

# DataPoint Tips & Tricks



The purpose of this document is to provide you with quick Tips & Tricks while navigating DataPoint. Most of these tips or tricks can be found within user guides on [sentarahealthplans.com/needtoknow](https://sentarahealthplans.com/needtoknow).

## Filtering

*Paid Date* is a required field but *Incurred* is not. *Incurred* and *Paid Date* should be selected for fully-funded groups to ensure data is aligned with the underwriting practices.

This can be done by using the *includes* or *trend* filters. Either way, be sure to include two-month lag.

Refer to the **Did You Know-Filtering** user guide located on [sentarahealthplans.com/needtoknow](https://sentarahealthplans.com/needtoknow) for more information.



As a reminder, self-funded groups only need to select *Paid Date* and do not need to include incurred date. A two-month lag is not necessary.



Presentation Report filters with an asterisk next to them are required fields.

## Metrics

There are limits to the number of metrics that can be selected for reports. When you build your columns out, the maximum number will be stated within the metric selection.

## Date Ranges

On *Presentation Reports*, we recommend using no more than a 12-month period. Data for the period selected will be compared to the same months for the prior year. For example, a filter set for January 2021 through June 2021 will illustrate data for that period vs. data for January 2020 through June 2020.



## Zoom in on Data

In a chart view within *Summary Reports*, hover over the metric on a chart to enlarge a specific category or data point.

If a naming convention in the tool is too long for the screen, you can hover over the item to see the full name.

## Favorites

*Organizational Favorites* allows ease of access to helpful reports chosen by Sentara Health Plans.

Under *Organizational Favorites*, you can click the *View All* and *Manage* to see the full list of saved reports.

You may add, edit, or delete personal favorites based on customized summary reports at any time throughout the year.

## Exporting

After you finalize your export, you can click the *Hide Export Progress* button to close the window and continue working in the tool while your export finishes processing.

- Summary reports are best if exported as an Excel file.
- Presentation reports are best if exported as a PDF.

Not all file types are available for each export. They differ from reports and/or dashboards.

(e.g., JPG, PNG, TIFF, BMP, GIF)

Best practice is to name your export as the following: Account name, type of report or dashboard, and date.

Example: *Client2 Full*

*Presentation Report 1.22.2023*

If you have any questions on DataPoint, please email: [datapoint@sentara.com](mailto:datapoint@sentara.com)

# DataPoint Crosswalk

The DataPoint Crosswalk is to provide you with the ability to determine which DataPoint report or dashboard to use to view metrics that were previously available through static legacy reports.

Location Key: U = Utilization, F = Financial, E = Enrollment, P = Presentation Reports

Previous Report	DataPoint Report	Location			
		U	F	E	P
Total Expense Report (TER)	Loss Ratio Report (applies to Fully-Funded)		X		
Full Employer Group Report (EGR)	Full Presentation Report Package				X

The table below represents each report that has been part of the previous static Full Employer Group Report (EGR). The Crosswalk provided will help you locate DataPoint metrics and information.

Previous Report/Metrics	DataPoint Report	Location			
		U	F	E	P
<b>Report 1 - Benefit Management Report</b>					
Contractual Discounts	Network Analysis		X		X
Total Eligible Claims Billed, Discount Arrangements, Coordination of Benefits (COB), Member Payments (Cost Share), Total Claims Paid (\$ and PMPM)	Financial Key Indicators				X
Average Number of Contracts, Average Number of Members, Member Months	Enrollment Overview (P) or Enrollment Overview Dashboard (E)			X	X
<b>Report 2 - Summary Report</b>					
Medical Utilization Summary	Cost & Utilization Key Indicators (P) or Cost & Utilization (U)	X			X
General Demographics	Enrollment Overview (P) or Enrollment Overview Dashboard (E)			X	X
<b>Report 3 - Medical Claims Report</b>					
Medical Costs by Demographics	Ad hoc				
<b>Report 4 - Inpatient (IP) Report</b>					
IP Utilization by Facility	Utilization by Facility (see <i>Organizational Favorite</i> menu options)				
Top 10 Inpatient Diagnosis	Top 15 Inpatient DRG (P) or IP Diagnostic Categories (U)	X			X
<b>Report 5 - Outpatient (OP) Surgery Report</b>					
OP Surgery Utilization by Facility	Utilization by Facility (see <i>Organizational Favorite</i> menu options)				
Top 10 Outpatient Surgery Diagnosis	OP Diagnostic Categories	X			
Outpatient Surgery Network Utilization	Outpatient Analysis				X

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Previous Report/Metrics	DataPoint Report	Location			
		U	F	E	P
<b>Report 6 - Professional Medical Services</b>					
Professional Medical Services Metrics	Professional Analysis				X
Professional Medical Services Breakdown	Professional Key Indicators by Service Type				X
<b>Report 7 - Mental Health</b>					
Mental Health Metrics and Utilization by Provider (applied to Self-Funded EGR)	Mental Health Overview (see Organizational Favorite menu options)				
<b>Report 7 - High Cost Claims Report</b>					
Group Information	High Cost Claimants (HCC) Overview (P), HighCost Claimants (F)		X		X
Specific Breakdown (HCC Listing)	Top 20 High Cost Claimant Listing				X
<b>Report 8 - Group Pharmacy Report</b>					
Utilization Statistics	Pharmacy Key Indicators				X
Mail Order vs. Retail	Maintenance RX Retail vs. Mail	X			
Brand vs. Generic	RX Brand vs. Generic Analysis	X			
Top Ten Drugs	Top Non-Specialty Therapeutic Drug Class (P and U) or Specialty Drug Analysis (P) or High Cost Specialty Drugs (U)	X			X

The table below captures some frequently requested reporting types that were previously on an ad hoc basis or unavailable and where that data may now be found in DataPoint.

Previous Report/Metrics	DataPoint Report	Location			
		U	F	E	P
<b>Additional Reporting</b>					
Deductible and Max Out-of-Pocket Report	Distribution Reports		X		X
High Cost Claims Report	Top 20 High Cost Claimant Listing				X
Monthly Excel Claims and Enrollment (applies to Self-Funded)	12 Month Claim Lag (P) or Enrollment Overview Dashboard (E) <i>(Enrollment by tier is in development)</i>			X	X
N/A for Fully-Funded, Ad hoc for Self-Funded	Telehealth Dashboard	X			
N/A	Emergency Room Visits Analysis	X			
N/A	COVID-19 Claims Analysis Dashboard		X		