Sales Forecast Report

Help Guide

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Contents

Tutorial: Sales forecast Report

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Overview

Sale forecast report allows you to view the enrolment trends across various level: County, Organization and Plan for your markets. This report has two functionality according to the Medicare calendar – Enrolment Trends and Planed vs Actuals. The Enrolment trends report (Sales forecast report) provides an option to compare the enrollment trends at a Plan and Payor organization level across years from 2017 to 2019 in an efficient and simple tabular way. You can select your view to compare the monthly or yearly enrollment trends for your plan and competitor plans.

On the other hand, Planned Vs Actuals reports the predicted enrollment numbers are at a Plan level for entire US within 72 hours of CMS data release in October.

What data is available in this report and when is it refreshed?

These report utilizes the enrolment information from the CMS Enrolment data and includes all information (Individual, group, PDP, MA-PD) for plans as of 2019. This report is refreshed every month to reflect the new enrolment numbers and can be used throughout the year. We include only the latest year plans (currently 2019) and crosswalk the enrolment numbers for previous years. In October of every year, we map the new plans and repeat the process of crosswalk.
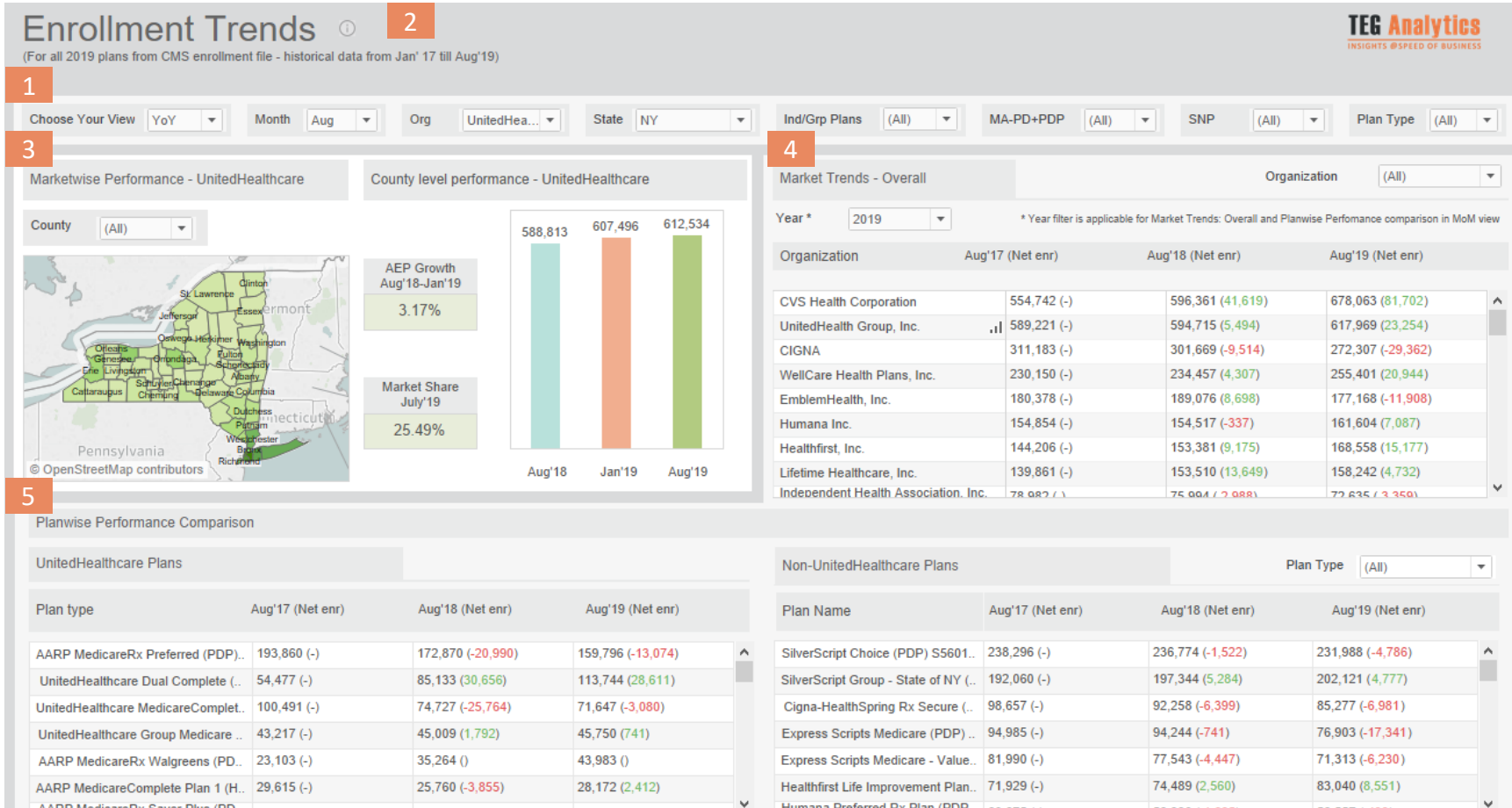
For the Planned Vs Actuals, this is active in the AEP period, where we project the predicted numbers (*output of our prediction models*) and refresh it each month during this period.
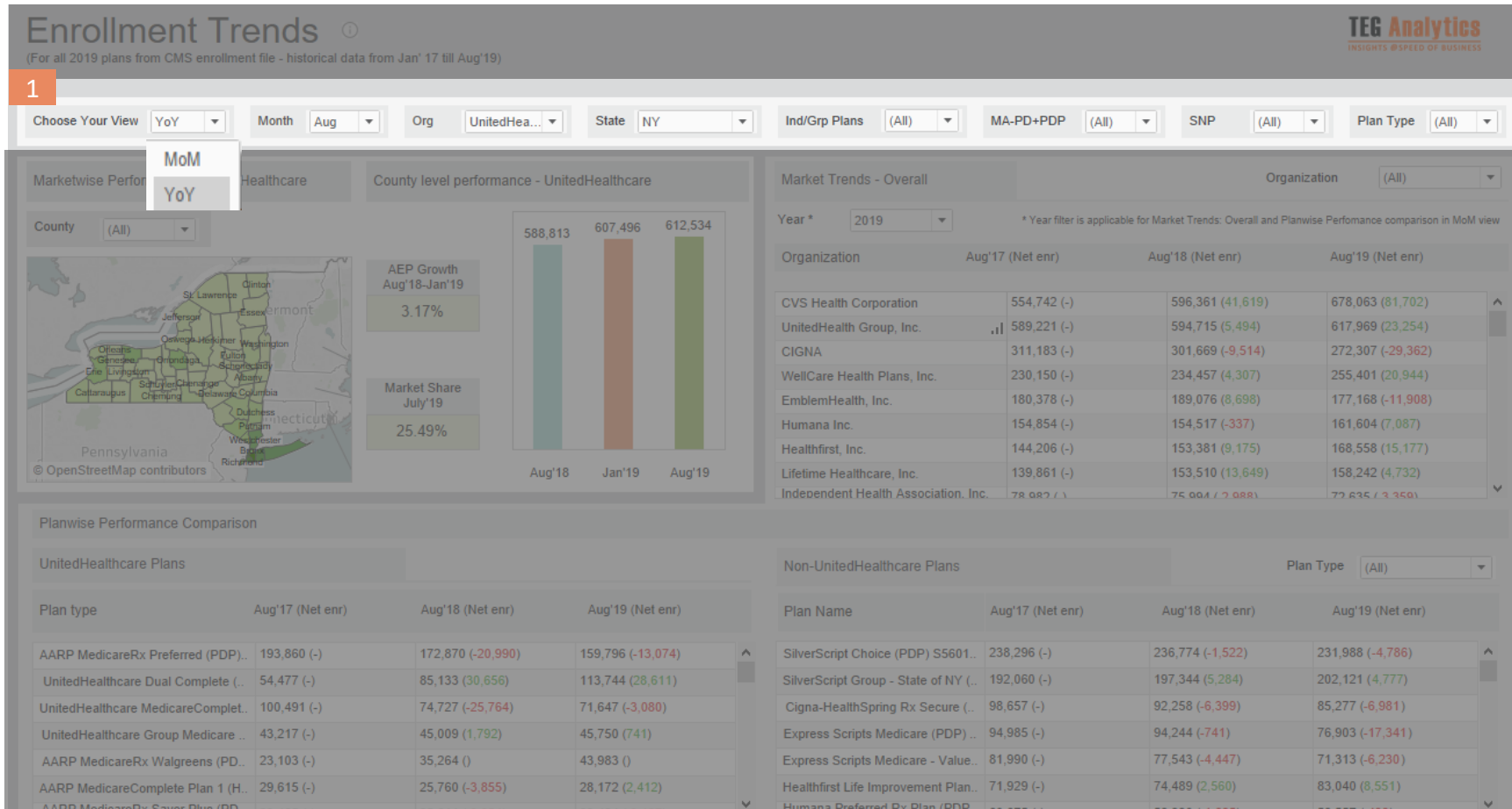
What decisions can I make using this report?

Use this report to compare the enrolment numbers across various stakeholders (county, organization and plan) for two time frames; Year over Year and Month over Month in tabular form and and hence draw insights for the same. Whereas, the Planned vs Actual, as the name suggests gives you the forecasted enrolments and helps to understand how the current AEP is going for you and your competitor across plan and payors.

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The default view is YoY for your organization at a State level. Follow these steps to gain insights from this report:

Enrollment Trends ⓘ
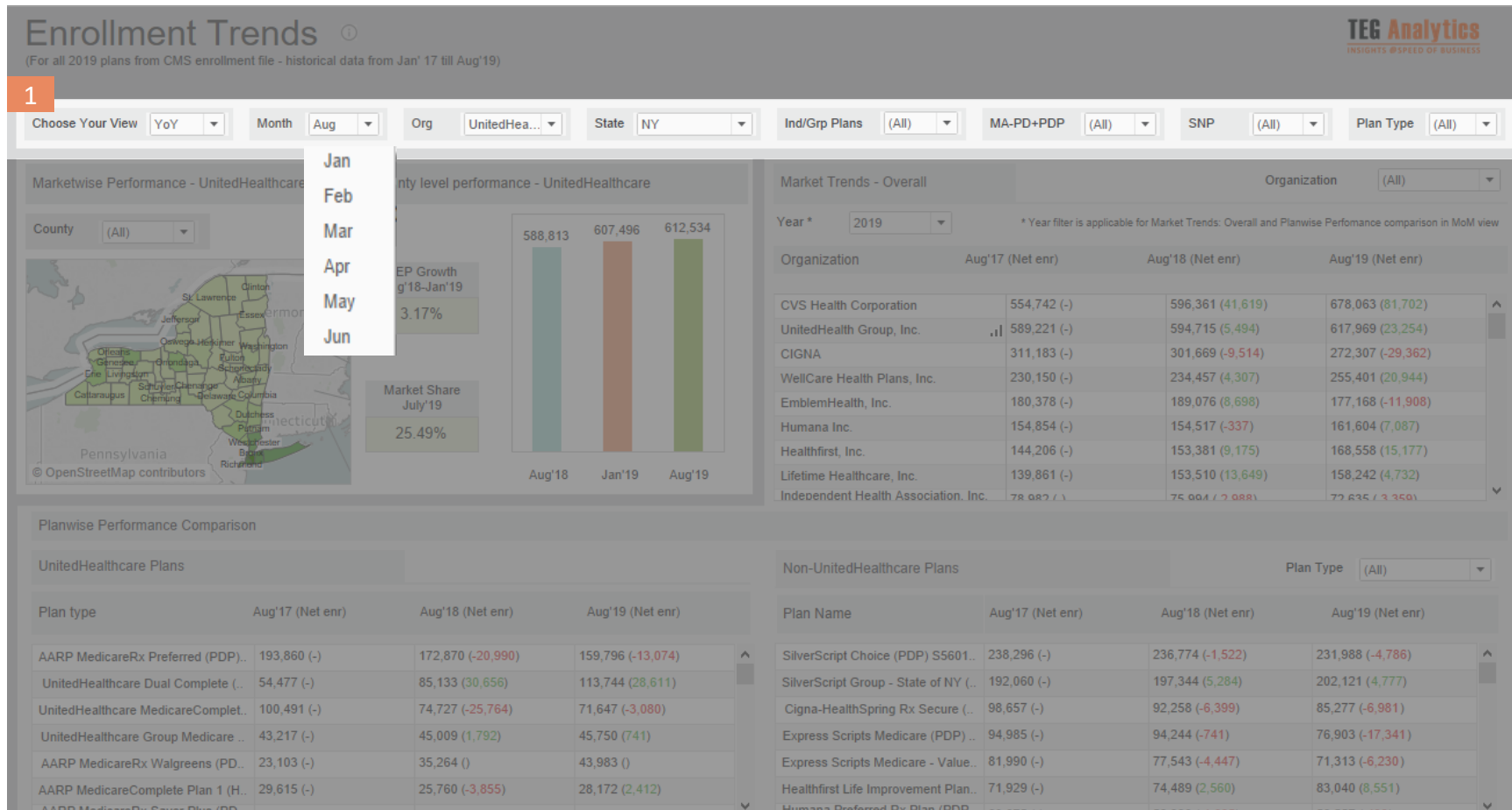
(For all 2019 plans from CMS enrollment file - historical data from Jan' 17 till Aug'19)

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1 | Choose Your View: YoY | Month: Aug | Org: UnitedHea... | State: NY | Ind/Grp Plans: (All) | MA-PD+PDP: (All) | SNP: (All) | Plan Type: (All)

3 Marketwise Performance - UnitedHealthcare

County level performance - UnitedHealthcare

County: (All)

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AEP Growth Aug'18-Jan'19
3.17%

Market Share July'19
25.49%

588,813 607,496 612,534

Aug'18 Jan'19 Aug'19

4 Market Trends - Overall

Organization: (All)

Year *: 2019   * Year filter is applicable for Market Trends: Overall and Planwise Perfomance comparison in MoM view

Organization	Aug'17 (Net enr)	Aug'18 (Net enr)	Aug'19 (Net enr)
CVS Health Corporation	554,742 (-)	596,361 (41,619)	678,063 (81,702)
UnitedHealth Group, Inc.	589,221 (-)	594,715 (5,494)	617,969 (23,254)
CIGNA	311,183 (-)	301,669 (-9,514)	272,307 (-29,362)
WellCare Health Plans, Inc.	230,150 (-)	234,457 (4,307)	255,401 (20,944)
EmblemHealth, Inc.	180,378 (-)	189,076 (8,698)	177,168 (-11,908)
Humana Inc.	154,854 (-)	154,517 (-337)	161,604 (7,087)
Healthfirst, Inc.	144,206 (-)	153,381 (9,175)	168,558 (15,177)
Lifetime Healthcare, Inc.	139,861 (-)	153,510 (13,649)	158,242 (4,732)
Independent Health Association, Inc.	78,982 (-)	75,994 (-2,988)	72,635 (-3,359)

5 Planwise Performance Comparison

UnitedHealthcare Plans

Plan type	Aug'17 (Net enr)	Aug'18 (Net enr)	Aug'19 (Net enr)
AARP MedicareRx Preferred (PDP)..	193,860 (-)	172,870 (-20,990)	159,796 (-13,074)
UnitedHealthcare Dual Complete (..	54,477 (-)	85,133 (30,656)	113,744 (28,611)
UnitedHealthcare MedicareComplet..	100,491 (-)	74,727 (-25,764)	71,647 (-3,080)
UnitedHealthcare Group Medicare ..	43,217 (-)	45,009 (1,792)	45,750 (741)
AARP MedicareRx Walgreens (PD..	23,103 (-)	35,264 ()	43,983 ()
AARP MedicareComplete Plan 1 (H..	29,615 (-)	25,760 (-3,855)	28,172 (2,412)
AARP MedicareRx Saver Plus (PD..		25,611	28,424

Non-UnitedHealthcare Plans   Plan Type: (All)

Plan Name	Aug'17 (Net enr)	Aug'18 (Net enr)	Aug'19 (Net enr)
SilverScript Choice (PDP) S5601..	238,296 (-)	236,774 (-1,522)	231,988 (-4,786)
SilverScript Group - State of NY (..	192,060 (-)	197,344 (5,284)	202,121 (4,777)
Cigna-HealthSpring Rx Secure (..	98,657 (-)	92,258 (-6,399)	85,277 (-6,981)
Express Scripts Medicare (PDP) ..	94,985 (-)	94,244 (-741)	76,903 (-17,341)
Express Scripts Medicare - Value..	81,990 (-)	77,543 (-4,447)	71,313 (-6,230)
Healthfirst Life Improvement Plan..	71,929 (-)	74,489 (2,560)	83,040 (8,551)
Humana Preferred Rx Plan (PDP..	60,675 (-)	58,990 (-1,685)	58,557 (-433)

1.1 Choose your View

Select one option (Year-over-Year or Month-over-Month) by clicking on the drop-down State

How can I use Enrollment Trends?- YoY view

1.2 Select the Month

Select the month for which you want to view the enrollment numbers by clicking on the drop-down filter

How can I use Enrollment Trends?- YoY view

1.3 Select your Organization

Select the payor (Your organization or competitor) by clicking on the drop-down. The default is set for your organization

How can I use Enrollment Trends?

1.4 Select your State

Choose the state (where you operate or any other area) from the drop-down filter and click apply

How can I use Enrollment Trends?- YoY view

1.5 Select the plans

Choose the plans (Group MA plans or Individual MA plans) from the drop-down filter and click apply
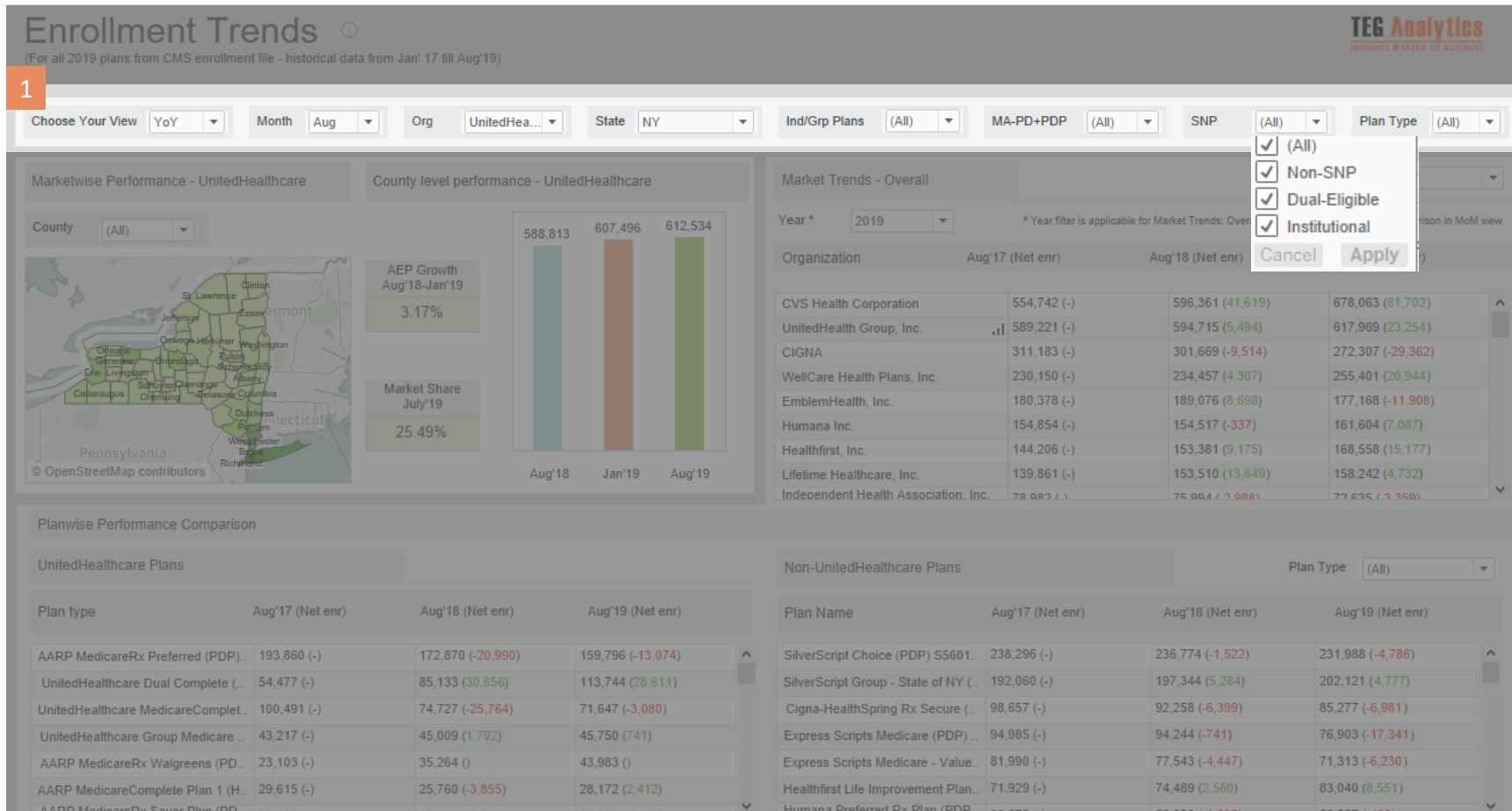
How can I use Enrollment Trends?- YoY view
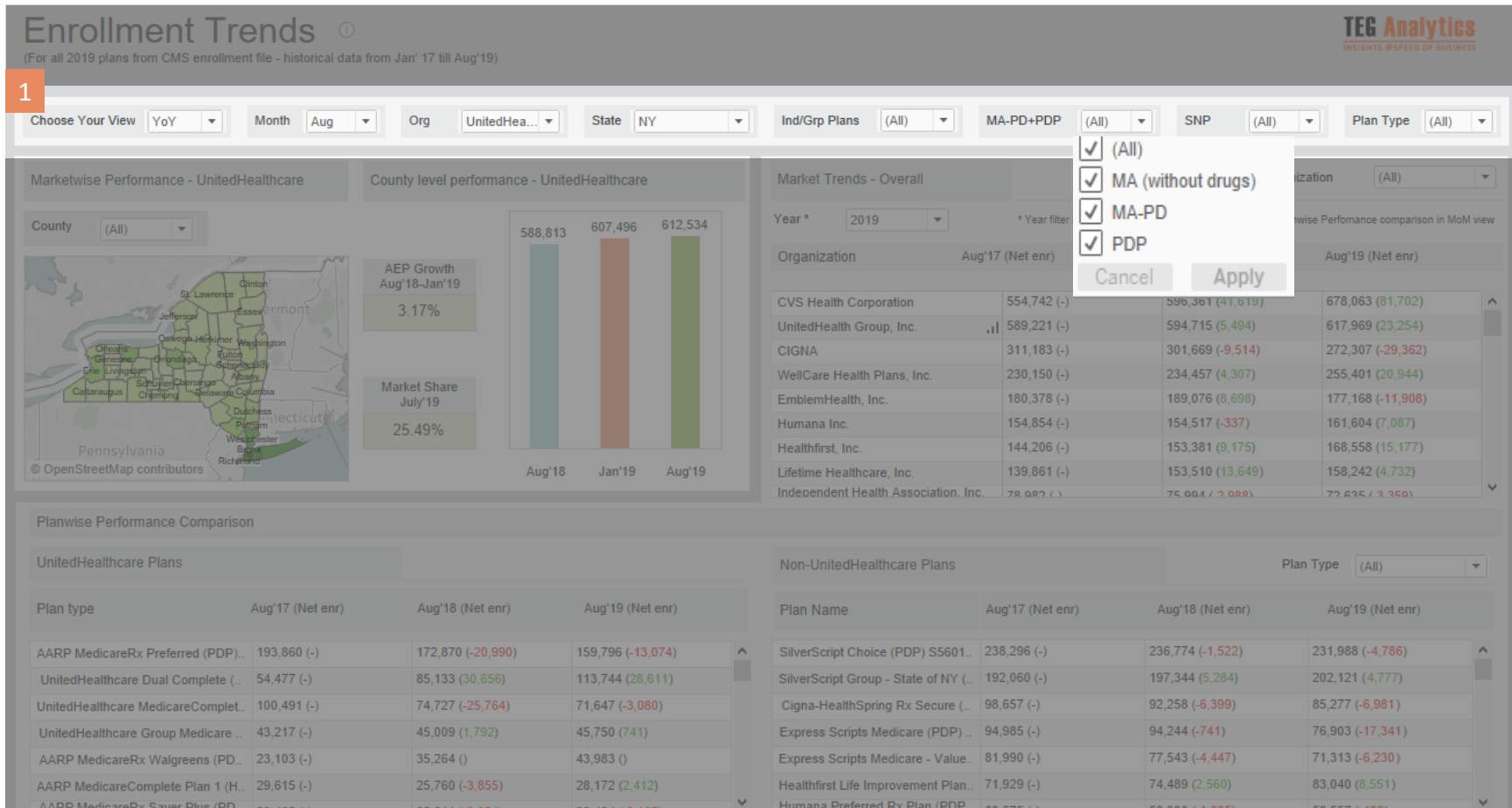
1.6 Select MA-PD/ PDP Plans

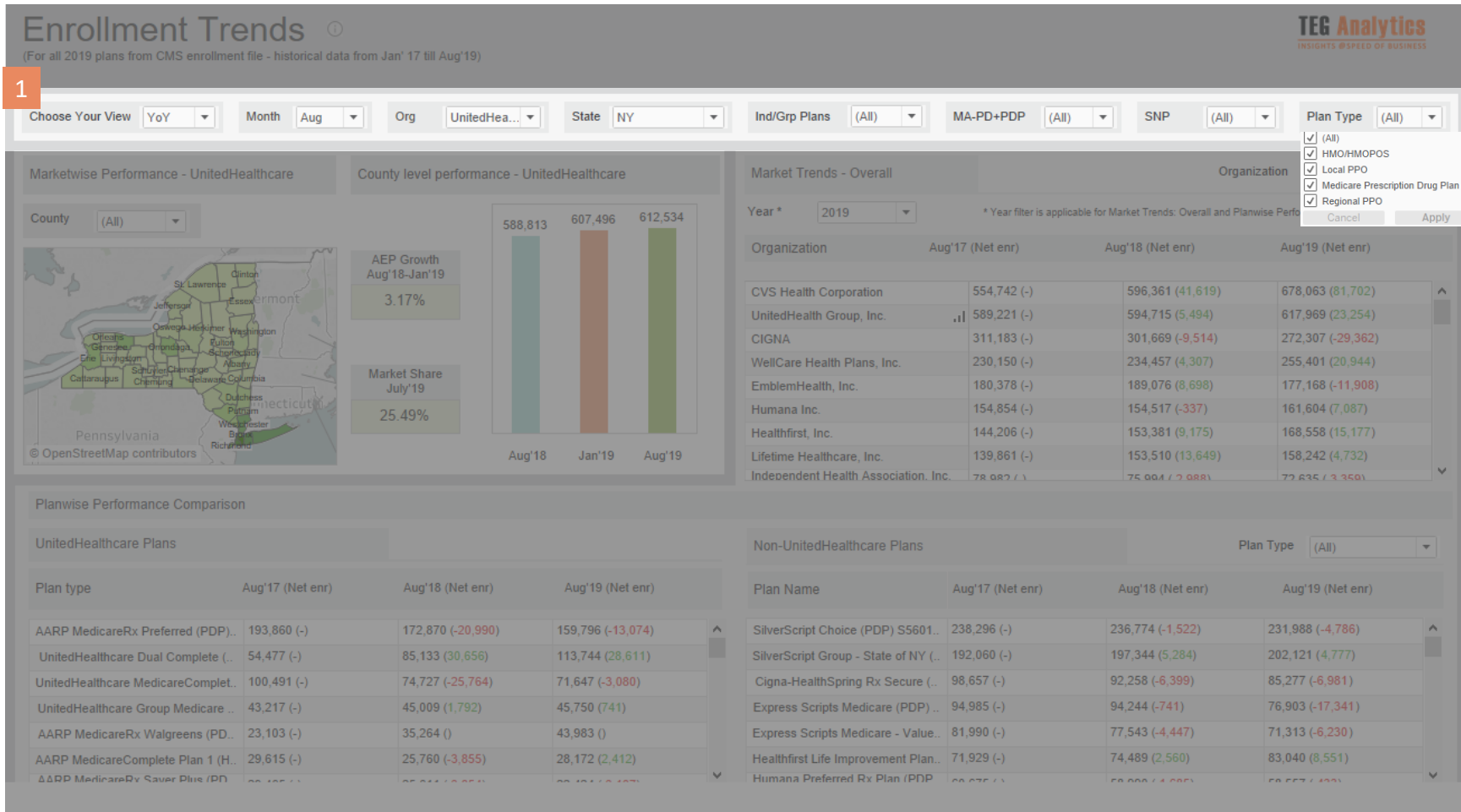Choose the plans (MA-PD or PDP) from the drop-down filter and click apply

How can I use Enrollment Trends?- YoY view

1.7 Select the SNP type

Choose the SNP plan type (Non-SNP, Dual-Eligible, Institutional) from the drop-down filter and click apply

How can I use Enrollment Trends?- YoY view

1.8 Select the Plan type

Choose the plan type from the drop-down filter and click apply

How can I use Enrollment Trends?- YoY view

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Enrollment Trends ⓘ **2**

(For all 2019 plans from CMS enrollment file - historical data from Jan' 17 till Aug'19)

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This report includes data for the current year but allows you to compare enrollment trends at Plan and Payor level across years starting from Jan' 2017 till the latest month in 2019

You have an option to choose your view: YoY (yearly) or MoM (monthly)

YoY View : Represents enrollments for 2017-2019) for the selected month(which can be changed using the month filter)

MoM View : Shows the enrollments for the selected month & year (2017-2019) and the previous 5 months enrollments (prior from the month selected). The Year filter is included here which is applicable for both Market Trends Overall and Plan Performance comparison view

| Choose Your View | YoY | Month | Jul | | SNP | (All) | Plan Type | (All) |

Marketwise Performance - UnitedHealth Group, Inc.

Organization   (All)

County   (All)

Market Trends: Overall and Planwise Perfomance comparison in MoM view

	Jul'18 (Net enr)	Jul'19 (Net enr)
95,559 (41,918)	676,243 (80,684)
91,762 (5,007)	617,071 (25,309)
02,018 (-10,099)	273,229 (-28,789)
33,949 (4,890)	254,733 (20,784)

Market Share
July'19
24.13%

Aug'18   Jun'19   Jul'19

	Jul'18 (Net enr)	Jul'19 (Net enr)
EmblemHealth, Inc.	180,098 (-)	188,413 (8,315)	176,043 (-12,370)
Humana Inc.	154,312 (-)	154,384 (72)	160,978 (6,594)
Healthfirst, Inc.	143,380 (-)	152,942 (9,562)	167,229 (14,287)
Lifetime Healthcare, Inc.	139,490 (-)	153,077 (13,587)	157,666 (4,589)
Independent Health Association, Inc.	79,088 (-)	76,006 (-3,082)	72,559 (-3,447)

Planwise Performance Comparison

UnitedHealth Group, Inc. Plans

Non-UnitedHealth Group, Inc. Plans

Plan Type   (All)

Plan type	Jul'17 (Net enr)	Jul'18 (Net enr)	Jul'19 (Net enr)	Plan Name	Jul'17 (Net enr)	Jul'18 (Net enr)	Jul'19 (Net enr)
AARP MedicareRx Preferred (PDP)..	194,669 (-)	173,479 (-21,190)	160,399 (-13,080)	SilverScript Choice (PDP) S5601..	238,401 (-)	237,155 (-1,246)	232,415 (-4,740)
UnitedHealthcare MedicareComplet..	100,354 (-)	74,963 (-25,391)	71,772 (-3,191)	SilverScript Group - State of NY (..	191,322 (-)	196,862 (5,540)	200,979 (4,117)
UnitedHealthcare Dual Complete (..	52,199 (-)	82,440 (30,241)	112,199 (29,759)	Cigna-HealthSpring Rx Secure (..	99,704 (-)	92,607 (-7,097)	85,873 (-6,734)
UnitedHealthcare Group Medicare ..	43,286 (-)	45,047 (1,761)	45,869 (822)	Express Scripts Medicare (PDP) ..	94,814 (-)	94,180 (-634)	76,922 (-17,258)
AARP MedicareRx Walgreens (PD..	22,414 (-)	34,731 ()	43,669 ()	Express Scripts Medicare - Value..	81,978 (-)	77,776 (-4,202)	71,741 (-6,035)
AARP MedicareComplete Plan 1 (H..	29,706 (-)	25,873 (-3,833)	28,276 (2,403)	Healthfirst Life Improvement Plan..	71,517 (-)	74,320 (2,803)	81,973 (7,653)
AARP MedicareRx Saver Plus (PD..	29,600 (-)	25,680 (-3,920)	22,536 (-3,144)	Humana Preferred Rx Plan (PDP..	60,617 (-)	59,030 (-1,587)	58,399 (-631)

2 Information icon

Overview of the report along with the source of the data used is mentioned

How can I use Enrollment Trends?- YoY view
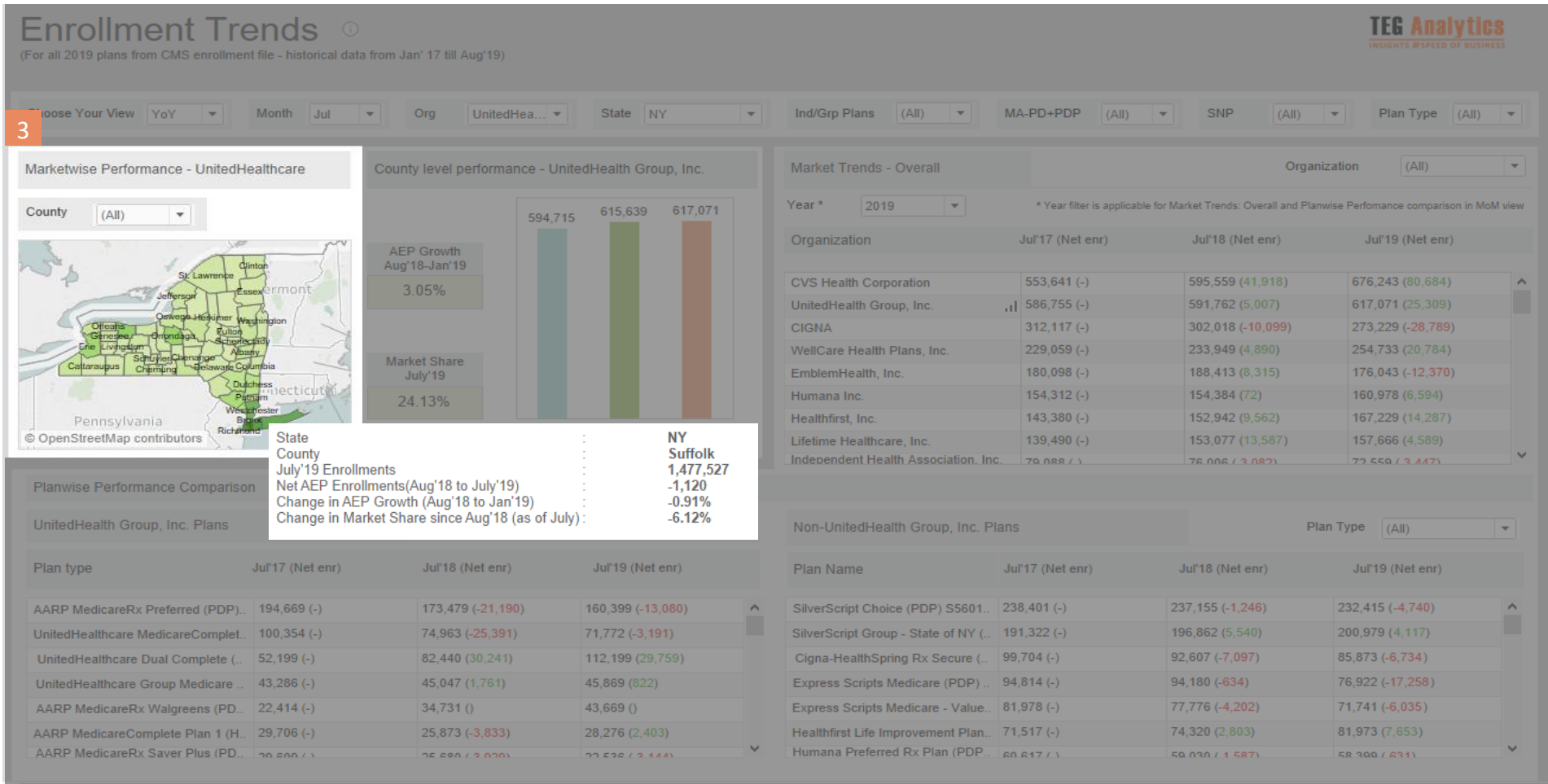
3.1 Market Performance- County view

Use the county drop-down filter or the heat map to select a county (one on multiple) to see the county level numbers along with other metrices like net AEP enrolments, Change in AEP growth, Change in market share across regions
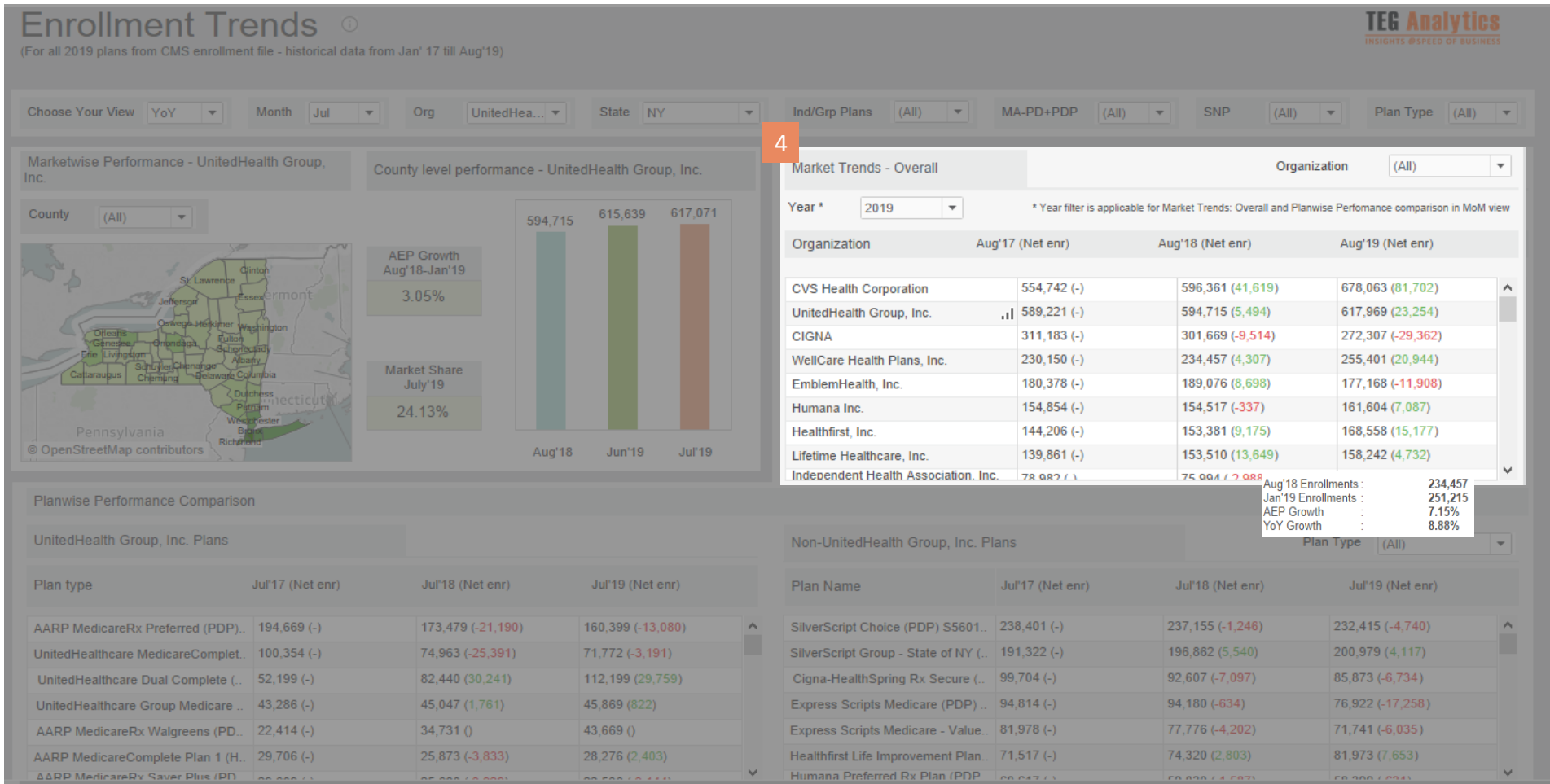
How can I use Enrollment Trends?- YoY view
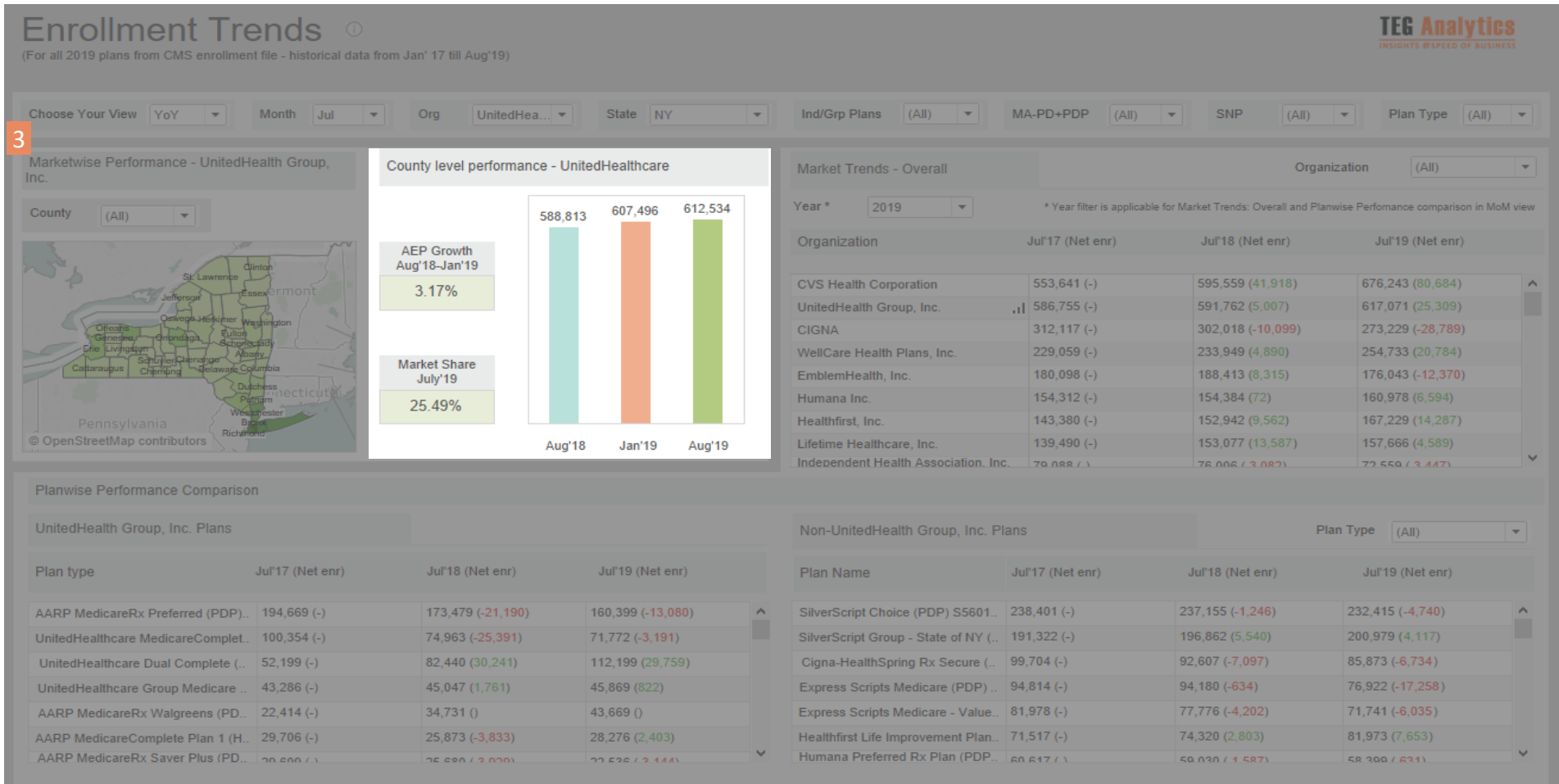
3.2 County level performance

This section gives the enrollment numbers (Aug'18, Current month, previous month), AEP growth (current and previous), Market share (as of current month and as of previous month)

How can I use Enrollment Trends?- YoY view

4. Market Trends- Overall

Gives Payor level trends for the years (2017-2019) and for the month selected. In addition, has Net enrollments, Aug'18 enrollments, AEP growth etc. in the tooltip. The organization filter available acts as a local filter for this table only. Important disclaimer, the Year filter is applicable for Market Trends: Overall and Plan wise Performance comparison in MoM view only

How can I use Enrollment Trends?- YoY view
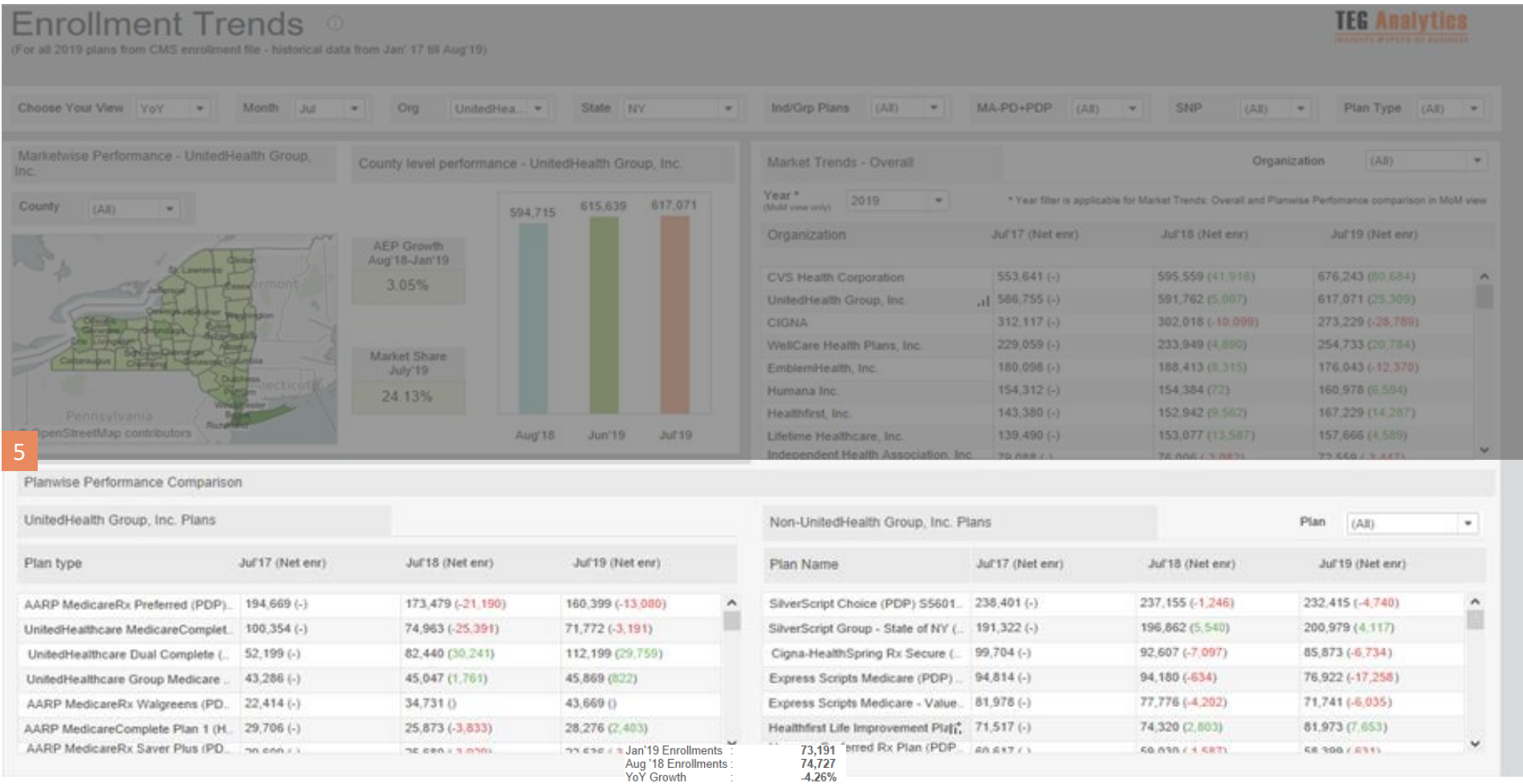
5. Plan wise performance comparison

This section allows you to view the plan level enrolment numbers for your plans vs your competitors plan (actuals and net enrolment). The plan local filter is provided to select specific competitor plans you want to look at. Information like YoY growth, net enrollments, Jan enrollments are provided in the tooltip on hover

How can I use Enrollment Trends?- MoM view

The default view is YoY for your organization at a State level. Follow these steps to gain insights from this report:
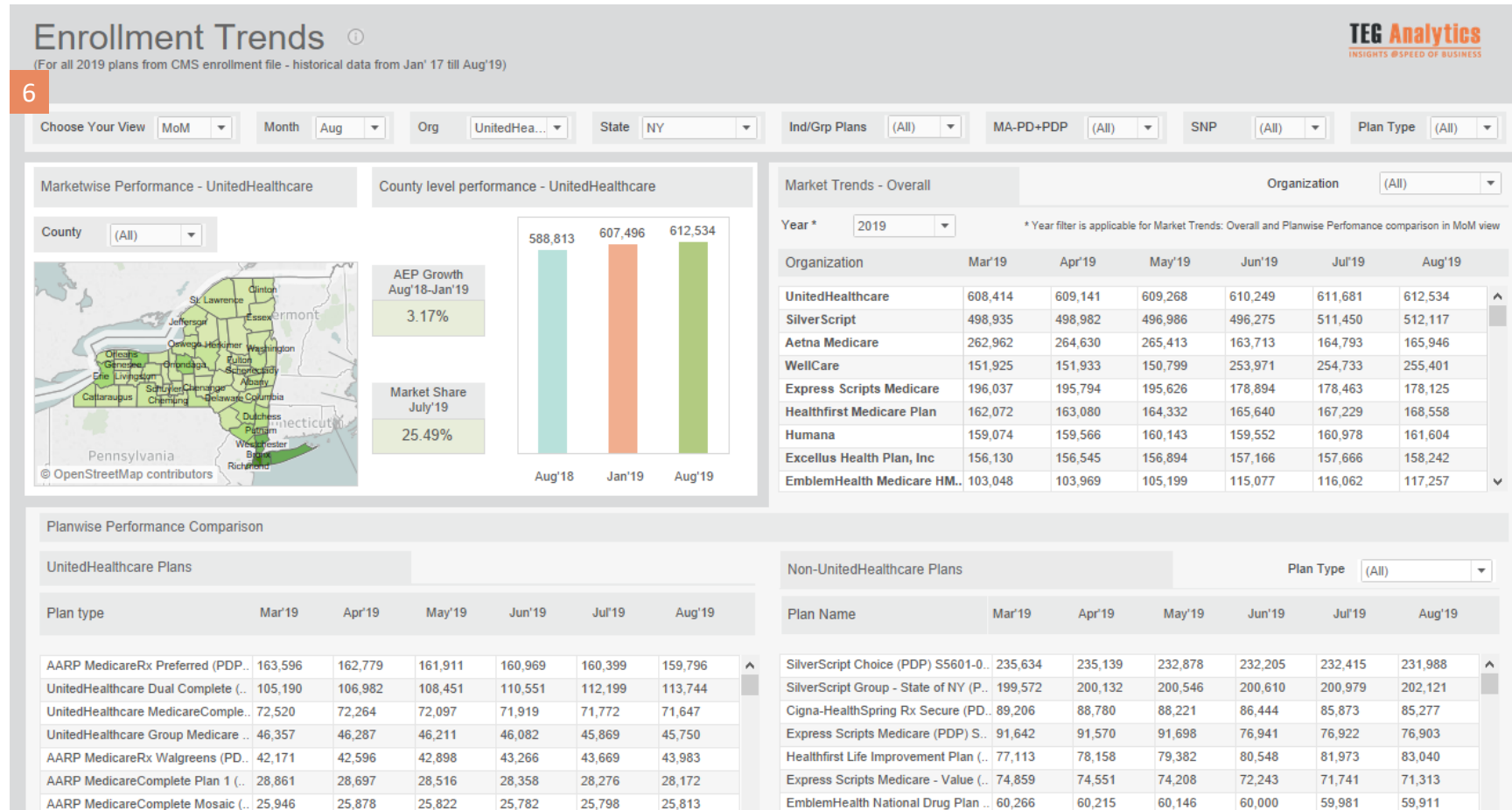
How can I use Enrollment Trends? – MoM view
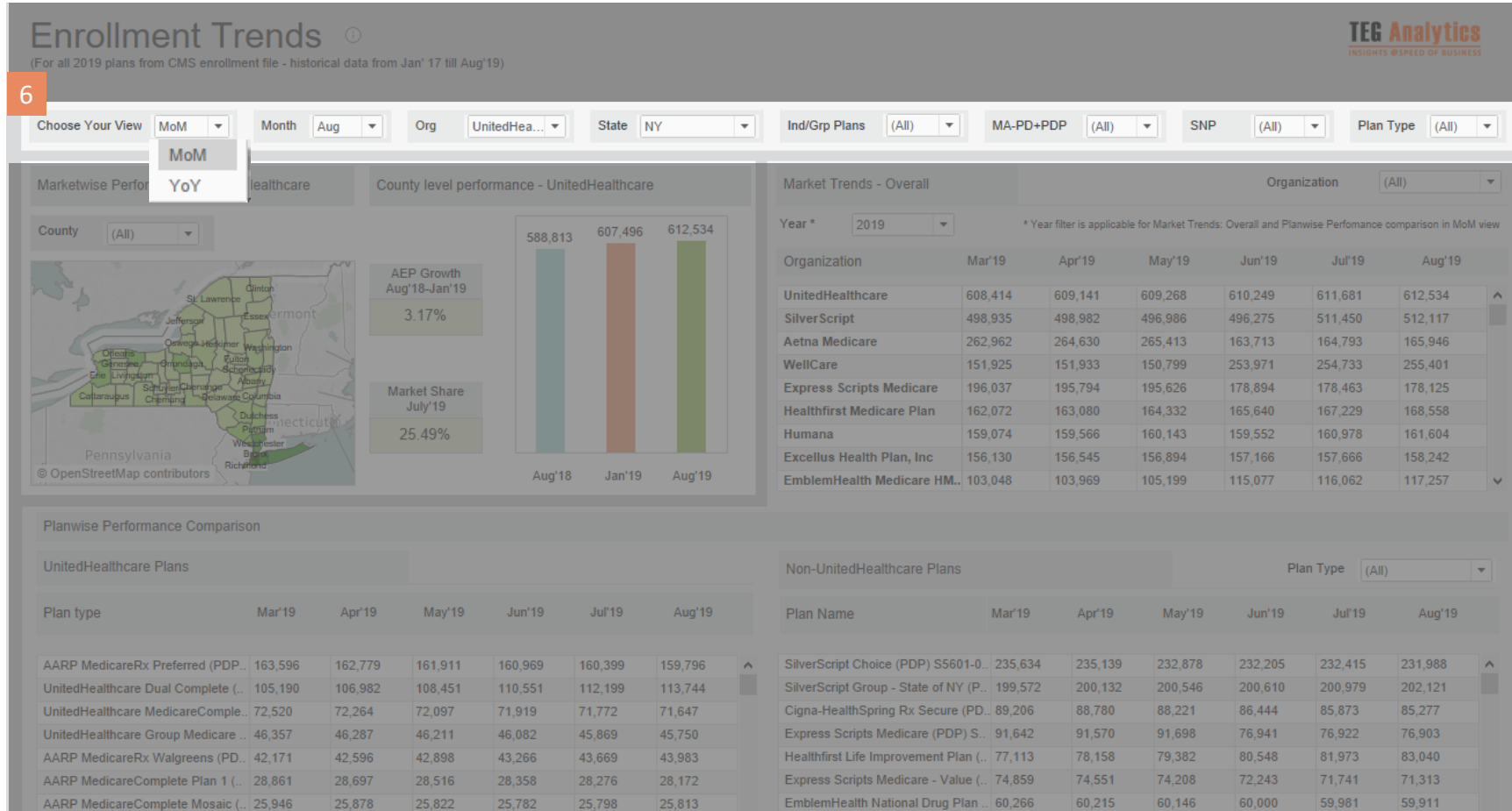
6.1 Choose your view (MoM)

Select the view as MoM and change other filters, if needed, and all the charts and numbers will be changed to MoM i.e. the month and year selected along with previous 5 months from that month

How can I use Enrollment Trends? – MoM view
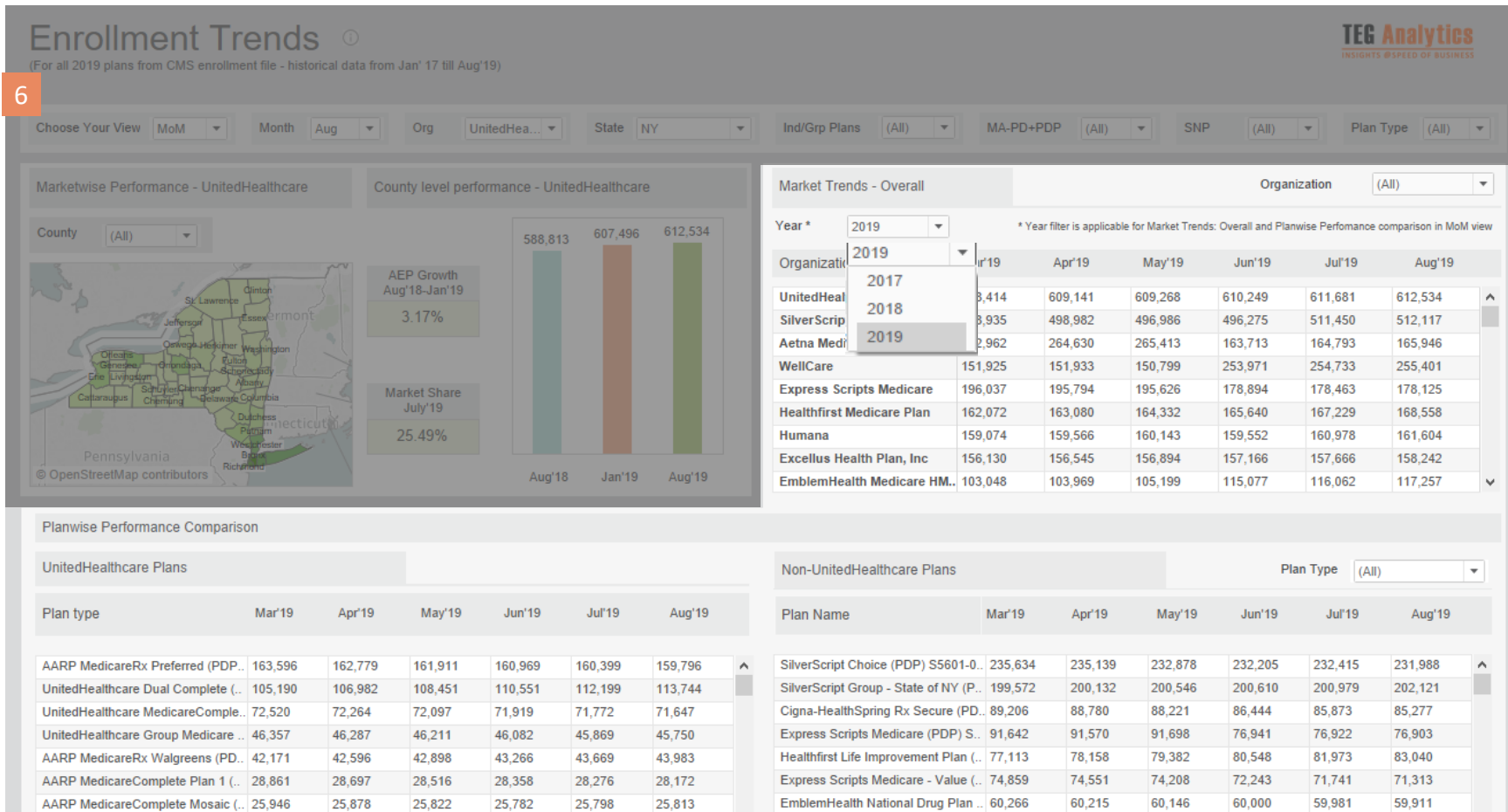
6.2 Choose the year

Select the year from the drop-down filter (2017-2019) and this acts as local filter for Market Trends and plan wise performance comparison sections. For the year and month selected, the tables gives the enrollment numbers for that month-year and previous 5 months from that

How can I use Enrollment Trends? – MoM view

7 Planned Vs Actuals

Use this report during AEP which gives the predicted Jan enrollment for the all plans (MA-PD, PDP, group). These predictions are available within 72 hours of data release in October at Payor and Plan level. We also highlight the gaining and loosing counties during AEP

Thank You

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