Consultative Analytics Reporting

Client Resources Portal
User Guide

Revision History

Version	Date	Author(s)	Revision Notes (note major changes, additions, deletions within each section)
1.0	02/17/2014	mwithington	Initial creation of CRP-CAP user guide
2.0	02/25/2014	Compliance/Legal	Medical and dental glossary definition modifications Cigna Copyright Statement
3.0	03/19/2014	mwithington	Guaranteed Cost/Fully Insured Accounts – Pg. 14
4.0	4/09/2014	mwithington	PDF attachments for Medical and Dental Glosseries – Appendix B Product Structure prefix defined – Page 10 Incurred Start and End Dates – Current and Base – Page 11

Table of Contents

Figures List

1.0 Consultative Analytics Reports - Quick Start Guide

A Quick Start Guide to requesting reports for users that prefer to jump right in and read the details later.

Create CAP Report Request

1. Log-in to the CRP
2. Group #- Options: Defaults to group number, Enter group # or Select from dropdown box and click the Go command button
3. Click the Reports link on the Main Welcome Page
4. Click the Consultative Analytical Reports Link to open and view Consultative Analytics Reports Overview Options
5. Click the "Create a New CAP Request" Link
6. Provide a name for your report or leave the screen generated default name
7. Select the desired product structure (s)
8. Select the reports for your package
9. Select the parameters desired (incurred dates-current and base)
10. Submit your request (allow 24 to 48 hours to process)

My Request Queue - Pick up Report

1. Repeat steps 1 through 3 from section 2.0
2. Click the "My Request Queue"
3. If the status is completed, click on the Pickup Icon
4. Click the download command button/icon

Posted Reports Queue

1. Repeat steps 1 through 3 from section 2.0
2. Click the "Posted Request Queue"
3. If the status is completed, click the Pickup Icon
4. Click the download command button/icon

1.1 Objectives

Informational guidance on how to use the Consultative Analytics Reports functions to generate and achieve the desired output.

- Illustrate the steps to create a new report request through the Consultative Analytics Report functionality via the Client Resources Portal website
- Select product structure that can be utilized in performing client analytics
- Complete the steps to pickup completed reports from the Request Queues

1.2 Consultative Analytics Reports (CAP) Overview

- Consultative Analytical Reports are Cigna's self-service client reporting tool for health plan utilization
- Utilization reporting that is currently available in the Client Resources Portal platform:
    - CP 265: Dental Summary
    - CP 266: Dental Utilization by Type of Service
    - CP 900: HCST Healthcare Spend & Trend-Incurred
    - CP 902: HCST Pharmacy-Incurred
    - CP 905: HCST Facilities

    **HCST is defined as Healthcare Spend & Trend*

- CAP includes data across all lines of business including Medical, Pharmacy, and Dental for an integrated viewpoint

  CAP Report Links -Users with permission will see CAP reports link
- Main page-
    - Consultative Analytical Platform
        - Create a new CAP Request
        - My Request Queue
        - Posted Report Queue

1.3 Getting Started

Access

- If you currently have access to the Client Resources Portal, your existing user credentials automatically grant permission to enter the Constultative Analyical Reports area
- If you do not currently have access to the Client Reources Portal, you will receive a new user ID and temporary password via secure email

Logging In

- Copy the link into your browser to access the Client Resources Portal www.cignaclientresources.com
- Enter your username and password and click the submit command button to navigate to the Portal's Welcome screen where you will be able to access the Consultative Analytical Reports area.

Figure 1 ***Client Resources Portal – Plan Administration Welcome Page***

2.0 Welcome to Client Resources Portal Home Screen

Return to Table of Contents

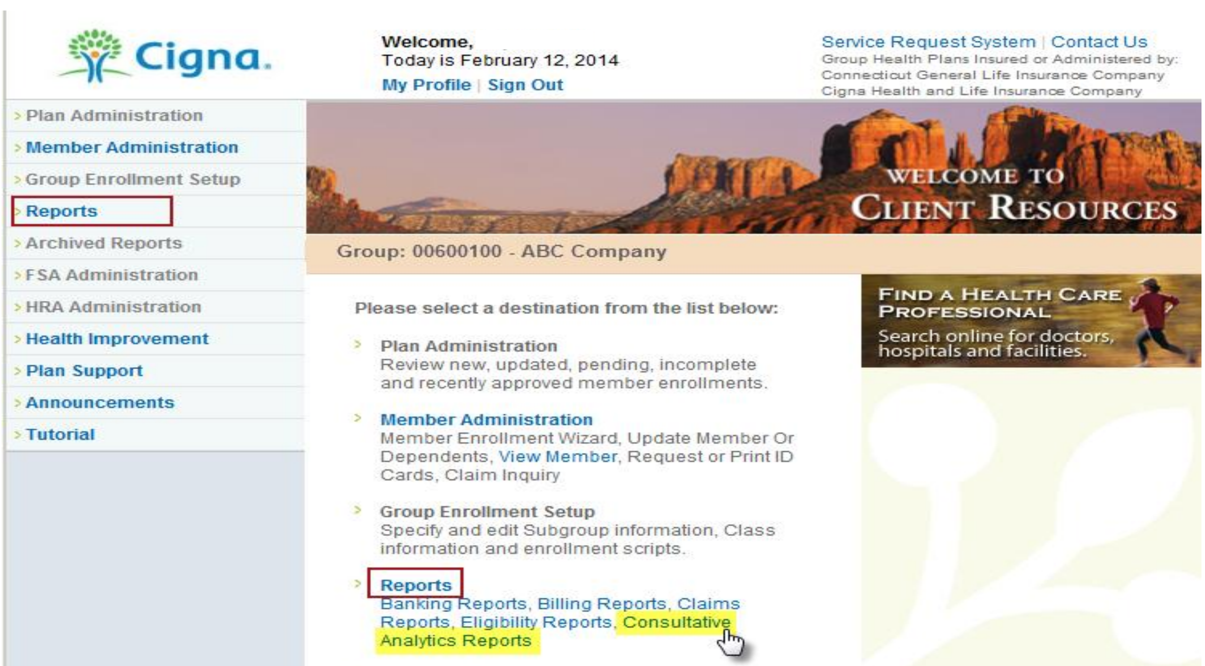
If you have access to only one group number, the group number field box will automatically default to that account number upon login. If you have access to multiple group account numbers, you can select the desired account from a dropdown menu.

Note: All accounts used in the following examples are fictitious.

From the Main Client Resources Welcome Screen

1. If your group account number did not automatically default in the field box, enter it. If you have multiple accounts, select desired account from dropdown box. Click the ***GO*** command button.

Figure 2 CRP Welcome Screen



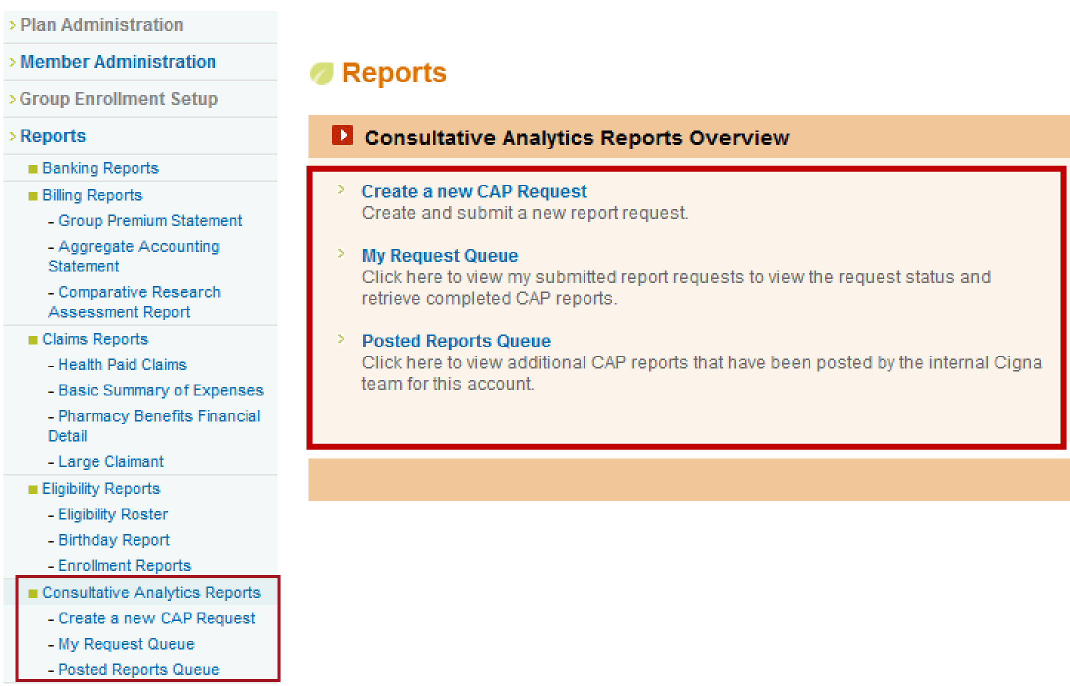
2.1 Consultative Analytics Reports (CAP) Overview Window

The Consultative Analytics Reports link located under the “Reports” heading, is only visible to those who have permission.

On the Main Client Resources Welcome Screen

2. ***Click the " Reports*** " heading
3. ***Click the Consultative Analytics Reports*** link to launch the reports overview window ***(figure 3)***

Figure 3 ***Consultative Analytics Reports Overview Window***



2.2 Creating a CAP Request

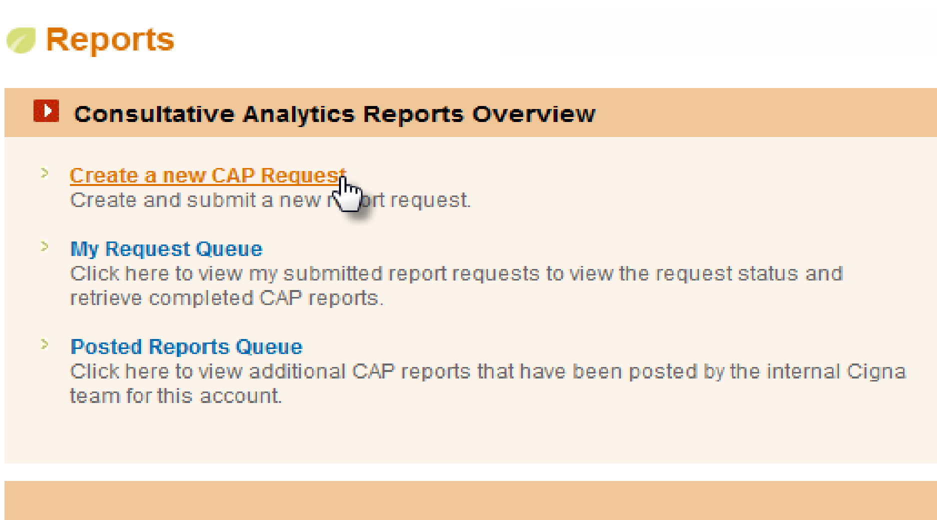
CAP Report Links are positioned on the main client resources menu page and on the left side navigation menu (shown in Figure 3.)

Options are as follows:

- ✓ **Consultative Analytical Platform** (main CAP link)
- ✓ ***Create a new CAP Request***
  Create and submit new report request
- ✓ ***My Request Queue***
  View your submitted report requests, check submission status, pickup completed reports
- ✓ ***Posted Report Queue***
  View CAP reports that have been posted by the Internal Cigna team for this account

From the Consultative Analytics Reports Overview Screen

4. ***Click the Create a new CAP Request link*** to navigate to the Create a New CAP Utilization Request screen



2.3 Naming your Request

New CAP Utilization Screen - This is where you will begin to build your report package. There are five action steps on the New CAP Utilization screen that will need to be completed to submit your report request. The steps are as follows:

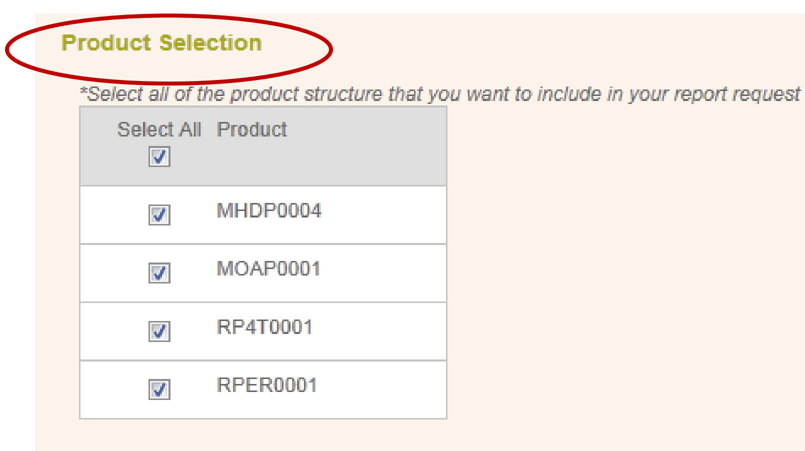
- ✓ Name your request
- ✓ Select product structure (s)
- ✓ Select reports
- ✓ Select parameters (dates)
- ✓ Submit your request

5. The screen default will automatically generate a report name, date, and time stamp. To change the name, click in the field box and enter the desired name for your report.

2.4 Product Selection

6. **Select the product structure** (s) you want to include in your report

The default selects all available products to include in your report. To deselect all, click in the "Select All" checkbox and select the product structure desired. At a high level, the first character represents if the product is for Dental (D), Medical (M) or Pharmacy (R) and the next three characters represent the type such as Open Access Plus (OAP) or Performance (PER) The remaining four numbers are plan/benefit specific, please contact your client manager/account manager for additional details.



2.5 Report Selection

7. Select the desired reports. *(refer to appendix A to view sample report slides)*

Report Selection

Select All ☐	Report Name
☐	CP_265 Dental Summary
☐	CP_266 Dental - Utilization by Type of Service
☐	CP_900 HCST Healthcare Spend & Trend Detail - Incurred
☐	CP_902 HCST Pharmacy - Incurred
☐	CP_905 HCST Facilities

2.6 Parameters

<u>Incurred Reporting</u>

- CAP reports are on an <u>incurred basis for all funding types</u>
- Incurred provides a better method for assessing the impact of plan design changes as it allows time periods to be a 1:1 match
- Incurred basis increases accuracy by measuring utilization when it happens rather than when the claim is paid
- Incurred **–** Allows user to specify the incurred dates of service. The dates entered here should be the dates you wish to analyze

<u>Selecting Dates</u>

- ***Incurred Current and Base*** – Select date range for current and base period analysis
- Current start and end dates represent the most recent time period
- Base start and end dates represent the prior time period

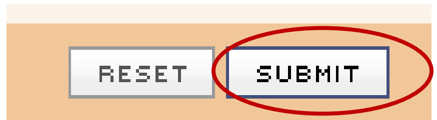
8. Click the Current period dropdown box to select your start and end date
9. Click the Base period dropdown box to select your start and end date

Parameters

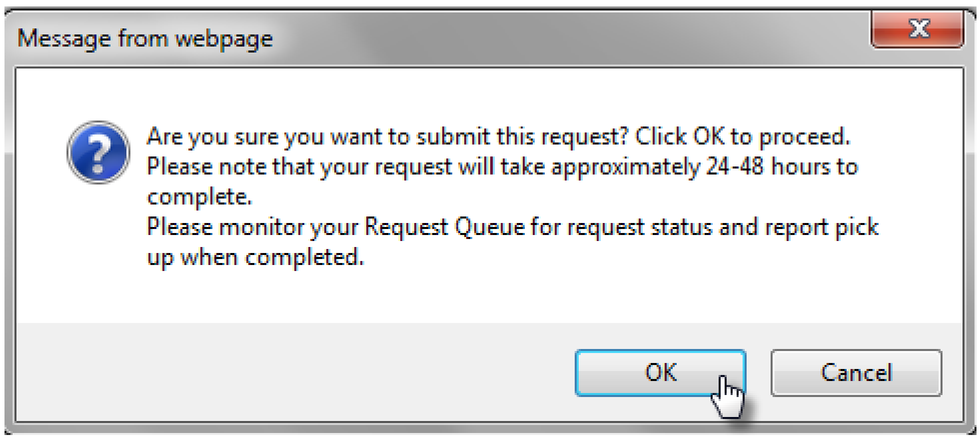
	Current		Base	
Incurred	--Start--	--End--	--Start--	--End--

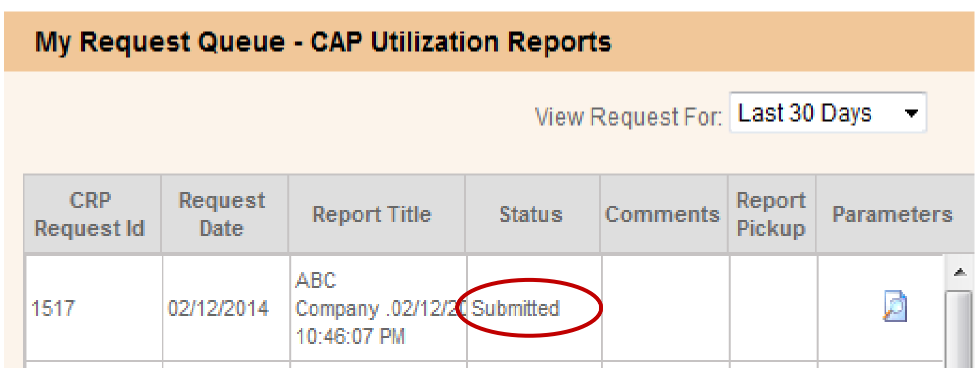
2.7 Submitting your Request

10. Review the information selected for your report package
11. If you want to start over **click the Reset** command button. This action will clear the form. An alert message will verify that you want to continue to reset. Cancel or click okay
12. If you want **to proceed and submit your request**, click the submit command button to launch the request confimation window



13. In the confirmation request window, **Click the OK** command button to navigate to your Request Queue where you can view the request status as Submitted



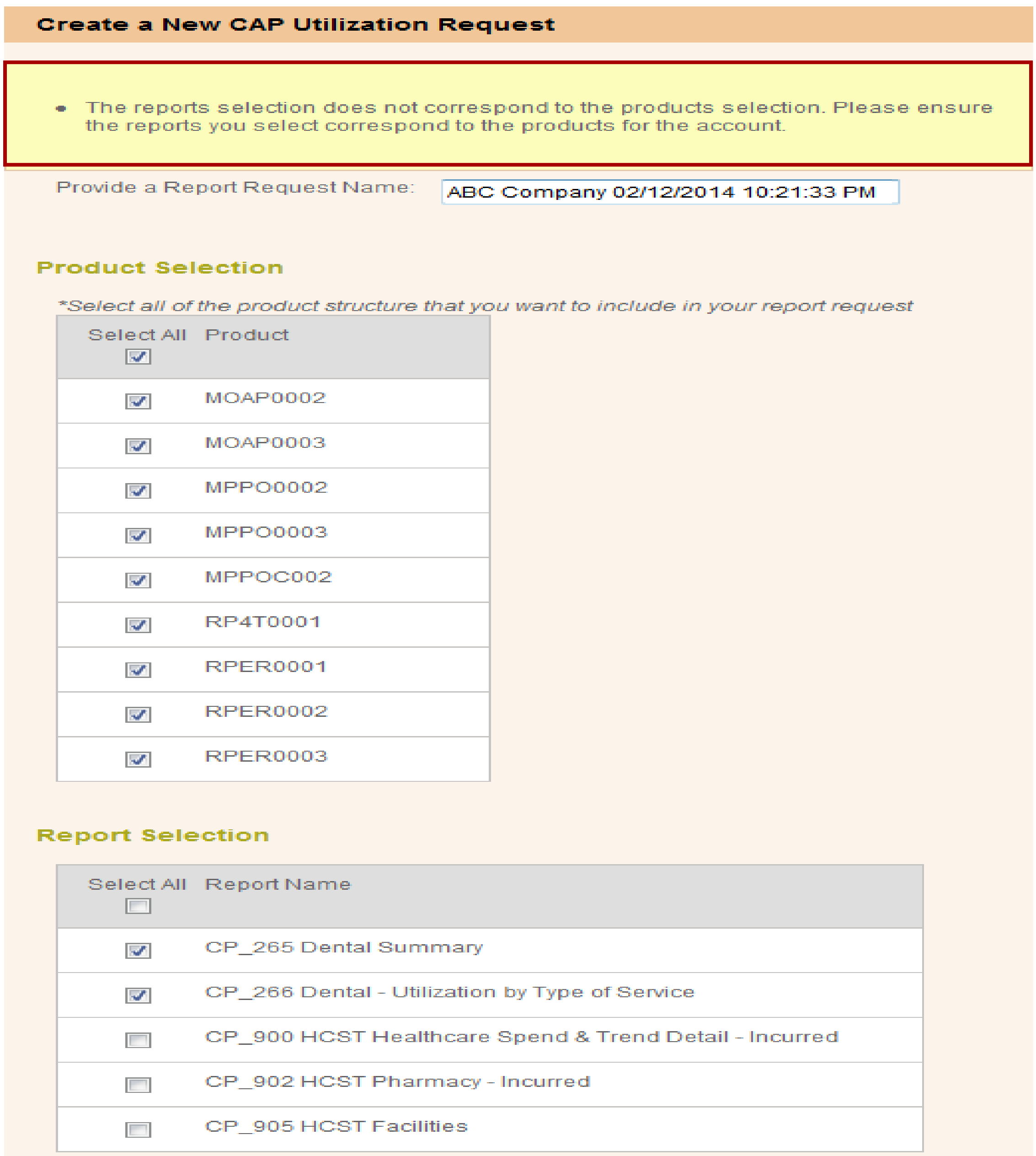


If your report request does not successfully submit and you receive an alert notification message, review the message for additional details and instructions (alert notifications will be visible along the top of the page.)

2.8 Alert Notifications Message – Product and Report Selection does not Correspond

If your report request did not submit due to product structure selections vs report content selections and you received an alert notification message, review the message and adjust your report parameters as necessary.

Figure 4 Alert Notification Message-Product and Report Selection does not Correspond

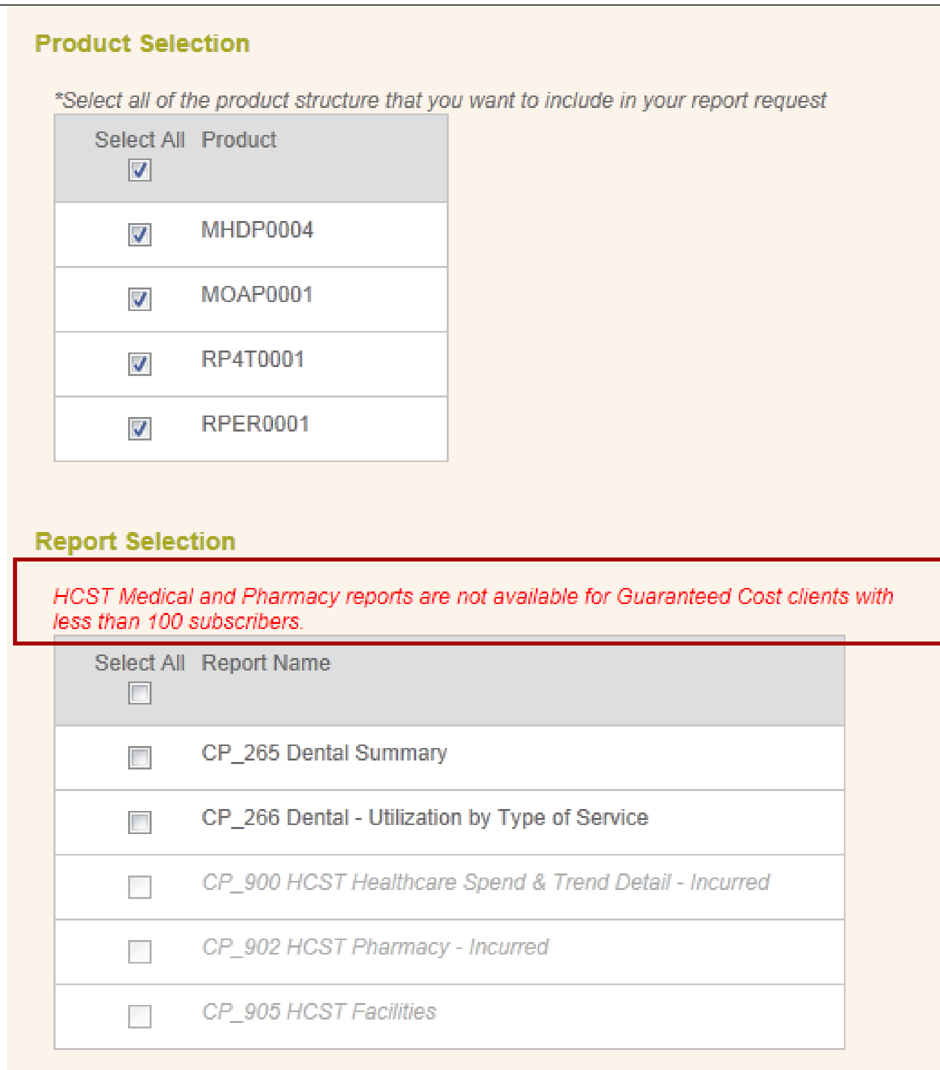


2.9 Alert Notifications Messages – Guaranteed Cost

- **Guaranteed cost/ Fully Insured Accounts**-If an account is identified as guaranteed cost/ Fully Insured and the subscriber count is less than 100 for medical/pharmacy or less than 200 for dental, for the account as a whole, then the user will be displayed with a message upon first entering the page. The account is ineligible for CAP reporting and the request cannot be submitted.

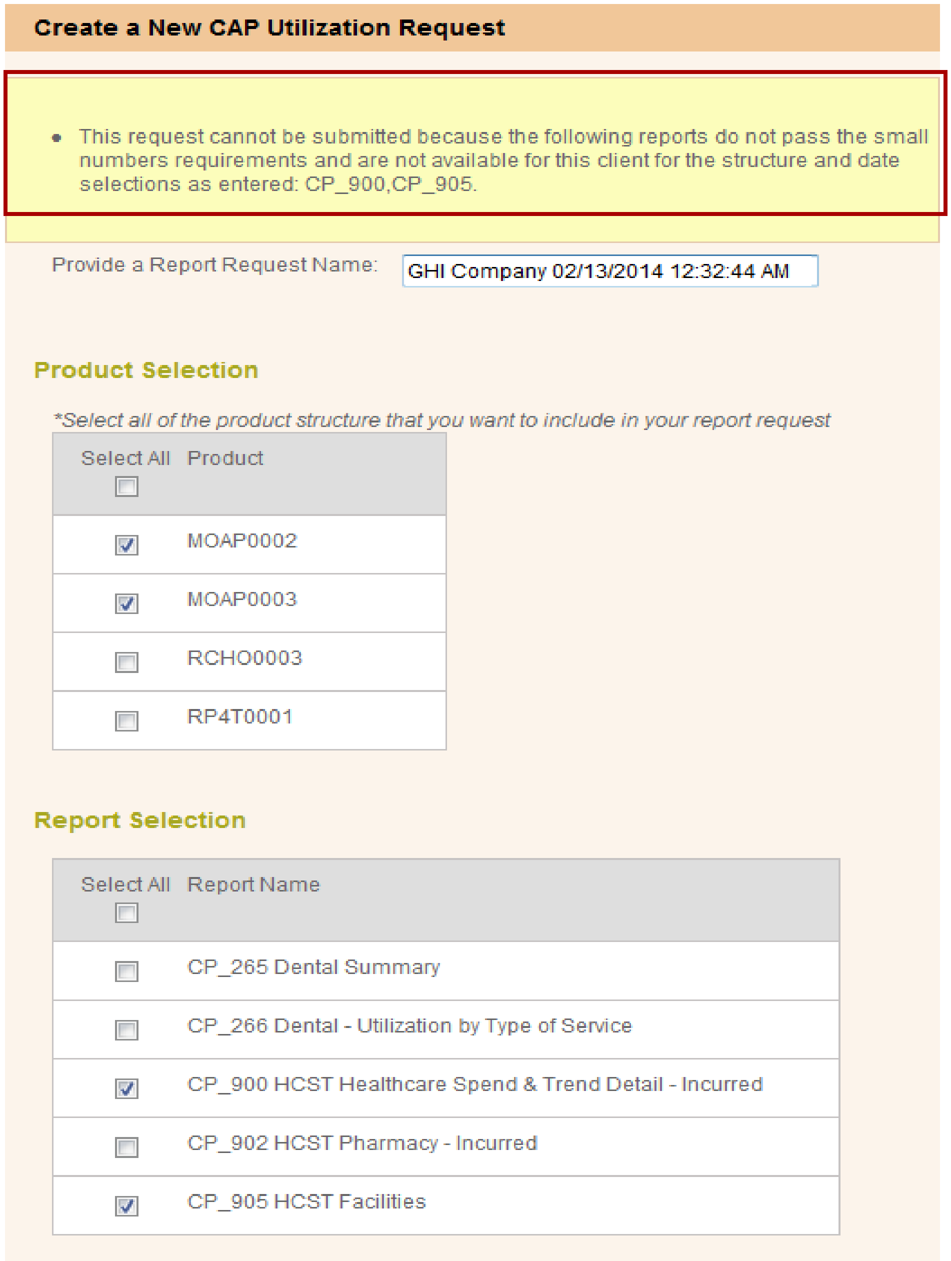
  If this message is displayed for an account that has more than 100 subscribers, be sure that you have selected all product structure to ensure all subscribers are captured in the request.

Figure 5 ***Alert Notification Message – Guaranteed Cost***



2.10 Alert Notifications Messages – Minimum Subscriber Threshold

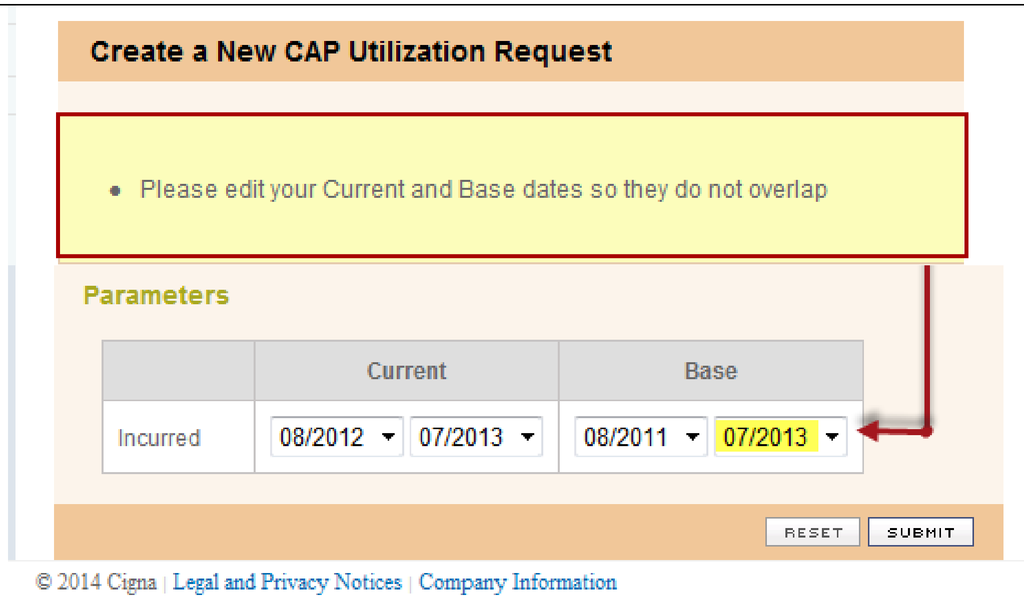
Figure 6 ***Alert Notification Message-Reports do not Pass Minimum Subscriber Threshold for Accounts When PHI is NO***



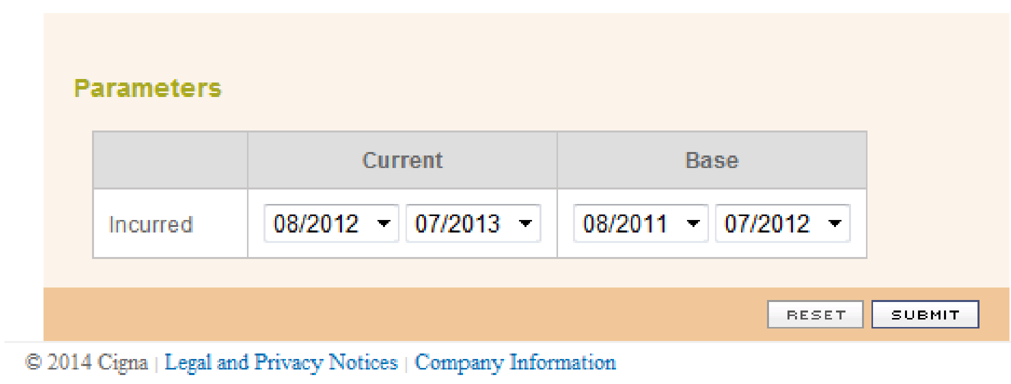
2.11 Alert Notifications Messages – Overlapping Dates

The cause of the overlapping dates alert notification message, ***as Shown in Figure 7***, where the date range selected for the current period is 8/2012 through 07/2013. The Base period date range is 8/2011 to 07/2013. The base and current periods are overlapping. To correct this, change the base period end date to 07/2012.

Figure 7 ***Alert Notification Message- Overlapping Dates***



Corrected dates shown below



3.0 My Request Queue – Report Pickup

Return to Table of Contents

The My Request Queue heading rows include:

- CRP Request ID, Request Date, Report Title, Status, Comments, Report Pickup, and Parameters

Report Statuses are reported under the Report Status heading. There are four statuses to note:

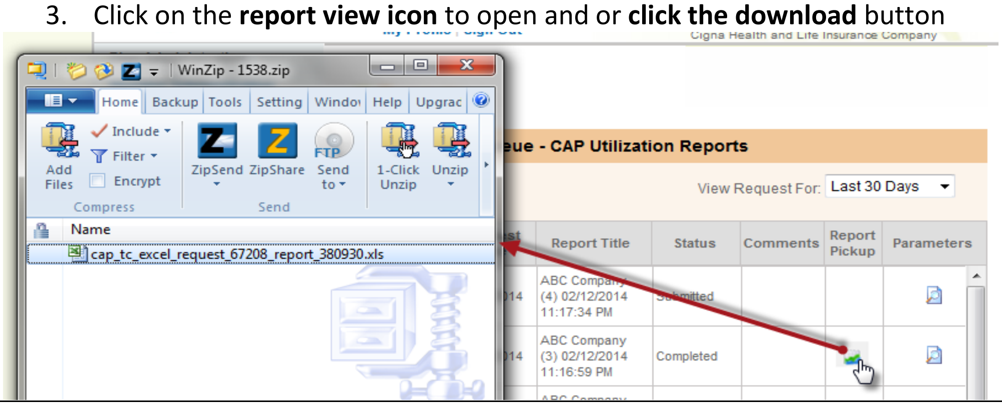
- Submitted– Your request has been submitted and is being processed
- Completed – Your request is approved, completed and ready for pickup
- Error—After the request has been submitted, the request queue will display comments for any Error status instructing the user on why the request errored out and tips for submitting a successful request
- Not Available—This status is used when a request runs successfully and there is insufficient data to produce report output; the request queue will display comments for any Not Available status instructing users on the issue or problem

1. To access your Reports Queue, repeat steps 1 through 3 then **Click on the My Request Queue** link on the Main Welcome Page

To pick up a completed report

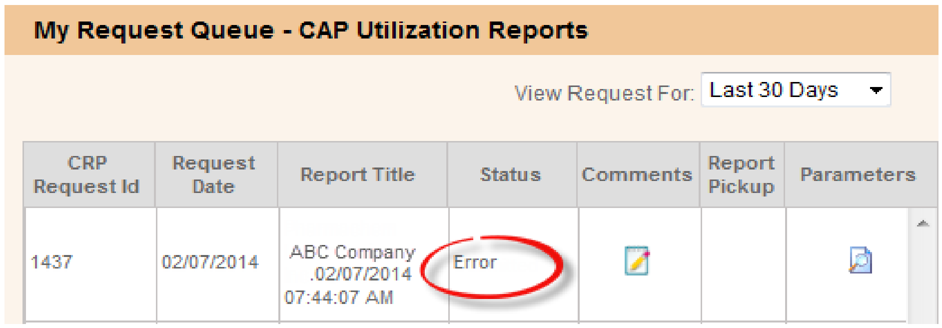
The reports Queue view defaults on 30 days. You can change the time period by clicking on the dropdown box and selecting desired period

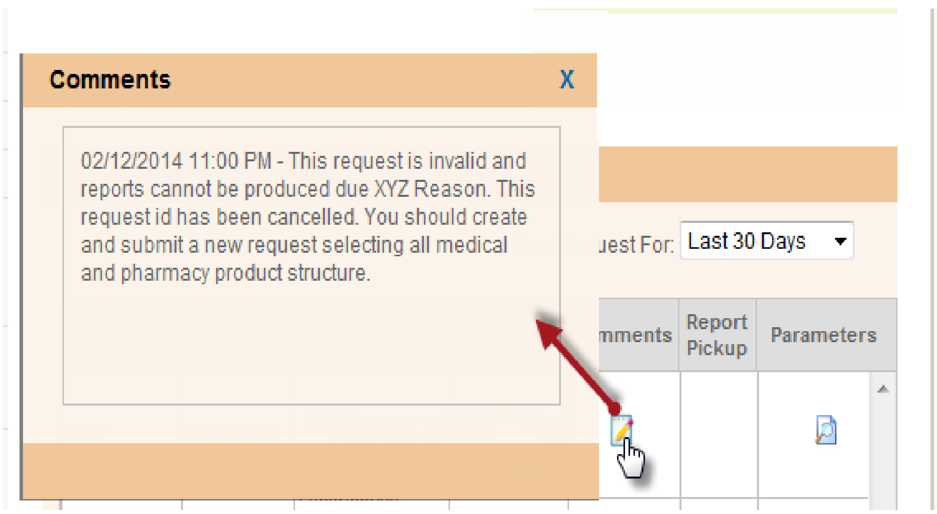
2. Under the report pickup heading, **click the pickup report icon** to launch download pop-up window
3. Click on the **report view icon** to open and or **click the download** button



3.1 My Request Queue Statuses, Error

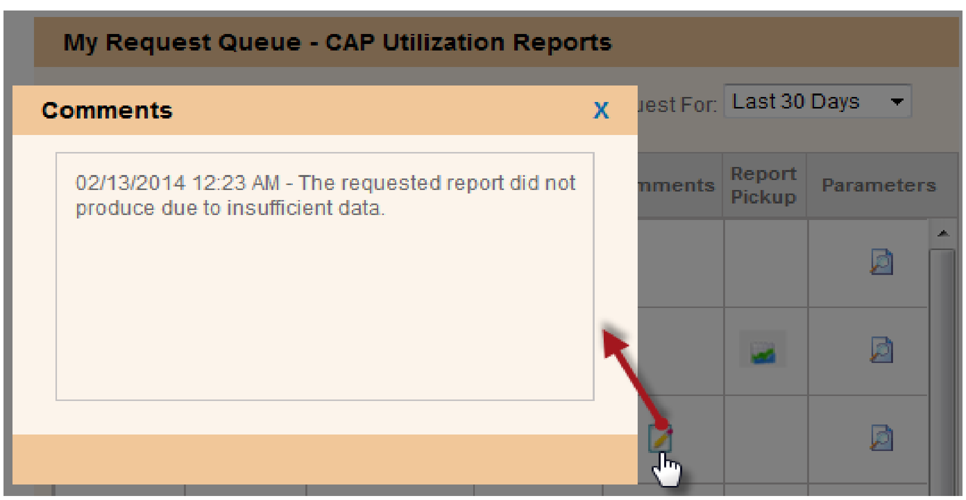
Figure 8 My Request Queue- Report Status, Error





3.2 My Request Queue Status, Not Available

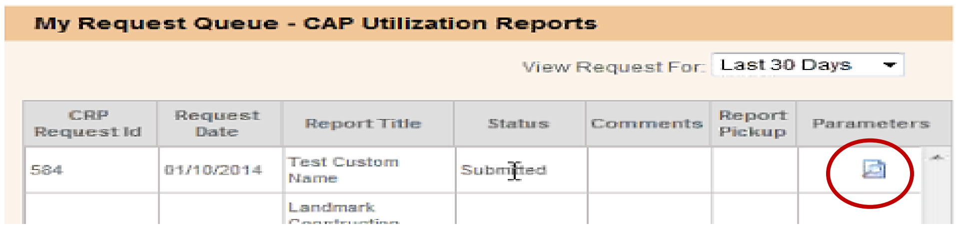
Figure 9 ***My Request Queue-Report Statuses-Not Available***

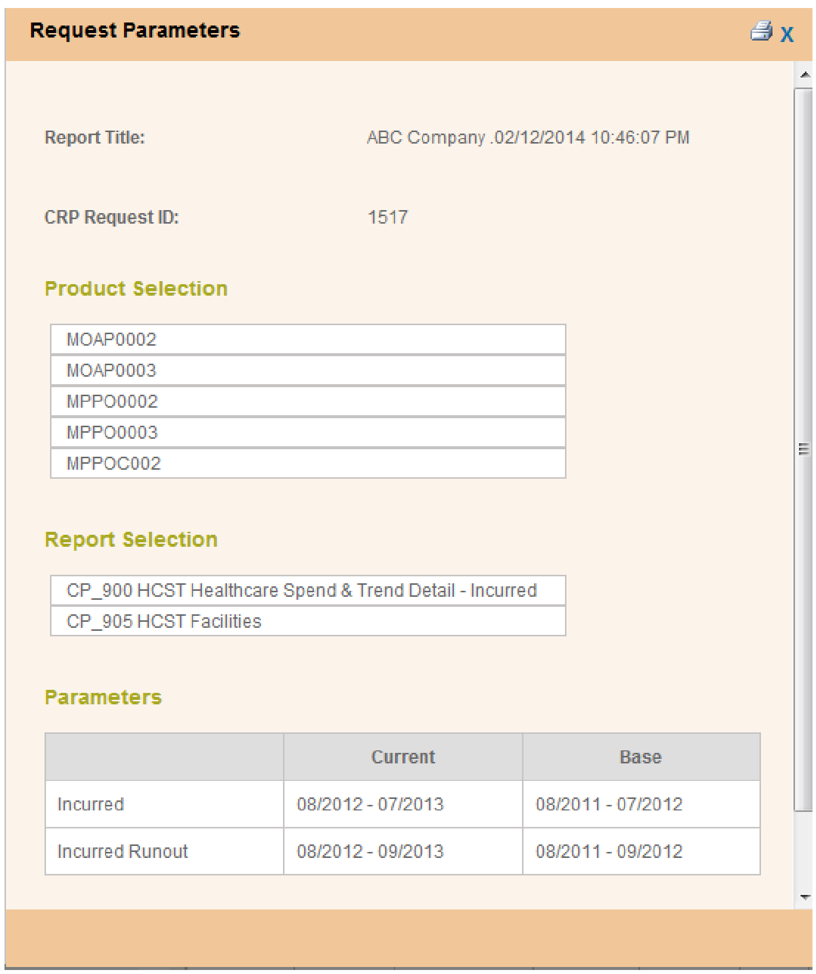


3.3 My Request Queue – Viewing Parameters

1. To view the report parameters, Click the magnyfying glass icon to open the parameters window

Figure 10 My Request Queue-Report Parameters





4.0 Posted Reports Queue

[Return to Table of Contents]

Posted Reports Queue allows you to view CAP reports that have been posted by the Internal Cigna team for this account

From the Main Welcome screen

1. Consultative Analytics Platform
2. Click the Posted Reports Queue link

Figure 11 Posted Reports Queue

3. Click the dropdown box to select desired view request dates
4. Click the Report Pickup Icon to launch the

Appendix A

Sample Reports

Return to Table of Contents

CRP-CAP Dental Report Sample	***See PDF attachment for file name*** **cap_request_dental_crp_sample.ppt**
CRP-CAP Health Care Trend and Spend Report Sample	***See PDF attachment for file name*** **cap_tc_excel_request_crp_sample.xls**

Appendix B

Glossary of Terms (Medical)	***See PDF attachment for file name Glossery of Terms - Medical***
Glossary of Terms (Dental)	***See PDF attachment for file name Glossary of Terms - Dental***