

# DataPoint User Guide Summary Reports and Dashboards – Intermediate Functionality



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### Purpose

The purpose of this user guide is to outline the following in DataPoint:

- what is a Summary Report
- how to navigate elements on a summary report
- overview metric selection process
- how to create a personal favorite
- how to update Summary Report filters with report examples
- how to navigate dashboard filters with dashboard examples

### What Are Summary Reports

Summary reports are dynamic reports that can be customized to pull specific information based on your needs.

They are located under the following tabs:

- Utilization
- Financial
- Enrollment

|               |             | Q Search     |                        |           |             |
|---------------|-------------|--------------|------------------------|-----------|-------------|
| Utilization 🔻 | Financial 🔻 | Enrollment 🔻 | Presentation Reports 🔻 | Explore 🔻 | Favorites 👻 |

# Navigating a Summary Report

Summary reports can give you a general idea of the information you're trying to find. You can dive deeper and edit filters to create a custom look for the data you need. When you pull a summary report, you'll see the following:

- 1. Table View the data is presented in a table view
- 2. Chart View the data is presented in chart views
- 3. **Favorite** you can save your report as a Favorite. Learn more about this in our *Overall Functionality User Guide.*
- 4. **Export** you can export your report. Learn more about this in our *Exports User Guide*.
- 5. Options where you can print, show totals, create a variance report, and other options
- 6. **Filters** you can adjust the filters in your summary report. Learn more about this in our *Overall Functionality User Guide*.
- 7. **Metrics** you can select the metrics you want to view.
- 8. Row you can select what data you want to view in your rows.
- 9. Column you can select what data you want to view in your columns.



10. Axis Orientation – you can select this button to quickly invert data in row and columns

| ← ▼ IP Services Paid     |                               |  |   |                               | 6          | Data Posted Thr          | ough: 09-30-2021            |
|--------------------------|-------------------------------|--|---|-------------------------------|------------|--------------------------|-----------------------------|
| Inpatient Year Paid      |                               |  |   |                               |            |                          |                             |
| Account: All             |                               |  |   |                               | Table View | 6                        | τ All Filters<br>2 in use Υ |
| Metrics 1                |                               |  |   |                               |            |                          |                             |
|                          | Rolling Paid Year             | Advance Care Planning Evaluation and Management Services | Alcohol and Drug Abuse Treatment Services / Rehabilitative Services | Allergy & Clinical Immunology | Ambulance  | Ambulatory Surgical Care | Anesthesia /                |
| Row 🛛 🚯                  | Oct 2019 - Sep 2020           |  |   |                               |            |                          |                             |
| 1. Rolling Paid Year *   | Oct 2020 - Sep 2021           |  |   | 10                            |            |                          |                             |
| + Add New                | Total : Selected<br>Filter(s) |  |   |                               |            |                          |                             |
|                          | •                             |  |   |                               |            |                          | +                           |
| Column 🛛 🧐               |                               |  |   |                               |            | Sh                       | iowing 1 – 2 of 2           |
| 1. Line Service Type 🔹 💌 |                               |  |   |                               |            |                          |                             |
| 2. Line Service Type D * |                               |  |   |                               |            |                          |                             |
| + Add New                |                               |  |   |                               |            |                          |                             |

# **Metric Selection**

Metrics allow you to customize data within a report by allowing you to add different utilization, financial, and/or enrollment metrics. Our basic summary reports have been built with metrics pre-populated.

To add metrics, click the **Metrics** button on the top left.



Select your desired utilization, financial, and/or enrollment metrics, then click **Apply**. **Tip**: As you begin building your columns out, there are limitations on the number of metrics that can be selected. For example, in the below image, no more than five metrics can be selected. These selections will initially be added to a column with the opportunity to switch them to a row using the axis orientation button.

| You cannot nest more than 5 metrics. Pleas | e select 5 or fewer me | rics.                                      |            |
|--|------------------------|--|------------|
| Available:                                 |                        | Selected:                                  |            |
| Search<br>Dental Paid PEPM                 |                        | II Total Paid PMPM<br>II Paid per Claimant |            |
| IP Paid PEPM                               |                        | II Paid per Service                        |            |
| Medical Paid PEPM                          |                        | Add >                                      |            |
| Out of Pocket % Cost Share                 |                        |  |            |
| Pharmacy Paid PEPM                         |                        | Remove                                     |            |
| Professional Paid PEPM                     |                        |  |            |
| Total Paid PEPM                            |                        | « Clear                                    |            |
| % Females                                  |                        |  |            |
| % Mail Order                               |                        |  |            |
| % Males                                    |                        |  |            |
| % of total Allowed                         |                        |  |            |
| % of total Billed                          |                        |  |            |
| % of total Claimants                       | -                      |  |            |
|  |                        |  | 4 selected |

Further detail on metric selection can be found in your Dimensions and Metrics User Guide.



#### How to Save a Summary Report/Dashboard as a Personal Favorite

After you have selected your desired utilization, financial, and/or enrollment metrics and/or the desired axis orientation, you can save it as a favorite to reference whenever you need.

As discussed in the *Overall Functionality User* Guide, to save a report or dashboard as a favorite, click the **Favorite** button on the top right.

| Medical Claim Lag | III ↓ ★ Favorite C Export ♦ Options - |
|-------------------|---------------------------------------|
| Account: All      | τ All Filters γ<br>2 in use γ         |

### **Updating Summary Report Filters**

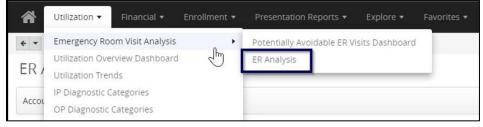
Summary Reports typically start as a high-level overview, and they can be customized using filters to drill down into the information you need to see. To learn more about filtering, reference the *Filtering Job Aid*.

We will review example summary reports in the sections below.

#### **Example 1: ER Analysis Report**

Some Summary Reports offer sub reports. In the example below, **Emergency Room Visit Analysis** offers multiple sub reports. We will be viewing the ER analysis report, which is applicable to both fully funded and self-funded books of business.

To view the **ER Analysis** report, click **Utilization** and hover over the carrot next to **Emergency Room Visit Analysis**. This will bring up a list of sub reports. Click **ER Analysis**.



Once the ER analysis report generates, you can select an account name, if applicable, by clicking **All** next to **Account**.

| ER Analysis | ■ Lui ★ Favorite & Export ♦ Options - |
|-------------|---------------------------------------|
| Account All |                                       |



Begin typing the account name, click on the account name that is applicable and then click **Apply**.

| _ | Account        | +t+         | Reset filter | 1           |
|---|----------------|-------------|--------------|-------------|
|   |                | \$ <u>1</u> | incode inter | CD          |
|   | Includes       |             | Ŧ            | ea          |
| R | 1              |             |              | <u>np</u>   |
|   | 1234 - ABC1234 |             |              | <u>ur</u> y |
| L | Apply          | Cancel      |              | e           |

To add additional filters, click **All Filters** in the top right corner of the screen.

For this report, we want to add a **Service From Date** filter. The *CCSR ICD10 Dx Category*\* and ER Flag filters will be pre-populated. To do this, click **Add Filter** and then choose **Service From Date** from the drop down menu.

| Account: All           |   |          |   |        |   |                          |  | ▼ All Filters<br>2 in use ^ |
|------------------------|---|----------|---|--------|---|--------------------------|--|-----------------------------|
| Type: Basic Advanced   |   |          |   |        |   |                          | Overview   |                             |
|                        |   |          |   |        | 5 | + Add Filter 🛍 Clear All | CCSR ICD10 Dx Category excludes [None]<br>ER Flag includes [Yes] |                             |
| CCSR ICD10 Dx Category | * | Excludes | * | None × |   | Select Values            |  |                             |
| ER Flag                | • | Includes | • | Yes x  |   | Select Values            |  |                             |
| Service From Date      |   | Includes | • |        |   | Select Values            |  |                             |
|                        |   |          |   | Update |   |                          |  |                             |

\*CCSR IC10 Dx Category – industry standard diagnosis claim categories To select the dates you would like to review, click **Select values**, and choose the appropriate year, guarter, and/or month. Select **Apply** once you make your selections.

| Service From Date            |   | × |
|------------------------------|---|---|
| Service From Date            |   |   |
| Select values Rolling date   |   |   |
| Search                       | Aug 2020<br>Sep 2020                          |   |
| View levels: All 1st 2nd 3rd | Oct 2020<br>Nov 2020                          |   |
| Dec 2020                     | ▲ Dec 2020<br>Add > Jan 2021                  |   |
| Q1 2021                      | Feb 2021<br>Mar 2021                          |   |
| Jan 2021<br>Feb 2021         | < Remove Apr 2021                             |   |
| Mar 2021                     | May 2021           « Clear           Jun 2021 |   |
| Apr 2021                     | Jul 2021                                      |   |
| May 2021<br>Jun 2021         |   |   |
| Q3 2021                      |   |   |
| Jul 2021<br>Aug 2021         |   |   |
| Sep 2021                     | *   |   |
|                              | Apply Cancel                                  |   |

Alternatively, you can click **Rolling date** and select dates.

All Filters 2 in use



Enter the number of months that you want to view. Best practice is to either select 12 or 24 and then select the Lag by 2 months. Select **Apply** once you make your selections

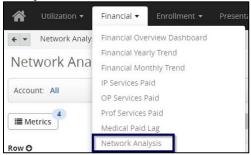
| rvice From Date           |                                  |  |
|---------------------------|----------------------------------|--|
| elect values Rolling date |                                  |  |
| show last 12 Months       | Last 12 Months (lag by 2 Months) |  |
| Lag by 2 Months           | ****                             |  |
|                           | Add >                            |  |
|                           | < Remove                         |  |
|                           | « Clear                          |  |
|                           |                                  |  |
|                           |                                  |  |
|                           |                                  |  |
|                           |                                  |  |

**Tip**: Depending on your date filters, the data in your **Utilization Summary Reports** may not always tie back to your **Financial Presentation Reports**.

Alternatively, selecting the **Paid Date** filter rather than **Service From Date** filter can be used for self-funded groups or to see data on a paid basis.

#### **Example 2: Network Analysis Report**

Network analysis can be found by navigating to the **Financial** dropdown and clicking **Network Analysis**.





#### If applicable, select account name.

| Ν | letwork Analysis     |
|---|----------------------|
| A | ccount: All          |
| - | Account Reset filter |
| - | Includes •           |
| R |                      |
|   | Select values        |
| : | Apply Cancel         |

For Self-Funded groups, keep the filter **Rolling Paid Year** and select the appropriate dates for analysis.

| Network Analysis             |   |                            | Image: Image |
|------------------------------|---|----------------------------|--|
| Account: All                 |   |                            | ₹ All Filters ^<br>2 in use ^  |
| Type: Basic Advanced         |   |                            | Overview   |
|                              |   | + Add Filter 🛛 🛍 Clear All | Rolling Paid Year includes [Oct 2020 - Sep 2021]<br>Service Category includes [Facility Inpatient, Facility Outpatient,  |
| Rolling Paid Year   Includes | • Oct 2020 - Sep 2021 🗙                                   | Select Values              | Professional]  |
| Service Category             | Facility Inpatient x Facility Outpatient x Professional x | Select Values              |  |
|                              | Update  |                            | \$   |

#### Fully-Funded groups should change the Rolling Paid Year filter to Incurred YTD w/ Runout(2).

| Network Analysis   |              |            |     | [           | ≡ | Last. | 🖈 Favorite                           | C Export | Options •       |
|--|--------------|------------|-----|-------------|---|-------|--------------------------------------|----------|-----------------|
| Account: All   |              |            |     |             |   |       |                                      |          | ₹ All Filters ~ |
| Type: Basic Advanced   |              |            | Ov  | erview      |   |       |                                      |          |                 |
|  | + Add Filter | 🛱 Clear Al |     |             |   |       | les [Oct 2020 -<br>les [Facility Inp |          | y Outpatient,   |
| Incurred YTD w/ Runout(2)  | Select Valu  | es 🗊       | Pro | ofessional] |   |       |                                      |          |                 |
| Service Category   Includes  Facility Inpatient  Facility Outpatient  Professional | Select Valu  | es 🗊       |     |             |   |       |                                      |          |                 |
| Update Cancel  |              |            |     |             |   |       |                                      |          |                 |

To select the necessary dates, you would like to review, click **Select Values**, and choose the appropriate year, quarter, and/or month. Select **Apply** once you make your selections.

| Search         Rolling syste           Search         Search           Usew levels:         All         1st         2nd         3rd           Dec 2020         2021         2102         3rd         3rd           Mar 2021         Q1 2021         4P 2021         4P 2021         4P 2021         4P 2021           Mar 2021         Q2 2021         4P 2021         < | Aug 3000<br>Sep 2000<br>Oc. 2000<br>Dec 2000<br>Dec 2000<br>Ge 2000<br>Fer 2001<br>Fer 2001<br>Arr 2001<br>Arr 2001<br>Arr 2001<br>Arr 2001<br>Jun 2001<br>Jun 2001<br>Jun 2001 |  |
|--|---|--|
|--|---|--|



Alternatively, you can click **Rolling date** and select dates. Enter in the number of months that you want to view. Select **Apply** once you make your selections.

Tip: Best practice is to either select 12 or 24 and then select the Lag by 2 months.

| Incurred Date              | _                                | × |
|----------------------------|----------------------------------|---|
| Select values Rolling date |                                  |   |
| Show last 12 Months        | Last 12 Months (lag by 2 Months) |   |
| Z Lag by 2 Months          |                                  |   |
|                            | Add>                             |   |
|                            | < Remove                         |   |
|                            | «Clear                           |   |
|                            |                                  |   |
|                            |                                  |   |
|                            |                                  |   |
|                            | Apply Cancel                     |   |

### Navigating a Dashboard and Setting Filters

A summary report is a singular report that has one type of data. Dashboards are a collection of multiple summary reports centered on one page with filters that present summarized data.

#### Simple Dashboard: Financial Overview Dashboard

Dashboards range from simple dashboards to more complex. For the example below, you will be viewing a simple dashboard found under the **Financial** dropdown labeled **Financial Overview Dashboard**.

When you pull a dashboard, you will see the key items below:

- 1. Account where you have the option to select an account
- 2. **Favorite** you can save your report or dashboard as a favorite. Learn more about this in the *Favorites Job Aid*.
- 3. **Export** you can export your report. Learn more about this in the *Exports User Guide*.
- 4. Options where you can edit or set as landing page
- 5. **Dashboard Insights** a summarization of the dashboard
- 6. Chart a graphical representation of the data



7. Report – the data broken down into a report structure

|   | / Dashboar  | ď                            |        |                                   | 2 * Favorite                     | E Export Options |
|---|---|------------------------------|--------|-----------------------------------|----------------------------------|------------------|
| count: All  |   |                              |        |                                   |                                  | • •              |
| shboard Insights 5<br>The Total Paid PMPM for the<br>The total Paid for the most r<br>The % of total paid for In-Ne<br>aid PMPM Trend by Serv | ecent month is <b>\$2,</b><br>twork in the last 2 y | 145,526.10<br>years is 98.0% |        | Order of Reduction Tab            |                                  | Total            |
|   |   |                              |        |                                   |                                  | lotal            |
| 150   |   |                              |        | Covered                           | \$5,170,576.97                   | \$5,170,576.97   |
| 100   |   |                              |        | Allowed                           | \$2,440,901.37                   | \$2,440,901.37   |
| 2   |   |                              |        | Out of Pocket                     | \$285,060.39                     | \$285,060.39     |
| 50  | -   |                              |        | СОВ                               | \$10,314.88                      | \$10,314.88      |
|   | 202003  | 2021Q1                       | 2021Q3 | COB Medicare                      |                                  |                  |
| 202001  |   |                              |        |                                   |                                  |                  |
| 150<br>100  |   | 1                            | 22     | Metrics<br>Not Covered<br>Covered | <b>2021/09</b><br>\$5,170,576.97 | \$5,17           |

#### **Complex Dashboard: Cost and Utilization Complex Dashboard**

For the example below, you will be viewing a more complex dashboard found under the **Utilization** dropdown labeled **Cost and Utilization Drivers Dashboard**. A more complex dashboard contains more options to manipulate the data.

- 1. **Tabs** where you have the option to select an overview of the dashboard or to focus on specific categories
- 2. **Favorite** you can save your report or dashboard as a favorite. Learn more about this in the *Favorites Job Aid*.
- 3. **Export** you can export your report. Learn more about this in our *Exports User Guide*. **Tip**: Tabs are better exported as a PDF.
- 4. **Options** where you can edit or set as landing page
- 5. **Filtering Options** a filter section to allow you to drilldown into the data. **Tip:** If you select different filters, those filters will remain across the different tabs.
- 6. Chart a graphical representation of the data



7. Report - the data broken down into a report structure

| Cost and Utilizati        | UT DIVELS        | Dashbuc        | i di                   |             |              |                        |              | ★ Favorite   | Export 2 | Option: |
|---------------------------|------------------|----------------|------------------------|-------------|--------------|------------------------|--------------|--------------|----------|---------|
| Overview Cost Utiliza     | tion Diagnoses a | and Procedures | Pharmacy               |             |              |                        |              |              |          |         |
| Account: All Service Cati | egory: All Produ | uct: All Me    | mber Relationship: All | Chronic Con | ditions: All | Network Indicator: All | Servicing Pl | rovider: All |          |         |
| rrend - Total Paid PMP    |                  | Þ              |                        |             | 1000         | Paid PMPM by Pr        |              |              |          | >       |
| - Facility Inpatie        |                  | urred Quarter  |                        | 10100       |              | 2019DA                 |              | POS • PPO    | 202107   | 101101  |
|                           | dout - Prior Yea | r Compariso    | n                      |             |              |                        |              |              |          |         |
| Cost vs Utilization Real  | -                | Facility In    | patient                | -           | Facility Out | patient                | (m)          | Pharmac      | v.       |         |

# **Exporting a Summary Report or Dashboard**

After you set your filters, you can export your summary report or dashboard. Click on the **Export** button in the top right.

| Fully-Funde       | d Dashboard   | ★ Favorite | 🖻 Export | Options • |
|-------------------|---|------------|----------|-----------|
| Group Summary     | Enrollment Total Paid Inpatient Analysis Outpatient Analysis Pharmacy Analysis                              |            |          |           |
| Account: 1234 - A | C1234 Group: All Paid Date: All Incurred Date: All Enrollment Month: All Premium Month: All X Reset Filters |            |          |           |

Complete the required fields in the **Export Settings** box by entering the following details and then click the **Export** button at the bottom of the page.

- 1. **Password** Create a password to view the export (optional).
- 2. **Title** Enter a name for the exported file. **Tip**: Include a date at the end of the file name (e.g., 20220106).
- 3. Export Use the dropdown to select Report Only or Chart Only.
- 4. **File Type** Choose your preferred file type: Excel, PDF, CSV, or Access. Excel and PDF are used most often. Options for exporting may differ based on report or dashboard.
- 5. **Data Format** Use the dropdown to select to export the data as displayed on the screen or with expanded rows that include additional data
- 6. **Paper size** If printing, choose your paper size. Otherwise, this will set the document size.



- 7. **Orientation and Scaling** Choose the desired formatting for the export if you would like to print it.
- 8. **Repetition and Start Date** For reoccurring reports, select a frequency and enter the start date for your reporting. We recommend scheduling after the 15th of each month to account for the monthly upload of data.
- 9. **Distribution List** Enter the usernames for people who need to receive the report or choose from the list of users that have access to this tool by clicking **Select Users**.

**Tip**: Summary Reports are best if exported as an Excel file and Presentation Reports are best exported as a PDF or PPT.

| 🖻 Export Setti                       | ngs   |
|--------------------------------------|---|
| environment. Be<br>confidential pati | download patient information outside of the secure MedeAnalytics<br>sure to follow your organization's rules regarding the security of<br>& information.<br>rotection requires the file to be compressed into a zip format. |
| Protect of                           | document with password to ensure HIPAA compliance   |
| Password:                            |   |
| Title:                               | Medical Claim Lag   |
| Export:                              | Report Only ~ 3   |
| File type:                           | 🗟 Excel (xlsx) = 4  |
| Data format:                         | Export as displayed   |
| Paper size:                          | Letter (8.5" x 11") ~ 6   |
| Orientation:                         | ⊙ Landscape 🗅 🕜 Portrait 🗋  |
| Scaling:                             | Fit width to 1 page(s) 7  |
|                                      | Fit height to   |
| Repetition:                          | No Repetition   |
| Start date:                          | 2/18/2022 🖀 🛛 🛛   |
| Recurring:                           | One time  |
|                                      | Update automatically when changes are made to the report<br>Reports need to be saved as favorites for automatic updates   |
| 9                                    |   |
| Distribution list:                   | Select Users  |
|                                      | Export Cancel   |