

DataPoint User Guide

Presentation Reports – Intermediate Functionality

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

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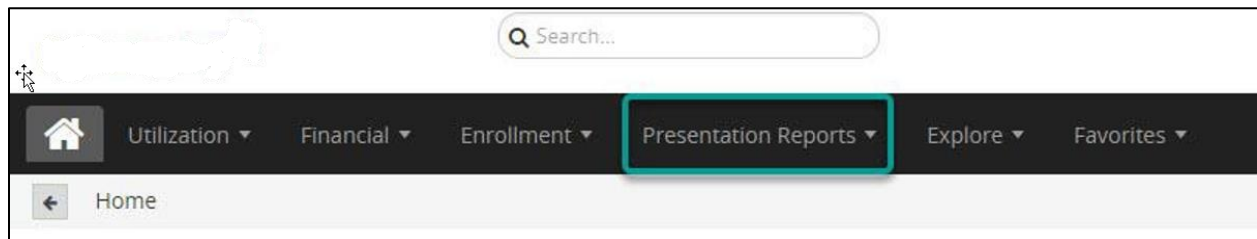
Purpose

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.



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 must 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*).

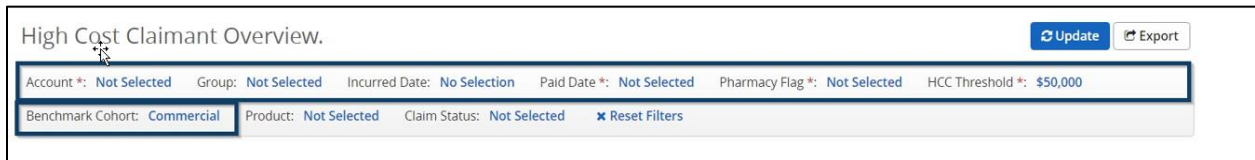
Tip: If you are an employer user, you likely only have one account and therefore may not have to filter. In rare occasions, due to change in funding, there may be more than one account for a given client.

When selecting an account, the master account number will appear; however, reports will reflect data for all 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 desired date range.
 - 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. The \$50,000 threshold will auto populate; however, there are additional threshold amounts to choose from depending on your reporting needs or group size.
4. **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.

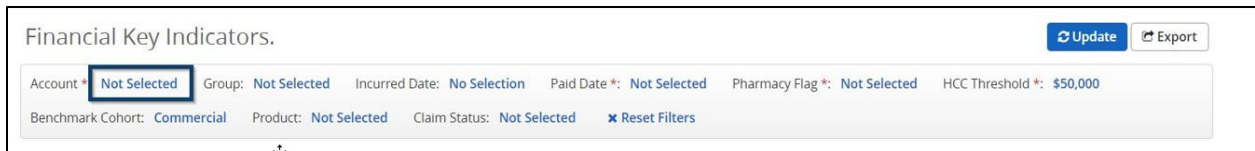


Tip: Filters with an asterisk * next to them are required fields. **Account***, **Paid Date***, **Pharmacy Flag***, and **HCC Threshold*** are all required fields. Only HCC Threshold has a default value and for all others you must select a filter.

Account Filters

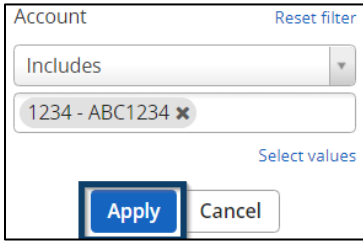
When you open a presentation report, you need to set an **Account** filter. The default setting is **Not Selected**.

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



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 ▼

1234 - ABC1234 ✕

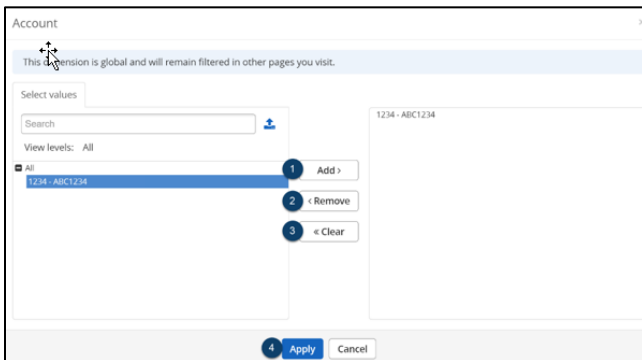
Select values

Apply Cancel

- 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.

- Click on the account you would like to add in the left frame and click the **Add >** button to add them to your filter.
- To remove an account, click on the account in the right frame and click the **< Remove** button.
- You can quickly remove an account from your selection by clicking the **< Clear** button.
- 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 +

View levels: All

All

1234 - ABC1234 1 Add >

2 < Remove

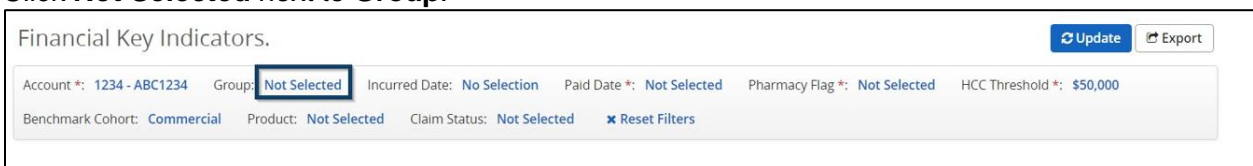
3 < Clear

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**.

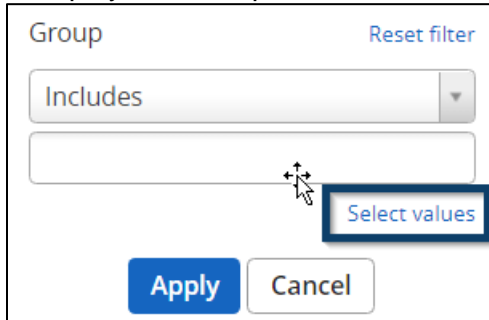


Financial Key Indicators. **Update** **Export**

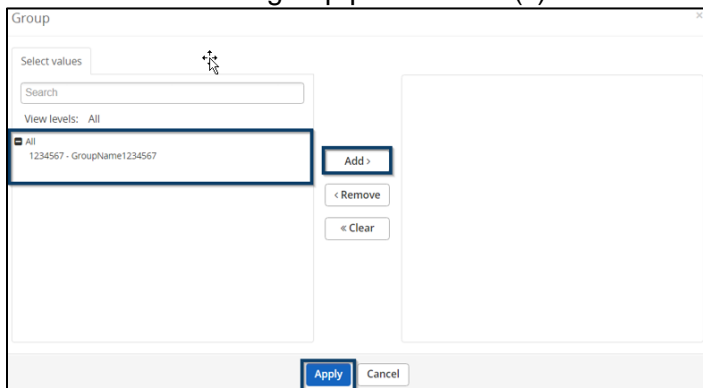
Account *: 1234 - ABC1234 Group: **Not Selected** Incurred Date: No Selection Paid Date *: Not Selected Pharmacy Flag *: Not Selected HCC Threshold *: \$50,000

Benchmark Cohort: Commercial Product: Not Selected Claim Status: Not Selected ✕ Reset Filters

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



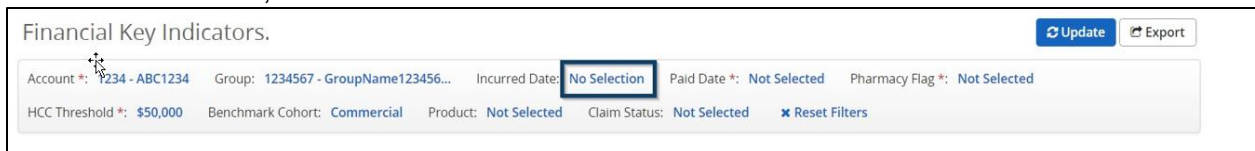
Choose the desired group plan number(s) on the left-hand side, click **Add** and then click **Apply**.



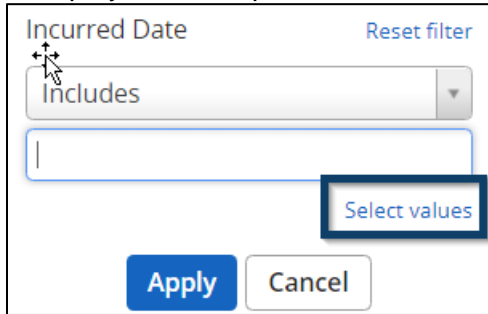
Tip: This filter is not required to generate a report. As indicated above, with presentation reports, selecting no group filter will pull data from all related group/plan numbers.

Incurred Date Filter – Fully Insured Groups

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

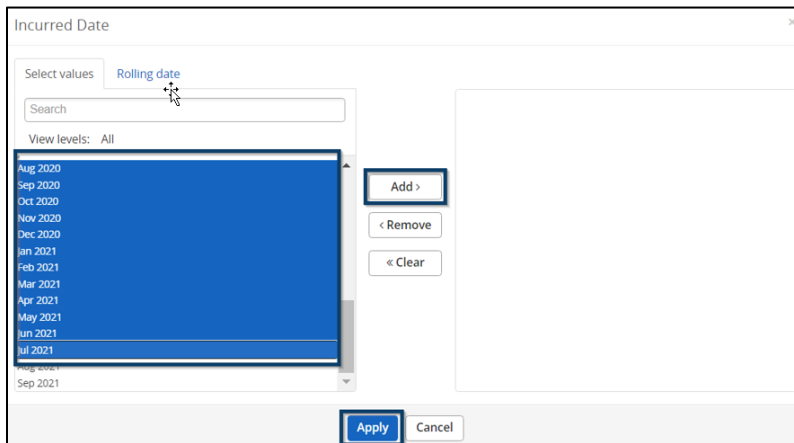


A display box will open, click **Select Values** to see specific values (months).



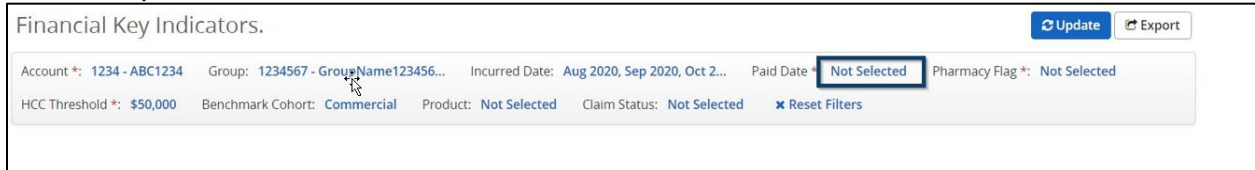
Tip: When setting the incurred date for a Fully Insured Group, keep in mind that a 2-month lag should be applied. If you want the most recent 12 months of data, you will need to begin your selection 14 months prior and choose the next 12 months. For example, if it is currently October 2021, you will 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**.

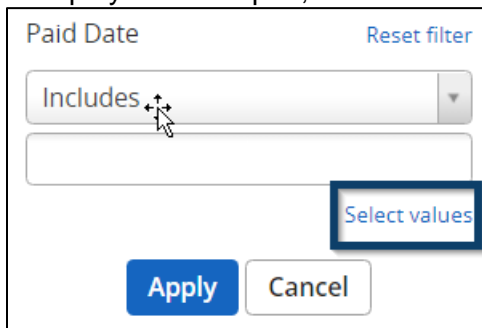


Paid Date Filter – Fully Insured Groups

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

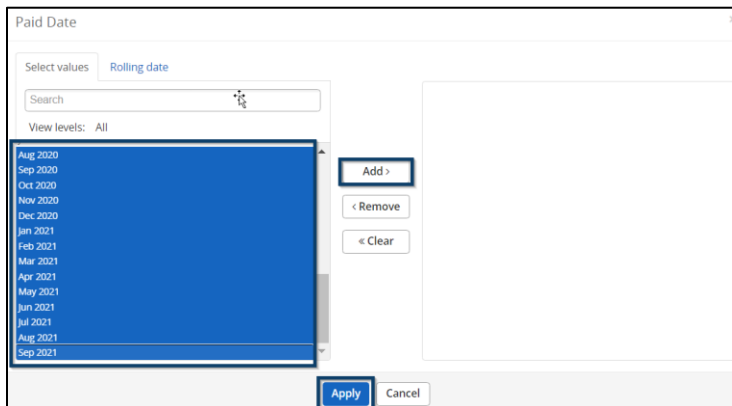


A display box will open, click **Select Values** to see specific values (months).



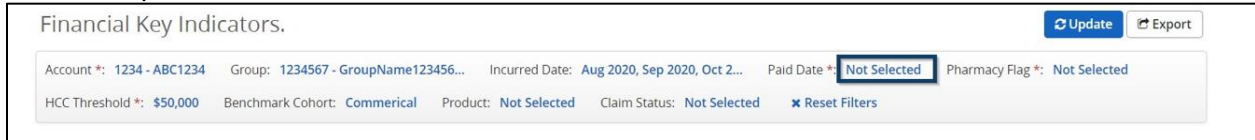
Tip: When setting the paid date for a Fully Insured Group, keep in mind that a 2-month lag should be applied. If you want the most recent 12 months of data, you will need to begin your selection 14 months prior and choose the full 14 months. For example, if it is currently October 2021, you will choose 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**.



Paid Date Filter – Self-Funded Groups

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

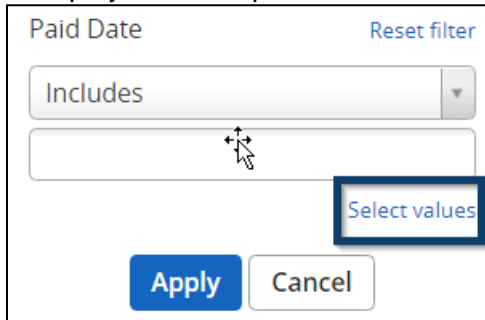


Financial Key Indicators. Update Export

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 Product: 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

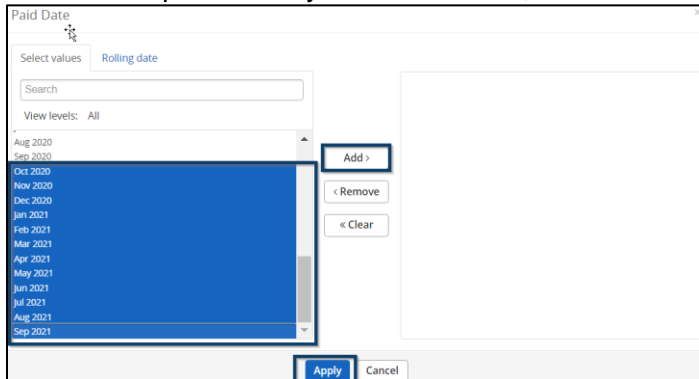
Includes

[Select values](#)

Apply Cancel

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**.



Paid Date

Select values Rolling date

Search

View levels: All

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

Add >

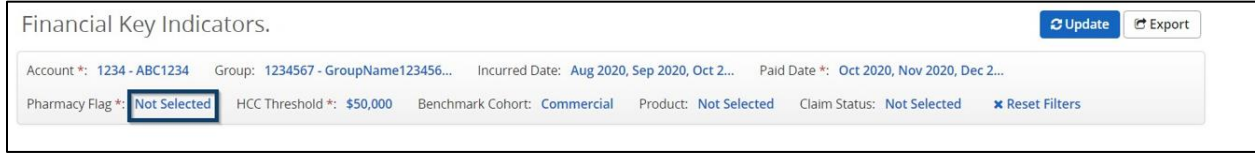
< Remove

<< Clear

Apply Cancel

Pharmacy Flag Filter

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

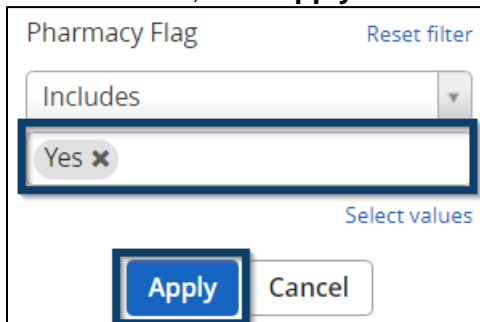


Financial Key Indicators. Update Export

Account *: 1234 - ABC1234 Group: 1234567 - GroupName123456... Incurred Date: Aug 2020, Sep 2020, Oct 2... Paid Date *: Oct 2020, Nov 2020, Dec 2...

Pharmacy Flag *: **Not Selected** HCC Threshold *: \$50,000 Benchmark Cohort: Commercial Product: Not Selected Claim Status: Not Selected 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

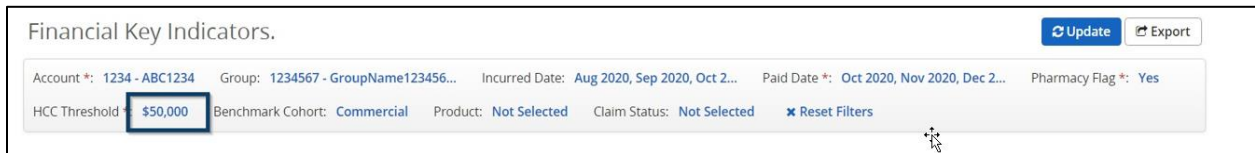
Yes ×

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**.

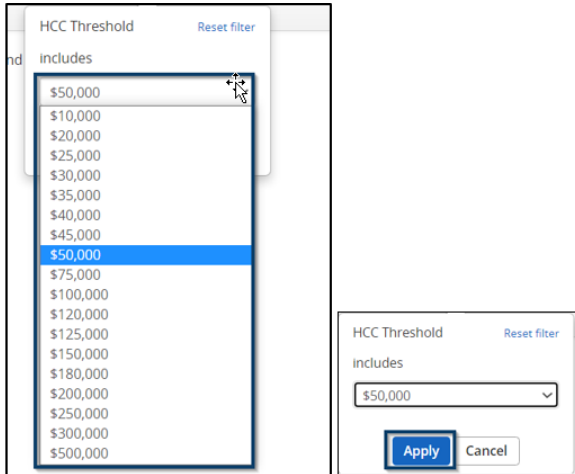


Financial Key Indicators. Update Export

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

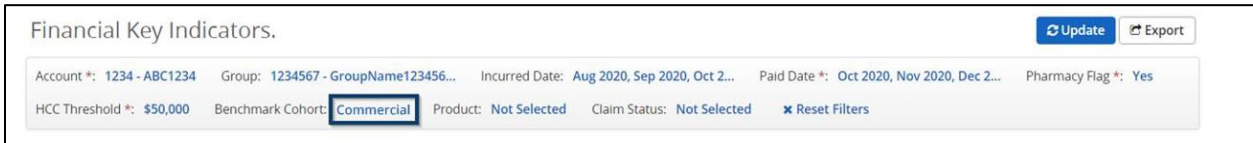
HCC Threshold *: **\$50,000** Benchmark Cohort: Commercial Product: Not Selected Claim Status: Not Selected Reset Filters

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**.

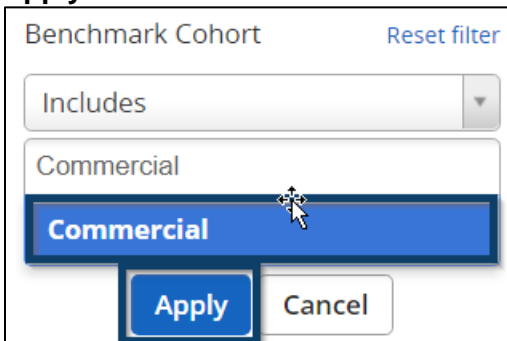


enchmark Filter

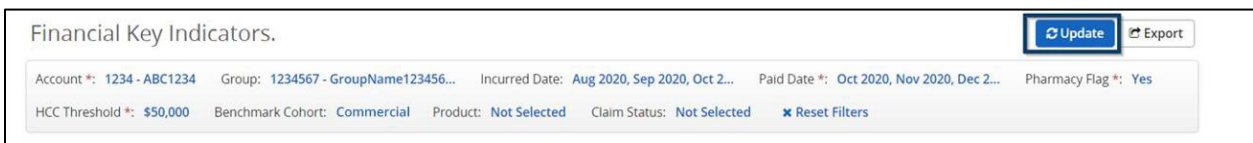
The default will be **Commercial**. The Commercial filter is recommended but there are additional benchmark cohort filters available.



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



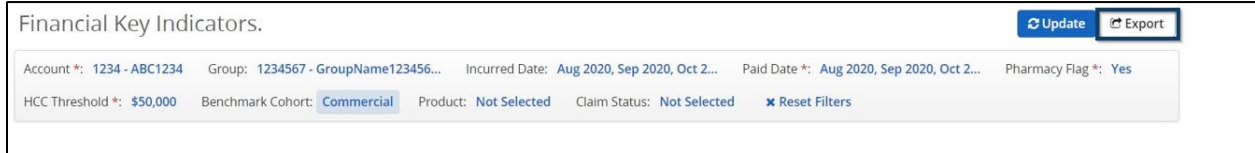
Once you have selected your filters, click **Update** in the top right corner.



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.



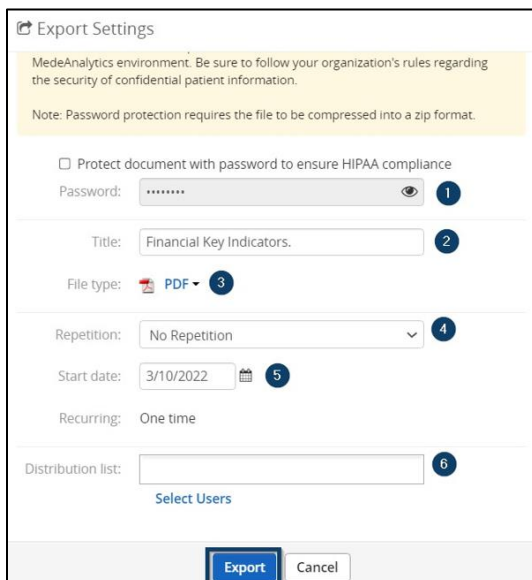
Financial Key Indicators. Update Export

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 [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. **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.
6. **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.



Export Settings

MedeAnalytics 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

File type: 3

Repetition: 4

Start date: 5

Recurring: One time

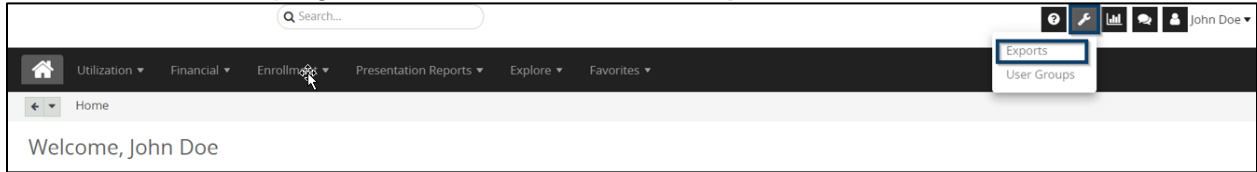
Distribution list: 6

[Select Users](#)

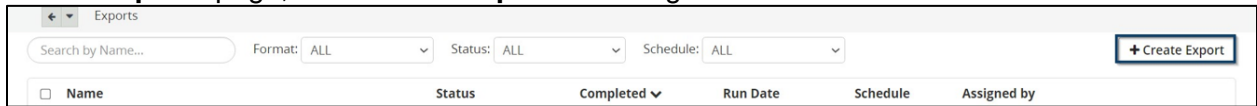
Export Cancel

Printing Presentation Reports as a Package

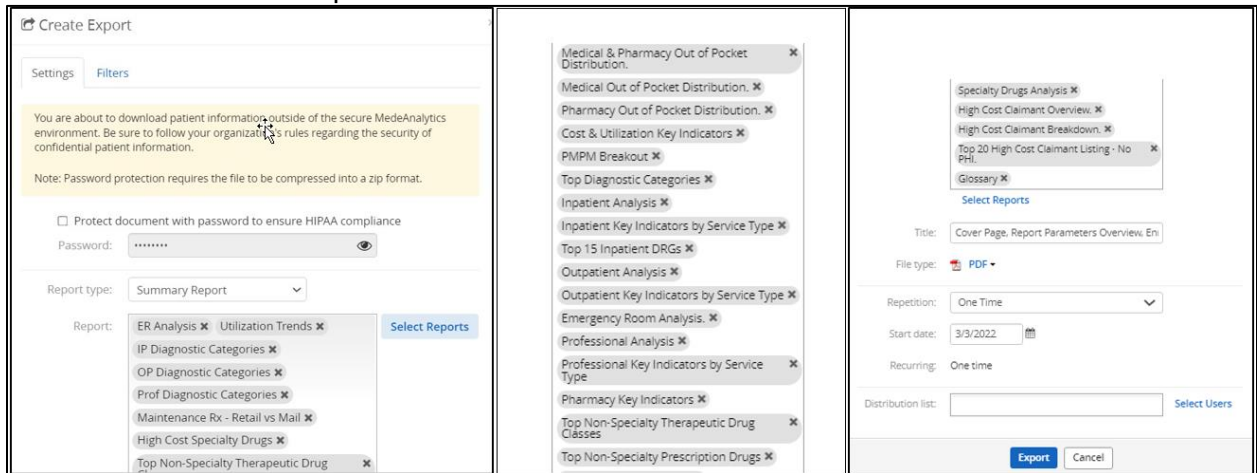
You can export multiple presentation reports at once as part of a package. To start, click the wrench icon in the top right of the screen, and select **Exports**.



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



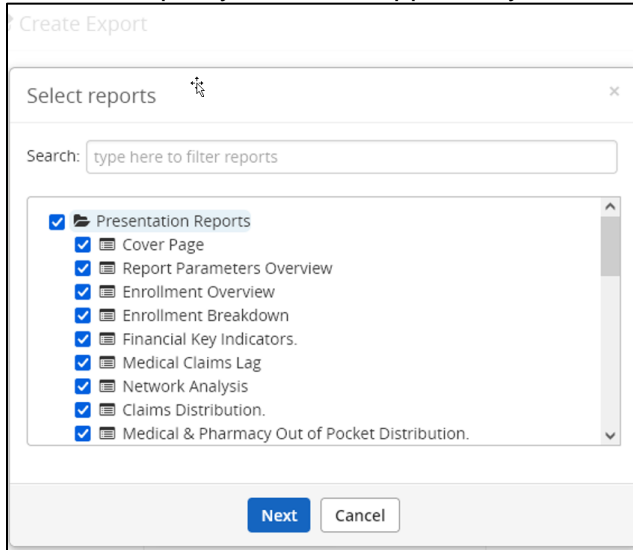
A **Create Export** display box will appear with Export Settings. In the display box, you will need to scroll down to see all options that are outlined in the 3 screenshots below.



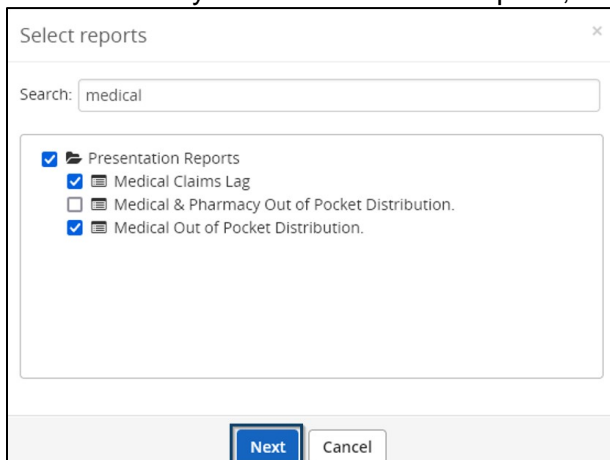
On the **Settings** tab, first, select **SSRS Report** from the **Report type** field, and then click **Select Reports**.



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.

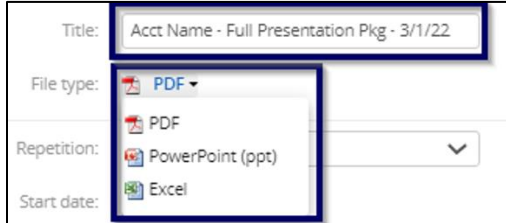


You can also search reports by typing in the **Search** field and selecting the reports you wish to include. Once you have chosen the reports, click **Next**.



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

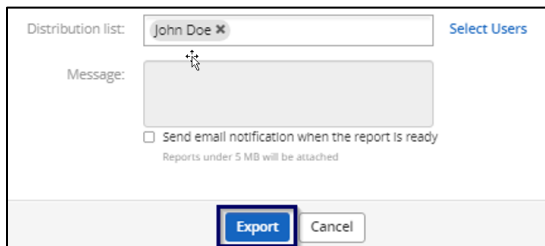
Tip: Best practice for naming a title is to type the account name, full presentation report, and date.



A screenshot of a report configuration form. The 'Title' field contains 'Acct Name - Full Presentation Pkg - 3/1/22'. The 'File type' dropdown is set to 'PDF'. The 'Repetition' dropdown is set to 'PowerPoint (ppt)'. The 'Start date' field is empty.

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

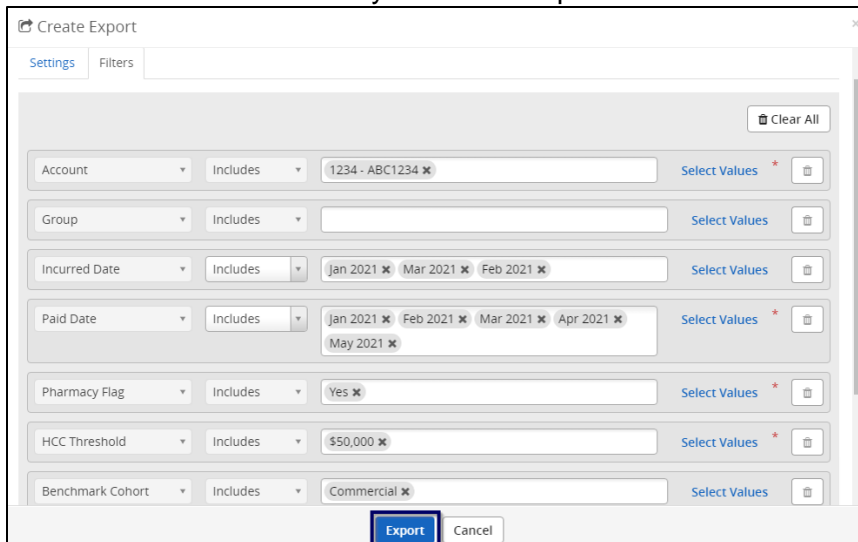
Finally, on the settings tab, choose whom you would like to receive the report by clicking **Select Users** or begin typing in the text field to find users. You can choose to send an email notification when the report is ready by clicking the *send email notification* check box. You can also type a custom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



A screenshot of the distribution settings section. The 'Distribution list' field contains 'John Doe' with a 'Select Users' link to its right. Below it is a 'Message' text area. A checkbox labeled 'Send email notification when the report is ready' is present, with a note below it: 'Reports under 5 MB will be attached'. At the bottom are 'Export' and 'Cancel' buttons.

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.



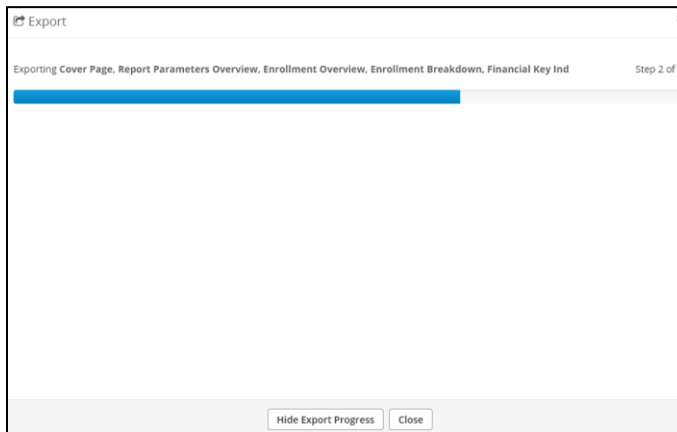
A screenshot of the 'Create Export' dialog box. It has two tabs: 'Settings' and 'Filters'. The 'Filters' tab is active. There is a 'Clear All' button in the top right. The filters are as follows:

- Account: Includes 1234 - ABC1234
- Group: Includes (empty)
- Incurred Date: Includes Jan 2021, Mar 2021, Feb 2021
- Paid Date: Includes Jan 2021, Feb 2021, Mar 2021, Apr 2021, May 2021
- Pharmacy Flag: Includes Yes
- HCC Threshold: Includes \$50,000
- Benchmark Cohort: Includes Commercial

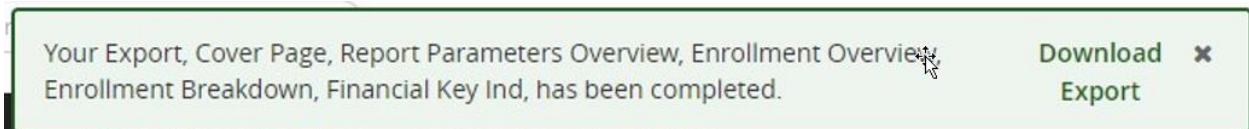
 At the bottom are 'Export' and 'Cancel' buttons.

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.



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



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