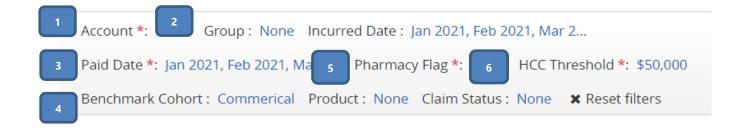# DataPoint Tips:
Did You Know...

Presentation Report Filters

The **Presentation Report** tab is a combination of static reports that can be pulled individually or as a package. These reports provide a year-over-year comparison of financial, utilization, and enrollment data for your account.

Related Filters

When selecting a presentation report, you will need to fill out the following filters to generate the report:

1. Account – Select the account name, account type, or enter the account number (this is your master account number and may not be an active group number. Selecting just an account number will capture date for all associated group numbers).

2. Group – This filter allows you to isolate one or more specific group numbers. Click **Select Values** to see the group numbers associated with the DataPoint set up. If all group numbers are desired, leave **None** as the filter selection.

3. Paid Date –
   - Self-Funded: Select desired values (up to 12 months)
   - Fully Insured: Select the incurred date with the timeframe you would like to view, plus add two months lag time to the paid date. For example, if a user wants to see data for Jan 2021 – June 2021:
     - Incurred Date: Jan 2021 – Jun 2021
     - Paid Date: Jan 2021 – Aug 2021

4. Benchmark Cohort – Change from **Age/Sex Adj BOB** to **Commercial**.

5. Pharmacy Flag – Select **Yes/No** based on your preference and/or group's set up.

6. HCC Threshold – Select your desired dollar amount.

1 Account *:	**2** Group : None	Incurred Date : Jan 2021, Feb 2021, Mar 2...
3 Paid Date *: Jan 2021, Feb 2021, Ma	**5** Pharmacy Flag *:	**6** HCC Threshold *: $50,000
4 Benchmark Cohort : Commerical	Product : None	Claim Status : None ✖ Reset filters

For more information, visit
optimahealth.com/needtoknow

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