DataPoint User Guide

Enhanced Filtering and Scheduling Reports – Advanced Functionality

Filtering Overview, Alternate Ways of Filtering, and How to Use Filtering to Create Scheduled Reports

Contents

Purpose

The purpose of this user guide is to provide an overview of the following:
- filtering overview
- how to use basic filters to create scheduled reports
  - single summary reports
  - single presentation reports
  - presentation report package
- using enhanced basic filters
- using advanced filters ('*or*' functionality)

Filtering Overview

While reviewing reports and dashboards in DataPoint, you can filter reports to only show certain data. Filtering can be used to highlight a portion of the data or to focus on a specific dimension.

Key terms and definitions:
- **Summary Reports** are dynamic reports that use a predefined template. This template allows you to add and/or refine information as needed.
  - Summary reports are found under the **Utilization**, **Financial**, and **Enrollment** dropdowns on your DataPoint home page.
- **Presentation Reports** are static reports with predefined formats 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** dropdown 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 predetermined. Examples of the most used dimensions will be described later in this guide.

Basic Filters

Under the Basic filter tab, you can create different filters depending on the report type (Summary vs. Presentation).
1. Trend – based on time dimensions, you can select rolling time periods (months, quarters, years)
2. Includes – data you want to see in your report/dashboard
3. Excludes – data you do not want to see in your report/dashboard
4. Top – data that falls within the upper range of values that you select. For example, you

can select the top 10 results based on a specific metric.

5. Bottom – data that falls within the lower range of values that you select. For example, you can select the bottom 10 results based on a specific metric.
6. Where – used to narrow data based on a condition. This filter is used in rare situations, primarily by advanced users.

How to Use Basic Filters to Create Scheduled Reports

To create scheduled reports, you must use the **Trend** filter option.

Example 1 – Scheduling a Single Summary Report: Loss Ratio – Fully Funded Groups
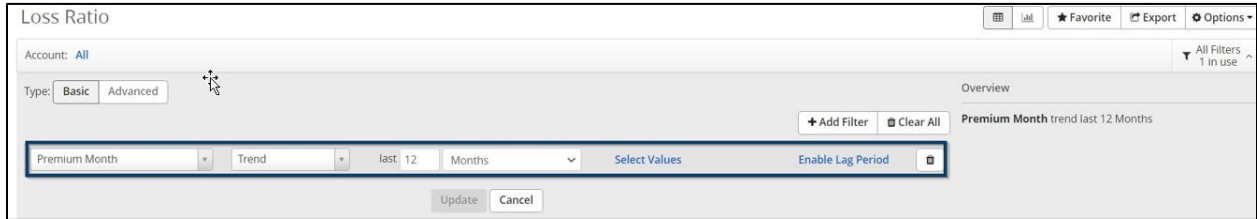
Navigate to the **Loss Ratio** report under the **Financial** dropdown.
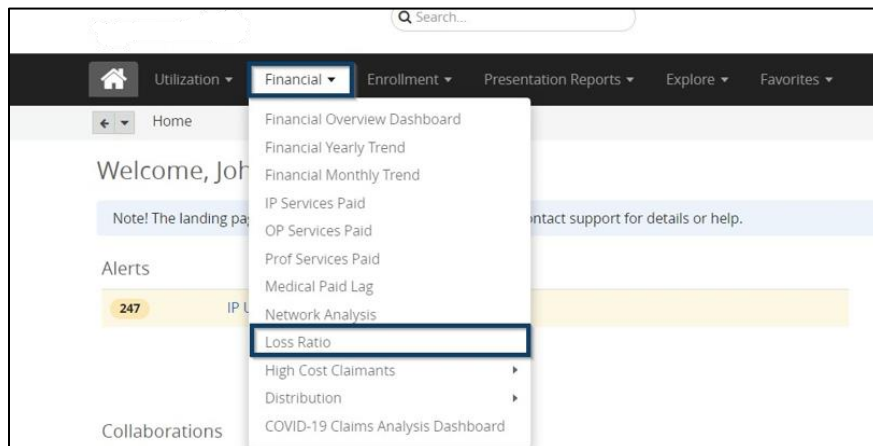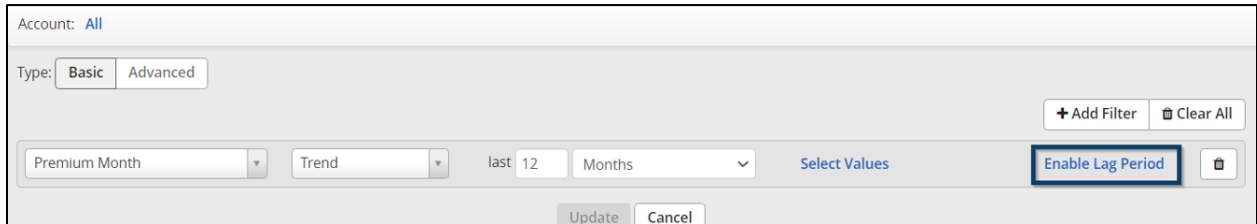
Click on **All Filters** on the right-hand side to ensure the filter is set to **Trend**.
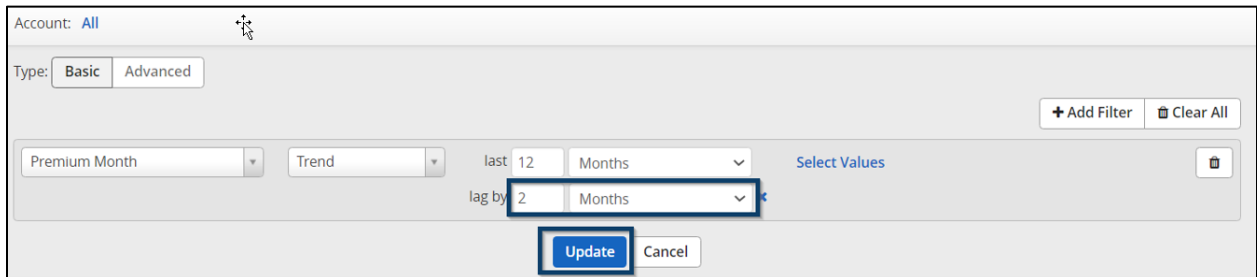
You will see that the **Premium Month** and **Trend** filters are pre-populated.

You will need to add a lag period. To do this, click **Enable Lag Period**.
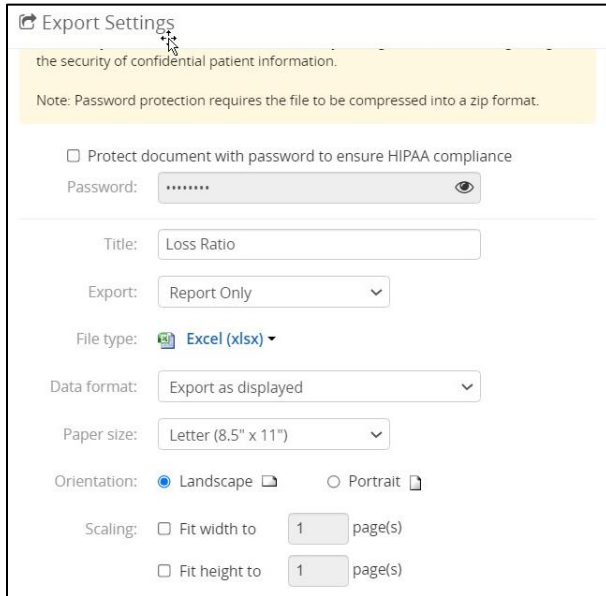
Update the lag to show a lag of 2 months and click **Update**.
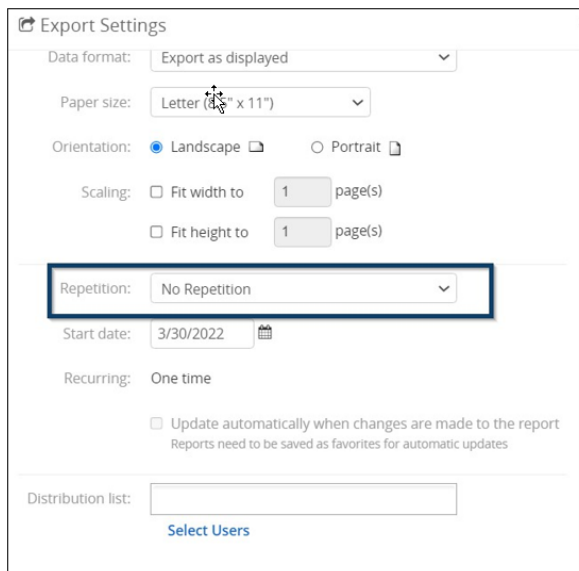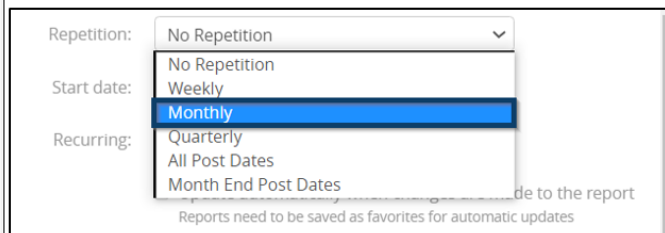
To create a scheduled report, click on **Export**.

Complete the information in the **Export Settings** tab. Please refer to the *Exporting and Distribution of Reports User Guide* for additional information.
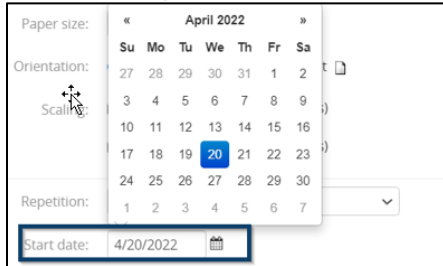
For this example, we want to show how to set up a scheduled report. To schedule a recurring report, scroll down to **Repetition**, click on the dropdown, and select **Monthly**.

Choose the Start Date. **Tip**: for the most up-to-date information, set a recurring report start date on or near the 20th of the month to coincide with the prior month's data load.

In this example, we selected a start date of 4/20/2022.

Finally, select the check box next to **Send email notification when report is ready**. Once you select this and click **Export**, you will receive an email notification each month on the 20th to let you know that your Loss Ratio report is ready.

Example 2 – Scheduling a Single Presentation Report: High-Cost Claimant Listing – NO PHI

Like the Summary Reports, you can schedule a single Presentation Report. As a reminder, the filter must be set to **Trend**.

In this example, we will explain how to schedule the Top 20 High-Cost Claimant Listing for a self-insured group.

Navigate to the **High-Cost Claimant Listing – NO PHI** under the **Presentation Reports** dropdown.

Note: Images in this section are reflective of what is available in the DataPoint demo site. Within the production site, the report and images will show the High-Cost Claimant Listing – No PHI.
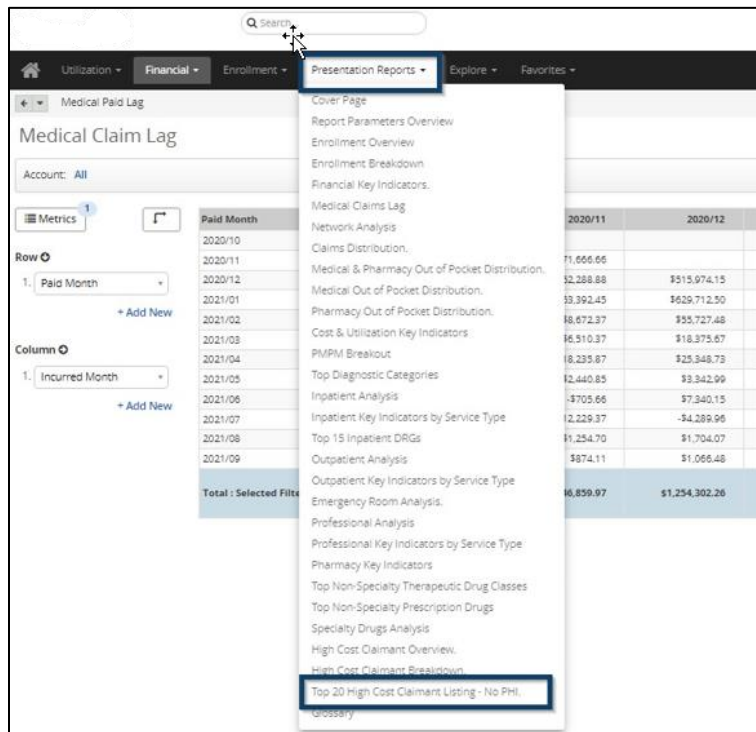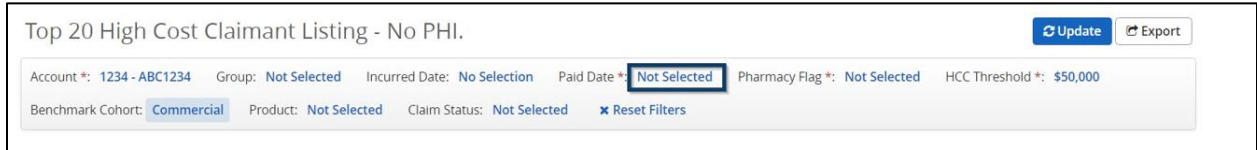
Complete the filters. For more information on how to set the filters, refer to the *Presentation Reports User Guide*.

For this example, we will update the **Paid Date** filter.

Click on **Not Selected** next to **Paid Date**.

Click on the dropdown and choose **Trend**.
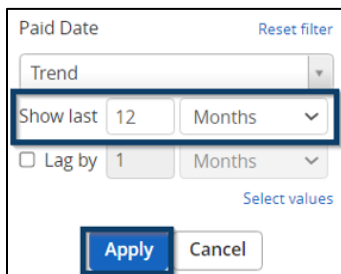
For this example, choose **Show last 12 months** and click **Apply**.
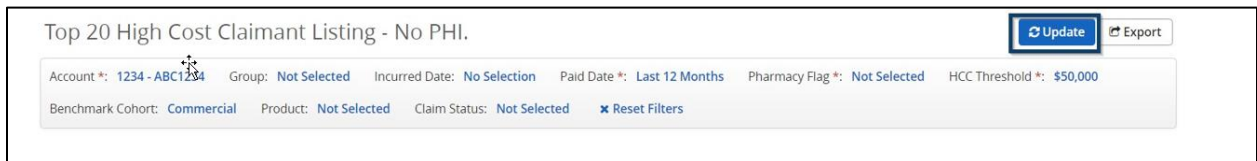
Tip: For a fully-funded group, you will also need to set the incurred date filter.

Once you have your filters selected, click **Update**.
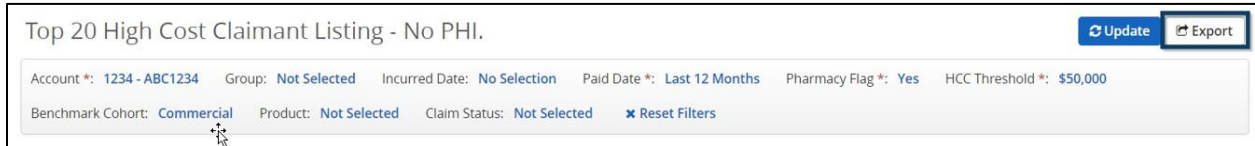
You can now schedule the Presentation Report to be sent monthly. Click **Export**.
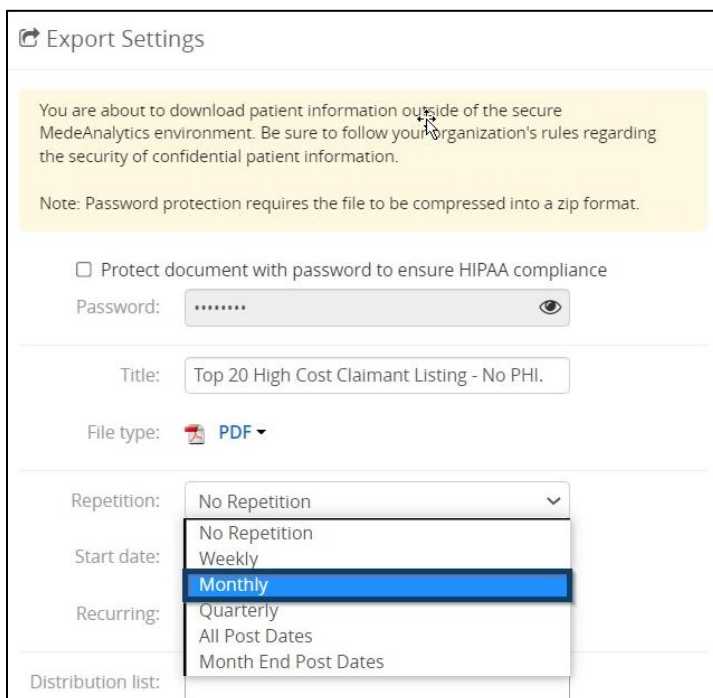
Update the title of your report, choose the file format, click the dropdown next to **Repetition** to schedule your Presentation Report, and select **Monthly**.

Choose the Start Date. **Tip**: for the most up-to-date information, set a recurring report start date on or near the 20th of the month to coincide with the prior month's data load.
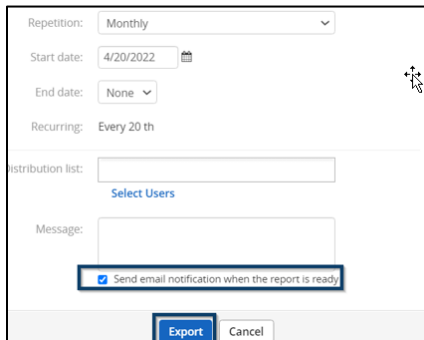
In this example, we selected a start date of 4/20/2022.

Finally, select the check box next to **Send email notification when report is ready**. Once you select this and click **Export**, you will receive an email notification each month on the 20th to let you know that your Top 20 High-Cost Claimants Listing report is ready.
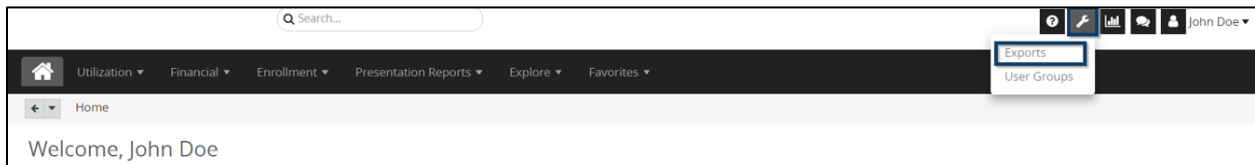
Example 3 – Scheduling a Presentation Report Package

You can export multiple presentation reports at once as part of a package. To start, click the wrench icon in the top right of the screen, and select **Exports**.

On the **Exports** page, click **Create Export** on the right-hand side.
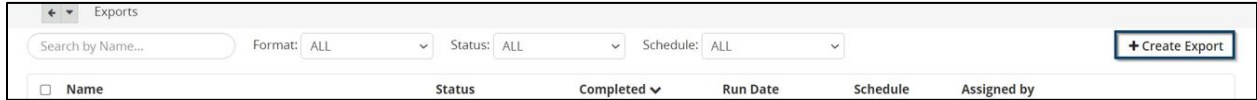
A **Create Export** display box will appear with Export Settings. On the **Settings** tab, select **SSRS Report** from the **Report type** field, and then click **Select Reports**.

*SSRS: SQL Server Reporting Service
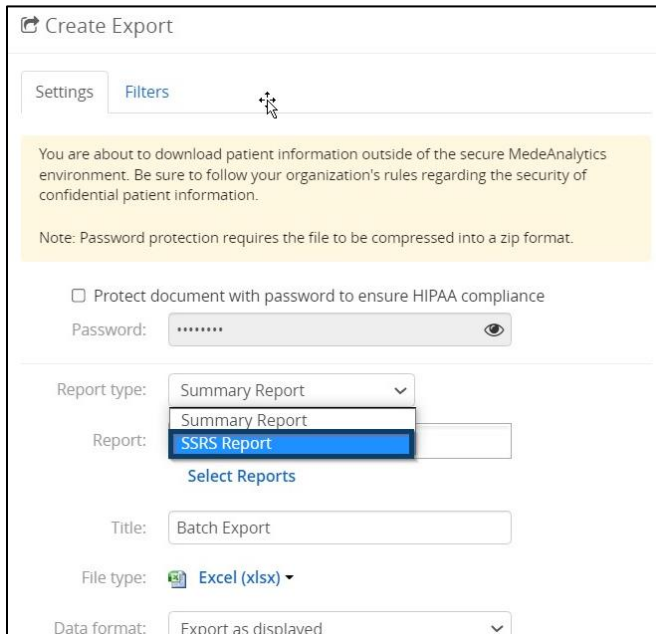
You can click on the folder next to **Presentation Reports** to view all available reports. Click the check box next to **Presentation Reports** to select all the reports, or you can select each individual report you want to appear in your Presentation Report Package.
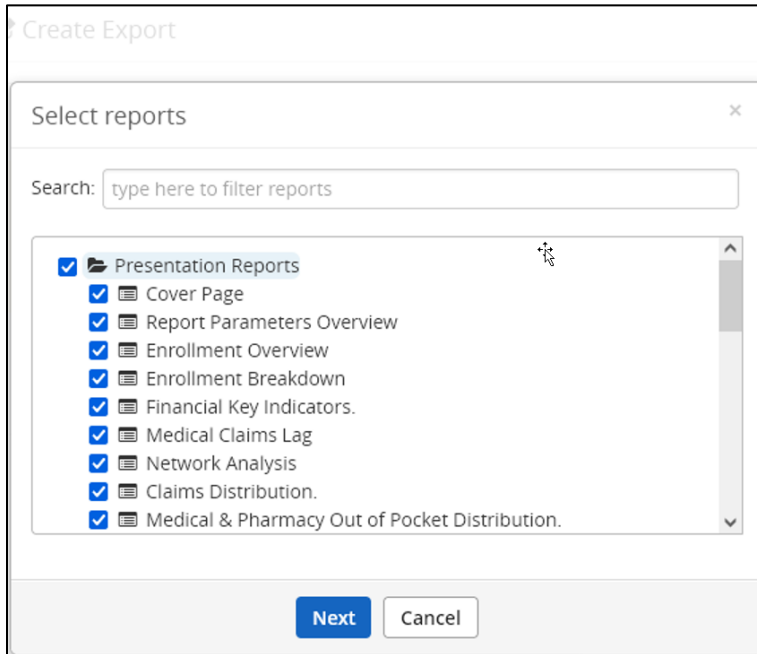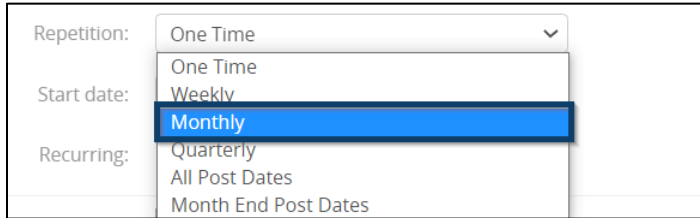
Customize your title and select your file type. You can choose between PDF and PowerPoint. Excel is available, but not recommended.

Tip: The best practice for naming a title is to enter the account name, full presentation report, and date.
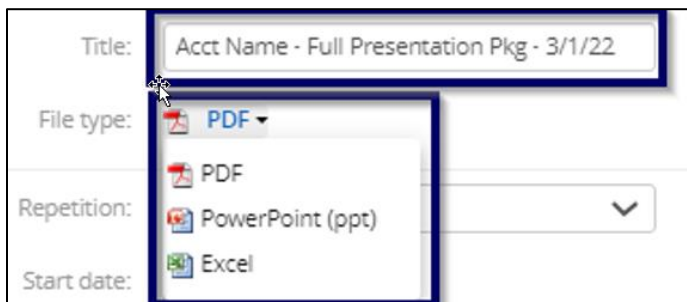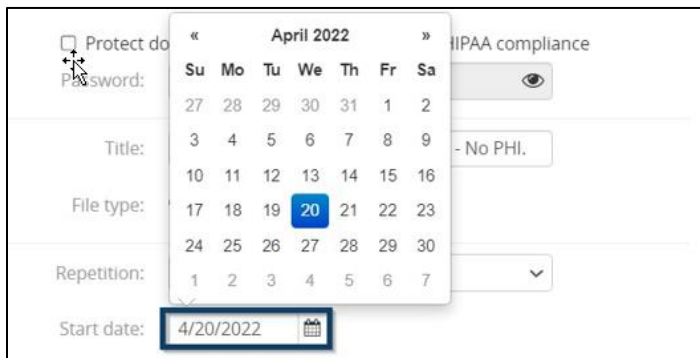
Click the dropdown next to **Repetition** to schedule your Presentation Report package and select **Monthly**.

Choose the Start Date. **Tip**: for the most up-to-date information, set a recurring report start date on or near the 20th of the month to coincide with the prior month's data load.

In this example, we selected a start date of 4/20/2022.

![Sentara Health Plans logo]

Click on Filters tab to review filters selected and/or update filters, as applicable.

For fully-funded groups, you will need to update the paid date and incurred date filters. The filter should be set to **Trend**.
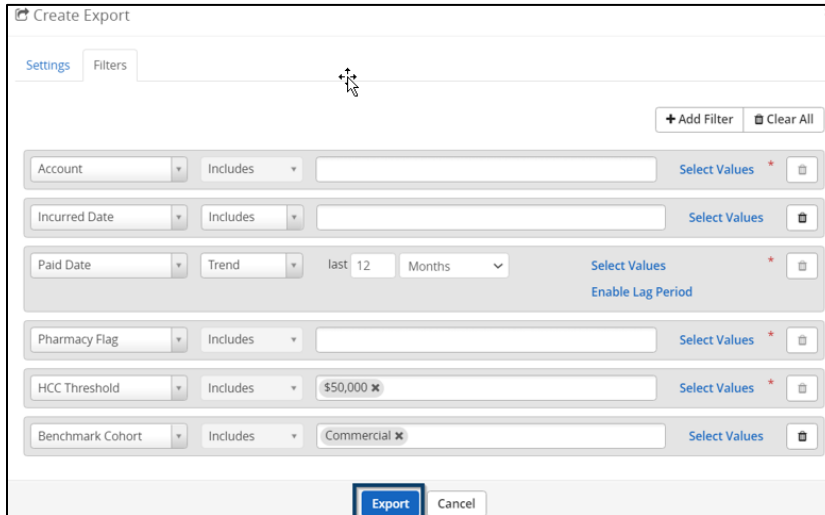
For self-funded groups, you can select a Paid Date trend of 12 months.
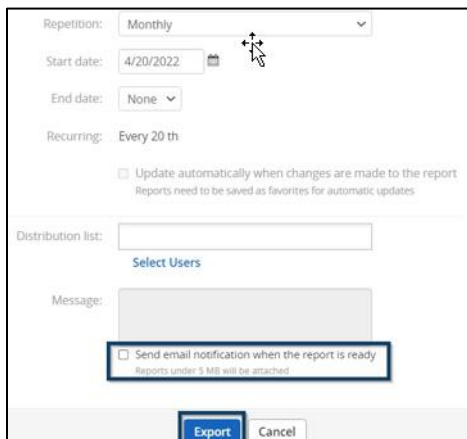
Once you have checked your filters, you can click **Export**.

Finally, select the check box next to **Send email notification when report is ready**. Once you select this and click **Export**, you will receive an email notification each month on the 20th to let you know that your Presentation Report package is ready.
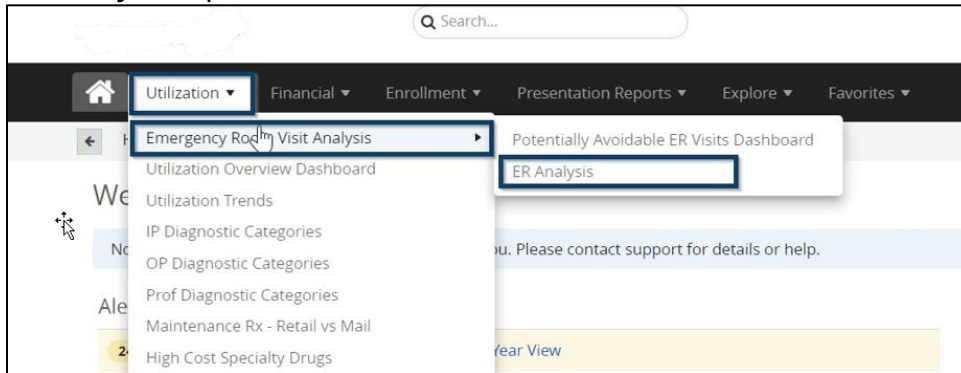
Using Enhanced Basic Filters

Advanced users may find it helpful to add multiple filters to a Summary Report to extract specific information and identify trends. In this example, we will be reviewing the **ER Analysis** and adding additional filters.

Navigate to **Emergency Room Visit Analysis** under the **Utilization** dropdown. Then select the **ER Analysis** report.


Click on **All Filters** on the right-hand side of the report.
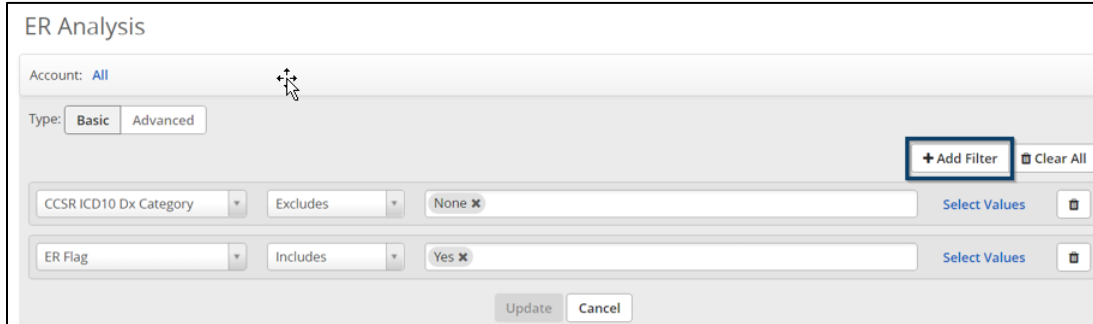

You will see two basic filters are already pre-populated:

1. **CCSR ICD10 DX Category** with the filter as **Excludes**. In the below example, we are excluding the **None** category from the CCSR ICD10 DX Categories to eliminate claims that are not bucketed into a diagnosis category.
2. **ER Flag** with the filter as **Includes**. In the below example, we are including claims with **Yes** as the **ER Flag** to bring in only emergency room claims.
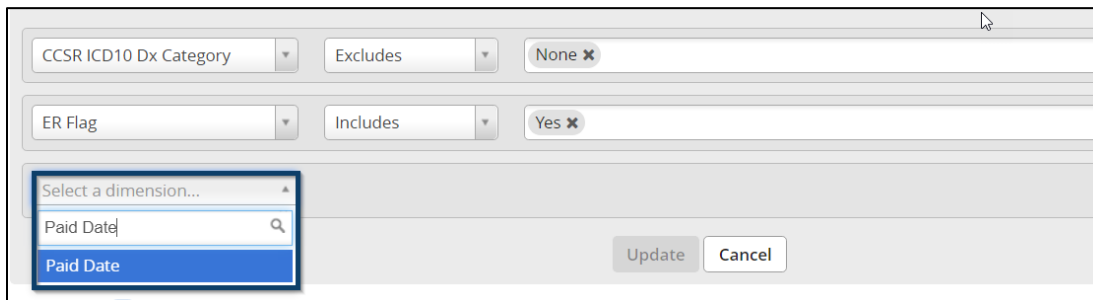
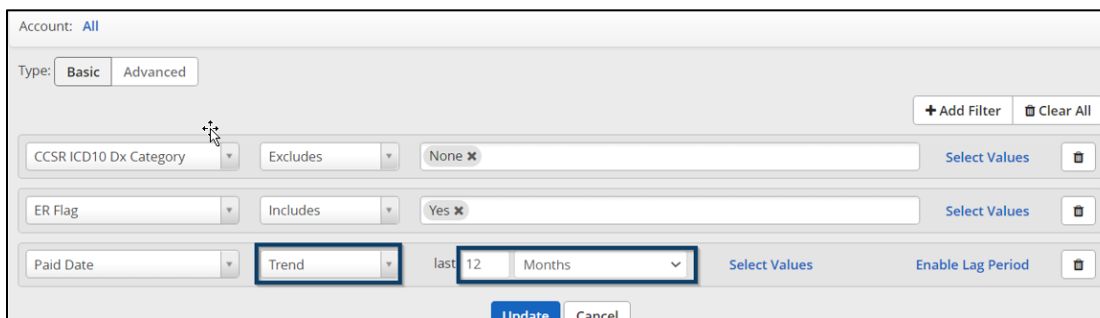*CCSR ICD10 Dx Category – industry standard diagnosis claim categories
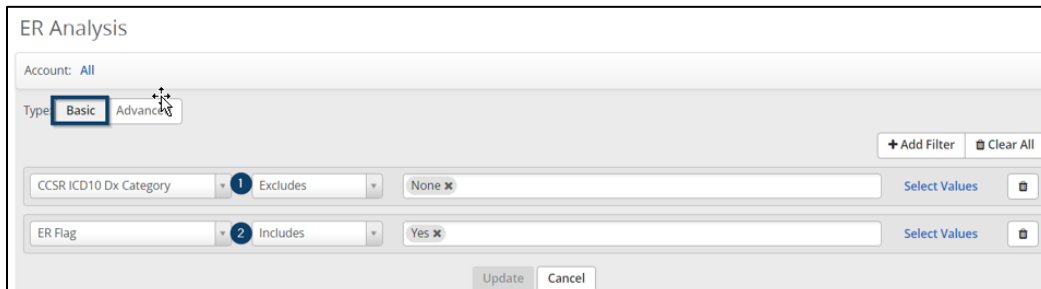
You can add additional filter(s) by clicking **Add Filter**.

Search for the dimension you want to add. To build upon our example, we will add **Paid Date**. Type "Paid Date" in the search bar and click **Paid Date** once found.
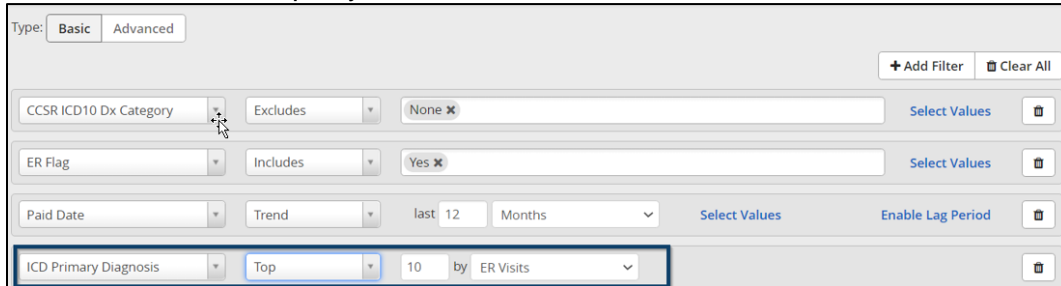

Set the filter to **Trend** and select your date range. For this example, we chose **12 months**.
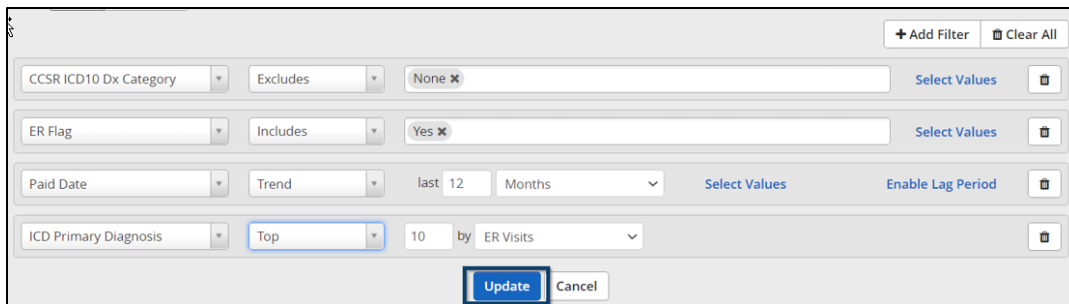
For this example, we want to pull the ICD Primary Diagnosis for the top 10 ER visits. To add this data to your report, click **Add Filter**.

In the search field, choose **ICD Primary Diagnosis,** set the filter to **Top,** and choose the metrics. For this example, you will choose **10** and then **ER Visits**.

Once you have added the filters you want for your report, click **Update**.

Based on the filters you selected, you have isolated the claims to show 12 months of data (vs. all months of data). This report lists the top 10 diagnosis codes and buckets based on ER visits, which can help you determine what is driving the costs of your Emergency Room visits.

Tip: After you run your report you will see your Row and Columns. You can hover over the dimensions in your row and/or column to see a definition of the selected dimensions.
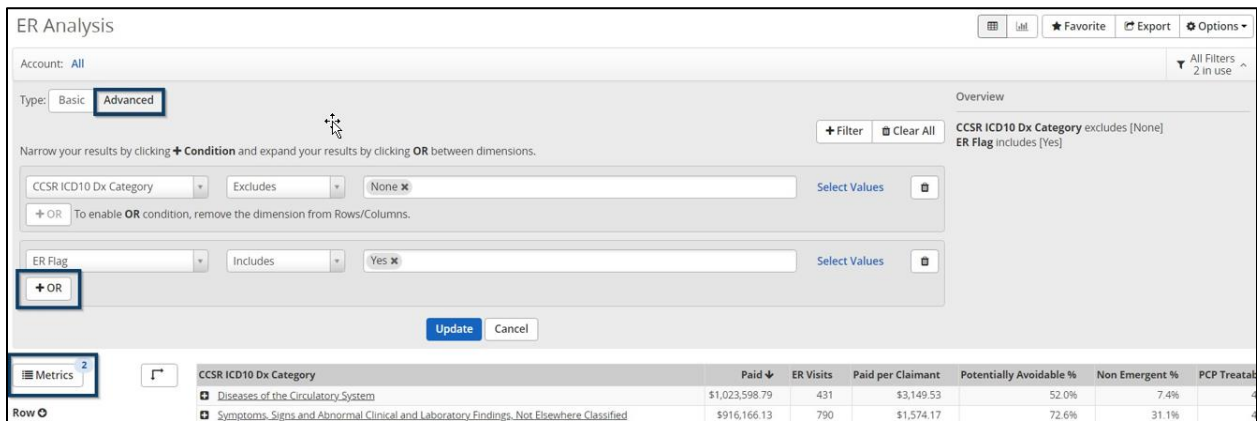
Using Advanced Filters

Alternatively, under the **All Filters** button you will see an option for Advanced filters. This option allows you to narrow your results by clicking **+Condition** and/or expand your results by clicking **+OR** between dimensions. To enable **+OR** conditions, limit metrics to two selections and you cannot combine filters with row and column options. In the screenshot below, you will see the ER Analysis Report has been updated to only include 2 Metrics and the +OR button can be clicked to add another condition.

Due to the unlimited combinations and possibilities with this functionality, advanced users should use their own discretion when creating conditions applicable to their group's needs. For additional assistance in this area, please reach out to datapoint@sentara.com .