

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**.

Q Search		
Utilization Financial Enrollment Presentation Reports Explore	Favorites 🕶	
← Home	Personal •	
Welcome, John Doe	Organizational 🖓	TOP 5 VISITED FAVORITES Self-Funded Dashboard
Note! The landing page is still being configured for you. Please contact support for details or help	View All & Manage	Fully-Funded Dashboard
Note: The landing page is still being configured for you. Please contact support for details or help	υ.	COVID Positive & Testing Dashboard
Alerts	т	Clinical Risk Summary

Fully-Funded	d Dashb	oard				
Group Summary	Enrollment	Total Paid	Inpatient Analysis	Outpatient Analysis	Pharmacy Analysis	
Account: All Gro	oup: All F	Paid Date: All	Incurred Date: All	Enrollment Month:	All Premium Month: All	

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.

🔶 💌 Loss Ratio					C	Data Posted	Through: 09-30-20
Loss Ratio				lad	★ Favorite	🕑 Export	Options •
Account: All							▼ All Filters ^
Type: Basic Advanced			Overvi	iew			
	+ Add Filter	🛍 Clear All	Premi	um Mo	onth trend last	12 Months	
Premium Month	Select Valu	Jes 🚺					
Update Cancel							

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.

Medical Claim La	ag								★ Favorite	🖻 Expor	rt 🗘 Options 🕶
Account: All											▼ All Filters へ 2 in use へ
Type: Basic Advanced								Overview			
						+ Add Filter	🛱 Clear All		onth trend last trend last 12 M		
Incurred Month	* Includes	¥				Select Valu	ues 🔳				
Paid Month	* Includes	•				Select Valu	Jes 🚺				
			Update	Cancel							

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.

High Cost Claimant C	Overview.				C Update Export
Account *: Not Selected Group	p: Not Selected	Incurred Date: No Selection	Paid Date *: Not Selected	Pharmacy Flag *: Not Selected	HCC Threshold *: \$50,000
Benchmark Cohort: Commercial	Product: Not Sel	ected Claim Status: Not Sel	ected 🗙 Reset Filters		

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**.



Account	Reset filter
Includes	v
123	
123 4 - ABC 123 4	
Apply	Cancel

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

Medic	al Clai	m La	g
Account:	All		
Accoun	t		Reset filter
Includ	es		.Ψ.
	***	Г	Select values
	Apply	Cance	Ū.

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

- 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.

Account	х
This dimension is global and will remain filtered in other pages you visit. Select values Search View levels: All All Ald C < Remove C < Clear	1234 - ABC1234
4 Apply Cancel	



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**.

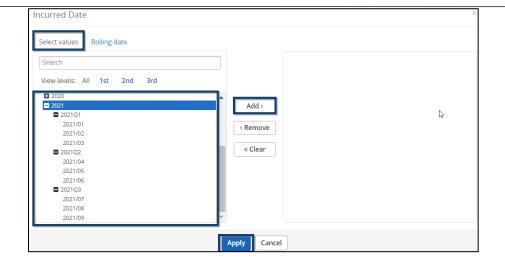
Fully-Funded Dashboard	★ Favorite	C Export	Options •
Group Summary Enrollment Total Paid Inpatient Analysis Outpatient Analysis Pharmacy Analysis			
Account: All Group: All Paid Date: All Incurred Date All Enrollment Month: All Premium Month: All			

Click on Select values.

Incurred Date	Reset filter
Includes	v
↓	Select values
Apply	Cancel

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**.

Incurred Date	×
Select values Rolling date	
Show last 12 Months	
Lag by 2 Months	
	Add>
	< Remove
	«Clear
	Apply Cancel

Example #2: Paid Date for Self-Funded Dashboard

Click All next to Paid Date.

Self-Funde	d Dashboard			★ Favorite	Export Export	Options •
Group Summary	Enrollment Total Paid	Inpatient Analysis Outpatient A	Analysis Pharmacy Analysis			
Account: All C	roup: All Paid Date All	Enrollment Month: All Premi	ium Month: All			
		Chromment Month. An Trenn				

Click Select values.

Paid Date	Reset filter
Includes	v
	Select values
Apply	Cancel



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**.

Paid Date	
Select values Rolling date	
Search View levels: All 1st 2nd 3rd	6
C 2020 2021 2021/01 2021/02 2021/02 2021/02 2021/03 2021/05 2021/05 2021/06 2021/07 2021/07 2021/07 2021/08 2021/09	Add > <remove «Clear</remove
	Apply Cancel

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

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

Loss Ratio		★ Favorite	C Export	Options •
Account: All				All Filters

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**.

Loss Ratio		<u>lati</u>	★ Favorite	Export Export	Options -
Account: All					▼ All Filters ^ 1 in use ^
Type: Basic Advanced	Overviev	N			
+ Add Filter Delar A	Premiur	n Mont	h trend last 12 M	Months	
Premium Month • Trend • last 12 Months • Select Values Enable Lag Period					
Update Cancel					

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



Account: All						
Type: Basic Advanced						Ove
					+ Add Filter 📋 Clear All	Prer
Premium Month * Trend *	last 12	Months	~	Select Values	D	
	lag by 2	Months	~ ×			
		Update Cancel				

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.

Financial Key Indicators.		C Update Export
Account * Not Selected Group: Not	t Selected Incurred Date: No Selection Paid Date *: Not Selected Pharmacy Flag *: Not Selected Ho	CC Threshold *: \$50,000
Benchmark Cohort: Commercial Pro	oduct: Not Selected Claim Status: Not Selected x Reset Filters	

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**.

Account		Peset filter
Includes		*
1234 - ABC	1234 >	c
		Select values
A	pply	Cancel

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

Account	차 Reset filter
Includes	v
	Select values
Apply	Cancel

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

- 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.



Account	
This dimension is global and will remain filtered in other pages you visit.	
Select values	
Search	1234 - ABC1234
View levels: All All Add>	
1234 - ABC1234 2 < Remove	
3 « Clear	
4 Apply Canc	iel

Group Filter

Click Not Selected next to Group.

Financial Key Indicators.	C Update	Export
Account *: 1234 - ABC1234 Group: Not Selected Incurred Date: No Selection Paid Date *: Not Selected Pharmacy Flag *: Not Selected HCC Threshol	d *: \$50,000	
Benchmark Cohort: Commercial Product: Not Selected Claim Status: Not Selected * Reset Filters		

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

Group	Reset filter
Includes	¥
	Select values
Apply	Cancel

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



Group	×
Select values	
Search	
View levels: All	
All 1234567 - GroupName1234567	Add >
	< Remove
	« Clear
	Apply Cancel

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**.

Financial Key Indi	cators.			l	2 Update	Export
Account *: 1234 - ABC1234	Group: 1234567 - GroupName123456	Incurred Date: No Selection	Paid Date *: Not Selected	Pharmacy Flag *: Not Selected		
HCC Threshold *: \$50,000	Benchmark Cohort: Commercial Product	Not Selected Claim Status	Not Selected 🛛 🗙 Reset Fi	ters		

Click Select values.

Incurred Date	Reset filter
Includes	v
[
	Select values
Apply	Cancel

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.

Incurred Date		×
Select values Rolling date		
Search		
View levels: All		
Aug 2020 Sep 2020 Oct 2020 Nov 2020 Dec 2020 an 2021 Feb 2021 Mar 2021 Mar 2021 May 2021 May 2021 Mar 2021 Mar 2021 Sep 2021	Add> < Remove < Clear	
	Apply Cancel	

Paid Date Filter – Fully-Funded Groups

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

Financial Key Indi	icators.
Account *: 1234 - ABC1234	Group: 1234567 - GroupName123456 Incurred Date: Aug 2020, Sep 2020, Oct 2 Paid Date * Not Selected Pharmacy Flag *: Not Selected
HCC Threshold *: \$50,000	Benchmark Cohort: Commercial Product: Not Selected Claim Status: Not Selected x Reset Filters

Click Select values.

Paid Date	Reset filter
Includes	v
	Select values
Apply	Cancel

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



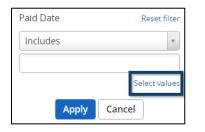
Paid Date	×
Select values Rolling date Search View levels: All	Add >
Aug 2020 Sep 2020 Oct 2020 Nov 2020 Dec 2020 Jec 2021 Jec 20	«Clear
	Apply Cancel

Paid Date Filter – Self Funded Groups

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

Financial Key Ind	cators.			C Update C Export
Account *: 1234 - ABC1234	Group: 1234567 - GroupName123456	Incurred Date: No Selection	Paid Date *: Not Selected Pharmacy Flag *: Not	Selected
HCC Threshold *: \$50,000	Benchmark Cohort: Commercial Produc	t: Not Selected Claim Status	:: Not Selected x Reset Filters	

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.



Paid Date	
Select values Rolling date	
Search	
View levels: All	
Aug 2020 _Sep 2020	
Oct 2020 Nov 2020	< Remove
Dec 2020 Jan 2021	«Clear
Feb 2021 Mar 2021 Apr 2021	
May 2021 Jun 2021	
Jul 2021 Aug 2021	
Sep 2021	×
	Apply Cancel

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**.

Pharmacy Flag	Reset filter
Includes	v
Yes 🗙	
	Select values
Apply	Cancel

HCC Threshold Filter

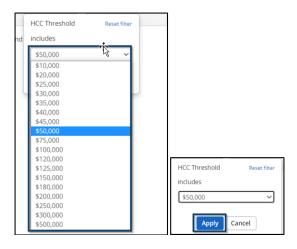
To set an HCC threshold filter, click \$50,000, which is the default amount, next to HCC



Threshold.

Financial Key Indi	cators.	CUpdate CExport
Account *: 1234 - ABC1234	Group: 1234567 - GroupName123456 Incurred Date: Aug 2020, Sep 2020, Oct 2 Paid Date *: Aug 2020, Sep 2020, Oct 2	Pharmacy Flag *: Yes
HCC Threshold * \$50,000	Benchmark Cohort: Commercial Product: Not Selected Claim Status: Not Selected X Reset Filters	

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.

	te 🕑 Expo	irt
Account *: 1234 - ABC1234 Group: 1234567 - GroupName123456 Incurred Date: Aug 2020, Sep 2020, Oct 2 Paid Date *: Aug 2020, Sep 2020, Oct 2 Pharmacy	lag *: Yes	
HCC Threshold *: \$50,000 Benchmark Cohort: Commercial Product: Not Selected Claim Status: Not Selected x Reset Filters		

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

Financial Key Indi	cators.	CUpdate Export
Account *: 1234 - ABC1234	Group: 1234567 - GroupName123456 Incurred Date: Aug 2020, Sep 2020, Oct 2 Pald Date *: Aug 2020, Sep 2020, Oct 2	Pharmacy Flag *: Yes
HCC Threshold *: \$50,000	Benchmark Cohort: Commercial Product: Not Selected Claim Status: Not Selected X Reset Filters	

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

Account *: 1234 - ABC1234 G	roup: 1234567 - GroupNai	me123456 Incurred D	ate: Aug 2020, Se	p 2020, Oct 2	Paid Date *: Aug 2020, Sep 2020, Oct 2	2 Pharmacy Flag *: Yes
HCC Threshold *: \$50,000 Ber	nchmark Cohort: Commer	cial Product: Not Sele	cted Claim Star	tus: Not Selected	× Reset Filters	
Financial Key Indica	tors		* * \$	5		
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 Medicare COB	\$266,104.89	\$296,913,73	11.6%			
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	5.8%	\$283.19	0.0%	
Paid PMPM b	Service Category		Breat	kdown of Billed Amor	unt	
\$160 \$140	_	\$80,0	00,000			
\$120- \$100- \$80-		\$60,0	00,000 -		Paid	
\$60- \$40- \$20-			00,000 -		COB Out of Pocket Network & Other Savings Not Covered	
\$0 Facility inpatient	utpatient Professio Pharmacy		50			
Dilar Dia	rrent Benchmark		SU Prior	Current		