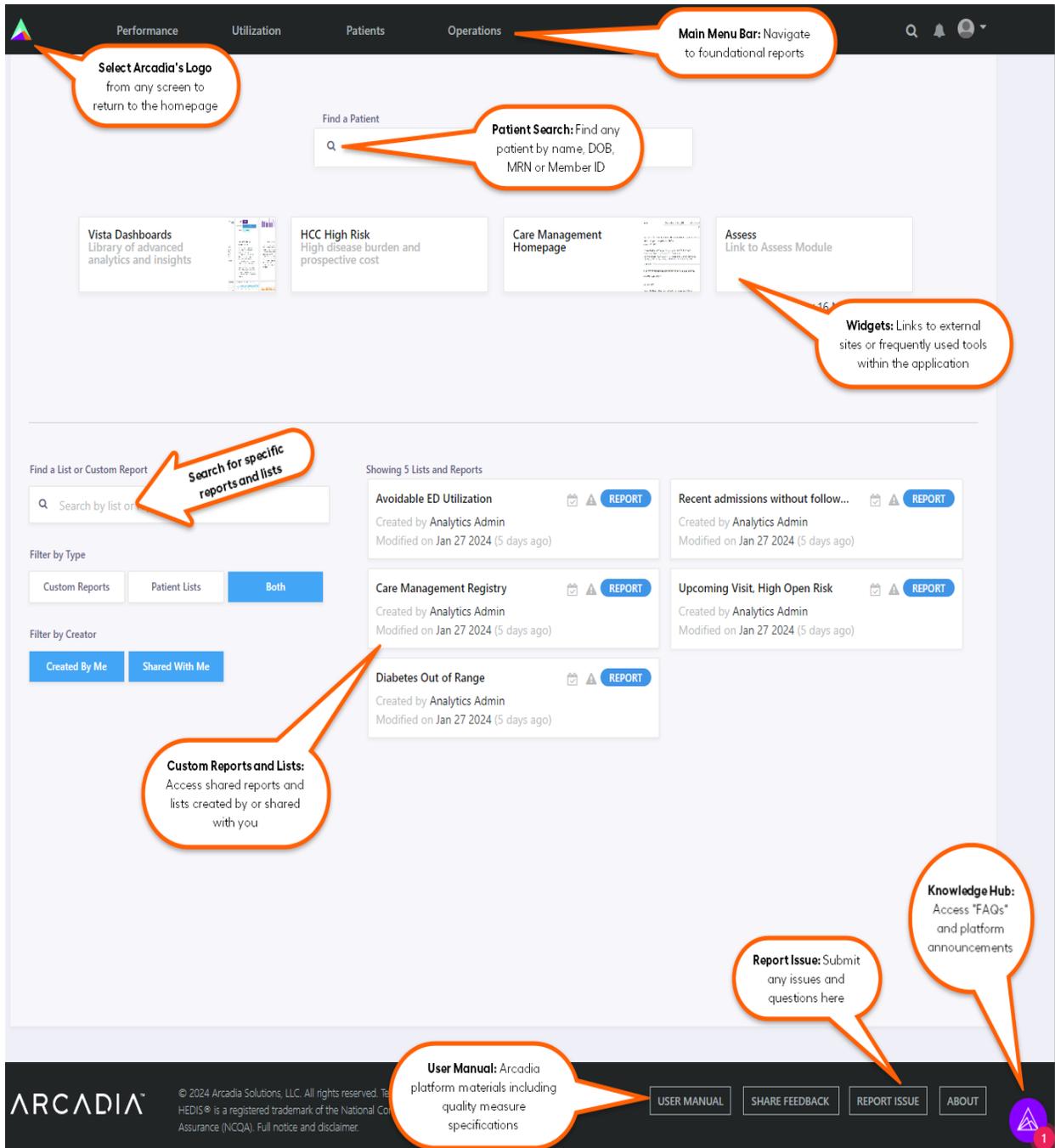


# Platform Fundamentals

## Homepage and Navigation



**Performance**   **Utilization**   **Patients**   **Operations**   **Main Menu Bar:** Navigate to foundational reports

**Select Arcadia's Logo** from any screen to return to the homepage

**Find a Patient**   **Patient Search:** Find any patient by name, DOB, MRN or Member ID

**Vista Dashboards**  
Library of advanced analytics and insights

**HCC High Risk**  
High disease burden and prospective cost

**Care Management Homepage**

**Assess**  
Link to Assess Module

**Widgets:** Links to external sites or frequently used tools within the application

**Find a List or Custom Report**   **Search for specific reports and lists**

Search by list or report name

**Filter by Type**  
Custom Reports   Patient Lists   **Both**

**Filter by Creator**  
**Created By Me**   Shared With Me

**Showing 5 Lists and Reports**

- Avoidable ED Utilization**  
Created by Analytics Admin  
Modified on Jan 27 2024 (5 days ago)   **REPORT**
- Recent admissions without follow-up**  
Created by Analytics Admin  
Modified on Jan 27 2024 (5 days ago)   **REPORT**
- Care Management Registry**  
Created by Analytics Admin  
Modified on Jan 27 2024 (5 days ago)   **REPORT**
- Upcoming Visit, High Open Risk**  
Created by Analytics Admin  
Modified on Jan 27 2024 (5 days ago)   **REPORT**
- Diabetes Out of Range**  
Created by Analytics Admin  
Modified on Jan 27 2024 (5 days ago)   **REPORT**

**Custom Reports and Lists:** Access shared reports and lists created by or shared with you

**Report Issue:** Submit any issues and questions here

**Knowledge Hub:** Access "FAQs" and platform announcements

**ARCADIA**   © 2024 Arcadia Solutions, LLC. All rights reserved. Telematics and HEDIS® is a registered trademark of the National Council on Quality Assurance (NCOQA). Full notice and disclaimer.

**User Manual:** Arcadia platform materials including quality measure specifications

**USER MANUAL**   **SHARE FEEDBACK**   **REPORT ISSUE**   **ABOUT**

## Using Global Filters to Customize Reports

As you select any tab in the main menu bar, the Global Filters will appear on the left-hand side of your screen. Global Filters are designed to support users identify specific subsets of their population for stratification and analysis.

**Measure Period / Date Range:** This filter may vary based on the intent of the report.

**Quality Measures:** Select the appropriate measure period – a calendar year or a rolling 12-month period (trailing year).

**Member Roster:** Select the date or date range to see Members who were eligible in the selected dates.

**Patient Registry:** Select a date range to see all Members with an encounter or other interaction in the selected date range.

**Patient Assignment:** Select Provider(s), Arrangement(s), or Region(s) from the MVP network. The attribution model can be changed which will update which Members are associated to which Providers:

- *Plan* is the MVP Attribution Model
- **Note: Attribution Model should always say *Plan*.**
- *Clinical* selects Members for whom the PCP listed in the clinical data
- *Functional*, *Cost Derived*, and *Event Derived* are proprietary Arcadia algorithms designed to identify the Members for whom that Provider renders the bulk of the Member's primary care services
- *Rendering* includes all Members seen by that Provider in the selected measure period

**Patient Lists\*:** Select Members who are included in a custom patient list.

**Line of Business (LOB) & Member Products:** Select products to display eligible members. Select the appropriate 'Eligible at' radio button to return eligibility at any time during the period or the end of the period.

**Age Ranges\*\*:** Returns only those Members of a certain age as of the current date.

**Demographic Filters:** Identify Members based on gender, language, ethnicity, and race

**Condition History:** Select the risk adjustment algorithm and conditions you need. Arcadia will select all Members with evidence of the selected condition(s). For instance, selecting the HCC algorithm allows for filtering the report by the 189 categories in the HCC system. Select *and/or* when selecting multiple conditions.

**PMPM:** Select Members by their current Per-Member-Per-Month cost.

The screenshot shows a 'Filters' panel with the following settings:

- Date Range: 04/01/2024 to 08/09/2024
- PCPs: All
- Patient Lists: All
- LoBs: All
- Member Products: All
- Age Ranges: All
- Sexes: All
- Languages: All
- Ethnicities: All
- Races: All
- Condition History: CMS-HCC | All
- PMPM: All
- Risk Score: All
- Active/Inactive Patients: Both
- ERGs: All
- In/Out of Network: Both
- Service Categories: All
- Service Providers: All Specialists | All Providers
- Service Facilities/POS: All

Risk Score: Select Members by their current risk score as calculated through the selected risk adjustment algorithm.

Active/Inactive Patients: By default, all Arcadia Analytics reports return all Members fitting the criteria of the report or measure. This filter option allows for restriction of a report to only active Members in the EHR or inactive Members in the EHR. **Note: This is not active eligibility on an MVP LOB/Product.**

Source Systems: Select Members who have a record in a particular EHR system.

Payers (from EHR): Selects Members based on the payer information on their EHR chart.

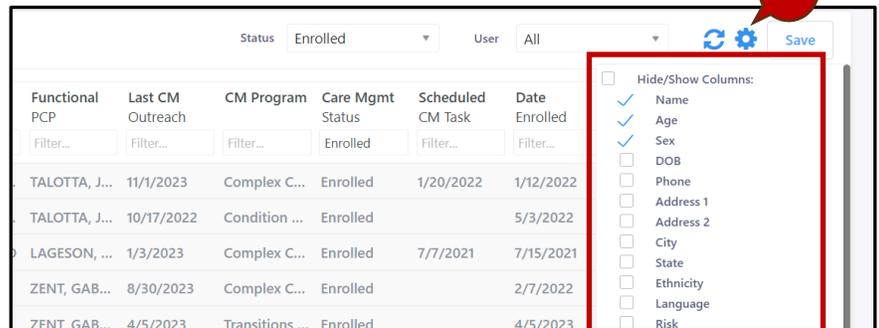
\*Only patient lists created by or shared to the user will display.

\*\*For measures with age requirements, the age filter is not necessary since the measure logic has factored in the Member's age as of the period to determine status in the denominator.

### Tabular Reports: Navigation, filtering, aggregating, and exporting tabular reports

In addition to the Global Filters, users have several tools for further manipulation of the tabular data grid.

1. Add/Show columns in the report by selecting the gear icon at the top right of the data grid and checking on/off certain data elements.



2. Resize columns by dragging the space in-between columns.
3. Sort data by selecting a report header. Sort again in the opposite order by selecting the same header again.

CM Patients

Status: Enrolled User: All

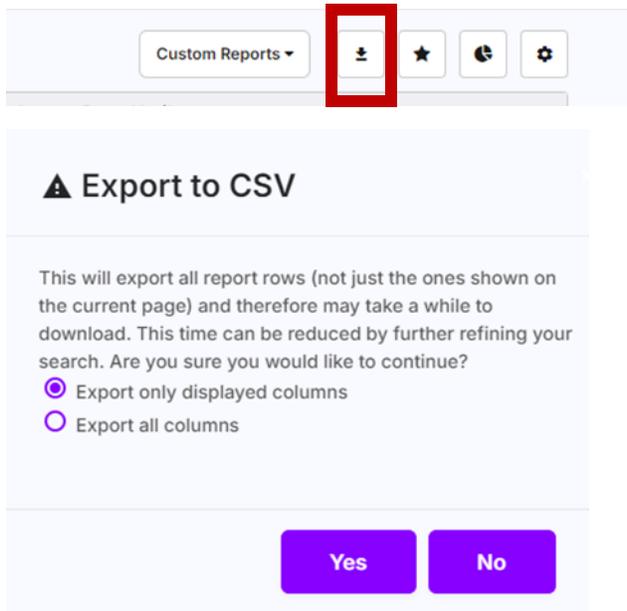
Name	Age	Sex	Source	Functional PCP	Last O...	CM Program	Care Mgmt Status	Scheduled CM Task	Date Enrolled
Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	Enrolled	Filter...	Filter...
Abdi, Allison	86	F	Blue Cross ...	TALOTTA, J...	11/1/2023	Complex C...	Enrolled	1/20/2022	1/12/2022
Abdi, Allison	86	F	Blue Cross ...	TALOTTA, J...	10/17/2022	Condition ...	Enrolled		5/3/2022
Abdi, Alyssa	86	F	CMS NGACO	LAGESON, ...	1/3/2023	Complex C...	Enrolled	7/7/2021	7/15/2021
Abdi, Amber	67	F	CMS MSSP	ZENT, GAB...	8/30/2023	Complex C...	Enrolled		2/7/2022
Abdi, Amber	67	F	CMS MSSP	ZENT, GAB...	4/5/2023	Transitions ...	Enrolled		4/5/2023
Abdi, Amelia	56	F	CMS MSSP	Unassigned...	2/15/2023	Depression...	Enrolled	8/15/2023	2/15/2023
Abdi, Deborah	50	F	State Medi...	CREDLE, KY...	9/16/2022	Diabetes M...	Enrolled	7/27/2022	7/26/2022
Abdi, Deborah	50	F	State Medi...	CREDLE, KY...	7/28/2022	Post Acute ...	Enrolled	7/27/2022	7/21/2022

4. Filter columns by entering in text or adding an operator and a value to the filter field, then typing 'enter'. The following options are available to users:

Column Data Type	Filter Operators	Description
Numbers, Dates	<, <=, >, >=	< (Less than); <= (Less than or equal to) > (Greater than); >= (Greater than or equal to)
Presence Indicator	=123 or =7/20/2024, <> != =	=### (Equal with numeric or date values); an error will be generated if this is applied to strings. <> (Not equal to) != (Returns only cells that contain data) = (Returns only cells that do not contain data) To filter out NULL or blank values, simply enter != or <> with no following value. To filter only populated values, enter = with no following value.
String (aka text)	[your text]	Type in any successive letters in the string of characters you are searching for. (i.e., to find all patients named Michael, you can type 'Mich' or 'icha' or 'ael') Spaces count as characters. You should not use equal signs here, but you can use not equal to.

## Exporting Reports

All tabular standalone reports can be exported by simply selecting the *export icon* at the top left of a report module. The export feature allows users to retrieve data contained in a report (with a maximum of 300,000 rows) into an unformatted CSV file.



## Custom Reports and Patient Lists

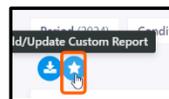
As you start using the platform for your work, customizable reports and lists support your shared workflows.

### Custom Reports

A custom report is a specific report with a set of user-defined parameters. It can be accessed from the home page. Saving a custom report will retain any of the parameters selected by the user: global filters, in-line table filters; columns shown/hidden; columns sorts; aggregation functions.

To create a custom report:

1. Navigate to any report in the application and apply any filters, sorts, aggregations, show/hide desired columns.
2. Select the *Star icon* at the top left of the report.
3. Name the custom report and select *Save*.



Suggest developing a naming convention for custom reports.



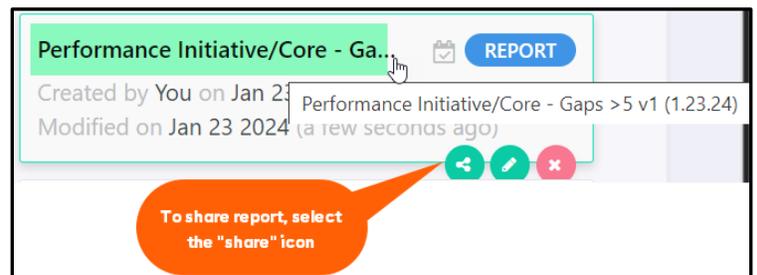
Several custom reports have the option to use either fixed or relative dates when saving a report.

Selecting *Use relative dates* means that the date range changes daily based on the report default date range. For example, the Patient Registry report default date range is seven days, using the "Use relative dates" option retains the 7-day date range.

Selecting *fixed* or deselecting *Use relative dates* means the date range will be the same each time the report is run based on original date range filters applied when creating the custom report.

Navigate back to the home page to find your custom report.

Users can share custom reports with others from the home page or the My Analytics page. Choose the report that you would like to share by selecting the *share icon* (it appears as you hover over the report title) and choose the user you would like to share the report with. The report will then appear on their home page.



Notes:

- Users may only share reports with other users in their user group and reports created by themselves. When accessing a shared report, a user's security profile remains in effect which may not permit access to the same Members as the owner of that report.
- Custom reports created by end-users are dynamic and update as Member data refreshes from both claims and clinical connectors.

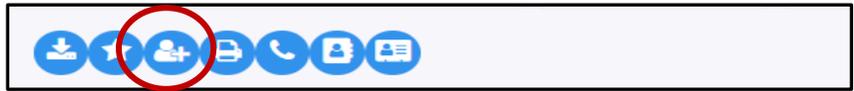
## Patient Lists

To help encourage collaboration and patient management, users can save Members to lists and share those lists with others. This enables users to have running worklists of Members who require immediate follow-up, appointment reminders, or simply need to be monitored by the user. Patient Lists can be created by selecting Members from any report:

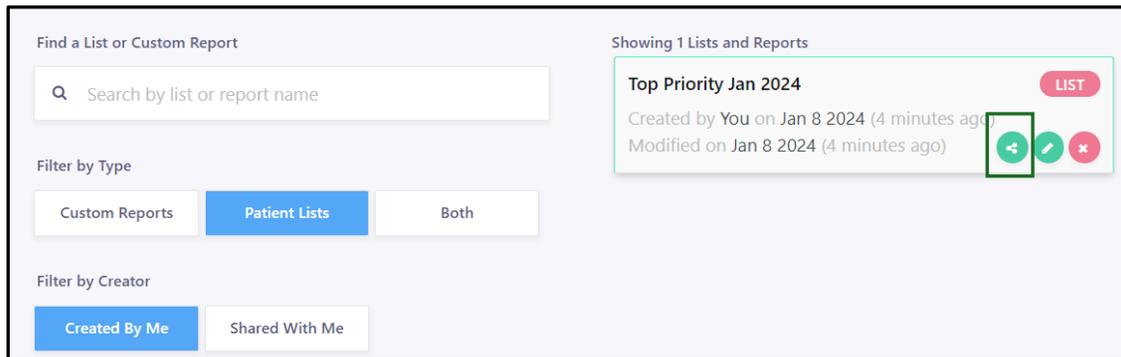
1. Adding a Member to a Patient List: Use the checkboxes to select the Members you want to add OR choose the "select all" checkbox.

Upcoming Visit																													
Name	Amputation	Anxiety	Blood	Cerebrovasc	Complicatio	Diabetes	Eye	Gastrointest	Heart	Infection	Injury	Kidney	Liver	Lung	Metabolic	Musculoskel	Neoplasm	Neurologia	Openings	Psychiatric	Skin	Spinal	Substance A	Transplant	Vascular	Risk	Open Risk	Age	
<input type="checkbox"/> Filter...																													
<input type="checkbox"/> Anderson, Alexis									<input type="checkbox"/>																		0.9	0.6	72
<input type="checkbox"/> Anderson, Alexis									<input type="checkbox"/>																		0.9	0.6	72
<input checked="" type="checkbox"/> Anderson, Alyssa																<input type="checkbox"/>				<input type="checkbox"/>							0.9	0.6	67
<input checked="" type="checkbox"/> Anderson, Alyssa																<input type="checkbox"/>				<input type="checkbox"/>							0.9	0.6	67
<input checked="" type="checkbox"/> Anderson, Angel					<input type="checkbox"/>																						0.5	0.2	67
<input checked="" type="checkbox"/> Anderson, Anth...																											0.4	0	69

2. Creating the List: Once Members are selected, new icons appear on the top left-hand side. Select the *Patient List icon* to create the new list name and save.



3. Sharing Lists: Lists can be shared with other users in their group using the *Share icon* on the homepage or the My Analytics page.



4. Viewing a List: You can view a list simply by selecting the list title. The list author can also apply a list as a filter to any report or dashboard.  
Note: Patient Lists created by end-users are static and do not change as Member data is refreshed.