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Recommended browsers: Chrome or Firefox

Report Manager Quick Start Guide

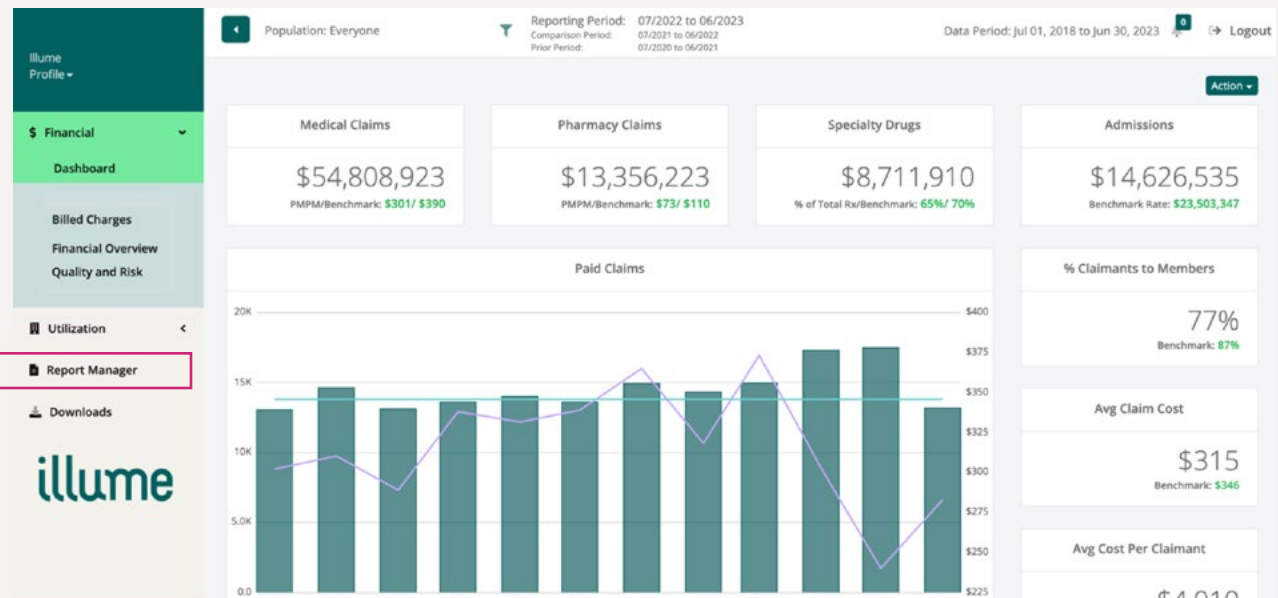
Mastering Report Manager

It's simple to **generate, manage and schedule** custom reports with Illume.

Try it for yourself using these easy instructions.

Navigating to Report Manager

Let's start by locating the "Report Manager" feature. The link is available in the main menu located on the left side of your screen.



After clicking on "Report Manager," you will see the below page:

Report Manager

Create Bundle Run Schedule

Reports Bundles Scheduler

Filter by Name or Description

0 report(s) selected

	Report Name	Description	Fav
<input type="checkbox"/>	Admissions By Diagnosis	Summarizes inpatient admissions and inpatient days in the report period by the high-le...	☆
<input type="checkbox"/>	Age Group Risk Analysis	Uses the output of the MARA risk model to report on prospective and concurrent risk al...	☆
<input type="checkbox"/>	Age Group Summary Report	Breakdown summary of medical and rx costs, enrollment and risk.	☆
<input type="checkbox"/>	Avoidable ER - Day of the Week	Potentially avoidable emergency room visits occur for diagnosis that could have been a...	☆
<input type="checkbox"/>	Avoidable ER - Diagnosis	Potentially avoidable emergency room visits occur for diagnosis that could have been a...	☆
<input type="checkbox"/>	Avoidable ER Visits Savings	A report on the potential financial impact of transitioning avoidable emergency room ut...	☆

Reports

In this section, you'll learn how to use the reports feature of the Report Manager.

There is a robust suite of standard reports conveniently available to you in the Report Manager repository of Illume. When you select the Report Manager link, a page displays that provides you with the names of these reports, a brief description of each and an option to favorite a report.

You can quickly search for a report using the search bar. For example, if you would like to see a list of reports that pertain to ER utilization, enter "ER" in the search bar and a list of reports related to ER display on the screen.

The screenshot shows the 'Report Manager' interface. At the top, there are three buttons: 'Create Bundle', 'Run', and 'Schedule'. Below these are three tabs: 'Reports' (highlighted in dark teal), 'Bundles', and 'Scheduler'. A search bar is located below the tabs, containing the text 'ER' and a magnifying glass icon. Below the search bar, it says '0 report(s) selected'. A table lists the following reports:

Select All	Report Name	Description	Fav
<input type="checkbox"/>	Avoidable ER - Day of the Week	Potentially avoidable emergency room visits occur for diagnosis that could have been a...	☆
<input type="checkbox"/>	Avoidable ER - Diagnosis	Potentially avoidable emergency room visits occur for diagnosis that could have been a...	☆
<input type="checkbox"/>	Avoidable ER Visits Savings	A report on the potential financial impact of transitioning avoidable emergency room ut...	☆
<input type="checkbox"/>	Chronic Conditions Utilization	Office, ER, Admission, Re-Admission and PMPY plan paid amounts for members with ea...	☆
<input type="checkbox"/>	ER Utilization Dashboard	A visual summary of Emergency Room Visits.	☆

Now, let’s see how to select a report and run it so that it’s viewable with the most recent data. In this example, we will use the Avoidable ER Visits Savings report. Simply click your mouse in the box next to the report. A checkmark will appear in the box and a green highlight will appear across the report name and description.

Report Manager

Create BundleRunSchedule

ReportsBundlesScheduler

Q ER

1 report(s) selected

Select All	Report Name ▲	Description	Fav ▲
<input type="checkbox"/>	Avoidable ER - Day of the Week	Potentially avoidable emergency room visits occur for diagnosis that could have been a...	☆
<input type="checkbox"/>	Avoidable ER - Diagnosis	Potentially avoidable emergency room visits occur for diagnosis that could have been a...	☆
<input checked="" type="checkbox"/>	Avoidable ER Visits Savings	A report on the potential financial impact of transitioning avoidable emergency room ut...	☆
<input type="checkbox"/>	Chronic Conditions Utilization	Office, ER, Admission, Re-Admission and PMPY plan paid amounts for members with ea...	☆
<input type="checkbox"/>	ER Utilization Dashboard	A visual summary of Emergency Room Visits.	☆

Next, select “Run” located above the “Scheduler” button.

Report Manager

Create BundleRunSchedule

ReportsBundlesScheduler

Q ER

1 report(s) selected

Select All	Report Name ▲	Description	Fav ▲
<input type="checkbox"/>	Avoidable ER - Day of the Week	Potentially avoidable emergency room visits occur for diagnosis that could have been a...	☆
<input type="checkbox"/>	Avoidable ER - Diagnosis	Potentially avoidable emergency room visits occur for diagnosis that could have been a...	☆
<input checked="" type="checkbox"/>	Avoidable ER Visits Savings	A report on the potential financial impact of transitioning avoidable emergency room ut...	☆
<input type="checkbox"/>	Chronic Conditions Utilization	Office, ER, Admission, Re-Admission and PMPY plan paid amounts for members with ea...	☆
<input type="checkbox"/>	ER Utilization Dashboard	A visual summary of Emergency Room Visits.	☆

After you select Run, you'll see the menu shown below. This menu allows you to apply filters to the data that you would like to see in the final report. We'll explain each component using the number assigned to it.

Run Report

1

Name

Avoidable ER Visits Savings

2

Population

Employer Group

Advanced Manufacturing (ACX03) x

Filter

Select

+

Saved Population

Select

3

Dates

Basis

Paid

Incurred

Reporting

07/2022

to

06/2023

Comparison

07/2021

to

06/2022

🔒

Prior

07/2020

to

06/2021

Cycle Date ranges from July 2018 to June 30, 2023

4

Benchmark

Commercial

5

High Cost Members

No

Yes

6

Settings

Format

☒ PDF

☐ DOCX

☐ PPTX

☐ XLSX

▲

Export Orientation

☒ Default

☐ Portrait

☐ Landscape

Data View

☒ PMPM

☐ PEPM

High Cost Threshold

\$50,000

By Report Tag

No

Yes

Blind PHI

☐

Include Cover Page

☒

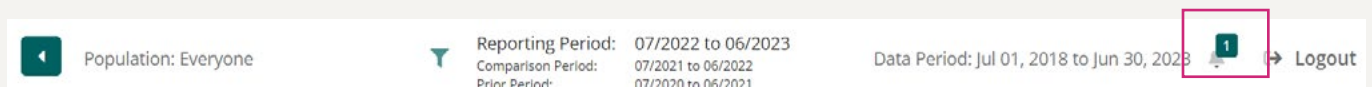
Reset

Run

- 1 **Name** - Enter a name for your report or bundle.
- 2 **Population** - Using your levels of aggregation (LOA) filters, select the population for which you want your report or bundle to run. By default, a single employer group will be selected. You can deselect this group by clicking the X next to its name. Click in the search box and select a new group from the drop-down menu; you can also type ahead in the box to filter your menu selections. If you want to add filter selections from another level of aggregation, select that LOA in the filter menu and click on the “Add” button.
- 3 **Dates** - Select the reporting basis, start date and end date for the reporting and comparison periods. Clicking on the dates will open a calendar that allows you to choose a month and year for the start and end dates. When the lock icon is closed, changes you make to the reporting period will be mirrored on the comparison period. When unlocked, the periods can be edited independently. When running on an incurred basis, you will have to select a third and fourth date for the paid from and paid through date.
- 4 **Benchmark** - Select which benchmark to use with your reporting.
- 5 **High Cost Members** – This defaults to “No.” If you select “Yes,” you will have the option to include only those high cost members or exclude those high cost members. If you select “No,” all members who meet your criteria will be included in the report.
- 6 **Settings** - Click the triangle in-line to show the advanced report settings. Here you can choose between Word, PDF, PPT, or Excel export formats and select whether report values should be shown in PMPM or PEPM format. The high cost threshold here will be applied to all reports which accept a dollar threshold, not only the high cost members report. Check the blind PHI option if you would like the report to generate as though you were a user with PHI restrictions.

When you have your settings finalized to your liking, click “Run” to generate the report. If, at any time, you want to start over, click the “Reset” button to return to the default selections.

When your report is ready for you to view, you’ll receive a notification on the bell icon at the top right side of the page. The number will increase by one, indicating you have one new report available to view. Simply click on the number over the bell icon and you will be directed to your report.



Report Bundles

Now let's learn how to bundle reports by merging them together.

As a reminder, on the Reports page of the Report Manager, you will see a robust suite of reports available to you. Earlier in the guide, we learned how to search for ER reports, and we selected one ER report to run. For this activity, we will select more than one ER report from the list to run. Merging more than one report together creates a Report Bundle. In the image below, you'll see that we have selected three ER reports: Avoidable ER – Day of the Week, Avoidable ER – Diagnosis and Avoidable ER Visit Savings, simply by clicking my mouse in the box next to each report.

Next, select "Create Bundle." This link is located on the top right of the screen.

The screenshot shows the 'Report Manager' interface. At the top right, there are three buttons: 'Create Bundle' (highlighted with a red box), 'Run', and 'Schedule'. Below these are three tabs: 'Reports' (active), 'Bundles', and 'Scheduler'. A search bar contains the text 'ER'. Below the search bar, it says '3 report(s) selected'. A table lists the reports:

Select All	Report Name	Description	Fav
<input checked="" type="checkbox"/>	Avoidable ER - Day of the Week	Potentially avoidable emergency room visits occur for diagnosis that could have been a...	☆
<input checked="" type="checkbox"/>	Avoidable ER - Diagnosis	Potentially avoidable emergency room visits occur for diagnosis that could have been a...	☆
<input checked="" type="checkbox"/>	Avoidable ER Visits Savings	A report on the potential financial impact of transitioning avoidable emergency room ut...	☆
<input type="checkbox"/>	Chronic Conditions Utilization	Office, ER, Admission, Re-Admission and PMPY plan paid amounts for members with ea...	☆
<input type="checkbox"/>	ER Utilization Dashboard	A visual summary of Emergency Room Visits.	☆

After you select the Create Bundle link, you should see the following menu:

The screenshot shows a 'Create Bundle' form with the following elements:

- 1 Bundle Name:** A text input field containing 'Avoidable ER'.
- 2 Available Reports:** A list of reports on the left, including 'Admissions By Diagnosis', 'Age Group Risk Analysis', 'Age Group Summary Report', 'Avoidable ER - Day of the Week', 'Avoidable ER - Diagnosis', 'Avoidable ER Visits Savings', 'Billed Charges Dashboard', 'Biometrics Report', and 'Breast Cancer Treatment Path'.
- 3 Bundle Description:** A text input field containing 'Avoidable ER Day of the Week, Diagnosis, and Visit Savings'.
- 4 Bundled Reports:** A list of reports on the right, including 'Avoidable ER - Day of the Week', 'Avoidable ER - Diagnosis', and 'Avoidable ER Visits Savings'.

At the bottom right, there are 'Cancel' and 'Save Bundle' buttons.

- 1 Bundle Name** – In this field, you can name the bundle. For this example, we have named it “Avoidable ER.”
- 2 Available Reports** – This menu provides a list of all reports that are available to you. This list is provided here as an opportunity to add additional reports to your bundle. To add a report to the bundle from here, simply click on the report and drag it over to the box on the right titled “Bundled Reports” (identified in the above image by using the green circle with the number 4 inserted in the center).
- 3 Bundle Description** – This field is provided for you to write a description of the bundle you are creating. For this example, we’re using “Avoidable ER Day of the Week, Diagnosis, and Visit Savings” as the description as these are the three types of reports that are being merged to create this bundle. Some other example descriptions could include date spans, financial indicators, or other utilization metrics.
- 4 Bundled Reports** – This box provides you with the list of reports that you are using to create your bundle. You can reorder them, remove one, or add one simply by using the click and drag feature with your mouse.

Once you have completed the above steps, click “Save Bundle” at the bottom right of the screen.

Create Bundle

Bundle Name

Avoidable ER

Bundle Description

Avoidable ER Day of the Week, Diagnosis, and Visit Savings

Available Reports

Admissions By Diagnosis

Age Group Risk Analysis

Age Group Summary Report

Avoidable ER - Day of the Week

Avoidable ER - Diagnosis

Avoidable ER Visits Savings

Billed Charges Dashboard

Biometrics Report

Breast Cancer Treatment Path

Bundled Reports

Drop here to add, re-order and configure report

Avoidable ER - Day of the Week

Avoidable ER - Diagnosis

Avoidable ER Visits Savings

Cancel

Save Bundle

You have just created your first bundle. You can now view your bundle by selecting the “Bundles” link on the Report Manager page.

Report Manager

Create

Run

Delete

Schedule

Reports

Bundles

Scheduler

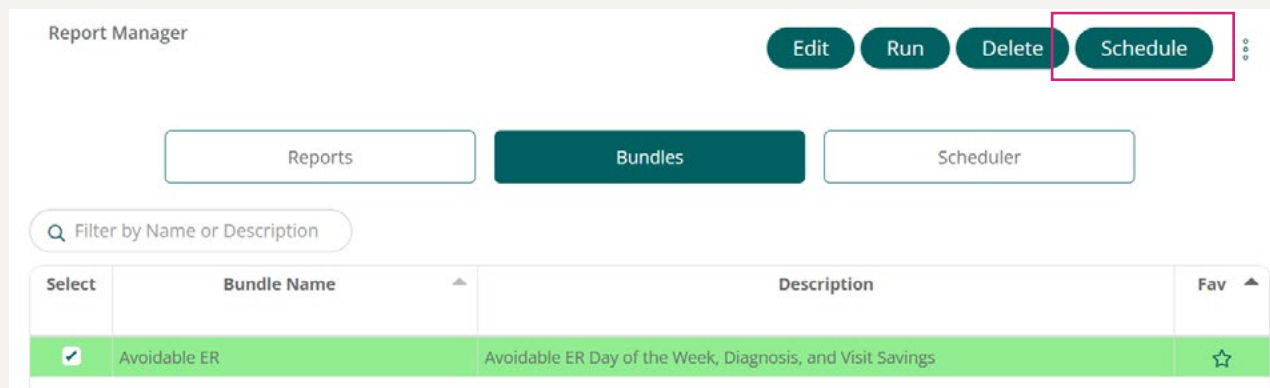
Filter by Name or Description

Select	Bundle Name	Description	Fav
<input type="checkbox"/>	Avoidable ER	Avoidable ER Day of the Week, Diagnosis, and Visit Savings	☆

Report Scheduler

Finally, we will learn how to schedule a report to refresh automatically. Let's tackle this task by learning how to schedule the ER bundle that we created in the previous step to automatically refresh for us monthly.

First, select the Avoidable ER bundle located in the Bundles section of the Report Manager page. Then select "Schedule" at the top far right side of the screen.



After you select Schedule, the below menu will appear on your screen:

The screenshot shows the 'Schedule Reports' dialog box. At the top, there are three tabs: '1. Frequency', '2. Date Ranges', and '3. Population'. The '1. Frequency' tab is selected. Below the tabs, there are four numbered steps: 1. 'Scheduled Report Name' with a text input field containing 'Avoidable ER Schedule'; 2. 'Repeat' with a dropdown menu set to 'Monthly'; 3. 'Day of the Month' with a dropdown menu set to '1'; 4. 'Next Run Date' with a text input field containing 'August 1, 2023'. At the bottom right, there are three buttons: 'Back', 'Next', and 'Save'.

Let's walk through it:

- 1 **Scheduled Report Name** – Use this field to name the scheduled bundle. We're keeping it simple and calling this bundle "Avoidable ER Schedule."
- 2 **Repeat** – How frequently would you like this report to automatically refresh? Your options are monthly, weekly, every 3 months, every 6 months, every 12 months, or every data refresh. Currently, data refreshes occur around the 15th of each month. For this example, we've selected monthly.
- 3 **Day of the Month** – For this example, we chose to have this bundle refresh for us monthly. The "Day of the Month" field will allow us to select which day of each month we want the data refresh to occur. For this example, we'll select the first day of each month, or "1" as shown in the above example.
- 4 **Next Run Date** – This field tells us the next date this bundle is scheduled to run.

Once you are finished filling out those fields, select "Next" and the below menu will appear on your screen:

The screenshot shows a 'Schedule Reports' dialog box with a close button (X) in the top right corner. At the top, there are three tabs: '1. Frequency' (active), '2. Date Ranges', and '3. Population'. Below the tabs, the configuration options are listed with numbered callouts:

- 1 **Basis**: Two buttons, 'Paid' (selected) and 'Incurred'.
- 2 **Reporting Period**: A dropdown menu showing 'Rolling 12 Months'.
- 3 **Comparison Period**: A dropdown menu showing 'Last Rolling 12 Months'.
- Prior Period**: A dropdown menu showing 'Prior Rolling 12 Months'.
- 4 **Include Current Month**: A toggle switch set to 'Yes'.
- 5 **Preview Dates**: A section showing the following dates:
 - Reporting Period: Jul-2022 to Jun-2023
 - Comparison Period: Jul-2021 to Jun-2022
 - Prior Period: Jul-2020 to Jun-2021

At the bottom right of the dialog box are three buttons: 'Back', 'Next', and 'Save'.

- 1 **Basis** – You have the option to run this report on a Paid basis or Incurred basis.
- 2 **Reporting Period** – You have several options available to you in this menu such as last rolling 12 months, quarter to date, month to date, year to date, etc.
- 3 **Comparison Period** – You have several options available to you in this menu as well. If you selected “rolling 12 months” in the previous step, this field will default to “last rolling 12 months.”
- 4 **Include Current Month** – You have the option to toggle to “Yes” or “No.” Please note that if you choose “Yes” and the current month has not yet concluded, you will only have what is available for the current month reflected in your data.
- 5 **Preview Dates** – This section simply previews the dates you’ve selected in the previous steps.

Once you have completed this menu, select “Next” at the bottom of the page. The following menu should appear:

The screenshot shows a 'Schedule Reports' dialog box with a close button (X) in the top right corner. At the top, there are three tabs: '1. Frequency', '2. Date Ranges', and '3. Population'. The '3. Population' tab is selected. Below the tabs, there are six numbered steps (1-6) on the left side of the form:

- 1 **Population**: Includes 'Employer Group' (dropdown menu showing 'Advanced Manufacturing (ACX03) X') and 'Filter' (dropdown menu showing 'Select' with a plus icon).
- 3 **Saved Population**: Includes a dropdown menu showing 'Select'.
- 4 **Benchmark**: Includes a dropdown menu showing 'Commercial'.
- 5 **High Cost Members**: Includes a toggle switch set to 'Yes' (with 'No' and 'Yes' labels).
- 6 **Settings**: Includes a dropdown arrow.

At the bottom right of the dialog box, there are three buttons: 'Back', 'Next', and 'Save'.

Here's how to customize your populations:

- 1 **Population** – You will only be able to select populations that you have approved access to view. The group reflected in this example is a fake group that was created for demo purposes.
- 2 **Filter** – You have several options available to you in the filter section to narrow the data based on your preferences. An example of a filter would be selecting a subgroup of your group population, such as retirees. Note - this field is optional and can be left blank.
- 3 **Saved Population** – This field is also optional and is only available to select if you have created a saved population. An example of a saved population could be all employees with a Diabetes diagnosis. Saved populations cannot be created in the Report Manager.
- 4 **Benchmark** – Only “Commercial” is available in this selection. Custom benchmarks could be added in the future.
- 5 **High Cost Members** – This defaults to “No.” If you select “Yes,” you will have the option to include only those high cost members or exclude those high cost members. If you select “No,” all members who meet your criteria will be included in the report.
- 6 **Settings** – Click the triangle in-line to view the advanced report settings. Here you can choose between Word, PDF, PPT, or Excel export formats and select whether report values should be shown in PMPM or PEPM format. The high cost threshold here will be applied to all reports which accept a dollar threshold, not only the high cost members report. Check the blind PHI option if you would like the report to generate as though you were a user with PHI restrictions.

Once you are satisfied with your selections, select “Save” at the bottom of the menu.

The screenshot shows the 'Schedule Reports' interface with the '3. Population' tab active. The form contains the following elements:

- 1. Frequency**: (tab)
- 2. Date Ranges**: (tab)
- 3. Population**: (tab, currently selected)

Fields within the '3. Population' tab:

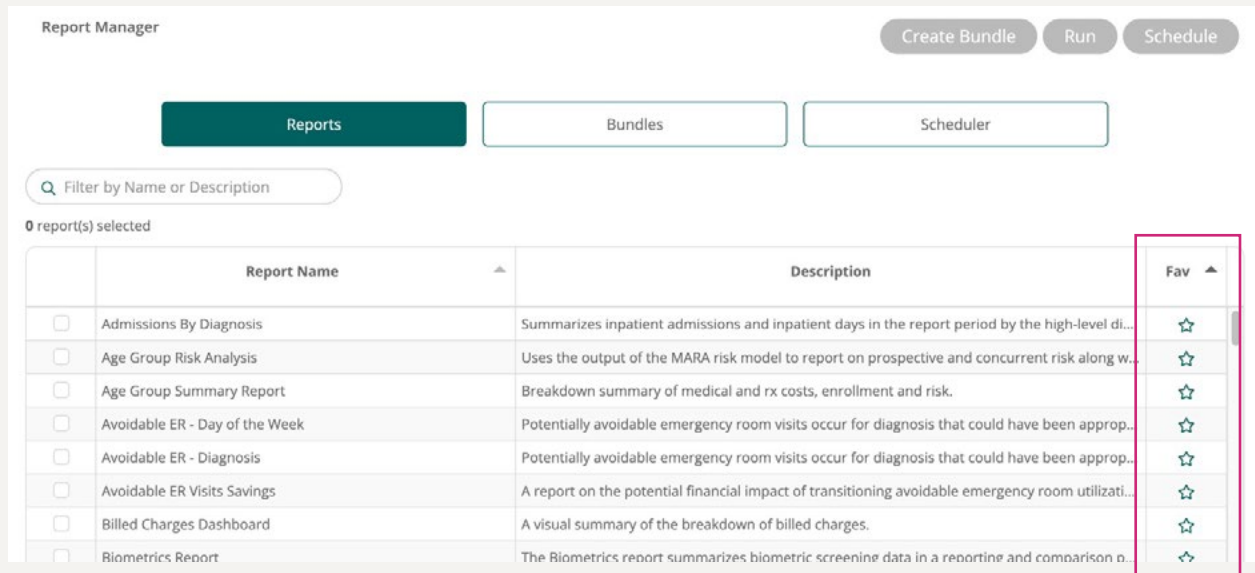
- Population**: Advanced Manufacturing (ACX03) [X]
- Employer Group**: (label)
- Filter**: Select [v] +
- Saved Population**: Select
- Benchmark**: Commercial [v]
- High Cost Members**: No [radio selected] Yes [radio]
- Settings**: [v]

Buttons at the bottom: Back, Next, and Save (highlighted with a red box).

You have now scheduled your bundle to automatically refresh monthly for you. At any time, you can select the “Scheduler” link in the Report Manager to view the list of reports you have scheduled.

Favoriting a report

In the Report Manager, there is a column on the far right titled “Fav” with stars below it. Simply click your mouse on the star to favorite a report. By default, the list of reports in the Report Manager will appear in alphabetical order except for favorited reports. Favorited reports will always be listed first.



The screenshot shows the 'Report Manager' interface. At the top, there are buttons for 'Create Bundle', 'Run', and 'Schedule'. Below these are tabs for 'Reports' (selected), 'Bundles', and 'Scheduler'. A search bar labeled 'Filter by Name or Description' is present. Below the search bar, it says '0 report(s) selected'. The main area is a table with the following columns: 'Report Name', 'Description', and 'Fav'. The 'Fav' column contains star icons. A red box highlights the 'Fav' column and the star icons.

	Report Name	Description	Fav
<input type="checkbox"/>	Admissions By Diagnosis	Summarizes inpatient admissions and inpatient days in the report period by the high-level di...	☆
<input type="checkbox"/>	Age Group Risk Analysis	Uses the output of the MARA risk model to report on prospective and concurrent risk along w...	☆
<input type="checkbox"/>	Age Group Summary Report	Breakdown summary of medical and rx costs, enrollment and risk.	☆
<input type="checkbox"/>	Avoidable ER - Day of the Week	Potentially avoidable emergency room visits occur for diagnosis that could have been approp...	☆
<input type="checkbox"/>	Avoidable ER - Diagnosis	Potentially avoidable emergency room visits occur for diagnosis that could have been approp...	☆
<input type="checkbox"/>	Avoidable ER Visits Savings	A report on the potential financial impact of transitioning avoidable emergency room utilizati...	☆
<input type="checkbox"/>	Billed Charges Dashboard	A visual summary of the breakdown of billed charges.	☆
<input type="checkbox"/>	Biometrics Report	The Biometrics report summarizes biometric screening data in a report and comparison o...	☆