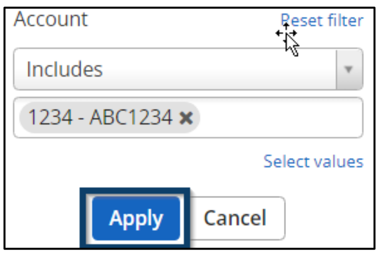
Account Filters

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.

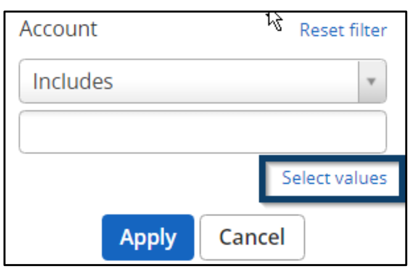


There are two ways you can filter by an account.

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**.

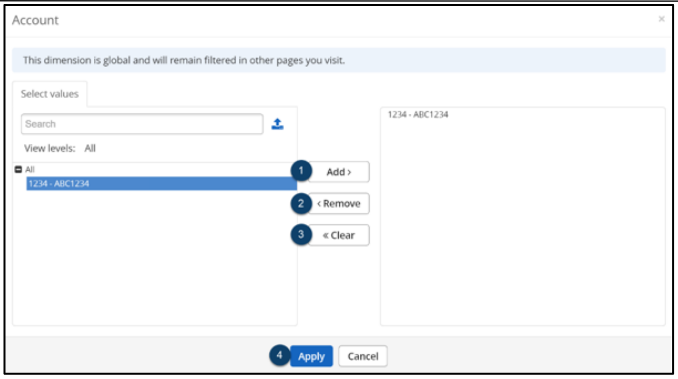


2. Alternatively, you can search for group name by clicking on **Select values**.



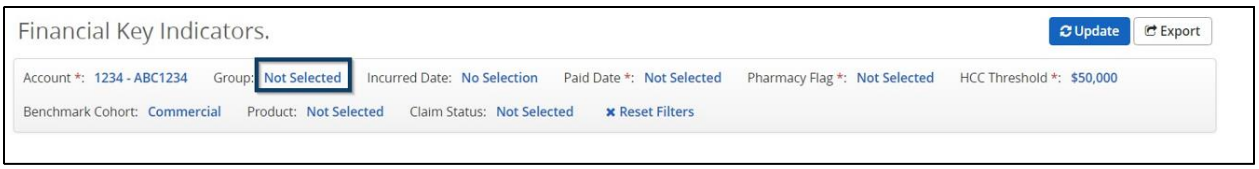
Once you click **Select values**, you can select the accounts you would like to add or remove.

1. 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.

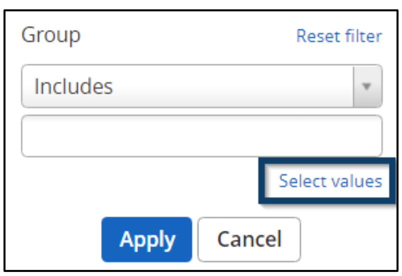


Group Filter

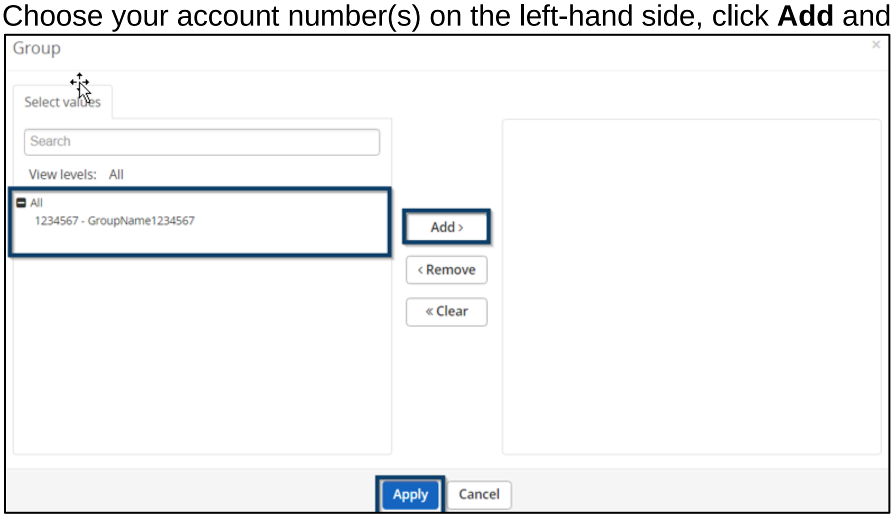
Click **Not Selected** next to **Group**.



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



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

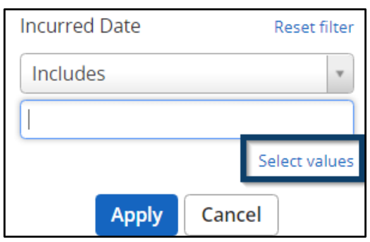


Tip: An account may have one or more group/plan numbers. This group filter is available if you want information for one or a few group numbers, but not all. This filter is not required to generate a report. As indicated above, with presentation reports, selecting no group filter will pull data from all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

Incurred Date Filter – Fully-Funded Groups

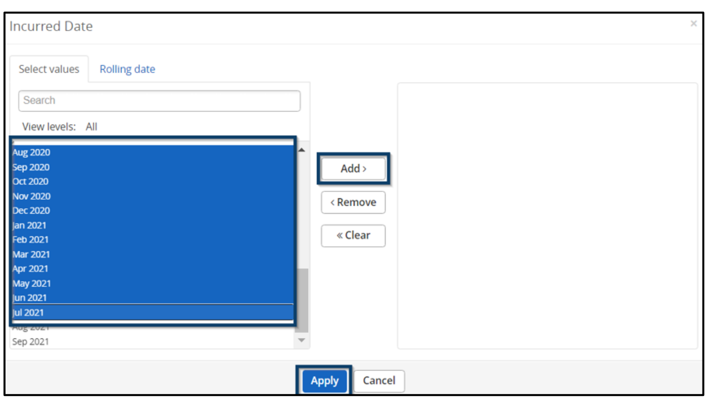
To set incurred date, click **No Selection** next to **Incurred Date**.

Click **Select values**.



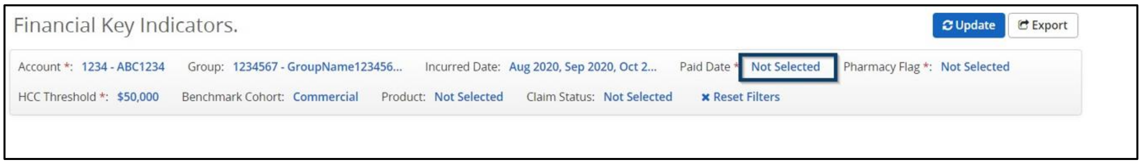
Tip: When setting the incurred date, keep in mind that a 2-month lag should be applied. If you want the most recent 12 months of data, you will need to begin your selection 14 months prior and choose the next 12 months. For example, if it is currently October 2021, you will choose August 2020 – July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

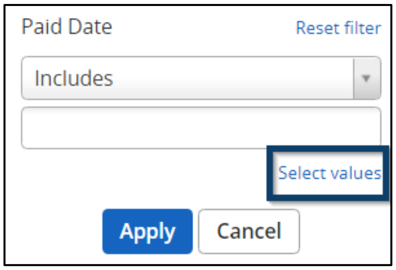


Paid Date Filter – Fully-Funded Groups

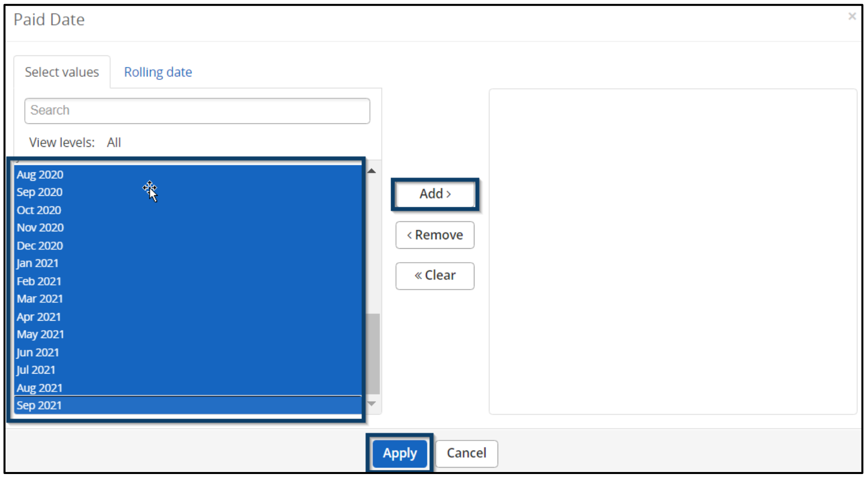
To set the paid date, click **Not Selected** next to **Paid Date**.



Click **Select values**.

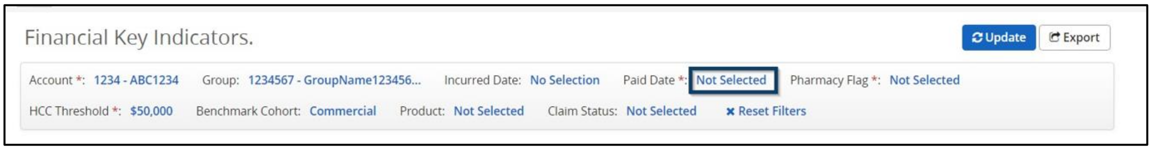


Choose the paid dates you want to view, click **Add** and then click **Apply**.

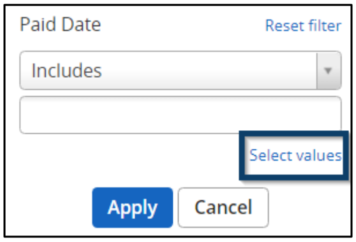


Paid Date Filter – Self Funded Groups

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

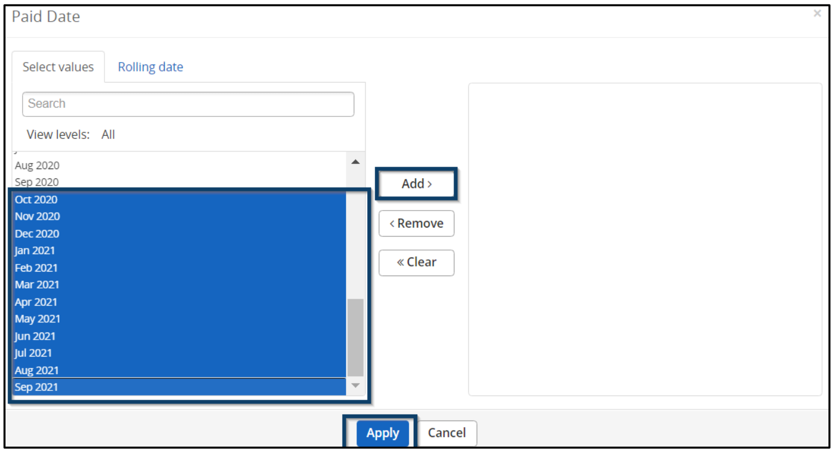


Click **Select values**.



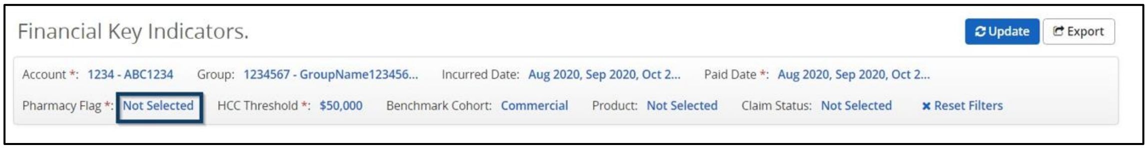
Tip: When setting the paid date, you want to select the most recent 12 months of data. For example, if it is currently October 2021, you will leave **No Selection** as the incurred date and you would select October 2020 – September 2021 for your paid date selection.

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

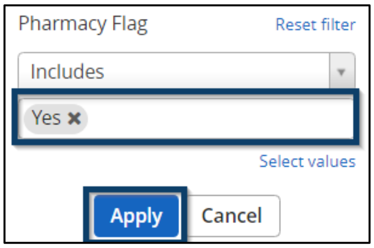


Pharmacy Flag Filter

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

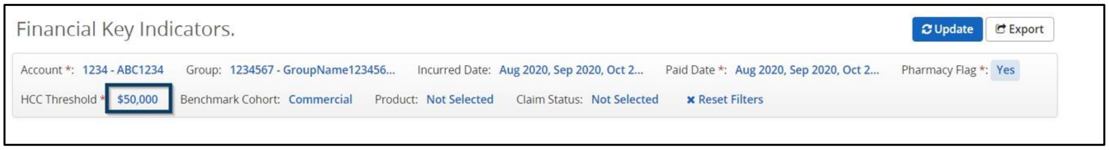


A display box will open, and you can choose to include or exclude the pharmacy flag. Once selected, click **Apply**.

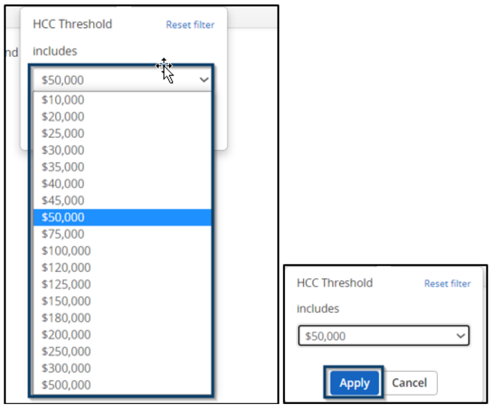


HCC Threshold Filter

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

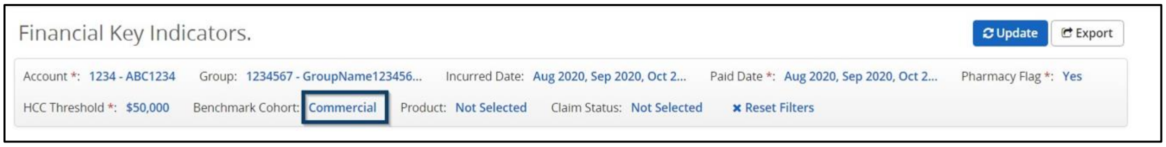


A display box will open, and you can choose your desired threshold from the drop down. For the HCC threshold, there are pre- determined values available. Once chosen, click **Apply**.

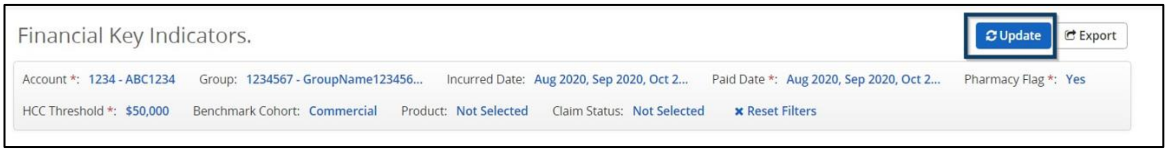


Benchmark Filter

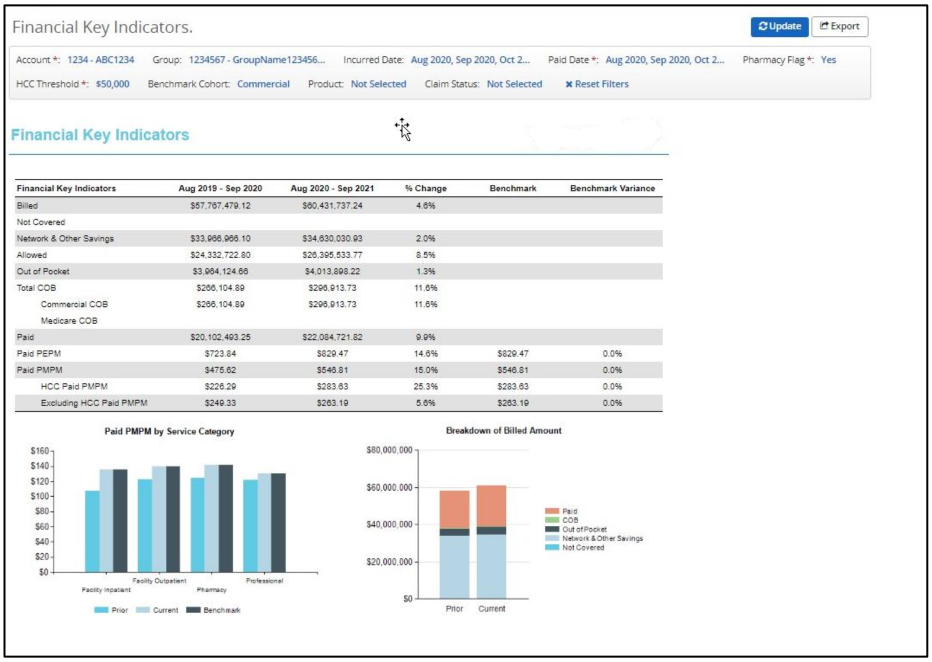
The default will be **Commercial**. This filter should not be changed. In the future, there may be additional filter options.



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



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



Financial Key Indicators	Aug 2019 - Sep 2020	Aug 2020 - Sep 2021	% Change	Benchmark	Benchmark Variance
Billed	$57,767,479.12	$60,431,737.24	4.6%		
Not Covered					
Network & Other Savings	$33,966,966.10	$34,630,030.93	2.0%		
Allowed	$24,332,722.80	$26,395,533.77	8.5%		
Out of Pocket	$3,964,124.66	$4,013,898.22	1.3%		
Total COB	$266,104.89	$296,913.73	11.6%		
Commercial COB	$266,104.89	$296,913.73	11.6%		
Medicare COB					
Paid	$20,102,493.25	$22,084,721.82	9.9%		
Paid PEPM	$723.84	$829.47	14.6%	$829.47	0.0%
Paid PMPM	$475.62	$546.81	15.0%	$546.81	0.0%
HCC Paid PMPM	$226.29	$283.63	25.3%	$283.63	0.0%
Excluding HCC Paid PMPM	$249.33	$263.19	5.6%	$263.19	0.0%