

**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:

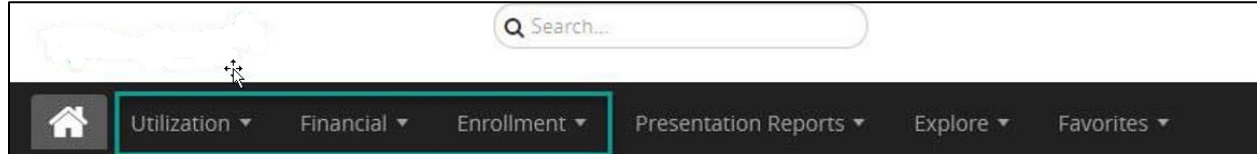
- what is a Summary Report
- how to navigate elements on a summary report
- overview metric selection process
- how to create a personal favorite
- how to update Summary Report filters with report examples
- how to navigate dashboard filters with dashboard examples

## 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

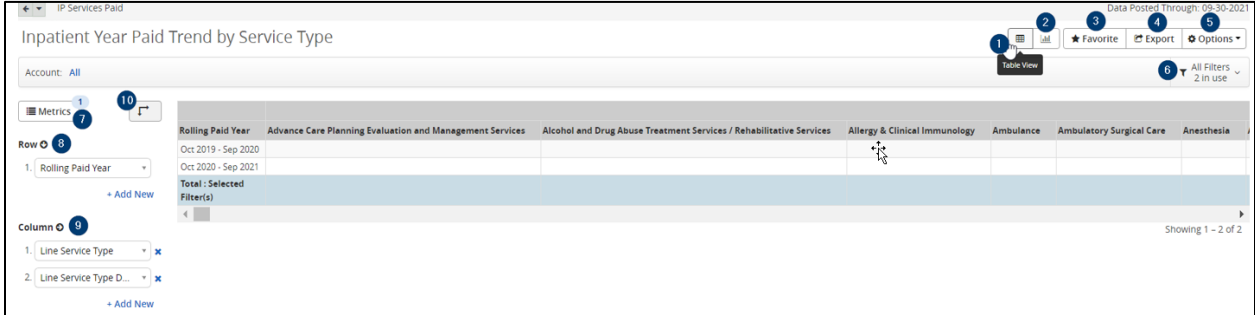


## Navigating a Summary Report

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



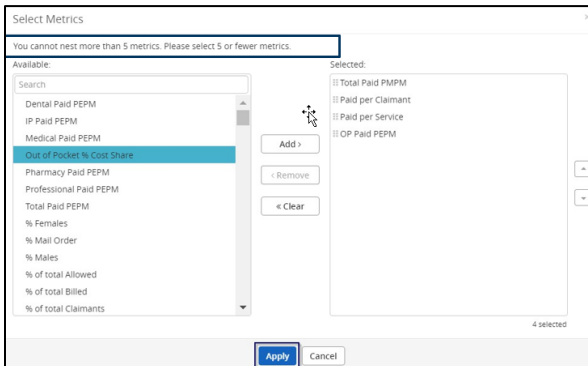
## Metric Selection

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.



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.



## Updating Summary Report Filters

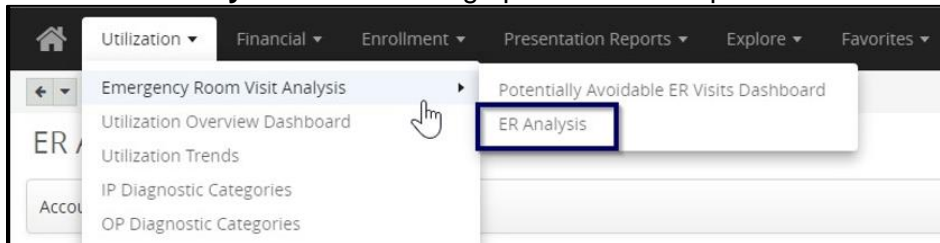
Summary Reports typically start as a high-level overview, and they can be customized using filters to drill down into the information you need to see. To learn more about filtering, reference the *Filtering Job Aid*.

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.

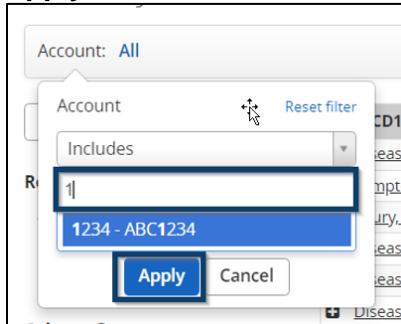
To view the **ER Analysis** report, click **Utilization** and hover over the carrot next to **Emergency Room Visit Analysis**. This will bring up a list of sub reports. Click **ER Analysis**.



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



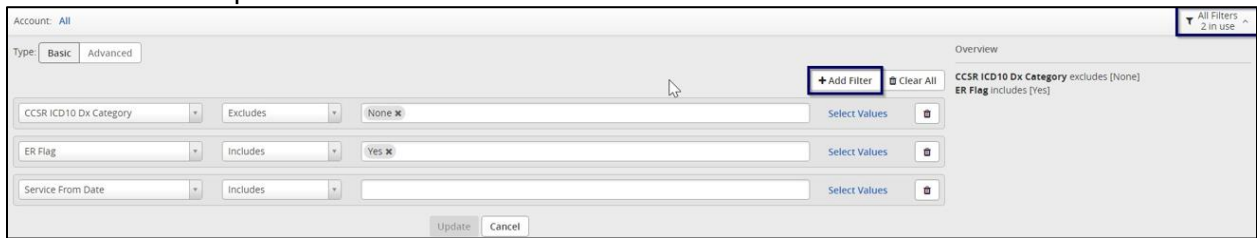
Begin typing the account name, click on the account name that is applicable and then click **Apply**.



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

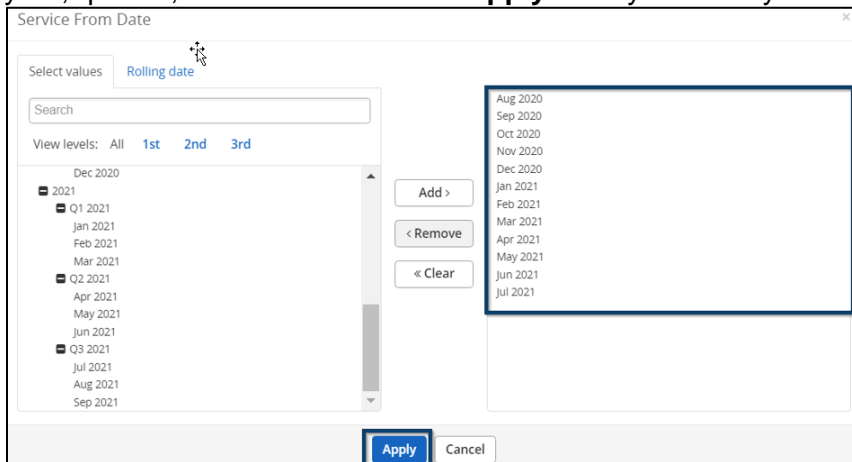


For this report, we want to add a **Service From Date** filter. The *CCSR ICD10 Dx Category\** and ER Flag filters will be pre-populated. To do this, click **Add Filter** and then choose **Service From Date** from the drop down menu.



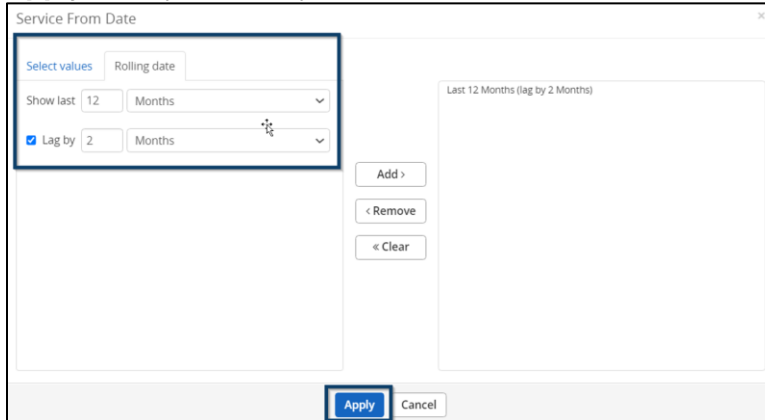
\*CCSR IC10 Dx Category – industry standard diagnosis claim categories

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



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

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.



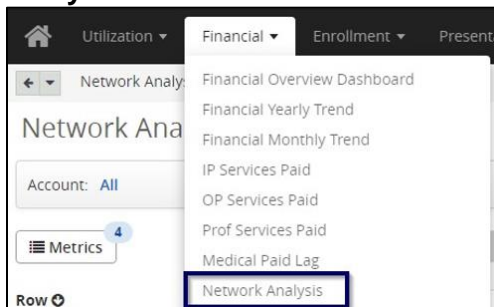
The screenshot shows a dialog box titled "Service From Date". It has a "Select values" section with a "Rolling date" label. Below this, there are two rows of controls. The first row has "Show last" with a value of "12" and a dropdown menu set to "Months". The second row has a checked "Lag by" checkbox, a value of "2", and a dropdown menu set to "Months". To the right of these controls is a large empty box labeled "Last 12 Months (lag by 2 Months)". Below this box are three buttons: "Add >", "< Remove", and "<< Clear". At the bottom of the dialog are "Apply" and "Cancel" buttons. The "Apply" button is highlighted with a blue border.

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

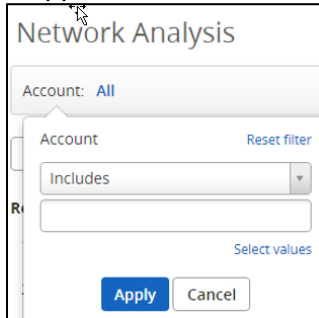
Alternatively, selecting the **Paid Date** filter rather than **Service From Date** filter can be used for self-funded groups or to see data on a paid basis.

## 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.



Network Analysis

Account: All

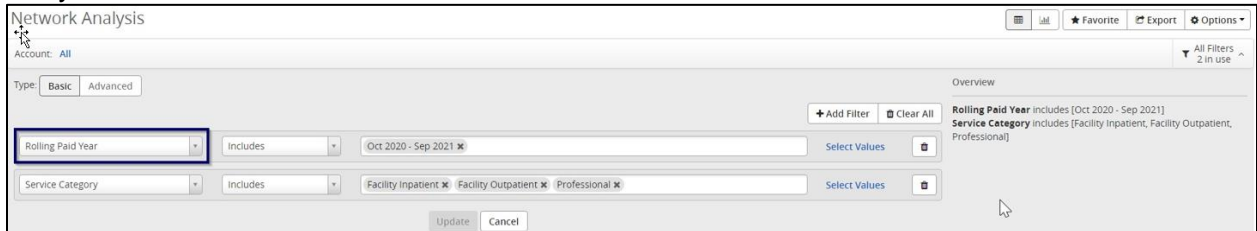
Account Reset filter

Includes

Select values

Apply Cancel

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



Network Analysis

Account: All

Type: Basic Advanced

Rolling Paid Year Includes Oct 2020 - Sep 2021 Select Values

Service Category Includes Facility Inpatient Facility Outpatient Professional Select Values

Update Cancel

Overview

Rolling Paid Year includes [Oct 2020 - Sep 2021]

Service Category includes [Facility Inpatient, Facility Outpatient, Professional]

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



Network Analysis

Account: All

Type: Basic Advanced

Incurred YTD w/ Runout(2) Includes Jan 2020 - Jul 2020 Select Values

Service Category Includes Facility Inpatient Facility Outpatient Professional Select Values

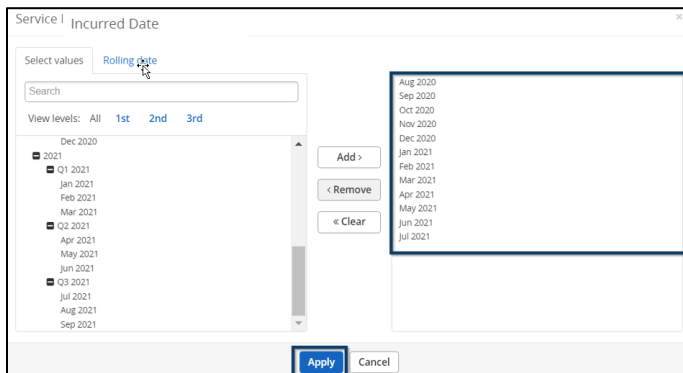
Update Cancel

Overview

Rolling Paid Year includes [Oct 2020 - Sep 2021]

Service Category includes [Facility Inpatient, Facility Outpatient, Professional]

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.



Service | Incurred Date

Select values Rolling Date

Search

View levels: All 1st 2nd 3rd

- Dec 2020
- 2021
  - Q1 2021
    - Jan 2021
    - Feb 2021
  - Q2 2021
    - Mar 2021
    - Apr 2021
    - May 2021
  - Q3 2021
    - Jun 2021
    - Jul 2021
    - Aug 2021
    - Sep 2021

Aug 2020  
Sep 2020  
Oct 2020  
Nov 2020  
Dec 2020  
Jan 2021  
Feb 2021  
Mar 2021  
Apr 2021  
May 2021  
Jun 2021  
Jul 2021

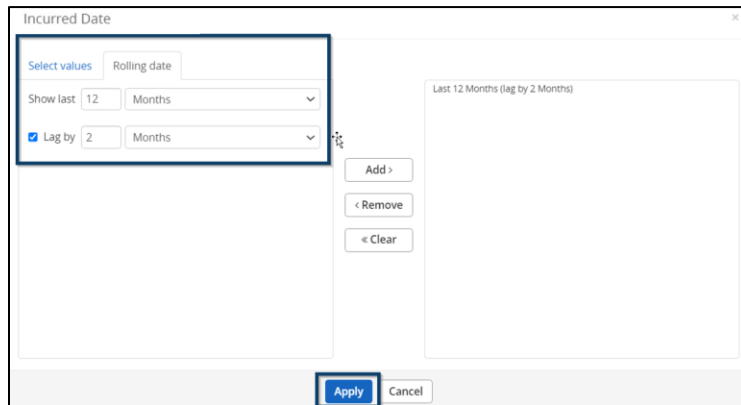
Add >  
< Remove  
<< Clear

Apply Cancel



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.



## 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.

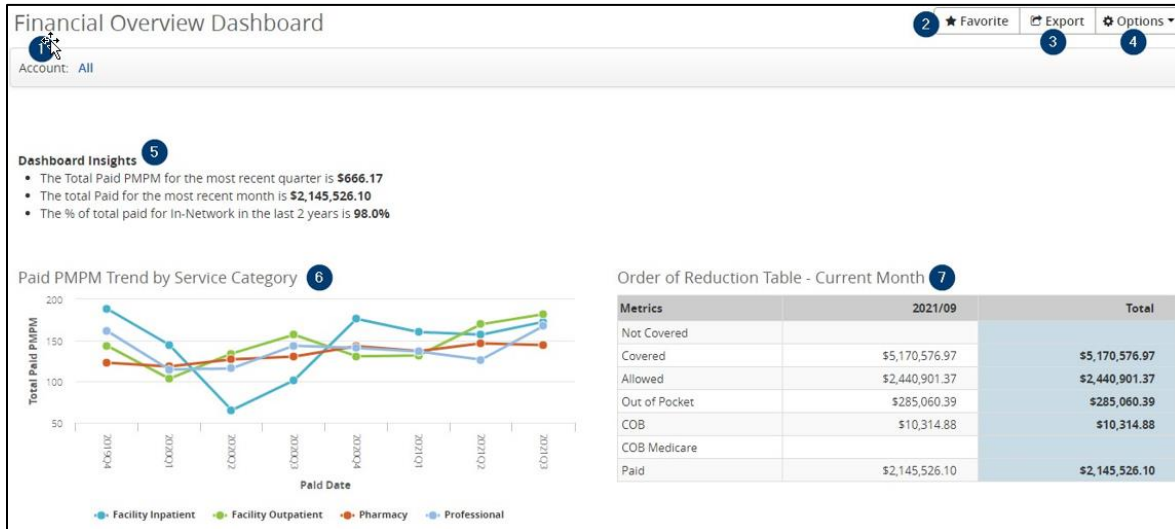
### Simple Dashboard: Financial Overview Dashboard

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

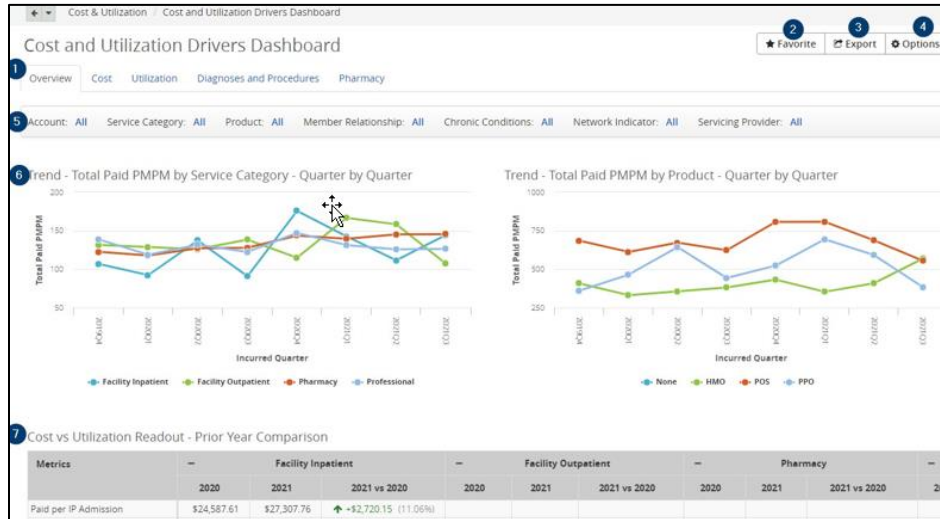


**Complex Dashboard: Cost and Utilization Complex Dashboard**

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.

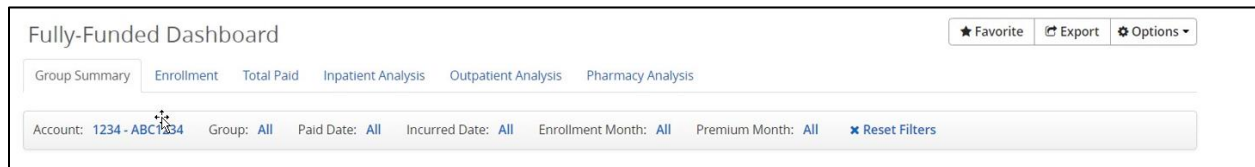
- Tabs** – where you have the option to select an overview of the dashboard or to focus on specific categories
- Favorite** – you can save your report or dashboard as a favorite. Learn more about this in the *Favorites Job Aid*.
- Export** – you can export your report. Learn more about this in our *Exports User Guide*. **Tip:** Tabs are better exported as a PDF.
- Options** – where you can edit or set as landing page
- 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.
- Chart** – a graphical representation of the data

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



## 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.



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 Settings**

You are about to download patient information outside of the secure MedAnalytics environment. Be sure to follow your organization's rules regarding the security of confidential patient information.

Note: Password protection requires the file to be compressed into a zip format.

Protect document with password to ensure HIPAA compliance

Password:  1

---

Title:  2

Export:  3

File type:  4

Data format:  5

Paper size:  6

Orientation:  Landscape  Portrait

Scaling:  Fit width to  page(s) 7  
 Fit height to  page(s)

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Repetition:

Start date:  8

Recurring:

Update automatically when changes are made to the report  
Reports need to be saved as favorites for automatic updates

Distribution list:  [Select Users](#) 9