

DataPoint User Guide Presentation Reports – Intermediate Functionality

How to Access, Export, and Print Presentation Reports as A Package



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Purpose

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

- describe presentation reports
- review presentation report dimensions
- exporting presentation reports
- printing presentation reports as a package

What Are Presentation Reports?

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.

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Utilization 🔻 Financial 🔻	Enrollment 🔻	Presentation Reports 🔻	Explore 🔻	Favorites 🔻
← Home				

Presentation Report Dimensions

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 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.

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 <u>must</u> select a filter for the desired date range.
- c. **Pharmacy Flag** You <u>must</u> 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. The \$50,000 threshold will auto populate; however, there are additional threshold amounts to choose from depending on your reporting needs or group size.
- Benchmark Cohort You can select your desired benchmark cohort. The Commercial benchmark will auto populate; however, there are other pre-defined benchmark populations available to meet your reporting needs. Tip: Commercial is recommended.

High C	Cost Claim	ant O	verview.								C Update	Export
Account *	: Not Selected	Group:	Not Selected	Incurred Date:	No Selection	Paid Date *:	Not Selected	Pharmacy Flag *:	Not Selected	HCC Threshold *:	\$50,000	
Benchmar	rk Cohort: Comm	nercial	Product: Not S	elected Clain	Status: Not Se	elected X	Reset Filters					

Tip: Filters with an asterisk * next to them are required fields. **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.

Account Filters

When you open a presentation report, you need to set an **Account** filter. The default setting is **Not Selected**.

To apply an **Account** filter, click **Not Selected** next to Account.

Financial Key Indicators. CUpdate CExport Account * Not Selected Group: Not Selected 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 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. Click the group name and then click **Apply**. Leave the filter on **Includes**.

Account	Reset filter
Includes	v
1234 - ABC1234 >	¢
	Select values
Apply	Cancel

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

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

- 1. Click on the account you would like to add in the left frame and click the **Add >** button to add them to your filter.
- 2. To remove an account, click on the account in the right frame and click the **< Remove** button.
- 3. You can quickly remove an account from your selection by clicking the **< Clear** button.
- 4. When you're finished with your selections, click the **Apply** button.

Account		×
This dension is global and will rema	in filtered in other pages you visit.	
Select values		
Search	1234 - ABC1234	
View levels: All		
1234 - ABC1234	1 Add>	
	3 « Clear	
	4 Apply Cancel	

Group Filter

To drill down to data specific to a group plan number, you can utilize the Group Filter. If you choose to not utilize the Group Filter, all group plan numbers are automatically included in reporting. The steps below outline how to utilize the filter.



Click Not Selected next to Group.

Account *: 1234 - ABC1234 Group: Not Selected 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 x Reset Filters	Financial Key Indicators.	CUpdate Export
Benchmark Cohort: Commercial Product: Not Selected Claim Status: Not Selected X Reset Filters	Account *: 1234 - ABC1234 Group: Not Selected Incurred Date: No Selection Paid Date *: Not Selected Pharmacy Flag *: Not Selected HC	C Threshold *: \$50,000
	Benchmark Cohort: Commercial Product: Not Selected Claim Status: Not Selected 🗙 Reset Filters	

A display box will open, click Select Values to see your group plan numbers.

Group	Reset filter
Includes	v
	Select values
Apply	Cancel

Choose the desired group plan 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: 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 Insured Groups

To set incurred date, click **No Selection** next to **Incurred Date**.

Financial Key Inc	licators.	C Update	🖻 Export
Account *: 1234 - ABC1234	Group: 1234567 - GroupName123456 Incurred Date: No Selection Paid Date *: Not Selected Pharmacy Flag *: Not Selected	cted	
HCC Threshold *: \$50,000	Benchmark Cohort: Commercial Product: Not Selected Claim Status: Not Selected Reset Filters		



A display box will open, click Select Values to see specific values (months).

Incurred Date		Reset filter
Includes		Ŧ
		Select values
Apply	Canc	el

Tip: When setting the incurred date for a Fully Insured Group, 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.

Once your 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 Nov 2020 Dec 2020 Nov 2020 Dec 2020 Nov 2021 Aug 202 A	Add > < Remove < Clear	
	Apply Cancel	



Paid Date Filter – Fully Insured Groups

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

Financial Key Ind	icators.	C Update C Export
Account *: 1234 - ABC1234	Group: 1234567 - Group: Name123456 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	

A display box will open, click Select Values to see specific values (months).

Paid Date	Reset filter
Includes	*
	Select values
Apply	Cancel

Tip: When setting the paid date for a Fully Insured Group, 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 full 14 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.

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

Select values Rolling date Search Image: Constraint of the select of the sele	Paid Date	×
Srp 2020 Add> Cxt 2020 < Remove Jan 2021 < Clear May 2021 Jan 2021 Jan 2021 Jan 2021 Jan 2021 Jan 2021	Search	
	Sep 2020 Cxt 2020 Dec 2020 Dec 2020 Jen 2021 Mar 2021 Mar 2021 Jun 2021 Jun 2021 Jun 2021 Jun 2021 Jun 2021	< Remove



Paid Date Filter – Self-Funded Groups

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

Financial Key Ind	icators.					♡ Update	Export
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: Commerical Proc	uct: Not Selected	Claim Status: Not Selected	× Reset Filters			

A display box will open, click Select Values to see specific values (months).

Paid Date		Reset filter
Includes		v
	\$	
		Select values
Apply	Cance	el

Tip: When setting the Paid Date for a Self-Funded Group, 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.





Pharmacy Flag Filter

To set a pharmacy flag filter, click Not Selected next to Pharmacy Flag.

Financial Key Indicators.			🔁 Update 🔀 Export
Account *: 1234 - ABC1234 Group: 123456	7 - GroupName123456 Incurred Date: Aug 20	20, Sep 2020, Oct 2 Paid Date *: Oct 2020, Nov 20	020, Dec 2
Pharmacy Flag *: Not Selected HCC Thresho	old *: \$50,000 Benchmark Cohort: Commercial	Product: Not Selected Claim Status: Not Selected	cted 🗙 Reset Filters

A display box will open, and you can choose to include (Yes) or exclude (No) the pharmacy flag. Once selected, click **Apply**.

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

HCC (High-Cost Claimants) Threshold Filter

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

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

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**.



	HCC Threshold	Reset filter	
nd	includes		
	\$50,000 \$10,000 \$20,000	14. 1	
	\$25,000 \$30,000 \$35,000 \$40,000 \$45,000		
	\$50,000 \$75,000 \$100,000		
	\$120,000 \$125,000 \$150,000 \$180,000 \$200,000		HCC Threshold Reset filter Includes
	\$250,000 \$300,000 \$500,000		Apply Cancel

Benchmark Filter

The default will be **Commercial**. The Commercial filter is recommended but there are additional benchmark cohort filters available.



A display box will open, and you can type in Commercial, select **Commercial** and then click **Apply**.





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



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

Exporting Presentation Reports

Once you have chosen your filters, click **Export** in the right-hand corner.

Financial Key Indi	cators.				C Update C Export
Account *: 1234 - ABC1234	Group: 1234567 - GroupName123	156 Incurred Date: Aug	g 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	× 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).
- File Type Choose your preferred file type: PDF or PowerPoint. Options for exporting may differ based on report or dashboard.
- 4. **Repetition** Refer to the Advanced Filtering User Guide for more information on Repetition and scheduling of a Presentation Report.
- 5. **Start Date** Enter the start date for your reporting. Like Repetition, we will discuss Start Date in a separate user guide.
- 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. Refer to the Exporting and Distribution of Reports User Guide for additional information.



	vironment. Be sure to follow your nfidential patient information.	organization's rules regarding
lote: Password p	rotection requires the file to be co	impressed into a zip format.
Protect d	ocument with password to ensu	ure HIPAA compliance
Password:		۰ (
Title:	Financial Key Indicators.	2
File type:	📩 PDF - 3	
Repetition:	No Repetition	~ 4
Start date:	3/10/2022 🛍 5	
Recurring:	One time	
stribution list:		6
	Select Users	

Printing Presentation Reports as a 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**.

Q Search		🔟 🗢 🛓 John Doe 🗸
Thilization • Financial • Enrollmage • Presentation Reports • Explore • Favorites •	Exports User Groups	
✓ Home		
Welcome, John Doe		

On the Exports page, click Create Export on the right-hand side.

	← ▼ Exports										
(Search by Name	Format:	ALL ~	Status:	ALL	~	Schedule:	ALL	~		+ Create Export
	Name			Status		Complet	ed 🗸	Run Date	Schedule	Assigned by	



A **Create Export** display box will appear with Export Settings. In the display box, you will need to scroll down to see all options that are outlined in the 3 screenshots below.

Create Expo	rt	2			
Settings Filter	s		Medical & Pharmacy Out of Pocket 🛛 🗙		
Joeungs The			Medical Out of Pocket Distribution. 🗙		Specialty Drugs Analysis ×
You are about to d	lownload patient information outside of the secur	e MedeAnalytics	Pharmacy Out of Pocket Distribution. 🛪		High Cost Claimant Overview. ×
You are about to download patient information outside of the secure MedeAnalytics environment. Be sure to follow your organizatit's's rules regarding the security of			Cost & Utilization Key Indicators 🗙		High Cost Claimant Breakdown. 🗙
confidential patier	nt information.		PMPM Breakout 🗙		Top 20 High Cost Claimant Listing - No X PHI.
Note: Password pr	rotection requires the file to be compressed into a	zip format.	Top Diagnostic Categories 🗙		Glossary ×
			Inpatient Analysis 🗙		Select Reports
Protect document with password to ensure HIPAA compliance			Inpatient Key Indicators by Service Type ×	Title:	Cover Page, Report Parameters Overview, Eni
Password:		Þ	Top 15 Inpatient DRGs 🛪	11000	
-			Outpatient Analysis 🗙	File type:	DF •
Report type:	Summary Report 🗸 🗸		Outpatient Key Indicators by Service Type ×	Repetition:	One Time
Report:	ER Analysis × Utilization Trends ×	Select Reports	Emergency Room Analysis. 🛪	Repebberi.	
Report.		Select Reports	Professional Analysis ×	Start date:	3/3/2022 🛍
	IP Diagnostic Categories X		Professional Key Indicators by Service 🗙	Recurring:	One time
	OP Diagnostic Categories X		Туре		
	Prof Diagnostic Categories 🗙		Pharmacy Key Indicators 🗙	Distribution list:	Select Users
	Maintenance Rx - Retail vs Mail 🗙		Top Non-Specialty Therapeutic Drug X Classes		
	High Cost Specialty Drugs 🗙				
	Top Non-Specialty Therapeutic Drug	¢	Top Non-Specialty Prescription Drugs ×		Export Cancel

On the **Settings** tab, first, select **SSRS Report** from the **Report type** field, and then click **Select Reports**.



You can click on the folder next to **Presentation Reports** to view all the 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.

Select reports	×
Search: type here to filter reports	
Presentation Reports	^
☑	
🗹 🔲 Report Parameters Overview	
Enrollment Overview	
Enrollment Breakdown	
 ✓ ■ Financial Key Indicators. ✓ ■ Medical Claims Lag 	
 Implementation in the second se	
 Claims Distribution. 	
🗹 🔲 Medical & Pharmacy Out of Pocket Distribution.	~
Next Cancel	



You can also search reports by typing in the **Search** field and selecting the reports you wish to include. Once you have chosen the reports, click **Next**.



Customize your title and select your file type. You can choose between PDF and PowerPoint. Excel is available but not recommended.

Tip: Best practice for naming a title is to type the account name, full presentation report, and date.



We will review the Repetition process in the Advanced Filtering User Guide.

Finally, on the settings tab, choose whom you would like to receive the report by clicking **Select Users** or begin typing in the text field to find users. You can choose to send an email notification when the report is ready by clicking the *send email notification* check box. You can also type a custom message.





Once you complete the **Settings** tab, complete the **Filters** tab.

The example below is for a fully-funded account. If you were working with a self-funded account, only paid date would need to be completed and not incurred date. Refer to the **Filtering** section above for self-funded vs. fully funded date parameters.

Create Export					
Settings Filters					
					🛱 Clear All
Account	٣	Includes	٣	1234 - ABC1234 ×	Select Values *
Group	٣	Includes	٣		Select Values
Incurred Date	¥	Includes	¥	Jan 2021 x) Mar 2021 x Feb 2021 x	Select Values
Paid Date	٣	Includes	¥	Jan 2021 🗙 Feb 2021 🗙 Mar 2021 🗙 Apr 2021 🗙 May 2021 🗙	Select Values *
Pharmacy Flag	¥	Includes	¥	Yes x	Select Values *
HCC Threshold	¥	Includes	¥	\$50,000 ×	Select Values *
Benchmark Cohort	¥	Includes	¥	Commercial ×	Select Values
				Export Cancel	

Click the blue **Export** button to begin the exporting process.

Tip: You can click the **Hide Export Progress** button to close the window and continue working in the tool while the export finishes processing.

😂 Export	×
Exporting Cover Page, Report Parameters Overview, Enrollment Overview, Enrollment Breakdown, Financial Key Ind	Step 2 of 3
Hide Export Progress Close	



You will receive a notification when the exporting process is complete, and your report is ready to view and download.

Your Export, Cover Page, Report Parameters Overview, Enrollment Overview,	Download	×
Enrollment Breakdown, Financial Key Ind, has been completed.	Export	

You can return to the **Exports** page to check on your status and view reports at any time.