BlueCross BlueShield Minnesota

EMPLOYER REPORTING

User Guide

Updated: 3/17/2023

Table of Contents

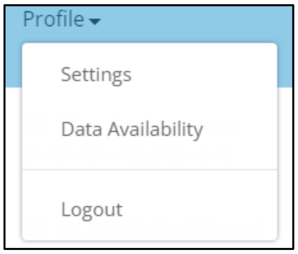
Access

Blue Cross Connect First Time Login with Okta [instructions] are located on the https://www.bluecrossmn.com/employerreporting page under the Employer Reporting 101 section.

Application Overview

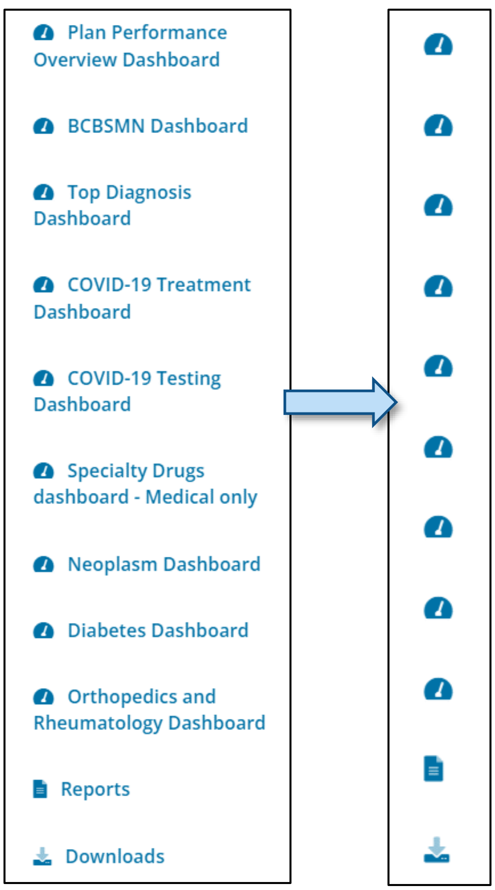
Profile Dropdown

Click here to access **Admin Settings**, view **Data Availability**, or **Logout** of the application.



Minimizing the Menu

Clicking on the will minimize the side menu. Labels will be abbreviated; however, functionality remains the same. Menu options may appear different, based on access.



Alert Menu

- Click the bell icon to access reports and documents that have been generated

- The badge indicates how many new notifications the user has

Levels of Aggregation (LOAs)

LOAs are core filters that can be applied by users to limit results for reporting purposes. LOAs may change based on access level.

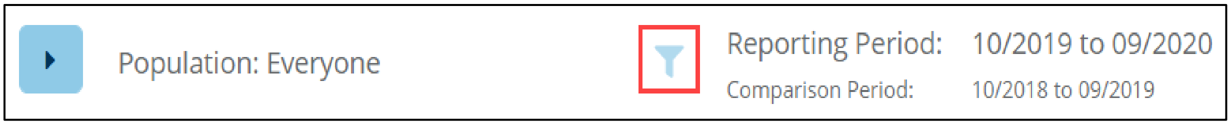
Tip: Not selecting an LOA (filter) will return all eligible values (e.g., If a client has five Group IDs, selecting the Client and choosing no Group IDs will return results that include all Groups within that Client).

LOA List	Selected Values
Service Coops	Lists each Service Cooperative CCOGA and School block
Client	Clients
Group	Group IDs associated with Client
Rx Coverage	Yes, No
Spending Account	HRA, HSA, None, Other
Industry	NAICS Industry List
BOB 1	Labor Markets, Large Group, Medicare Group, Mid-Market, Nat'l Accts, Other, Public Sector, Small Group
BOB 2	Splits out BOB 1 by funding type, components of business segment
Funding Type	Fully Insured, Self Insured
Product Type	CMM, HMO, Other, POS, PPO, Supplemental, Traditional
Product	List of all products sold
Report Code	Client-Provided Identifiers to support additional reporting groupings
Clinic	This is not populated and will not be visible when running reports; however, it is visible when running dashboards and can be disregarded
PCP	Primary Care Provider
Group and Clinic	This is not populated and will not be visible when running reports; however, it is visible when running dashboards and can be disregarded
Relationship Class	Employee, Dependent, Other, Spouse
Gender	F (female), M (Male), U (Unknown)
Age Group	Multiple age group breaks
Member State	State of the member
Zip	Zip Code of the member
Metropolitan Statistical Area	Federally defined areas for reporting purposes such as census
Region	Midwest, Northeast, South, West
Report Tag 2	Used to combine multiple aggregated clients set up by analysts
Non Prime Flag	Indicates whether a group has Prime coverage. Prime coverage is also segmented by National and Non National. This breakout is used by BCBSMN analysts.
Report Tag	Used to combine multiple aggregated clients set up by analysts

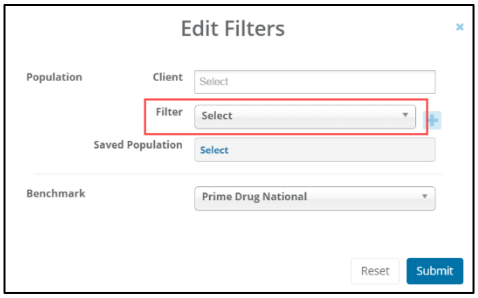
Filtering

Population Filtering

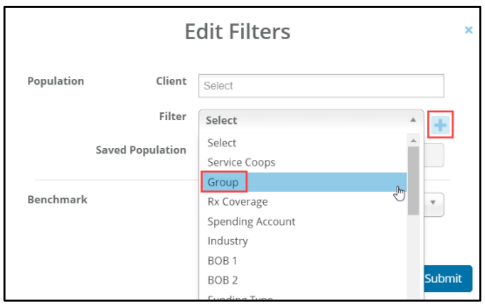
Filtering can be done based on levels of aggregation and by changing the benchmark data set. The default value for the population will be “Everyone”.



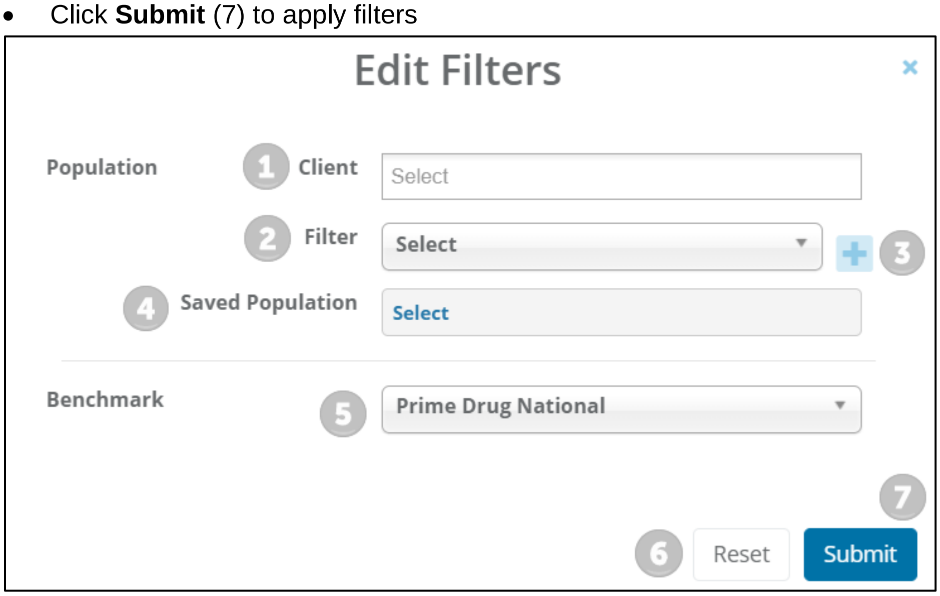
- To create a new filter, click on the filter icon located next to the reporting and comparison periods
- Choose a **Client** (1) as the population to run the dashboard on
- Expand the drop-down arrow in the **Filter** (2) area, which contains a list of Levels of Aggregation (LOAs)



- Choose the **Filter** to be added. See Levels of Aggregation (LOAs) section above for more detail on available LOAs



- Click on the **Plus sign** (3) to add a filter and repeat to add multiple filters
- Instead of manually entering each LOA, **Saved Population** filters (4) can be used. See Saved Population Filtering sub-section below for more information on creating Saved Population Filters. To load a Saved Population filter with which to run a report, click **Select** box next to Saved Population. Select desired Saved Population. Saved Population will automatically load in LOA selections. Please note: this process can take a few moments if the LOA selections are extensive.
- If benchmarking is applicable to report, select the appropriate **Benchmark** (5) from the dropdown list
    - **Non Prime Drug National**: National clients without Prime pharmacy coverage
    - **Prime Drug National**: National clients with Prime pharmacy coverage
- Note: You cannot remove filters and must click **Reset** (6) and add them all again
- Click **Submit** (7) to apply filters

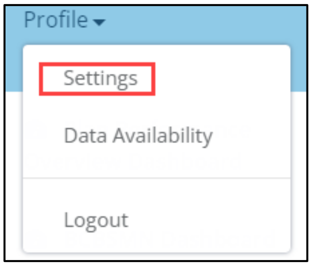


Saved Population Filtering

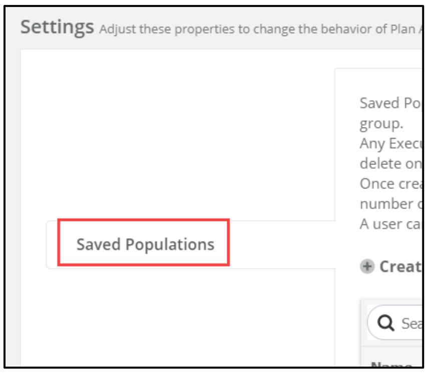
It is possible to create and save a specific combination of Levels of Aggregation (LOAs) (i.e., report filters) and use the saved filter when running reports. This will significantly reduce the time spent selecting LOAs when running reports, especially in cases where many groups need to be selected.

<u>Create Saved Populations</u>

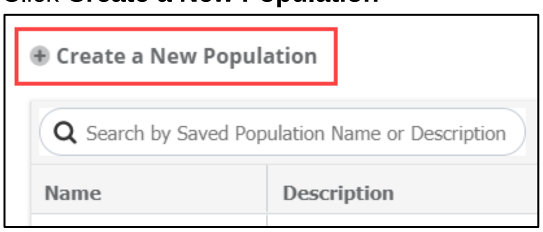
1. Within the application, click your name in the upper left corner. Click **Settings**



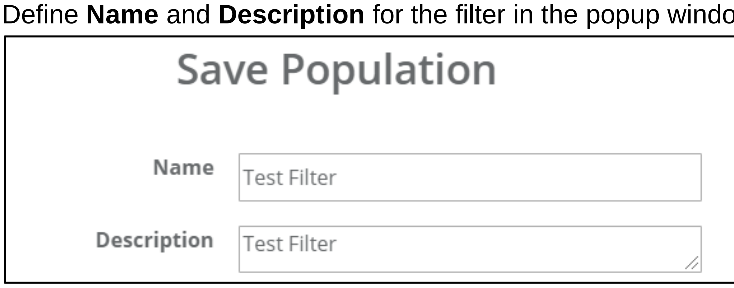
2. Access the **Saved Populations** screen within settings



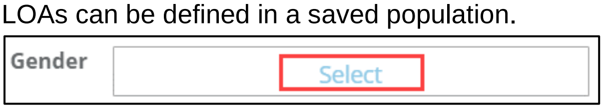
3. Click **Create a New Population**



4. Define **Name** and **Description** for the filter in the popup window

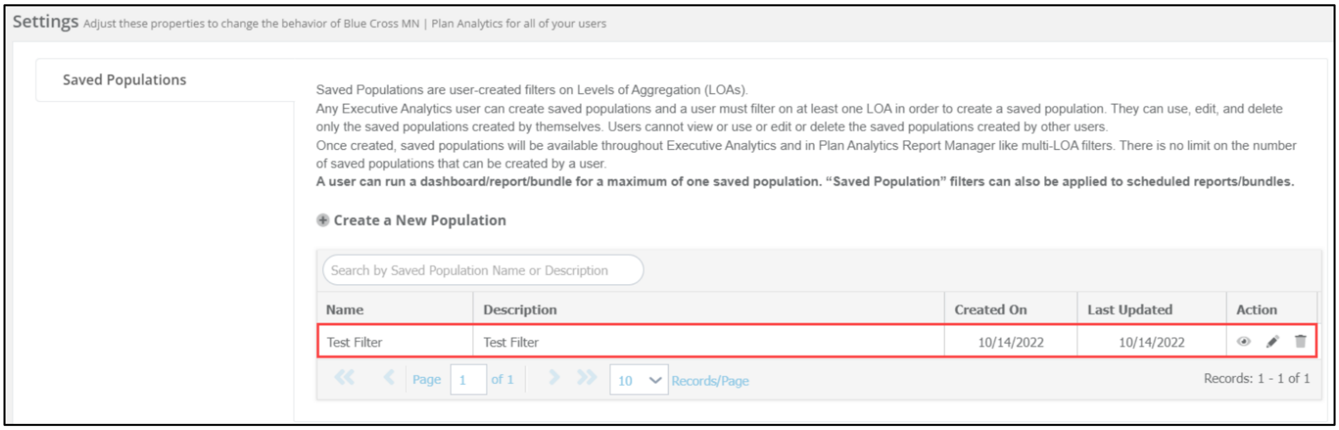


5. Define the LOAs to be defined in the saved population by clicking **Select** next to applicable LOA. Any number of LOAs can be defined in a saved population.



6. Once all desired LOAs are defined, click **Submit**

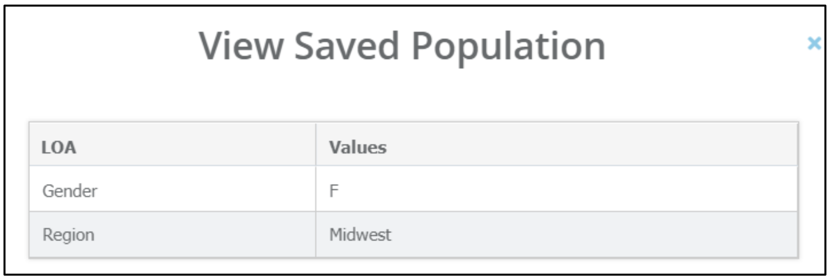
7. The newly saved population filter will now be visible on the Saved Populations screen within Settings



Manage Saved Populations

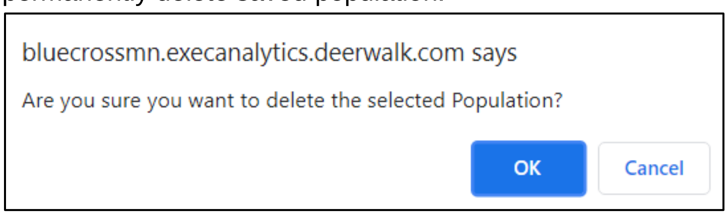
Please note: Only saved populations that you created will be visible. Saved populations cannot be shared between users.

1. Identify the saved population to be viewed, edited, or deleted
2. For applicable saved population, click the view button to see defined LOAs for selected saved filter. Click **x** to close popup view window.



3. For applicable saved population, click the edit button to edit selected saved filter. This will bring up the same screen used for creating a new population. Follow the steps above for Create Saved Population to edit existing saved population.

4. For applicable saved population, click the delete button to delete selected saved filter. Click **OK** to permanently delete saved population.



Differences Between Saved Population and Report Tags

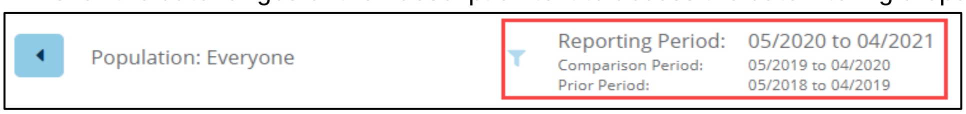
Saved Populations and Report Tags serve a similar function; however, there are key differences.

	Report Tag	**Saved Population**
Create / Manage Functionality	Report Tag Administrators (BCBSMN Analysts)	All users
View / Use in Tool	Any user can use Report Tags that have been published, dependent on access to a particular client	Users can only view / use the Saved Population they created
Levels of Aggregation (LOA) (i.e., filters)	Must be associated with a single Employer Group (Client)	Any combination of LOAs can be used, including multiple Employer Groups (Clients)
Ad-Hoc Run Reports / Bundles	Multiple Report Tags can be applied	Maximum of one Saved Population can be applied; however, additional LOA selections can be made after applying a Saved Population
Scheduled Reports / Bundles	Report Tag(s) can be applied to scheduled reports / bundles	Saved Populations can be applied to scheduled reports / bundles

Date Filtering

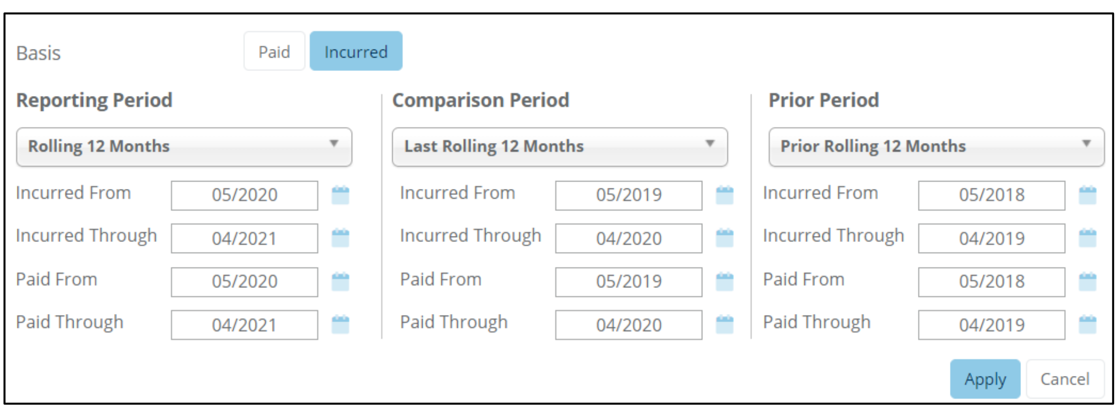
Date filtering has been designed to allow users to quickly choose typical date ranges from a quick access dropdown.

- Click the date ranges or their description text to access the date filtering dropdown



- Choose **Incurred** or **Paid** Basis. When running on Incurred Basis, Paid From (start) and Paid Through dates can be adjusted independently from Incurred dates
- Use the dropdown to select a predetermined date range, or use the date input option below the dropdown to enter a custom range
  - Reporting Period – Define the date ranges for which the report should run
  - Comparison Period – Define the date ranges for a single comparison period
  - Prior Period – Define the date ranges prior to the comparison period for a secondary comparison date range

Tip: Comparison Period and Prior Period are only applicable to reports that have secondary or tertiary reporting periods, respectively, displayed within the report. **Most reports run on a single Reporting Period only.**



- Click **Apply**

Visualization Functionality

Hovering

Throughout the application, you can place your mouse over certain areas to display additional information in a pop-up box, this is known as hovering. Use this functionality to see specific data values on graphs and to view explanations regarding certain data points.

Exporting Visuals

Many visuals can be exported to PDF or Excel.

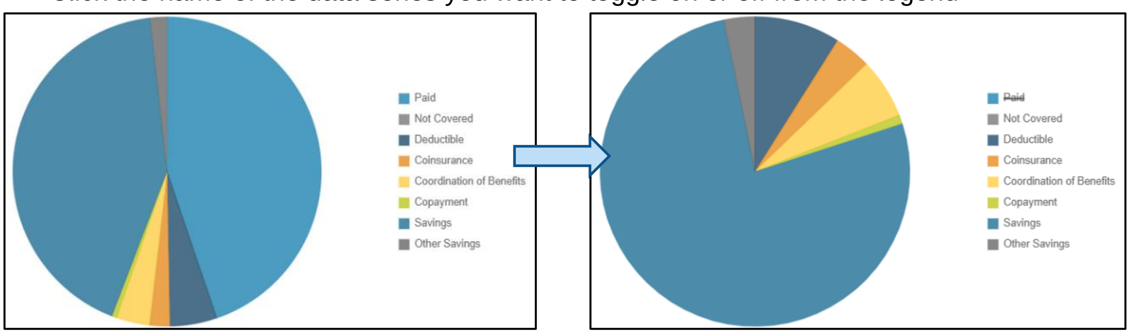
- Click the **Action** button in the upper right-hand corner

- If you do not see an **Action** button, the current visual is currently not available for export
- Choose the format in which you wish to export the visual
- Your export will be available under **Downloads**

Removing Data from Visualizations

If a visualization has a data legend, users can turn off or on specific data series.

- Click the name of the data series you want to toggle on or off from the legend



Note: Only the visualization changes. The export and data tables remain unaffected

Reports

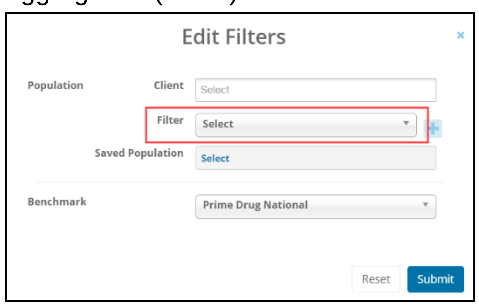
Reports Manager lists all the reports available for download.

Single Reports

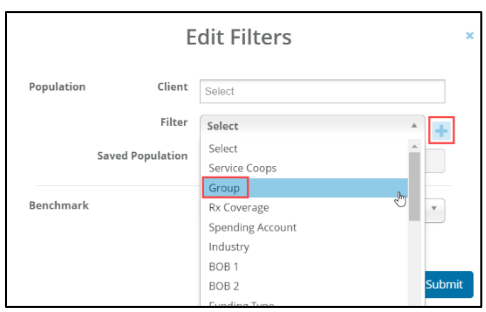
- In the **Report Manager** section, click the checkbox for desired report

Tip: Favorited reports will appear at the top of the report list. Click the Star under **Fav** to favorite a report.

- Click **Run**  to begin the run process
- Choose parameters for report on the **Run Report** screen
  1. Customize report name
  2. Population
     i. **Client** – Add Client(s) by typing in the input box. Remove a client using the “x” at the end of the label
     ii. Filter
        - Expand the drop-down arrow in the **Filter** area, which contains a list of Levels of Aggregation (LOAs)

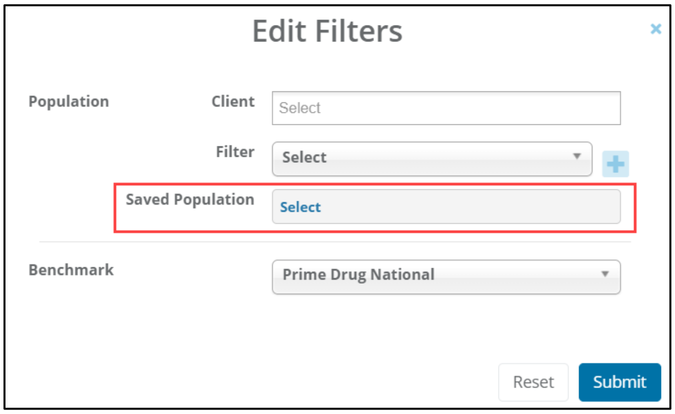


        - Choose the **Filter** to be added. See Levels of Aggregation (LOAs) section above for more detail on available LOAs



        - Click on the **Plus sign** (3) to add a filter and repeat steps a - c to add multiple filters
        - Instead of manually entering each LOA, **Saved Population** filters can be used. See Filtering section for more information on creating Saved Population Filters. To load a Saved Population filter with which to run a report, click **Select** box next to Saved Population. Select desired Saved Population. Saved Population will automatically load in LOA selections.

Please note: this process can take a few moments if the LOA selections are extensive.



3. Set the Basis (paid or incurred), reporting dates, comparison dates (if applicable), and prior dates (if applicable). When running on Incurred Basis, Paid From (start) and Paid Through dates can be adjusted independently from Incurred dates
   Note: High Cost Members Monthly report runs on a "run time basis." If paid basis is selected, claims will be placed into the month in which they were paid. If incurred basis is selected, claims will be placed into the month in which the were incurred.
   i. Reporting Period – Define the date ranges for which the report should run
   ii. Comparison Period – Define the date ranges for a single comparison period
   iii. Prior Period – Define the date ranges prior to the comparison period for a secondary comparison date range

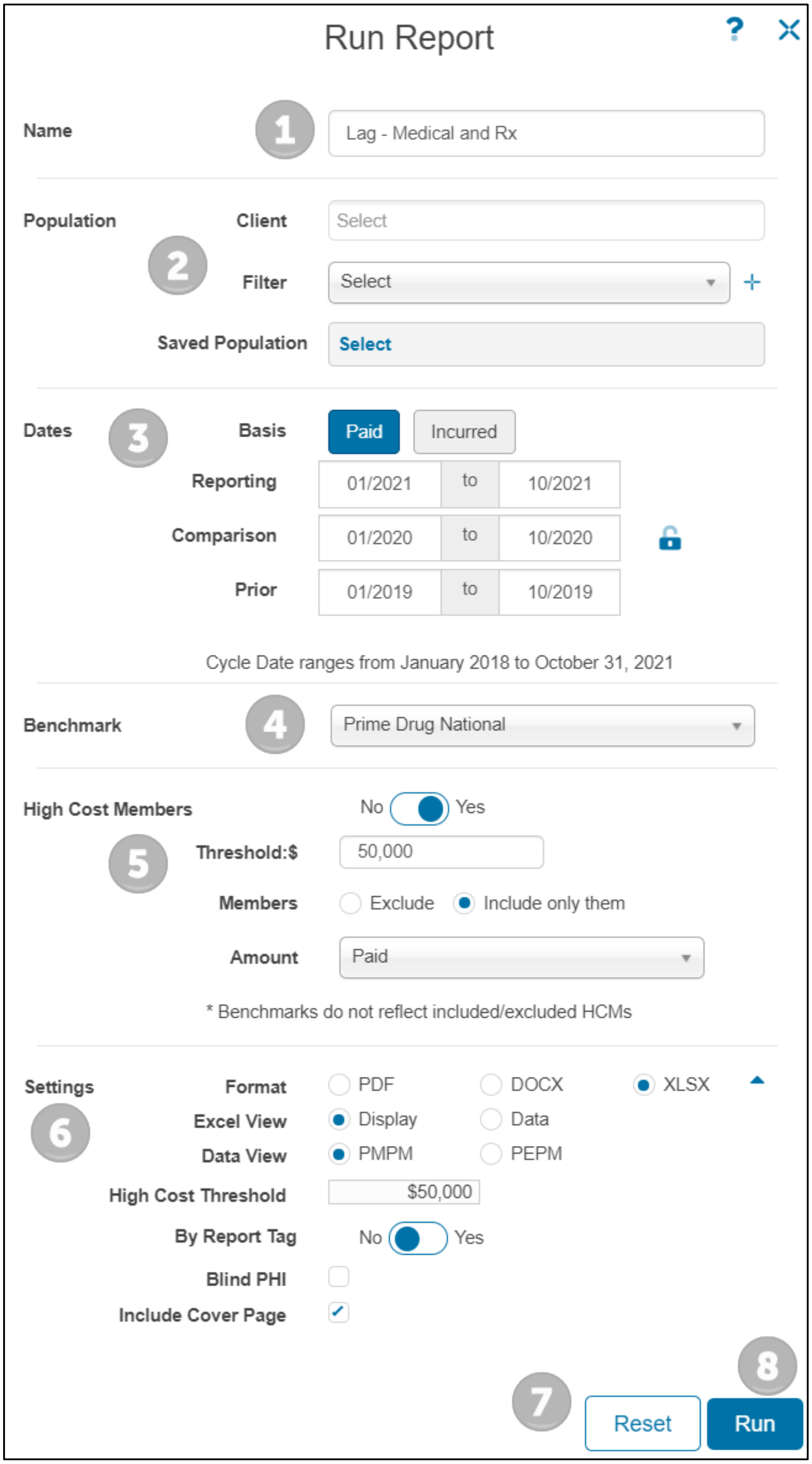
Tip: Comparison Period and Prior Period are only applicable to reports that have secondary or tertiary reporting periods, respectively, displayed within the report. **Most reports run on a single Reporting Period only.**

4. If benchmarking is applicable to report, select the appropriate **Benchmark** from the dropdown list
   i. **Non Prime Drug National**: National clients without Prime pharmacy coverage
   ii. **Prime Drug National**: National clients with Prime pharmacy coverage
5. Choose if report should be run for only High Cost members. Select **Yes** to run report based on High Cost Members. Select **No** to run report based on all members. If selecting **Yes** to run on all High Cost Members:
   i. Define **Threshold**. This will be defined in the High Cost Members section and within the Settings
   ii. Select **Only include them** to run report that includes results only from high case members, or select **Exclude** to run report that includes results only from members not above the high case threshold
   iii. Set Amount to **Paid**

Tip: High Cost Members section is applicable to reports that are not High Cost specific

6. Adjust Settings
   i. Select export **Format** – PDF, DOCX (Word), or XLSX (Excel) Display or Data
   ii. Select **Data View** – PMPM or PEPM
   iii. Set **High Cost Threshold** – High Cost Threshold in Settings is applicable only to High Cost specific reports (e.g. High Cost Members Monthly)
   iv. Choose to run **By Report Tag** – This setting will break report out by each Report Tag for a group. The first page will be the total group. Report Tags are used to combine multiple aggregated clients and are set up by analysts; they are not applicable to all groups
   v. Disregard **Blind PHI**, as there is not PHI in the application
   vi. It is recommended that you always **Include Cover Page**
7. Resets all settings and filters back to default
8. Applies all settings and filters and begins the report run and export

- Click **Downloads** from the navigation menu to download reports

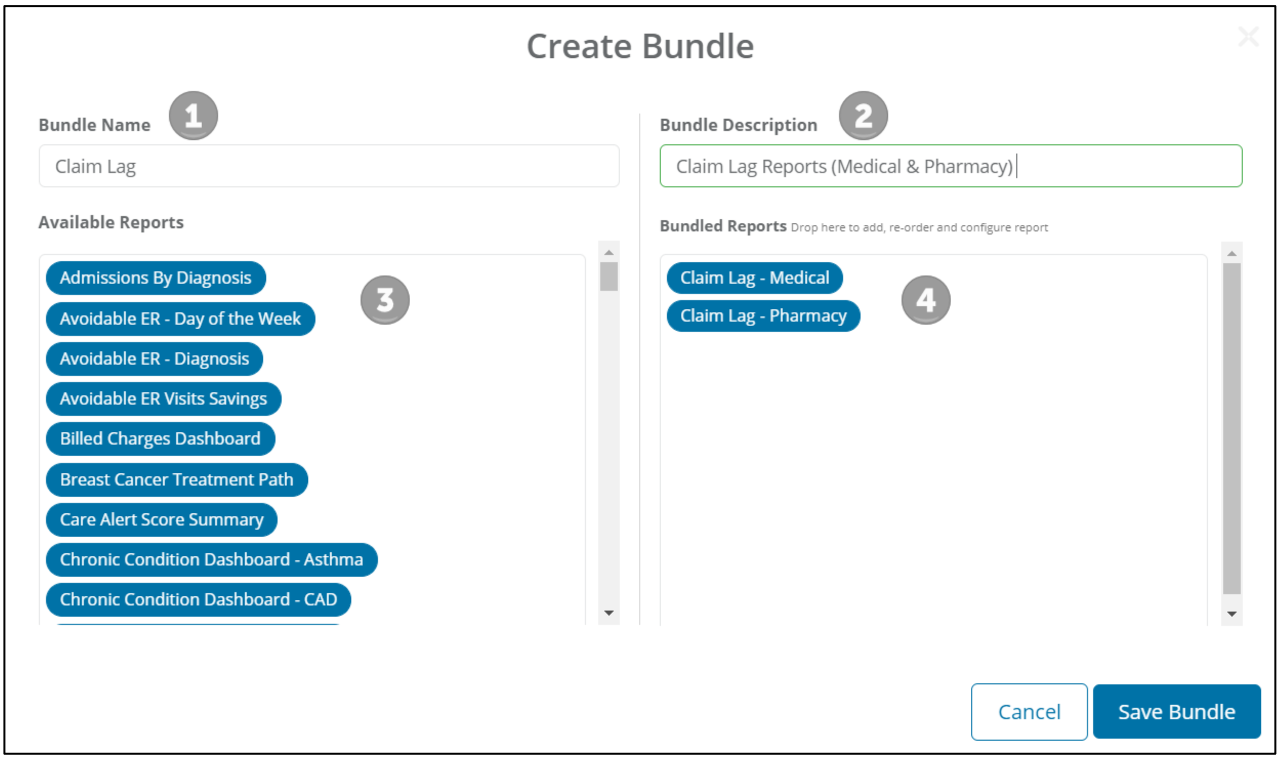

Run Report
Name
1
Lag - Medical and Rx
Population
Client
Select
2
Filter
Select
Saved Population
Select
Dates
3
Basis
Paid
Incurred
Reporting
01/2021
to
10/2021
Comparison
01/2020
to
10/2020
Prior
01/2019
to
10/2019
Cycle Date ranges from January 2018 to October 31, 2021
Benchmark
4
Prime Drug National
High Cost Members
No
Yes
5
Threshold:$
50,000
Members
Exclude
Include only them
Amount
Paid
* Benchmarks do not reflect included/excluded HCMs
Settings
6
Format
PDF
DOCX
XLSX
Excel View
Display
Data
Data View
PMPM
PEPM
High Cost Threshold
$50,000
By Report Tag
No
Yes
Blind PHI
Include Cover Page
7
8
Reset
Run

Bundled Reports

Bundled reports are a way to run multiple reports at once. All reports in the bundle will be in one file and include a Table of Contents.

- In the **Report Manager** section, click on the checkbox next to each desired report
- Click Create Bundle

- In the **Create Bundle** screen
  1. Give the bundle a name
  2. Give the bundle a description
  3. Click and drag reports from **Available Reports** (3) to **Bundled Reports** (4) to add reports to the bundle
     - Click and drag reports from **Bundled Reports** (4) to **Available Reports** (3) to remove reports from the bundle
  4. Click and Drag reports to reorder
- Click **Save Bundle** to save your changes



- Click **Bundles** on the Report Manager screen to see saved bundles
- Run bundles the same way you run a single report (see Single Reports section)

Scheduling Bundles and Reports

Single or Bundled reports can be scheduled to run automatically on a specified cadence. Scheduled reports will be run to the **Downloads** section. Subscribers can also be added to scheduled reports; the reports will be delivered to the subscriber's Downloads section. Subscribers must have access to the application.

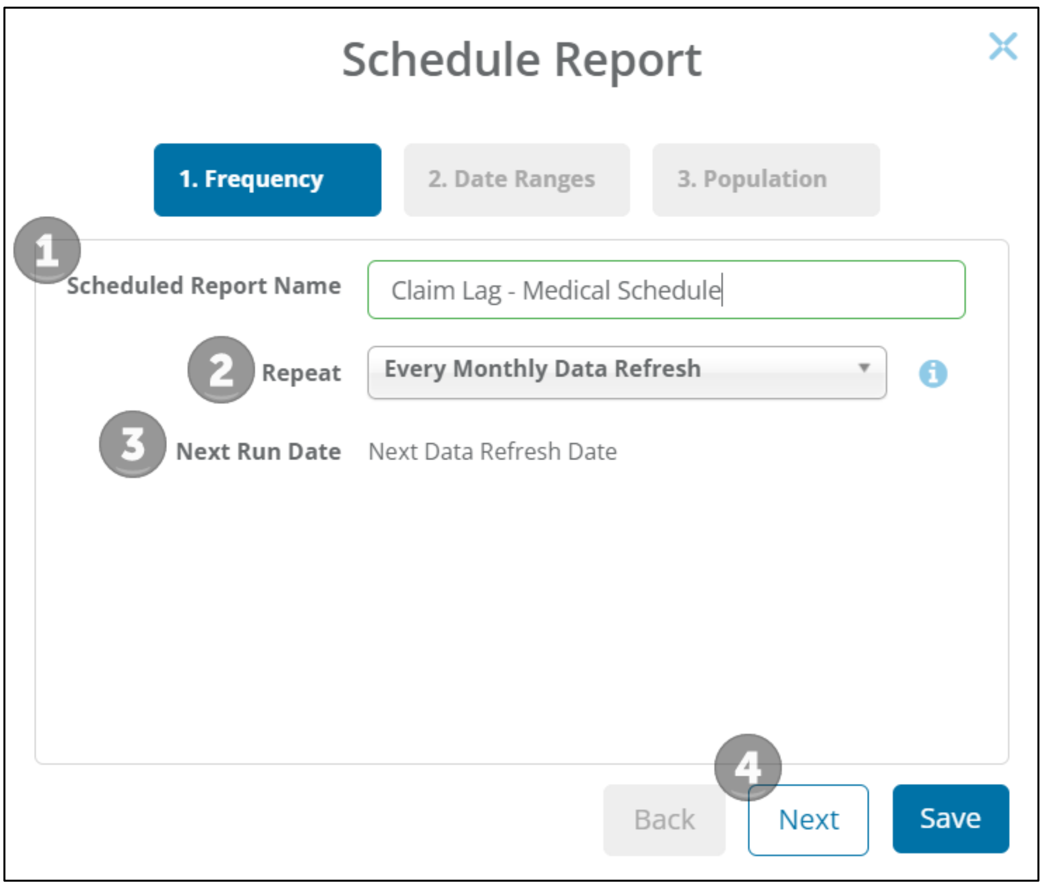
- In the **Report Manager** section, select desired reports or bundles
- Click Schedule

- On the **Frequency** screen, choose the following:

1. Give the report/bundle schedule a name
2. Choose how often the report runs

Tip: Selecting **Every Monthly Data Refresh** will generate the report on the first calendar day following when refreshed data is available in the application.

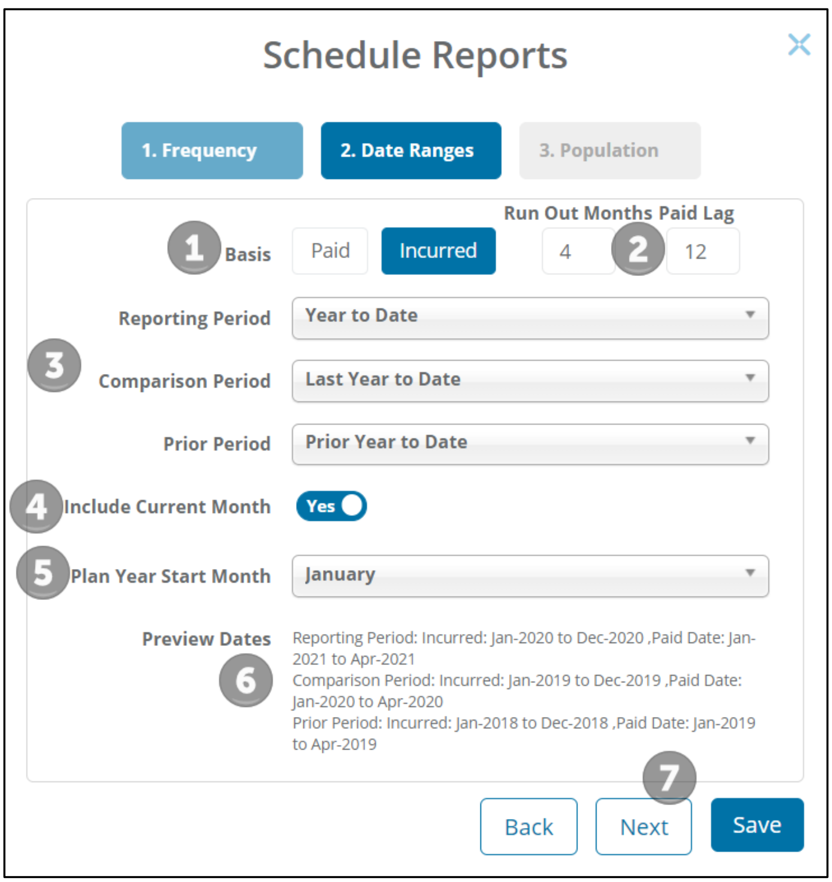
3. The next run date that the report will generate based on the interval and day selected
4. Click **Next**



- On the **Date Ranges** screen
  1. Choose the basis of **Paid** or **Incurred** for the report
  2. If Incurred basis is selected, input the number of **Run Out Months** and **Paid Lag**. Run Out Months influences the Paid Through date and Paid Lag influences the Paid From (start) date
  3. Use the dropdown to define date period
     a. Reporting Period – Define the date ranges for which the report should run
     b. Comparison Period (if applicable) – Define the date ranges for a single comparison period
     c. Prior Period (if applicable) – Define the date ranges prior to the comparison period for a secondary comparison date range

Tip: Comparison Period and Prior Period are only applicable to reports that have secondary or tertiary reporting periods, respectively, displayed within the report. **Most reports run on a single Reporting Period only.**

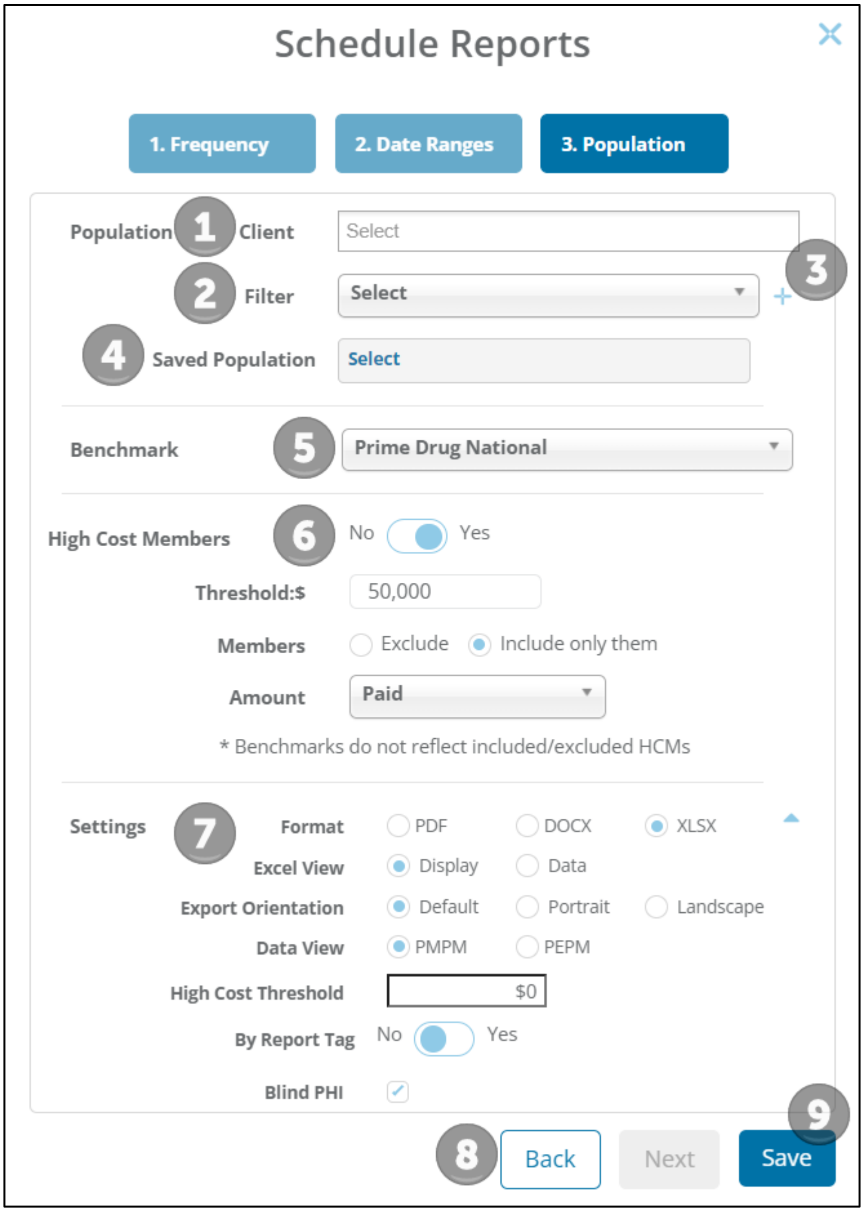
  - Note: Selections run based on calendar quarters/years
    - **Last Month/Quarter/Year** selections are the last full month, quarter or year
    - **Month/Quarter/Year to Date** selections will be affected by the current month selection
      - If **Include Current Month** is set to **No** on the first month of a period change, then the quarter or year will be the previous period, not the current period since it is not including the current month
    - **Last Quarter/Year to Date** selections will display data starting from the beginning of the last quarter or year through the same number of periods of the current quarter or year
  4. Select **Yes** if you want to include current month; **No** to exclude current month
  5. If applicable, choose the start month of the plan year
  6. Always check **Preview Dates** to confirm date ranges are set up correctly
  7. Click **Next**



- On the **Population** screen, you will apply applicable filters
  1. Add Client(s) by typing in the input box. Remove a client using the “x” at the end of the label
  2. Use the dropdown to select a LOA (level of aggregation) filter. See Levels of Aggregation (LOAs) section above for more detail on available LOAs
  3. Plus sign after filter box adds filter and input box to select criteria
     - Repeat steps 2-3 for each additional filter
  4. Saved Population may be used in lieu of or in addition to manual selection of Client and Filter values. Adding Saved Population after adding Client or Filter values will remove previously selected Client / Filters. View Saved Population Filtering section within Filtering for additional information on Saved Populations.
  5. If benchmarking is applicable to report, select the appropriate **Benchmark** from the dropdown list
     - **Non Prime Drug National**: National clients without Prime pharmacy coverage
     - **Prime Drug National**: National clients with Prime pharmacy coverage
  6. Choose if report should be run for only High Cost members. Select **Yes** to run report based on High Cost Members. Select **No** to run report based on all members. If selecting **Yes** to run on all High Cost Members:
     - Define **Threshold**. This will be defined in the High Cost Members section and within the Settings
     - Select **Only include them** to run report that includes results only from high case members, or select **Exclude** to run report that includes results only from members not above the high case threshold
     - Set Amount to **Paid**

Tip: High Cost Members section is applicable to reports that are not High Cost specific

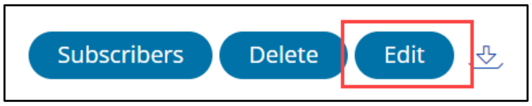
7. Adjust Settings
   - Select export **Format** – PDF, DOCX (Word), or XLSX (Excel) Display or Data
   - Select **Export Orientation** – Default, Portrait, or Landscape. Note: Not all reports will have this option.
   - Select **Data View** – PMPM or PEPM
   - Set **High Cost Threshold** – High Cost Threshold in Settings is applicable only to High Cost specific reports (e.g. High Cost Members Monthly)
   - Choose to run **By Report Tag** – This setting will break report out by each Report Tag for a group. The first page will be the total group. Report Tags are used to combine multiple aggregated clients and are set up by analysts; they are not applicable to all clients
   - Disregard **Blind PHI**, as there is not PHI in the application
8. Goes back to previous screen without saving settings on current screen
9. Saves the settings for the report


Schedule Reports
1. Frequency
2. Date Ranges
3. Population
Population
1
Client
Select
2
Filter
Select
3
4
Saved Population
Select
Benchmark
5
Prime Drug National
High Cost Members
6
No
Yes
Threshold:$
50,000
Members
Exclude
Include only them
Amount
Paid
* Benchmarks do not reflect included/excluded HCMs
Settings
7
Format
PDF
DOCX
XLSX
Excel View
Display
Data
Export Orientation
Default
Portrait
Landscape
Data View
PMPM
PEPM
High Cost Threshold
$0
By Report Tag
No
Yes
Blind PHI
8
Back
Next
Save
9

Reviewing your Scheduled Reports

- In the **Report Manager** section, select **Scheduler**

- Click **Edit** to adjust the scheduled report settings.



- Subscribers can be added to scheduled reports by clicking **Subscribers**. This will deliver scheduled report to subscriber within the application at time of scheduled run. To add a subscriber, user must know subscriber's username (generally, an email address). Error will display if username was incorrect.

- Click **Delete** to remove the report from the scheduler queue

Downloads

The downloads section houses ad hoc reports / bundles, scheduled reports / bundles, and documents that have been processed.

- Click **Downloads** from the navigation menu
- This screen can also be accessed from the **Alert Menu**
- Download or delete reports from this area