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Recommended browsers: Chrome or Firefox

Creating Charts Quick Start Guide

Creating Charts

See things your way: by creating charts, you're able to build your own custom visualizations utilizing the Illume data sets.

Let's go on a brief tour.

Navigating to charts

Step 1 - Hover over “Create” at the top right of the page.

illumine

Report

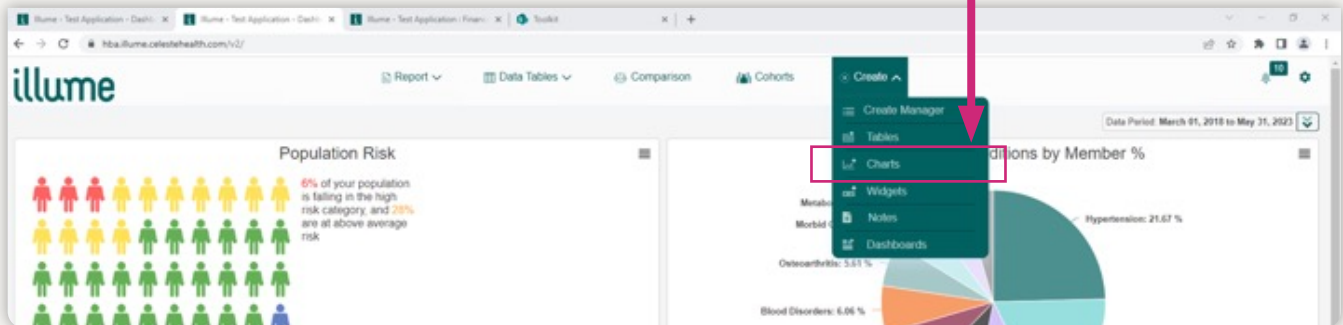
Data Tables

Comparison

Cohorts

Create

Step 2 - A dropdown menu will appear. Select “Charts” from the menu.



Create Charts Overview

1. Population & Date Range

Population – Allows you to select a population during the Create process to see an actual population example while creating the visual. After the chart is saved, it can be re-run for any population the user has access to.

Data Period – Select a reporting basis (paid or incurred) and date range to use while creating the chart. After the chart is saved, it can be re-run for any date range or basis.

High-Cost Members – Select members by cost. Choosing “No” will include all members. Selecting “Yes” will provide you the option to select a dollar threshold. By toggling to “Yes,” you will have the option to exclude high-cost members from the report, or only include high-cost members in the report.

1. Population & Date Range

Population

Select a population's data to use while creating the chart. After you save the chart, you'll be able to re-run it for any population you have access to.

Employer Group

Blank (BK) x

Filter

Select

+

Data Period

Select a reporting basis and date range to use while creating the chart. After you save the chart you'll be able to re-run it for any date range or basis.

Basis

Paid

Incurred

Reporting

05/2022

to

04/2023

Comparison

05/2021

to

04/2022

🔒

Prior

05/2020

to

04/2021

High Cost Members

Select high cost threshold, amount type, and behavior for members crossing the threshold.

Use

No

☒

Yes

2. Select Data

Data Type – Choose one of the available data sets.

Trend – Data can be trended on a Weekly, Monthly, Quarterly or Yearly basis. When trending is enabled, only one value field will be available at a time. Also, trending is required when no “Summarize By” value is selected.

Summarize By – A single-select field that will be the category grouping for the chart. A chart of Medical PMPM by plan would have “Plan” as the subject. This is required when trend is disabled.

Maximum Results – Select 5, 10, 20, or 50 as the maximum number of results that should be displayed on the chart.

Add Filter – Create or load a previously created filter. Data that doesn’t match the filter criteria will be excluded.

2. Select Data

Data Table

Single-select from the list of data tables loaded in this application.

Pharmacy X

Trend

Disable trending or select a trending time period. Required when no subject is selected.

☐ Monthly

Summarize By

Single-select the field you want to be the category grouping for your chart. A chart of Medical PMPM by plan would have plan as its subject. Required when trend is disabled.

Brand Name X

Maximum number of Brand Name

5

Add Filter

Create or load a filter. Data not matching these criteria will be excluded.

No filter selected

Create

Load

3. Data Series

Add Value Fields – Search for a value field to add to the chart and then select a function (Sum, Average, Min, Max, PMPM or Per 1,000) for the selected field. Click the plus to add the value field and function to the “Active Fields” list. The same field can be added to a chart multiple times using different functions.

Active Fields – Incorporates a list of the “Value Field” series that have been added to the chart. Remove a series by clicking the “X”. Drag and drop the “Active Fields” to change the order in which they appear on the chart.

3. Data Series

Add Value Fields

Search for a value field to make available during chart creation.

Search

Sum

+

Reporting Period

Comparison Period

Prior Period

Actual Change

% Change

Active Fields

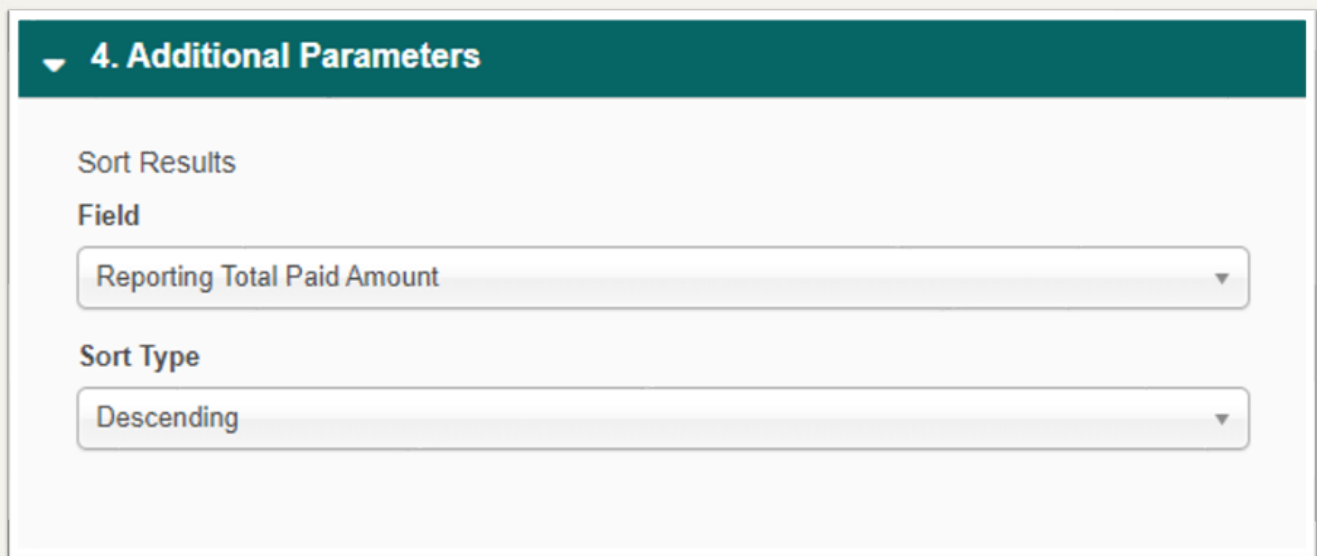
Review the series you have added to the chart. Remove a series by clicking X. Drag and drop to change order.

Reporting Total Paid Amount X

4. Additional Parameters

Field – This menu shows you the field you selected in Step 2 to summarize by (in this example, we selected “Brand Name”). This menu also shows you the “Active Fields” you chose in Step 3 (in this example, we selected “Reporting Total Paid Amount”).

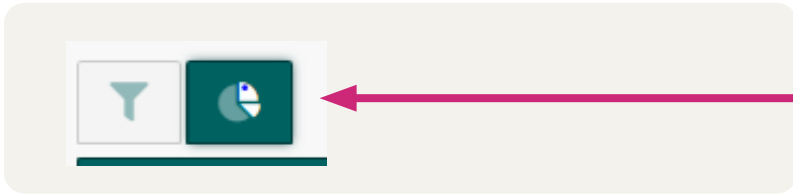
Sort Type – You can choose to sort by ascending or descending.



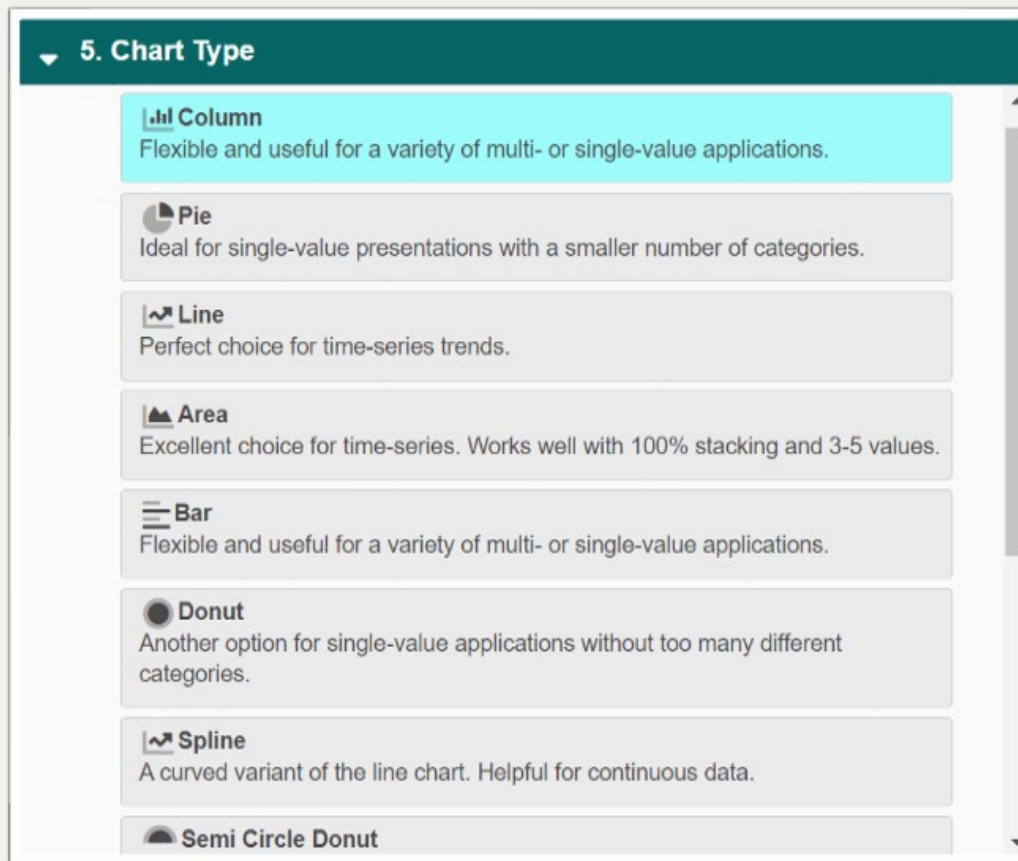
The screenshot shows a user interface for configuring chart parameters. At the top is a dark teal header bar with a white downward-pointing triangle icon and the text "4. Additional Parameters". Below this header, the text "Sort Results" is displayed. Under "Sort Results", there are two sections. The first section is labeled "Field" and contains a dropdown menu with the text "Reporting Total Paid Amount" and a small downward-pointing triangle icon on the right. The second section is labeled "Sort Type" and contains a dropdown menu with the text "Descending" and a small downward-pointing triangle icon on the right.

5. Chart Type

Select the chart icon above “Section 1. Population & Date Range.”



Choose the desired chart type to present the data. Your visualization options include Column, Pie, Line, Area, Bar, Donut and Spline charts. Please note that Pie and Donut charts are disabled for certain data configurations, including trend charts, as well as charts with two or more active fields.



6. Data View

Categories – This is the primary X-axis grouping for the chart. Click the arrows to the right of the “Categories” box to switch the primary and secondary X-axis.

Values – This is the secondary X-axis grouping for your chart.

Stacking – This is a parameter that governs the display of multiple series as values.

- **Disabled** will display each category in its own space
- **Enabled** will display each category in the same space
- **100%** will display each category in the same place as a percentage of the total

▼ 6. Data View

Categories

Categories are the primary X-Axis grouping for your chart.

Subject - Brand Name

↕

Values

Values are the secondary X-Axis grouping for your chart.

Series - Reporting Total Paid Amount

▼

Stacking

A parameter that governs the display of multiple series as values.

Disabled - Each series will be displayed in its own space.

▼

7. Customization

Chart Text – Define or disable the chart’s text fields with a 50-character limit.

Other Elements – Enable each Element by placing a checkmark in the box next to it and disable by simply removing the checkmark.

7. Customization

Chart Text

Define or disable the chart's text fields. Character limit is 50 letters.

Title

☒

Top 5 Drugs

Subtitle/Note

☒

Top 5 Brand Name by Paid Amount

X-Axis Label

☐

Click to enter text

Y-Axis Label

☐

Click to enter text

Secondary Y-Axis Label

☐

Click to enter text

Other Elements

Enable or disable these elements.

Data Labels

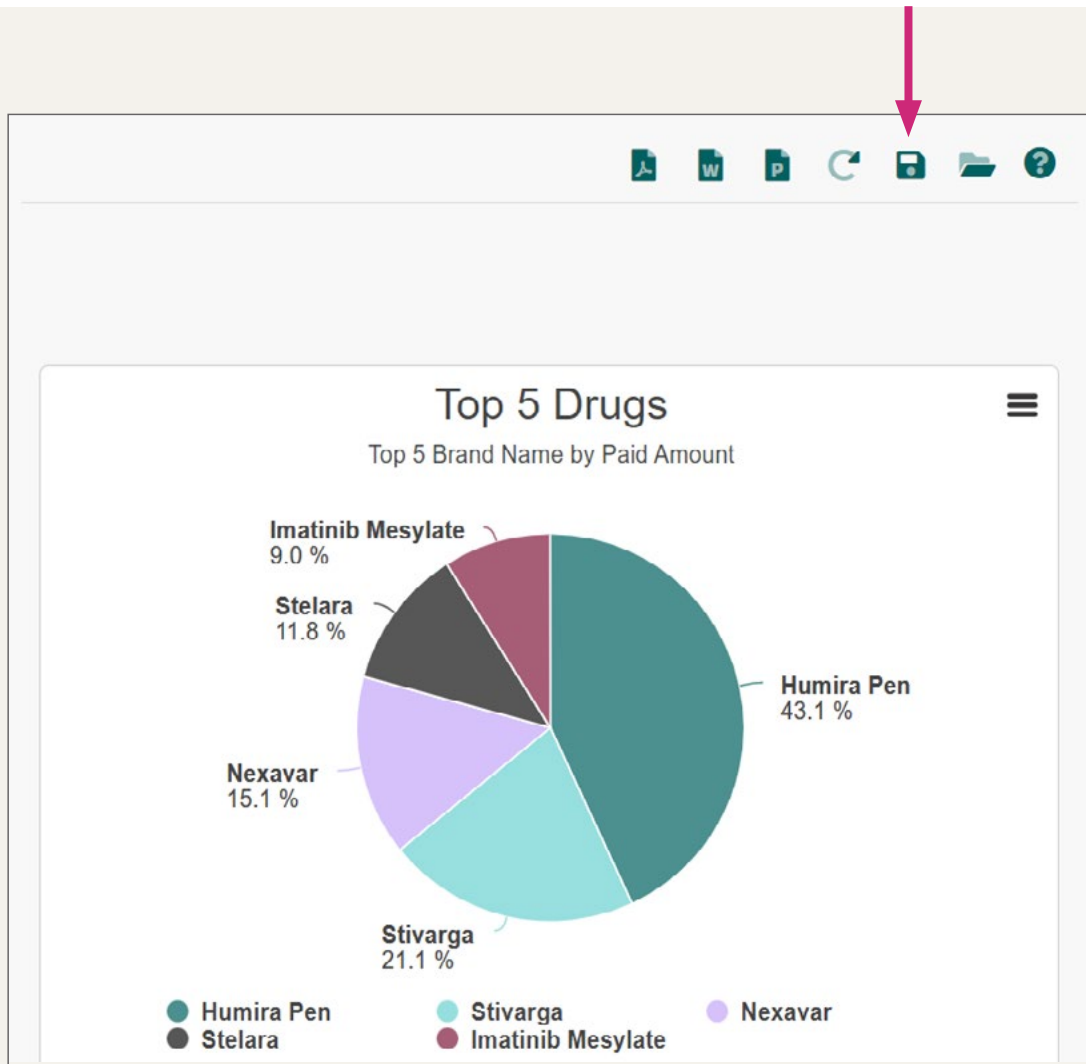
☒

Legend

☐

8. Save

Click the “Save” button to save the chart for future use. Saved charts are stored in “Create Manager” and can be accessed by clicking on the “Charts” tab.



User Roles

Report Library Administrator – Controls the functionality for Create Manager. They can view all charts regardless of sharing status, make themselves the “owner” of any chart, publish any chart, and manipulate charts through sharing, un-sharing, and cloning.

Non-Administrators – Can only access charts that they own or that have been shared with them. They cannot edit charts that have been shared with them.

Create Charts in Report Library

Once a chart has been published to the Report Library, it will appear among all the other reports in this library. The default setting for published charts is unshared. Administrators must change the share setting for the report to be visible by all end-users. Once shared, charts can be bundled, scheduled and made available in Executive Analytics by all end-users.