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| CoC Executive Dashboard – Phase II |
| Business Requirement Document – Sept, 2022 |

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# Scope

Carelon will provide the required environment for the HiLabs team to work on the following items for deploying an executive dashboard Phase II.

* Develop data model in Snowflake based on source data which will be available in Snowflake (this will most likely be an intermediate summarized layer)
* Leverage the dashboard built in Phase I to build the Phase II in React
* Finalize dashboard and deliver it in an existing production environment

# Description

Build cloud-enabled data models and dashboards to enable insights for Elevance executives, primarily plan presidents. Carelon will share the wireframes with the Supplier to use. Supplier will use these wireframes and enhance these based on input from Elevance/Carelon stakeholders. These services will be deployed on-premises or on the cloud on Carelon servers within Carelon’s existing infrastructure. The likely workstreams will consist of the following:

* Develop Phase II Executive Dashboard prototype in React for a desktop screen only
* Finalized dashboard in production

# Assumptions

The following assumptions have been agreed:

* Environment exists for HiLabs team to start working on data modeling
* The following types of resources will be needed
* Snowflake ETL: To build the data model
* React web development: To build the web page for a desktop ONLY

# Data and Filters

New data needs for Phase II:

4.1 Type of Service Categories

4.2 Target Data

4.3 Physician Specialty

4.4 Rendering Provider (New to RFR data sources)

4.5 PCP

4.6 In Network Ind (New to RFR data sources)

## 4.1 Type of Service Categories

Phase I has the following Type of Service categories: IP, OP, Phys, Pharm, Cap/Ven and Intrst/Net Rein/Oth. For Phase II, IP and OP need to allow for drill to the next level of categories, utilizing the existing HCC categories in RFR/CoC. Specifically, the complete Type of Service categories should be the following IFTPM Categories (TOS). Crosswalk between these and EDM exist (DDIM\_HCC table: trnd\_medm\_grp\_hcc\_cd for types of services at the level used by IFTPM. For description, trnd\_medm\_grp\_hcc\_shrt\_desc or long desc).

|  |
| --- |
| **TOS\_Detail** |
| IP BH |
| IP Med/Surg |
| IP OB/NICU |
| NF |
| **Inpatient** |
| OP ER |
| OP Surg |
| OP Hgh Tech Rdlgy |
| OP HH/DME |
| OP Oth - Dialysis |
| OP Oth - Lab |
| OP Oth - MHSA |
| OP Oth - Spec Rx/Onc |
| OP Oth |
| **Outpatient** |
| **Phys** |
| **Rx** |

See section 6 for how it is used.

## 4.2 Target Data

Phase I has integrated two sources of target data: IFTPM, Budget. Adjustments on IFTMP, Budget and RFR data are required to ensure apples-to-apples comparison. The attached Excel file provides the logic for RFR and IFTPM exclusions.



1. Implement the “RFR Exclusion” logic to adjust the RFR (actual) data
2. Implement the “Plan Exclusion” to adjust IFTPM data
3. Implement the Budget Exclusion logic (business to develop) to adjust budget data
4. Compare the results from #1-3 to determine if further adjustments are needed
5. Dashboard approach – TBD
6. Target MLR calculation: Target MLR TBD

## 4.3 Provider Specialty

To provide a list of provider specialties for the Claims by Provider Specialty dashboard (Section 7), use HCC Low Phys Spec that contains 65+ specialties, e.g.,

Graphical user interface, text, application

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## 4.4 Rendering Provider

Bring in the Rendering Provider filter from CoC to enable Claim by Rendering Provider page (Section 8).

## 4.5 PCP

Bring in the PCP filter from RFR to enable Claim by PCP page (Section 9).

## 4.6 In Network Ind

Bring in the In Network Ind from CoC. Apply to rendering providers and PCPs for the Claims by Rendering Provider (Section 8) and Claims by PCP (section 9) pages. Related to Section 8, FOR DISCUSSION: Can we obtain data where the “In Network” column is % of PMPM that’s in network, In Network Indicator = Y.

# Dashboard -- Overview

Add two new visuals to the Overview page built in Phase I:

5.1 MLR Trend

5.2 Membership Mix by Segment

## 5.1 MLR Trend

Referring to the screenshot below,

1. Change the title to “MLR Trend”
2. Ignore the dropdowns/selections in the red boxes. The same dropdowns/selections at the top of the Overview page built in Phase I will apply to this visual
3. Gross Margin therefore the bar chart is not included. Only the MLR trend lines are included. Trend is only for 12 months for Current period plus 12 months for the Prior period – even when the time period selection is M, 3M, 6M, or YTD, this graph just shows 12 months current vs 12 months prior.

Chart

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## 5.2 Member Mix by Segment

Referring to the screenshot below,

1. See section 5.1 regarding red boxes. Note: “All Benefits” indicator is out of scope
2. If the selection is LOB, the visual shows the segments for the LOB just like the screenshot below displayed. If a segment, e.g., Medicare GRS is selected, the visual will only display GRS. The Commercial Local Group is the only exception because it has sub segments. Thus if it is selected, the visual will show the 3 sub segments: Large Group, Local Group Green and Small Group
3. “View Details” is out of scope.

Graphical user interface, application

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# Dashboard -- Claims by Type of Service

This is a new dashboard page. Referring to the screenshot below,

1. “Site of Care” change to “Type of Service”
2. See section 5.1 (#2) regarding red boxes. Note the following,
   1. Target vs. Actual is in scope
   2. Add “Including IBNR” dropdown (only applies to Current vs Current, Not Target vs Current)
3. Use the Type of Service categories in section 4.1 instead of the ones in the screenshot
4. Display the data for the 3 metrics as shown in the screenshot: PMPM, Utilization, Unit Cost
   1. For the utilization and unit cost metrics, use the primary measures specific to each HCC as shown in the grid below:
   2. For Target vs. Actual, it’s Target, Current, Var, % change

|  |  |  |
| --- | --- | --- |
| TOS | Utilization -- Primary Measures | Unit Cost |
| IP (-) | Admits/1000 | Cost/Admit |
| IP BH | Admits/1000 | Cost/Admit |
| IP Med/Surg | Admits/1000 | Cost/Admit |
| IP OB/NICU | Admits/1000 | Cost/Admit |
| NF | Days/1000 | Cost/Day |
| OP (-) | Visits/1000 | Cost/Visit |
| OP ER | Visits/1000 | Cost/Visit |
| OP Surg | Visits/1000 | Cost/Visit |
| OP Hgh Tech Rdlgy | Services/1000 | Cost/Service |
| OP HH/DME | Services/1000 | Cost/Service |
| OP Oth - Dialysis | ~~Services~~ **VISITS**/1000 | Cost/~~Service~~ **VISIT** |
| OP Oth - Lab | Services/1000 | Cost/Service |
| OP Oth - MHSA | ~~Services~~ **VISITS**/1000 | Cost/ ~~Service~~ **VISIT** |
| OP Oth - Spec Rx/Onc | Services/1000 | Cost/Service |
| OP Oth | Services/1000 | Cost/Service |
| Phys | Visits/1000 | Cost/Visit |
| Pharmacy | Scripts/1000 | Cost/Script |

1. “View Subdrivers” is out of scope.
2. For the orange color in the PMPM Var column, it’s to indicate the sorting in descending order within a category, e.g., lower HCCs under OP sorted in PMPM descending order – Create the sorting for all 12 metrics so the users can choose whichever metric they want to sort.

Table

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# Claims by Provider Specialty

This is a new dashboard page. Referring to the screenshot below,

1. “Procedure Specialty” change to “Provider Specialty” in the title and the visual
2. See section 6 (#2) for the treatment of the dropdowns at the top right (red box)
   1. Target vs. Actual is out of scope
   2. Add IBNR
3. Notice the Type of Service selection at the top left (blue box). Use these as is.
4. For the list of physician specialties, use HCC Low Phys Spec (see 4.3). When displaying on the dashboard, take out “Phys Spec” from the specialty name.
5. # of specialties displayed is determined by the page’s performance (i.e., page response time). I.e., if listing all specialties can cause performance issue, then just display top X (e.g., 20) by PMPM to ensure that enough top specialties are listed yet the performance is still good (1-2 seconds responsTable

   Description automatically generatede time)
6. Orange color in the PMPM Var column indicates the sorting of specialties by PMPM in descending order – see section 6 (#7) for sorting. Create the sorting for all 12 metrics so the users can choose whichever metric they want to sort.

# Claims by Rendering Provider

This is a new dashboard page. Referring to the screenshot below,

1. Title change to “Claim Details by Rendering Provider”; change “Facility” to “Rendering Provider”
2. See #2 and 3 under section 7 for the treatment of the red and blue boxes
3. Rendering Provider filter (see 4.4) for the list of rendering providers
4. Change “Participation” to “In Network”, and “Par/Non Par” to “Y/N”; use In Network Ind (see 4.6) to identify providers in or out of network, FOR DISCUSSION: Can we obtain data where the “In Network” column is % of PMPM that’s in network, In Network Indicator = Y
5. For data, use the same 3 sections as in Section 7: PMPM, Utilization and Unit Cost. Create the sorting for all 12 metrics so the users can choose whichever metric they want to sort.

Table

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# Claims by PCP

Same as Claims by Rendering Provider except that instead of using the Rendering Provider filter, use the PCP filter. Note the following differences:

1. No Utilization and Unit Cost
2. No IP, OP, Phys, Pharmacy, Total buttons
3. No In Network Indicator
4. Same sorting functionality as Section 7
5. Explore what else we can add for the other content, e.g., VBC indicator after the McK VBC Phase I