

The background of the image is a wide-angle landscape of a mountain range during sunset. The sky is filled with dramatic, orange and yellow clouds. In the foreground, there is a field of tall, green grass swaying slightly.

Analytics Peak User Guide

V13 – October 2024



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Overview

The Waystar Analytics Peak application is a comprehensive reporting platform that allows you to measure the performance of your organization's entire revenue cycle in a single location using Waystar-created and custom reporting (dashboards, reports, and KPIs).

Note: Users can only view Analytics data for the Waystar applications they have access to. For example, to view claims reporting, users will need to have basic claims permissions and likewise for remits.

Starting from a series of Waystar-created reports (also known as "Looks") that are organized into theme-based dashboards, you can explore the data behind the Looks, customize or build your own Looks, and share saved Looks and dashboards.

Work Spaces

The **ANALYTICS > Analytics > Work Spaces > Dashboard** screen displays all Waystar-created packaged analytics and custom, user-defined analytics that were saved to your account.

The following shows a truncated list of dashboards and Looks for example-purposes only.

The screenshot shows the Waystar Analytics Peak interface. At the top, there is a navigation bar with tabs: MY WORK, CLAIMS PROCESSING, PATIENT TOOLS, ANALYTICS (which is currently selected), MEDICARE, and ACCOUNT. Below the navigation bar, the title "Analytics Peak" is displayed, followed by a sub-header "Work Spaces". A sidebar on the left contains a "Dashboard" section with links for Packages, Shared, Favorites, Personal, and Trash. The main content area is titled "Work Spaces" and includes a search bar. It lists three dashboards under the "Dashboards" section and one look under the "Looks" section. Each item has a thumbnail, a title, a description, and a "Last Updated" timestamp. The "Dashboards" section includes AR Performance Dashboard, Benchmark Comparison Dashboard, and Claim Monitoring - Projected Denials Dashboard. The "Looks" section includes \$0 Paid Claims by Payer.

Category	Name	Description	Last Updated	Count	Actions
Dashboards	AR Performance Dashboard *NEW*	Provides insight into the back end claim follow up, payment performance, and denial outcomes.	19 months ago	0	
	Benchmark Comparison Dashboard *NEW*	The Benchmark Comparison Dashboard provides a number of tiles/Looks which will allow you to compare your organizational and payer performance to other Waystar clients/payers with regard to claim rejections, payments, and A/R days and claim denials.	19 months ago	0	
	Claim Monitoring - Projected Denials Dashboard	This dashboard presents various views of Claim Monitoring activity regarding claims that have been or are projected to be denied by the payer. Donut charts are filtered by the response date filter selected. Trend tiles include 12 complete months.	19 months ago	0	
Looks	\$0 Paid Claims by Payer	The \$0 Paid Claims report shows all remits that are not denied, but have been returned with a payment amount of \$0.00. Common scenarios that would create a \$0 Paid Claim include duplicates and claims held for records. This report can be grouped and analyzed by payer, procedure code, or reason code. Group by payer to evaluate which payers are returning the largest amount of \$0 Paid remits. Group by reason code to understand why payers are returning \$0 Paid claims. Business office managers may use this report to review staff performance in areas such as: - Responses to payer requests for info. - Submission of duplicate claims - Failure to perform pre-certifications or authorizations leading to Non-Covered procedures	19 months ago	0	

In the left pane of Work Spaces are the following tabs:

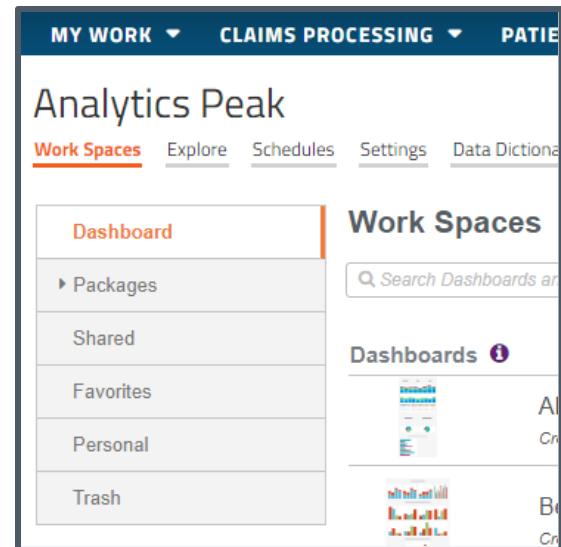
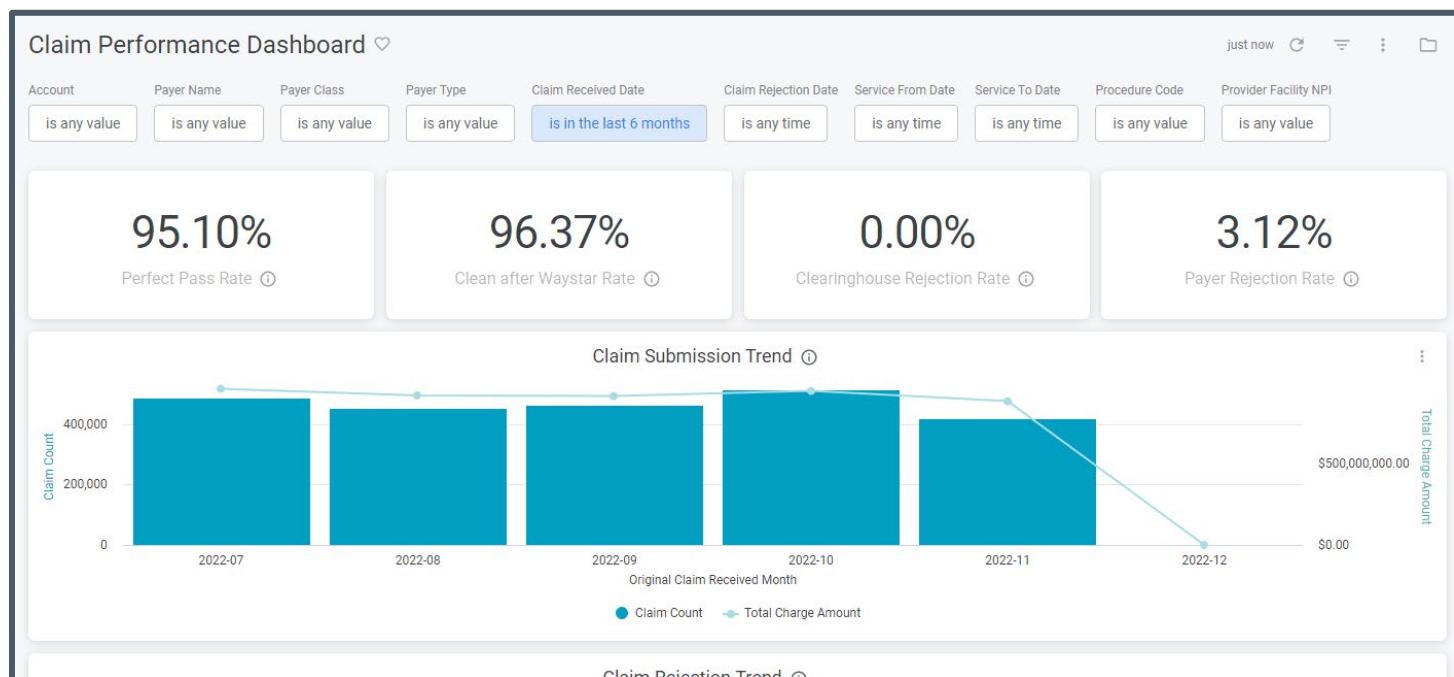
- **Dashboard:** Your default dashboard that you set up in [Analytics User Settings](#). (not to be confused with the Analytics dashboards listed under Work Spaces).
- **Packages:** The Waystar-provided dashboards/Looks that you have available to you. For example, this may contain the Revenue Cycle Report Package.
- **Shared:** Dashboards/Looks that you have shared with others or that others have shared with you. It can contain both your organization's custom Looks/dashboards as well as Waystar-provided packages.

Recommended usage: Use the Shared tab for your custom dashboards/Looks and access all Waystar-provided analytics through the Packages tab.

- **Favorites:** Those dashboards/Looks that you have marked as a favorite; see the [Selecting favorite dashboards/Looks](#) section.
- **Personal:** Dashboards/Looks that you have built but not shared with others in your organization.
- **Trash:** Discarded (soft-deleted) dashboards/Looks. You can retrieve the discarded dashboards/Looks or you can permanently delete them.

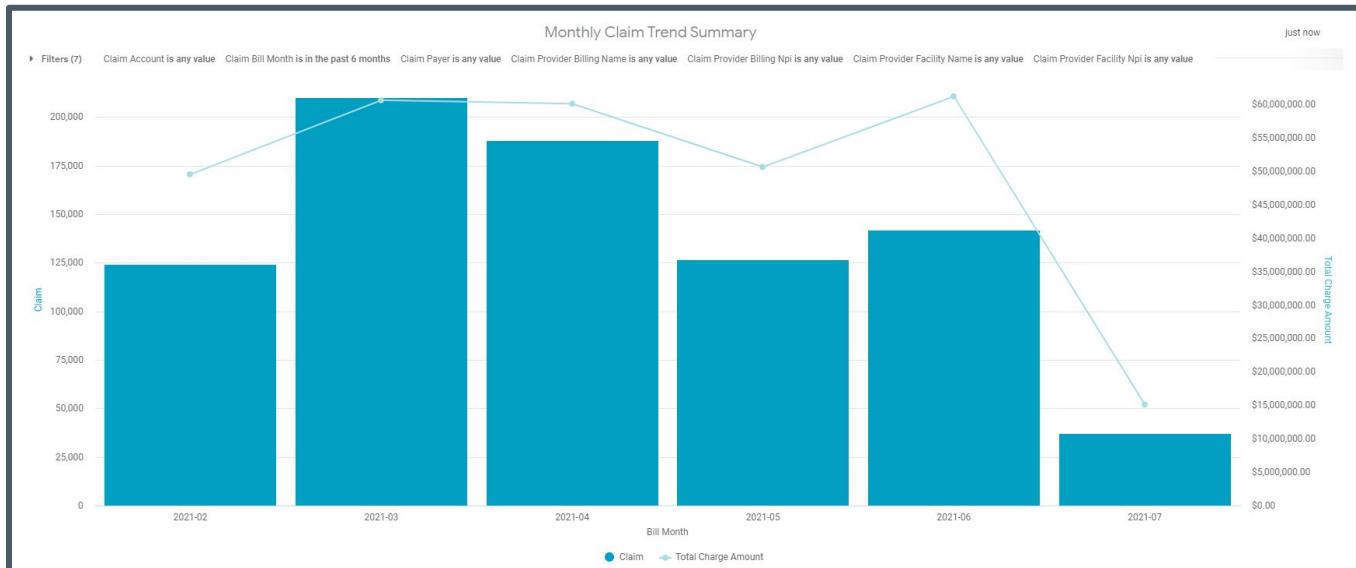
Analytics reporting is broken down into two types (dashboards and Looks), as the following explains:

- **Dashboards:** A collection of visualizations, text, queries, and single-value KPIs that are displayed as tiles on one screen:

- Looks:** Waystar-created or custom user-defined reports created from a wide range of attributes called dimensions and measures (use the [Data Dictionary](#) to find descriptions). You can save Looks, share them with other people in your organization, and include them in a dashboard.

For instructions on how to create new looks and to see definitions of all available dimensions and measures, see the [Building a new Look](#) section.



To view a dashboard or Look, simply click the desired item in the **Dashboards** or **Looks** areas of the Work Spaces screen. After clicking a dashboard or Looks object, you will be directed to either the individual Look or the report collection (dashboard).

On the Work Spaces screen, if the dashboard or Look you are trying to find is not displayed, perform a keyword search for the item in the search menu at the top of the screen.

Dashboards	
	Claim Performance Dashboard Created by Waystar
	Claim Rejections Dashboard Created by Waystar
	Claims Dashboard Created by Waystar

Looks		Last Updated	Dashboards
	\$0 Paid Claims by Payer Created by Waystar	4 months ago	0

Managing Work Spaces dashboards/Looks

This section explains how to manage your Work Spaces dashboards and Looks:

- **Copy dashboards and Looks:** You can copy any dashboard or Look. When you copy Waystar-created dashboards/Looks, you can then turn them into custom, user-defined dashboards/Looks that will allow you to perform various actions.
- **Favorites:** You can set any dashboard or Look as a favorite, in which the object will then be available to you from your Favorites tab.
- **Additional actions:** You can perform additional actions on custom, user-defined dashboards/Looks.

Performing actions on dashboards/Looks

To perform actions with dashboards and Looks:

1. Go to **ANALYTICS > Analytics > Work Spaces** and select the appropriate tab, such as Dashboard, Shared, or Personal.
2. Click the three-dot button to the right of any dashboard or Look to access the following action items.

The Rename, Move, and Trash actions described later are available only for custom, user-defined dashboards and Looks. When you click the three-dot button for a **Created by Waystar** dashboard or Look, you'll only see the Copy action as the following example shows.

Analytics Peak

MY WORK ▾ CLAIMS PROCESSING ▾ PATIENT TOOLS ▾ ANALYTICS ▾ ACCOUNT Eligibility ▾

Work Spaces Explore Schedules Settings Data Dictionary

Dashboard	Work Spaces
Packages	Search Dashboards and Looks
Shared	
Favorites	
Personal	
Trash	

Work Spaces

Dashboards

	Description	More
AR Performance Dashboard Created by Waystar	Provides insight into the back end claim follow up, payment performance, and denial outcomes.	
AR Performance Dashboard Created by Waystar	Provides insight into the back end claim follow up, payment performance, and denial outcomes.	
Benchmark Comparison Dashboard Created by Waystar	Provides insight into the back end claim follow up, payment performance, and denial outcomes.	
Benchmark Comparison Dashboard	The Benchmark Comparison Dashboard provides a number of tiles/Looks which will allow you to	

This example of using the action menu for a **custom** dashboard shows all available actions.

The screenshot shows the Waystar Analytics Peak interface. At the top, there are navigation tabs: MY WORK, CLAIMS PROCESSING, PATIENT TOOLS, ANALYTICS (which is selected), and ACCOUNT. Below these are sub-tabs: Eligibility, Work Spaces, Explore, Schedules, Settings, and Data Dictionary. The main title is "Analytics Peak". On the left, a sidebar titled "Work Spaces" lists Dashboard, Packages, Shared, Favorites, Personal, and Trash. The main content area is titled "Work Spaces" and contains a search bar. It lists three dashboards: "AR Performance Dashboard" (Shared), "Claims" (Custom, created by Joan Smith), and "Claims Dashboard" (Shared). To the right of the dashboards is a "Description" column. An orange arrow points to the "Claims" entry in the list. Another orange arrow points to the three-dot menu icon at the end of the row for the same entry. A context menu is open, listing "Rename", "Trash", "Copy", and "Move".

The following describes each action item:

- **Rename:** Available only for custom, user-defined dashboards and Looks. Rename the associated dashboard or Look.
- **Trash:** Available only for custom, user-defined dashboards and Looks. Move the associated dashboard or Look to the Work Spaces > Trash screen (i.e., soft delete the item).
- **Copy:** Available for all dashboards/Looks. Copy the associated dashboard or Look to either the Shared or Personal tab.
- **Move:** Available only for custom, user-defined dashboards and Looks. Move the associated dashboard or Look to the Shared tab.

Selecting favorite dashboards/Looks

You can select any dashboard or Look as a favorite, which will then appear in your **ANALYTICS > Analytics > Work Spaces > Favorites** folder. Favorited dashboards/Looks will be marked with a blue heart to the right of the dashboard/Look title.

Analytics Peak

MY WORK ▾ CLAIMS PROCESSING ▾ PATIENT TOOLS ▾ ANALYTICS ▾ MEDICARE ▾ ACCOUNT Payments ▾

Work Spaces Explore Schedules Settings Data Dictionary

Work Spaces

Dashboard Packages Shared Favorites Personal Trash

Search Dashboards and Looks

Dashboards

	Description	Last Updated	Dashboard
	AR Performance Dashboard - Custom Created by Gary Piserchio	Provides insight into the back end claim follow up, payment performance, and denial outcomes.	19 months ago 0
	Claim Performance Dashboard Created by Waystar	Dashboard for Rejection/Front End Management	users

Looks

	Description	Last Updated	Dashboard
	\$0 Paid Claims by Payer Created by Waystar	The \$0 Paid Claims report shows all remits that are not denied, but have been returned with a payment amount of \$0.00. Common scenarios that would create a \$0 Paid Claim include duplicates and claims held for records. This report can be grouped and analyzed by payer, procedure code, reason code. Group by payer to evaluate which payers are returning the largest amount of \$0 Paid remits. Group by reason code to understand why payers are returning \$0 Paid claims. Business office managers may use this report to review staff performance in areas such as - Responses to payer requests for info - Submission of duplicate claims - Failure to perform pre-certifications or authorizations leading to Non-Covered procedures.	19 months ago 0
	Claim Lag Summary Created by Waystar	The Claim Lag Summary calculates the average amount of time it has taken for a remittance to be received for a claim. Claim Lag Summary analyzes the three distinct phases of the revenue cycle: Charge Lag, Waystar Lag and Payer Lag.	15 months ago 0

To mark/unmark dashboards/Looks as favorites:

1. Go to **ANALYTICS > Analytics > Work Spaces**.

The Work Spaces screen will open. All dashboards and Looks will have hearts on the right side of their rows.

2. Click any heart to mark (or unmark, if previously marked) the dashboard/Look as a favorite.

Any dashboards/Looks with a blue heart will appear in your Favorites tab. Any that you unmark will disappear from your Favorites tab.

Work Spaces

Search Dashboards and Looks

Dashboards

	Description
	AR Performance Dashboard Created by Waystar
	Benchmark Comparison Dashboard Created by Waystar
	Claim Performance Dashboard

You can also mark/unmark dashboards/Looks after opening them.

- From **ANALYTICS > Analytics > Work Spaces**, click the thumbnail or name of any dashboard/Look in the worklist to open it.

After the dashboard/Look opens, you'll see a heart next to the title.

- Click the heart to mark (or unmark, if previously marked) the dashboard/Look as a favorite.

A blue heart indicates a favorite.

The screenshot shows the 'Analytics Peak' interface. At the top, there are tabs: 'Work Spaces' (which is red), 'Explore', 'Schedules', 'Settings', and 'Data Dictionary'. Below the tabs, the title 'Benchmark Comparison Dashboard' is displayed, followed by a blue heart icon. Underneath the title, there are several filter options: 'Billing Provider Specialty', 'Billing Provider Classification', 'Patient State', and 'Claim Status', each with a dropdown menu labeled 'is any value'.

This screenshot is identical to the one above, showing the 'Analytics Peak' interface with the 'Benchmark Comparison Dashboard' and its associated filters. The blue heart icon is present next to the dashboard title.

Working with Looks in Work Spaces

As mentioned previously, the Work Spaces screens may include both Looks within dashboards and stand-alone Looks. For information on adding a new Look, see the [Building a new Look](#) section in this guide.

The following section explains the various ways you can interact with Looks.

Viewing Looks

This section explains how to locate and view Looks.

Viewing a Look

The following explains how to locate and open a Look to view its most current version.

To view a Look:

- Go to **ANALYTICS > Analytics > Work Spaces** and select the appropriate tab, such as Dashboard, Shared, or Personal.
- From the Work Spaces screen that will open, do either of the following:
 - In the **Search Dashboards and Looks** field at the top of the Work Spaces screen, begin typing the name of a Look. Any Looks that match your text will display below the search field.
 - On the Work Spaces screen, scroll the list of Looks.

3. After locating the Look you want, click the thumbnail image or the Look name.

Analytics Peak

MY WORK ▾ CLAIMS PROCESSING ▾ PATIENT TOOLS ▾ ANALYTICS ▾ MEDICARE ▾ ACCOUNT ▾ ADMIN ▾ Payments ▾

Work Spaces Explore Schedules Settings Data Dictionary Internal Work Spaces Internal Explore Internal Schedules Admin

Work Spaces

Packages Shared Favorites Personal Trash

Dashboards i

Claims Dashboard	Description
	Created by Waystar

Looks i

Look Name	Description	Last Updated	Dashboards
\$0 Paid Claims by Payer	The \$0 Paid Claims report shows all remits that are not denied, but have been returned with a payment amount of \$0.00. Common scenarios that would create a \$0 Paid Claim include duplicates and claims held for records. This report can be grouped and analyzed by payer, procedure code, or reason code. Group by payer to evaluate which payers are returning the largest amount of \$0 Paid remits. Group by reason code to understand why payers are returning \$0 Paid claims. Business office managers may use this report to review staff performance in areas such as: - Responses to payer requests for info. - Submission of duplicate claims - Failure to perform pre-certifications or authorizations leading to Non-Covered procedures	19 months ago	0
Test Claims List (Copy)	Created by John Smith	4 months ago	0

The most current version of the Look will display:

\$0 Paid Claims by Payer 26m ago

Filters: Remit Received Date is any time AND Remit Account is any value AND Remit Payer Name (Waystar) is any value AND Remit Payer Class is any value AND Remit Payer Type is any value AND Check Check Da...

Payer Name (Waystar)	Zero Paid Billed Amount	Zero Paid Adjusted Amount	Zero Paid Remit Count	Remit Count	Zero Paid Line Count
1	\$728,551,243.90	\$203,511.00	162,071	5,687,648	664,098
2	\$402,837,830.27	\$0.00	147,744	2,609,208	402,801
3	\$320,916,938.60	\$127.00	12,340	758,577	54,995
4	\$299,949,849.93	\$5,919,909.83	145,799	1,310,270	371,794
5	\$295,902,861.70	\$0.00	61,757	887,652	69,920
6	\$132,936,694.93	\$24,878.90	41,459	671,553	156,934
7	\$106,867,423.11	\$18,405.16	70,202	2,124,328	133,741

Opening a dashboard/Look from a Look

When viewing a Look, you can open other dashboards/Looks.

To view dashboards/Looks from a Look:

1. [View a Look](#).
2. From the opened Look, hover over the top-right corner of the screen, and click the **Folder** icon.

A menu of folders will open.

The screenshot shows a Look interface with a sidebar on the right containing a 'Folders' section. The sidebar lists four categories: 'Favorites', 'My Folder', 'Group', and 'Shared'. An orange arrow points to the folder icon in the top right corner of the main Look area, which is part of a larger interface showing patient data and a search bar.

3. Select one of the folders: **Favorites**, **My Folder**, **Group**, or **Shared**.

The folder will open and when available, a list of dashboards and/or Looks will also appear.

4. To open a dashboard/Look, from the selected folder, click any displayed dashboard or Look.

The screenshot shows a 'My Folder' interface with a list of items under 'Dashboards' and 'Looks'. An orange arrow points to the 'Looks' section. The 'Dashboards' section contains one item: 'AR Performance Dashboard - Cust...'. The 'Looks' section contains three items: '\$0 Paid Claims by Payer (Custom)', 'Reimbursement Aging Summary', and 'Total Paid Amount (Copy)'. Each item has a three-dot menu icon to its right.

5. For additional actions, click the **More Actions** icon to the right of a dashboard or Look name.

A dropdown of actions will open allowing you to:

My Folder

Dashboards Name ↓

AR Performance Dashboard - Cust... :

Looks Name ↓

\$0 Paid Claims by Payer (Custom) :

Reimbursement Type Name ↓

Total Paid Amount Name ↓

- Make a copy
- Move to
- Move to trash

Group

Looks Name ↓

Cody's

Lauren's report

Mariahs Report

Monthly Claim Trend Summary

My Report

Report

You are moving the Look "\$0 Paid Claims by Payer (Custom)"

Cancel Move Here

- **Make a copy:** To make a copy of the selected dashboard/Look into the current folder, select **Make a copy**, and then click the **Copy Here** button that will appear at the bottom of the folder.
- **Move to:** To move the dashboard/Look to another folder:
 - a. Select **Move to**.
 - b. Navigate to another folder.
 - c. If the **Move Here** button is active, you can click it to move (not copy) the dashboard/Look to the selected folder.
If the Move Here button is inactive, you cannot move the dashboard/Look to the selected folder.
- **Move to trash:** Moves the dashboard/Look to the Work Spaces > Trash folder.

Managing individual Looks

This section explains how to manage individual Looks.

Managing a displayed Look

To manage a displayed Look:

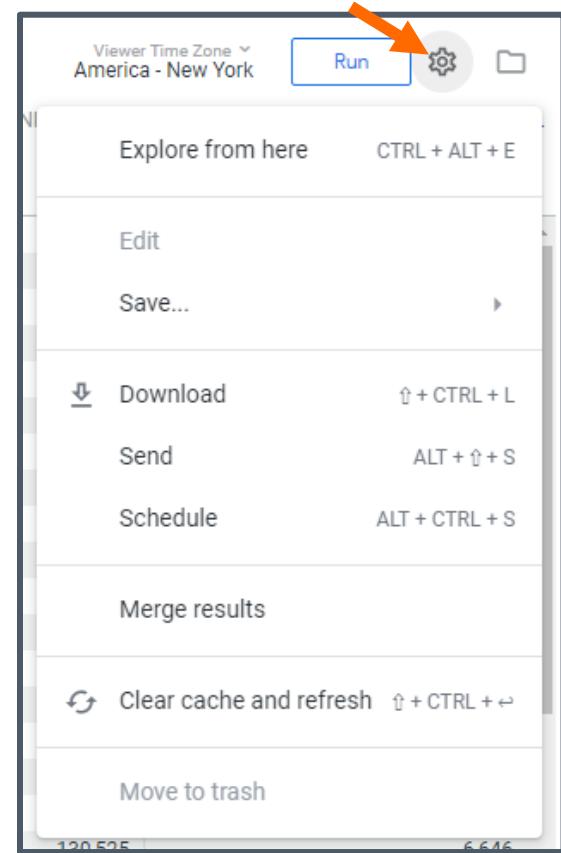
1. [View a Look](#).
2. From the opened Look, hover over the top-right corner of the screen, and then click the **Explore actions** (cog) icon that will appear.

The following menu of actions will open:

- **Explore from Here:** View the expanded version of the Look in the [Explore](#) area of the Analytics application.
- **Edit:** You can only edit custom Looks, you cannot edit a “Created by Waystar” Look. You can, however, copy a Waystar Look, thus creating a custom Look that you can then edit.

After clicking the **Edit** button, the Edit Look screen will appear where you can edit properties such as the Look name, fields, filters, and visualizations. See the [Building a new Look](#) section for instructions on how to modify the Look fields and apply new filtering.

- Once you have made the desired changes to the Look, click the **Run** button to confirm the new query and view the desired results.
 - After updating a Look, click the **Save** button at the top of the Edit Look screen to save it to Work Spaces.
 - **Save....:** Will open a menu for the following actions:
 - **To an existing dashboard:**
 - a. To add the Look to an existing dashboard, click **To an existing dashboard**, which will open the “Add to a Dashboard in this folder” screen.
 - b. Enter the following information:
 - **Title:** Enter an appropriate name for the Look.
 - **Folder:** Select the appropriate Work Spaces location (**Personal** or **Shared**) and then the specific dashboard where you would like the Look to be added.
- Note:** For more information on the Shared and Personal tabs, click [HERE](#).
- c. Click **Save to Dashboard** to save the Look to the specified dashboard.
 - **As a new dashboard:** For information, see the [Adding a custom dashboard](#) section.



- **Save As:**

- a. Select **Save As** to open the Save Look screen.
- b. Enter the following information:
 - **Title:** Enter an appropriate name for the Look.
 - **Description** (optional but recommended): Enter a summary of the Look. The description will appear in the Work Spaces list next to the Look.
 - **Folder:** Select the appropriate Work Spaces location (**Personal** or **Shared**) where you would like to save the Look.

Note: For more information on the Shared and Personal tabs, click [HERE](#).

- c. Click **Save** to save the Look to the specified Work Spaces location.

- **Download:** Download the report in any of the following formats:

- TXT (tab-separated values)
- Excel Spreadsheet (Excel 2007 or later)
- CSV
- JSON
- HTML
- Markdown
- PNG (Image of Visualization).

- **Send:** Send a one-time, custom-formatted Look to an email address or group of email addresses; if enabled, you can choose to also send data to your organization's default domain FTP location. For instructions on how to Send a Look, see the [Sending an individual Look](#) section.
- **Schedule:** Create a recurring schedule for the Analytics application to auto-generate and distribute a Look to an email address or group of email addresses; if enabled, you can choose to also send data to your organization's default domain FTP location. For instructions on how to create a new schedule for an individual Look, see the [Creating a new Look schedule](#) section.
- **Edit settings:** Will appear for custom Looks and it opens the Look Settings menu, allowing you to turn on/off the **Run on Load** setting. When turned on, this setting will cause the Look data to refresh automatically upon selecting the Look from Work Spaces.
- **Merge results:** Select a data set (Claim, Remit, or Denial) to load the Merge Query screen, which allows you to create a new Look and combine the new query with the previously saved Look data.

This action is most beneficial for when you are looking to overlay benchmarking values onto reported data (from the Claim, Remit, and Denial data sets). For instructions on how to merge benchmarking values with a Look, see the [Analytics Benchmarking](#) section.

Note: When merging, report data is restricted to 5,000 rows of the primary source and the secondary source.

- **Clear cache and refresh:** Clears/refreshes the Look cache in Waystar to view the most current version of the reported data.
- **Move to trash:** Moves the Look to the Work Spaces > Trash tab.

Managing a Look from the Work Spaces list

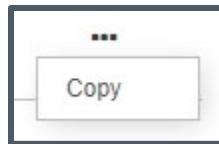
You can perform the actions defined in this section on Looks that appear in the list on the Work Spaces screen.

Keep in mind that there are Looks that Waystar created and there could be custom Looks that you created. The two types of Looks allow for different actions that you can perform. For example, you cannot edit a "Created by Waystar" Look, but you can copy it and then edit that copy.

To manage a Look from the Work Spaces list:

1. Go to **ANALYTICS > Analytics > Work Spaces**.
2. From the **Looks** areas of the Work Spaces screen, locate the appropriate Look, and then click the three-dot menu on the far right.

The menu will display actions based on whether the Look is "**Created by Waystar**," which only allows you to copy the Look.



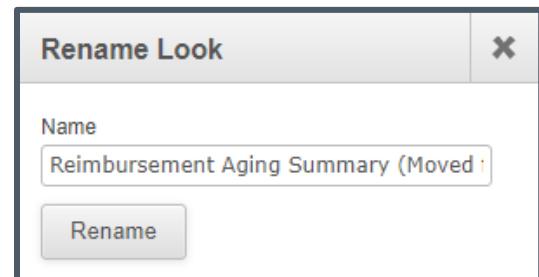
Or is a **custom Look** that allows you to perform more actions. Keep in mind that after you make a copy of a "Created by Waystar" Look, that copied Look is now custom and you would then see this menu.



3. From the menu, select the appropriate action:

- **Rename:** Opens the Rename Look screen.
 - In the **Name** field, enter an appropriate name for the Look
 - Click the **Rename** button.

The Look will now appear in the list under the new name.



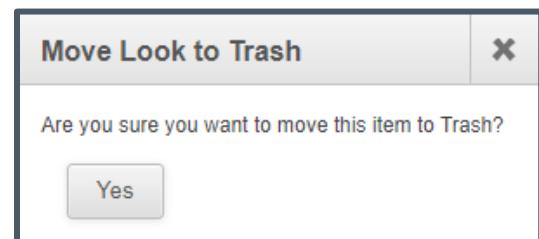
Rename Look

Name
Reimbursement Aging Summary (Moved)

Rename

- **Trash:** Opens the Move Look to Trash screen. If you're sure you want to move the Look to the Trash tab, click the **Yes** button.

From there, you can retrieve the Look or permanently delete it.



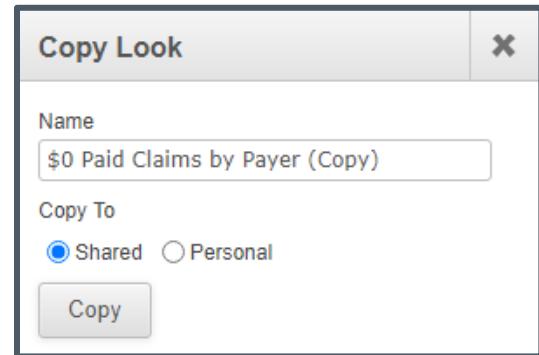
Move Look to Trash

Are you sure you want to move this item to Trash?

Yes

- **Copy:** Opens the Copy Look screen. This action allows you to copy custom or "Created by Waystar" Looks.
 - In the **Name** field, type the name you want for the Look.
 - From the Copy To radio buttons, select to copy it to the **Shared** folder or your **Personal** folder.
 - Click the **Copy** button.

The Look is copied as a custom Look into the folder you specified. If it was a "Created by Waystar" Look, you can now perform the other actions defined in this section.



Copy Look

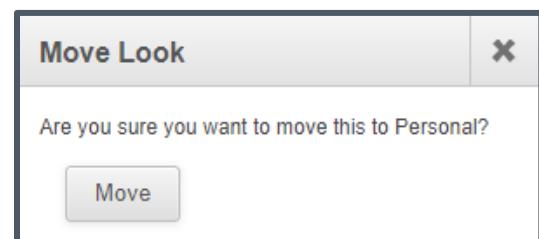
Name
\$0 Paid Claims by Payer (Copy)

Copy To

Shared Personal

Copy

- **Move:** Opens the Move Look screen. If you're sure you want to move the Look to the appropriate tab (based on where the Look is currently located), click the **Move** button. The Look will now appear within the indicated tab.



Move Look

Are you sure you want to move this to Personal?

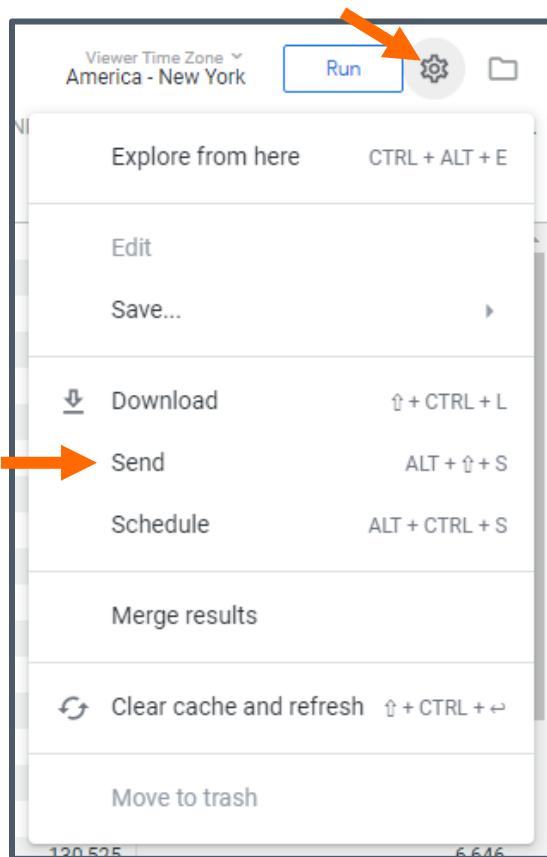
Move

Sending an individual Look

If you do not want to [schedule recurring reporting](#), the Analytics application allows you to send a one-time Look delivery.

To send a one-time Look link to your email address:

1. From the [Work Spaces](#) screen within the **Shared** or **Personal** tabs, locate/search for the Look you would like to send.
2. Click the appropriate Look item.
The selected Look screen will open.
3. Hover over the top-right corner of the Look and click the **Explore actions** (cog) icon.
4. From the dropdown menu, select **Send**.



The Send [Look name] screen will open.

Send \$0 Paid Claims by Payer (Custom) X

Title Give your schedule a name.

\$0 Paid Claims by Payer (Custom)

Where should this data go?

Email  

Email *
e.g. test@example.com

Format data as

CSV XLSX JSON – Simple Text HTML

▶ Filters Check Check Date is any time Remit Account Is any value Remit Claim Status Is any value Remit Payer Class Is an...

▶ Advanced options

Send

5. Complete the following information:

- **Title:** Enter an appropriate name for the delivery in the **Title** field. This name will display for the reported data once it lands in the recipient's email inbox.
- **Where should this data go?:** Click one of the following:
 - **Email:** Sends an email with a link to the scheduled report on the **Analytics > Schedules > Exports** screen.
Note: The following FTP selection appears only if the FTP feature is enabled at the domain or child-account level.
 - **FTP:** Saves the scheduled report in your organization's default domain FTP location inside the Download folder. You'll also receive an email letting you know the report finished processing and the email will provide a link to the **Analytics > Schedules > Exports** screen.

- **Email** If necessary, update the **Email** address where the reported data will be delivered. The email address saved to your Waystar account profile will be entered here by default.

To deliver the reporting to multiple email addresses, set up the appropriate email addresses in a comma-delimited list (e.g., john.doe@company.com, jane.doe@company.com, etc.) in the **Email** field.

- **Format data as:** Select a Look data option:

Note: If you selected FTP delivery, the report also appears in your organization's default domain FTP location inside the Download folder.

- **CSV:** The delivered link will direct you to the **Analytics > Schedules > Exports** screen and a .CSV spreadsheet of the reported data will automatically download to your system.
- **XLSX:** The delivered link will direct you to the **Analytics > Schedules > Exports** screen and a .XLSX spreadsheet of the reported data will automatically download to your system.
- **JSON - Simple:** The delivered link will direct you to the **Analytics > Schedules > Exports** screen and a JSON (JavaScript Object Notation) file of the reported data will automatically download to your system.
- **Text:** The delivered link will direct you to the **Analytics > Schedules > Exports** screen and a simple text file of the reported data will automatically download to your system.
- **HTML:** The delivered link will direct you to the **Analytics > Schedules > Exports** screen and an HTML file of the reported data will automatically download to your system.

Looks data in the above formats will be available on the Exports screen, allowing you to download/access the data at any time. For more information and instructions on how to download auto-generated reporting, see the [Downloading exported/generated reports](#) section.

- **Filters:** If necessary, click to expand the reporting filters for the Look. You can add to and/or modify the reporting filters as explained in the [Updating Look filters](#) section.
- **Advanced options:** If necessary, click to expand the advanced options to define additional customizations for your delivery. The options available in this menu depend on the selected format of your delivery.

By default, delivered reporting will include *only the first 500 generated results*. Select **All Results** from the **Limit** area to have **all** the generated results included in the delivery.

The screenshot shows a reporting interface with a sidebar on the left containing various filters. A large orange arrow points to the 'Advanced options' button, which is currently expanded. The expanded 'Advanced options' section contains two main sections: 'Limit' and 'Format options'. Under 'Limit', there are two radio buttons: 'Results in Table' (selected) and 'All Results'. Under 'Format options', there are two checked checkboxes: 'Apply visualization options' and 'Formatted data values'. At the bottom right of the expanded section is a blue 'Send' button.

6. Once you are satisfied with all the entries above, click **Send** to deliver a link of the reporting to the specified email address.

A link to the reporting data will be delivered to the specified email address(es):

Hello [redacted],

[Claim Lag Summary](#) is ready to view.

Thanks,
Analytics Team

If you have any difficulties viewing this report, please contact Waystar Support by opening a case in the Waystar Support & Training Center or calling 1-877-494-7633.

CONFIDENTIALITY NOTICE: This e-mail message, including any attachments, is for the sole use of the intended recipient(s) and may contain confidential and privileged information. Any unauthorized review, use, disclosure or distribution is prohibited. Waystar, Inc. has strict policies regarding the content of e-mail communications. ***It is intended only for the use of the individual or entity named above. If you are not the intended recipient(s), you are hereby notified that any unauthorized disclosure, dissemination, distribution or copy of this communication, or the information contained herein, may be strictly prohibited by law.*** If you have received this communication in error, please notify Waystar immediately by telephone at 1-877-494-7633 and destroy all copies of the original message. Thank you.

To view the linked reported data:

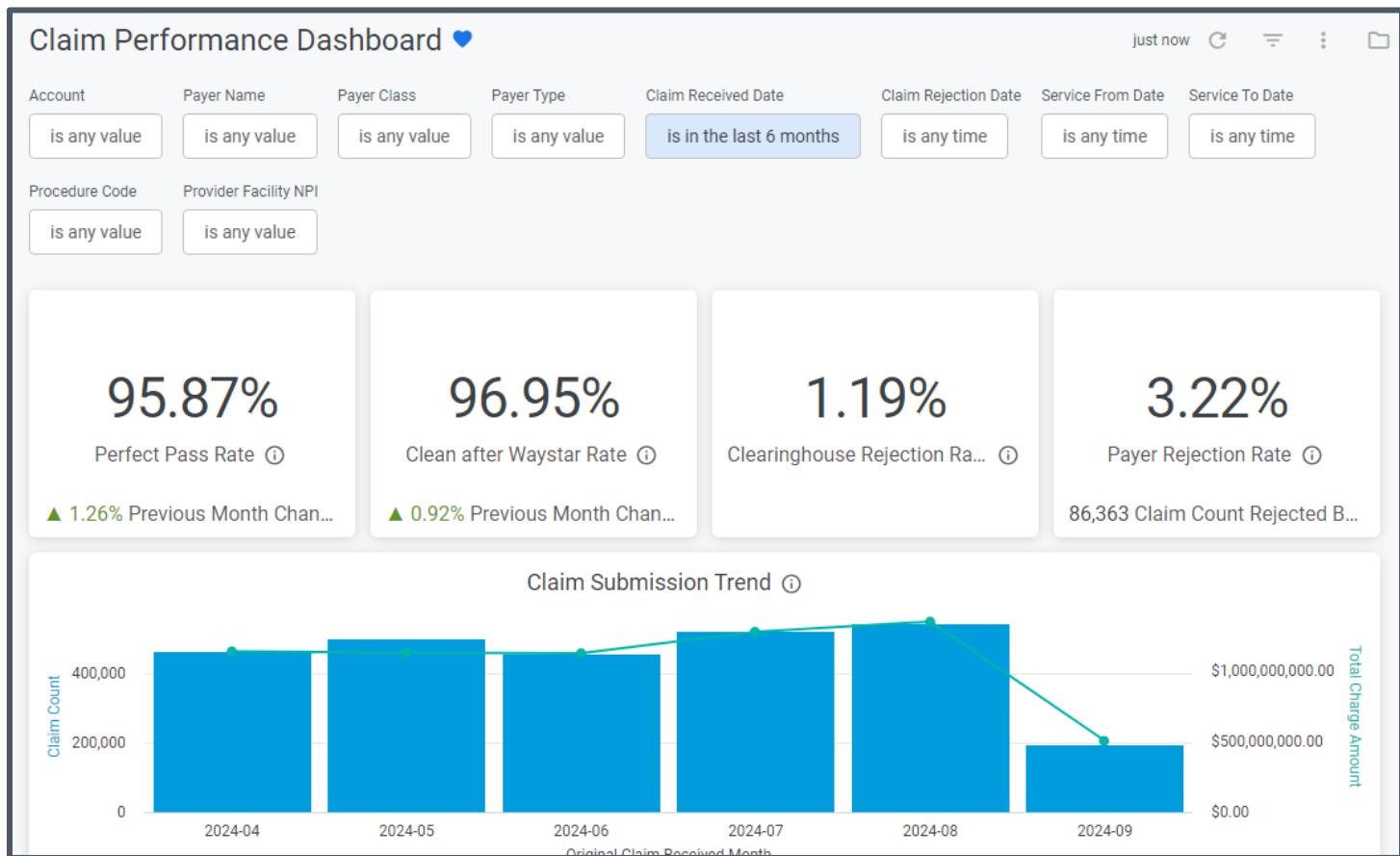
1. To access the reported data, you must first log into the Waystar portal.
2. Click the link in the email.

The **ANALYTICS > Analytics > Schedules > Exports** screen will open.

3. The download process will automatically begin, opening a Download screen from which you can download the reported data file to your system.
 - The generated data will be included in the **Exports** list, allowing you to download/access the data at any time. For more information and instructions on how to download reporting, see the [Downloading exported/generated reports](#) section.
 - If you had selected an FTP delivery, the report will also appear in your organization's default domain FTP location inside the **Download** folder.

Viewing/managing Looks within a dashboard

After you select a dashboard in the Dashboards area of the Work Spaces screen, you may see summary tiles including Looks data and visualizations that were saved to the dashboard.



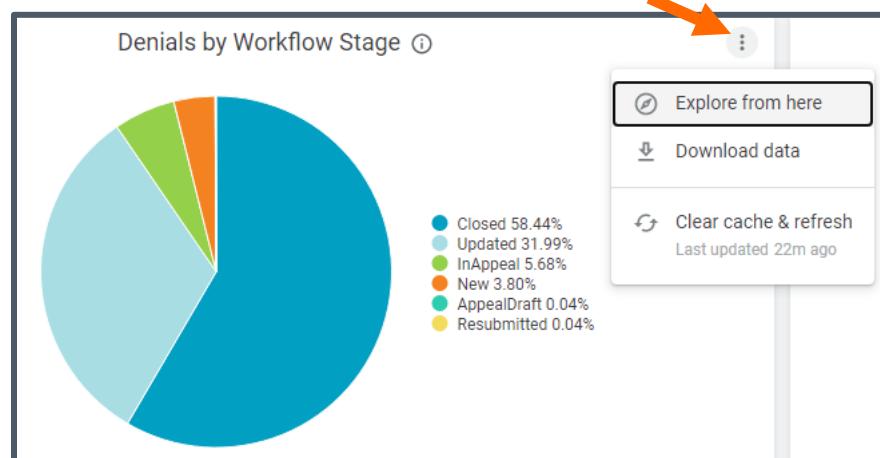
To load the Details screen that displays a preview of the associated data, click a numerical link or an interactive chart item (e.g., bar chart, point on a line chart, etc.) on these tiles.

Details		CLAIM Payer Payer ID is "Z1161"																	
Account	Archived (Yes / No)	Batch ID	Batch Name	Billing Note	Claim Number	Claim ID	Claim Type	Discharge Status	Event Status	Facility Type	Filing Indicator Code	Frequency Code	Has POF (Yes / No)	ION Number	Instance ID	Has Remit (Yes / No)	Payer	Patient City	Patient MRN
1	No	51294189000	2021-06-15BatchFile_8	0	00000000000000000000000000000000	00000000000000000000000000000000	Institutional	01	CLAIM REJECTED BY SECOND EDITS	13	CI	1	No	0	0	No	CIGNA (Connecticut General, Equicor, Equitable)	Plandome village	00000000000000000000000000000000
2	No	51294189000	2021-05-22BatchFile_8	0	00000000000000000000000000000000	00000000000000000000000000000000	Institutional	01	CLAIM REJECTED BY SECOND EDITS	13	MA	1	No	0	0	No	Medicare A - Novitas	East Jordan	00000000000000000000000000000000
3	No	51294189000	2021-05-20BatchFile_4	0	00000000000000000000000000000000	00000000000000000000000000000000	Institutional	01	CLAIM REJECTED BY SECOND EDITS	13	MC	1	No	0	0	No	Molina Healthcare of Texas	Spring Mills	00000000000000000000000000000000
4	No	51294189000	2021-05-31BatchFile_4	0	00000000000000000000000000000000	00000000000000000000000000000000	Institutional	02	CLAIM REJECTED BY SECOND EDITS	13	MC	1	No	0	0	No	Molina Healthcare of Texas	Montpelier	00000000000000000000000000000000
5	No	51294189000	2021-05-23BatchFile_20	0	00000000000000000000000000000000	00000000000000000000000000000000	Institutional	01	CLAIM REJECTED BY SECOND EDITS	13	MC	1	No	0	0	No	Molina Healthcare of Texas	Snoek	00000000000000000000000000000000
6	No	51294189000	2021-05-29BatchFile_10	0	00000000000000000000000000000000	00000000000000000000000000000000	Institutional	01	CLAIM REJECTED BY SECOND EDITS	13	CI	1	No	0	0	No	Aetna	Iuka	00000000000000000000000000000000
7	No	51294189000	2021-05-19BatchFile_15	0	00000000000000000000000000000000	00000000000000000000000000000000	Institutional	02	CLAIM REJECTED BY SECOND EDITS	13	MC	1	No	0	0	No	Molina Healthcare of Texas	Lochearn	00000000000000000000000000000000

Click the buttons at the top of the Details preview screen to do the following:

- Explore from Here:** View the expanded version of the Look in the [Explore](#) area of the Analytics application.
- Download Results:** Opens the Download pop-up screen where you can build a download of the report in any of the following formats:
 - TXT (tab-separated values)
 - Excel Spreadsheet (Excel 2007 or later)
 - CSV
 - JSON
 - HTML
 - Markdown
 - PNG (Image of Visualization)

These actions can also be accessed by clicking the three-dot icon in the top-right corner of a tile.



Updating Look filters

Filters may be applied when [building Looks](#) and you can redefine the parameters for any of these preset filters. Redefining these filters will update all impacted Looks data.

To update a Look filter:

1. Go to **ANALYTICS > Analytics > Work Spaces** and select the appropriate tab, such as Dashboard, Shared, or Personal.
2. Select the desired Look from the **Looks** areas of the associated Work Spaces screen.

The Look will load. If the Look has any applied filters, they will display along the top of the screen.

A screenshot of a web application titled "Claim Lag Summary". At the top, there is a horizontal bar containing the title and several filter conditions separated by "AND": "Claim Payer Name (Waystar) is any value AND Claim Billing Provider Name is any value AND Claim Billing Provider Npi is any value AND Claim Facility Npi is any value". An orange arrow points to the word "Filters" in this bar.

3. Click the **Filters** link to display the dropdown of filters applied to the Look.

A screenshot of the "Claim Lag Summary" Look with the "Filters" section expanded. The filters are listed in a grid format with dropdown menus for each field. The fields include: Claim Payer Name (Waystar), Claim Billing Provider Name, Claim Billing Provider Npi, Claim Facility Npi, Claim Facility Name, and Claim Account. A small "AND" button is visible between the first two rows of filters. An orange arrow points to the "Filters" link in the top left corner of the expanded section.

- Reassign all necessary secondary filter qualifiers from the first field dropdown.
 - Reassign all necessary tertiary filter qualifiers (if available) from the second field dropdown.
 - For date range filters, reassign the date range qualifiers using any of the dropdowns to the right of the field.
 - To add or remove filter values, click the **Explore actions** (cog) icon in the upper-right of the Look, and select **Edit** from the dropdown menu. For more filter information, see the [Building a new Look](#) section.
4. When satisfied with your filter changes, hover over the top-right corner of the screen, and click the **Run** button.

A screenshot of the Look interface showing the bottom navigation bar. It includes a timestamp "2m ago", a "Viewer Time Zone" dropdown set to "America - New York", and three buttons: "Run" (highlighted with an orange arrow), "Settings", and "Folders".

Downloading individual Look data

This section explains how to download a Look's data.

To download individual Look data:

1. Go to **ANALYTICS > Analytics > Work Spaces** and select the appropriate tab, such as Dashboard, Shared, or Personal.
2. From the Looks area of the list, select the appropriate Look.
The selected Look will open.

Claim Lag Summary just now

Filters Claim Payer Name (Waystar) is any value AND Claim Billing Provider Name is any value AND Claim Billing Provider Npi is any value AND Claim Facility Npi is any value AND Claim Facility Name is any value A...

	Account	Average Waystar Lag Days	Average Payer Lag Days	Average Charge Lag Days	Average Life Cycle Days
1	America Healthcare Inc (729)	Ø	Ø	Ø	Ø
2	Waystar Training Account (5076)	Ø	Ø	Ø	Ø
3	America Healthcare Hospital (4520)	0.25	12.54	22.76	23.01
4	America Healthcare Primary Care (188)	0.19	9.92	22.81	23.00
Totals		0.19	10.25	22.80	23.00

3. Hover over the top-right corner of the Look and click the **Explore actions** (cog) icon.
4. From the dropdown menu that will open, select **Download**.

Claim Lag Summary just now

Provider Name is any value AND Claim Billing Provider Npi is any value AND Claim Facility Npi is any value AND Claim Facility Na...

Avg Days	Average Payer Lag Days	Average Charge Lag Days	Average Life Cycle Days
Ø	Ø	Ø	Ø
Ø	Ø	Ø	Ø
0.25	12.54	22.76	23.01
0.19	9.92	22.81	23.00
0.19	10.25	22.80	23.00

Viewer Time Zone America - New York

Explore from here CTRL + ALT + E

- Edit
- Save... ▾
- Download** ⇩ ⌘ + ⌃ + L
- Send ALT + ⌘ + S
- Schedule ALT + ⌃ + S
- Merge results
- Clear cache and refresh ⌘ + ⌃ + ⌂
- Move to trash

The Download screen will open.

- Configure the download using the following options.

Download

Format
 CSV

Filename
Claim Lag Summary 2024-09-13T1111

Results
 With visualizations options applied i
 As displayed in the data table

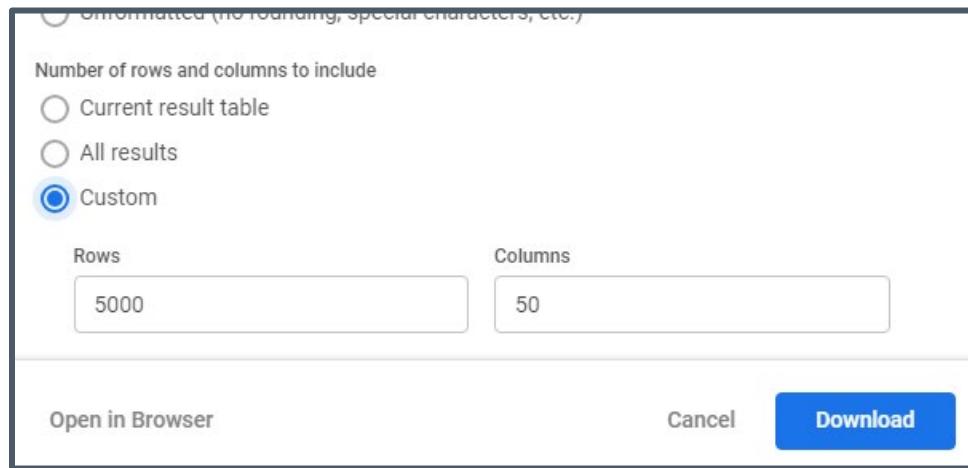
Data values
 Formatted
 Unformatted (no rounding, special characters, etc.)

Number of rows and columns to include
 Current result table
 All results
 Custom

[Open in Browser](#) [Cancel](#) [Download](#)

- File Format:** Select one of the following from the dropdown:
 - TXT (tab-separated values)
 - Excel Spreadsheet (Excel 2007 or later)
 - CSV
 - JSON
 - HTML
 - Markdown
 - PNG (Image of Visualization)
- Filename:** *Optional.* Update the default file name as desired.

- **Results:** To configure how you want the Look visualization applied to your download, select one of the following radio buttons:
 - **With visualization options applied:** Some of the visualization settings will be applied to the download, causing the downloaded data to appear similar to what is displayed in the Analytics application. Any customization of the data will be reflected in the download.
 - **As displayed in the data table:** Visualization options will not be applied, and the download will appear like a standard data table.
- **Data values:** To configure how you want the data results to appear in your download, select one of the following radio buttons:
 - **Formatted:** Data will appear in your download similar to what is shown in the Analytics application.
 - **Unformatted (no rounding, special characters, etc.):** No special formatting will be applied to your download. For instance, long numbers will **not** be rounded and no special characters will be added that may have been saved in the Look.
- **Number of rows and columns to include:** To choose how much data you want included in your download, select one of the following radio buttons:
 - **Current result table:** Selected by default, which will limit the rows in your download by the row limit set in the Look.
 - **All results:** Downloads all results of the Look.
 - **Custom:** Will open additional fields from which you can select the number of rows and columns you want included in the downloaded data.



6. When finished with your selections, do either of the following:
 - When available for the selected format, click the **Open in Browser** button to open the Look data in a new browser tab.
 - To download the Look data to your system, click the **Download** button.

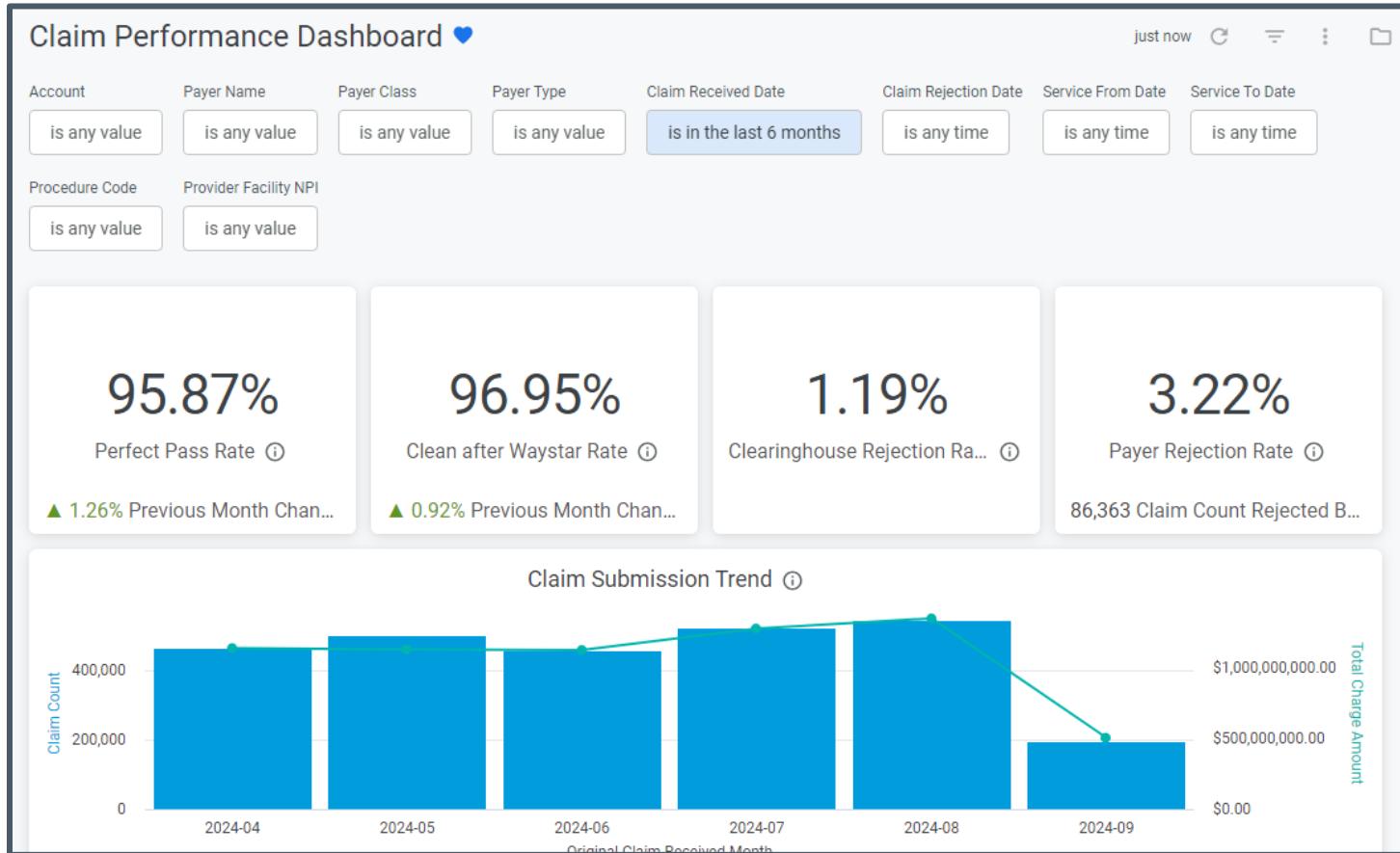
Downloading Look data within a dashboard

This section explains how to download a tile's Look data from within a dashboard.

To download Look data within a dashboard:

1. Go to **ANALYTICS > Analytics > Work Spaces** and select the appropriate tab, such as Dashboard, Shared, or Personal.
2. From the Dashboards area of the list, select the appropriate dashboard.

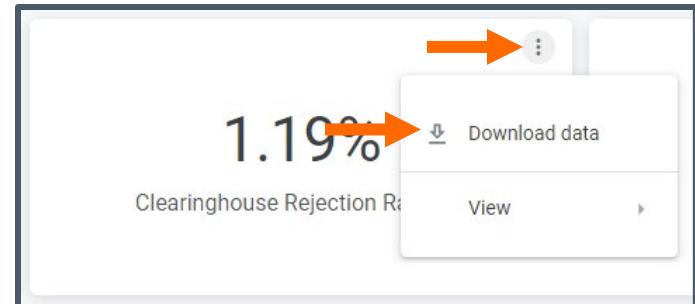
The dashboard will open displaying summary tiles, including Look data and visualizations.



3. From the appropriate tile, begin the download process using either of the following two methods:

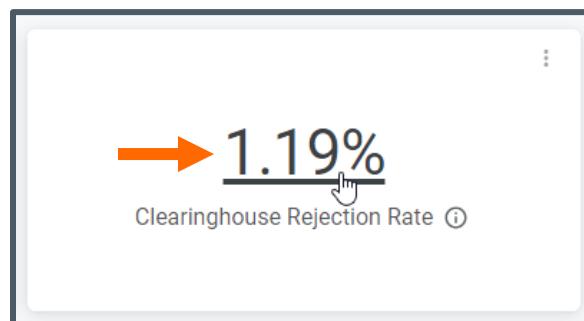
- **From the tile:**

- a. Click the **Tile actions** (three dot) icon in the upper-right corner.
- b. From the dropdown menu that will open, select **Download data**.



- **From the tile chart:**

- a. Click a numerical link or a drilldown link in an interactive chart item, such as a bar chart or a point on a line chart.



The tile details table chart will open with a display preview of the associated data.

- b. In the upper-right corner of the screen, click the **Download** button.

Clearinghouse Rejection Rate							
CLAIMS (10 Filters)							
⚠ Row limit reached. Results may be incomplete. Download results to see more							
Account	Archived (Yes / No)	Batch ID	Batch Name	Billing Note	Claim Number	Claim ID	
1 America Healthcare Primary Care (188)	No	620696614000	2024-03-15BatchFile_13		1280750540 ...	7838602983000	
2 America Healthcare Primary Care (188)	No	620696614000	2024-04-09BatchFile_1		1280750550 ...	7838602982000	
3 America Healthcare Primary Care (188)	No	620696614000	2024-03-30BatchFile_6		1280753220 ...	7838604682000	
4 America Healthcare Primary Care (188)	No	620696614000	2024-04-09BatchFile_18		1280746540 ...	7838604981000	
5 America Healthcare Primary Care (188)	No	620696614000	2024-04-07BatchFile_9		1280757580 ...	7838604047000	
6 America Healthcare Primary Care (188)	No	620696614000	2024-03-29BatchFile_8		1280756980 ...	7838603946000	
7 America Healthcare Primary Care (188)	No	620696614000	2024-03-31BatchFile_2		1280746050 ...	7838604340000	
8 America Healthcare Primary Care (188)	No	620696614000	2024-04-05BatchFile_14		1280756650 ...	7838604332000	
9 America Healthcare Primary Care (188)	No	620696614000	2024-04-03BatchFile_8		1280751380 ...	7838604594000	
10 America Healthcare Primary Care (188)	No	620696614000	2024-03-15BatchFile_7		1280752300 ...	7838604377000	
11 America Healthcare Primary Care (188)	No	620696614000	2024-03-15BatchFile_3		1280749480 ...	7838604329000	
12 America Healthcare Primary Care (188)	No	620696614000	2024-03-30BatchFile_1		1280757200 ...	7838604998000	
13 America Healthcare Primary Care (188)	No	620696614000	2024-03-28BatchFile_15		1280746120 ...	7838604591000	
14 America Healthcare Primary Care (188)	No	620696614000	2024-03-18BatchFile_7		1280749360 ...	7838604653000	
15 America Healthcare Primary Care (188)	No	620696614000	2024-03-26BatchFile_15		1280750220 ...	7838604804000	
16 America Healthcare Primary Care (188)	No	620696614000	2024-03-22BatchFile_12		1280747600 ...	7838604258000	

Using either of the previous methods, the Download [tile name] screen will open.

4. From the **Format** dropdown, select one of the following:

- TXT (tab-separated values)
- Excel Spreadsheet (Excel 2007 or later)
- CSV
- JSON
- HTML
- Markdown
- PNG (Image of Visualization)

5. When available for the selected format, click the **Advanced data options** dropdown and complete the following:

- **Results:** To configure how you want the Look visualization applied to your download, select one of the following radio buttons:
 - **With visualization options applied:** Some of the visualization settings will be applied to the download, causing the downloaded data to appear similar to what is displayed in the Analytics application. Any customization of the data will be reflected in the download.
 - **As displayed in the data table:** Visualization options will not be applied, and the download will appear like a standard data table.
- **Data values:** To configure how you want the data results to appear in your download, select one of the following radio buttons:
 - **Formatted:** Data will appear in your download similar to what is shown in the Analytics application.
 - **Unformatted (no rounding, special characters, etc.):** No special formatting will be applied to your download. For instance, long numbers will **not** be rounded and no special characters will be added that may have been saved in the Look.

Download Clearinghouse Rejection Rate

Format

CSV

▶ Advanced data options

Open in Browser Cancel Download

Download Clearinghouse Rejection Rate

Format

CSV

▼ Advanced data options

Results

With visualizations options applied 

As displayed in the data table

Data values

Formatted

Unformatted (no rounding, special characters, etc.)

Number of rows to include

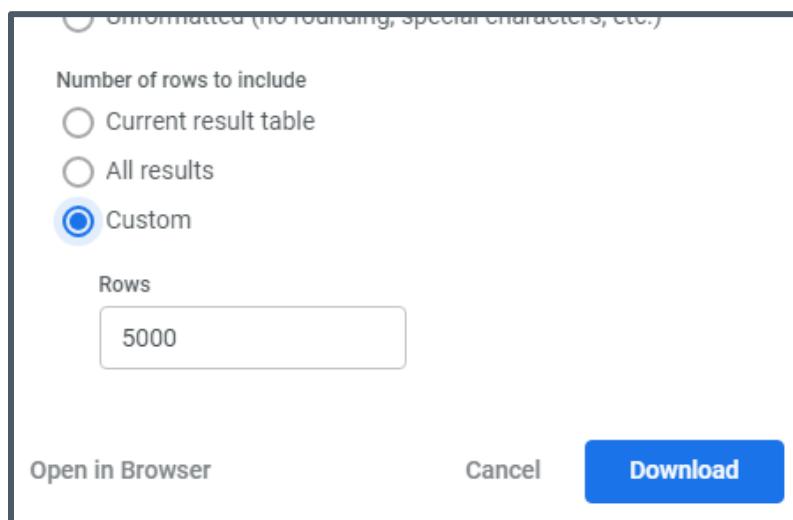
Current result table

All results

Custom

Open in Browser Cancel Download

- **Number of rows to include:** To choose how much data you want included in your download, select one of the following radio buttons:
 - **Current result table:** Selected by default, which will limit the rows in your download by the row limit set in the Look.
 - **All results:** Downloads all results of the Look.
 - **Custom:** Will open an additional field from which you can select the number of rows you want included in the downloaded data.



6. When finished with your selections, do either of the following:
 - When available for the selected format, click the **Open in Browser** button to open the Look data in a new browser tab.
 - To download the Look data to your system, click the **Download** button.

Using column options for Look table charts

This section explains how to use the column options of a Look table chart (also known as a data table) to do such things as freeze columns, copy values, autosize columns, and reset column widths.

Note: This is only for Look table charts (data tables), not for other visualizations such as bar charts. However, even if the Look is not a table chart (for example, it's a bar chart), you can select a specific data point within the bar chart that will then open a table chart of that data point.

Viewing a Look table chart

This section explains how to view a Look table chart from either the Look itself or through a dashboard tile.

To view a Look table chart:

1. Go to **ANALYTICS > Analytics > Work Spaces** and select the appropriate tab, such as Dashboard, Shared, or Personal.

2. Select the appropriate dashboard or Look.

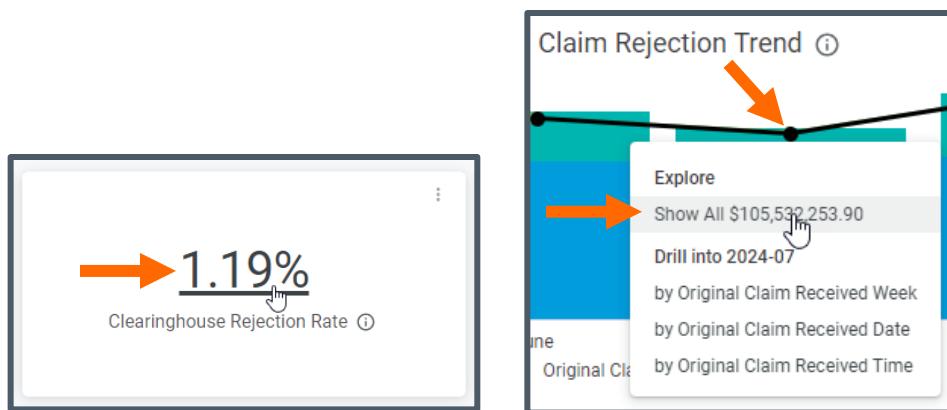
The selected dashboard/Look will open.

3. Do either of the following:

- **From the dashboard tile:**

- If the dashboard tile contains a table chart, you can continue with using the column options explained in this section.
- If the tile contains a numerical link or a drilldown link in an interactive chart item, such as a bar chart or a point on a line chart, click the link. The tile details table chart will open. After you click the appropriate link, you can continue with using the column options explained in this section.

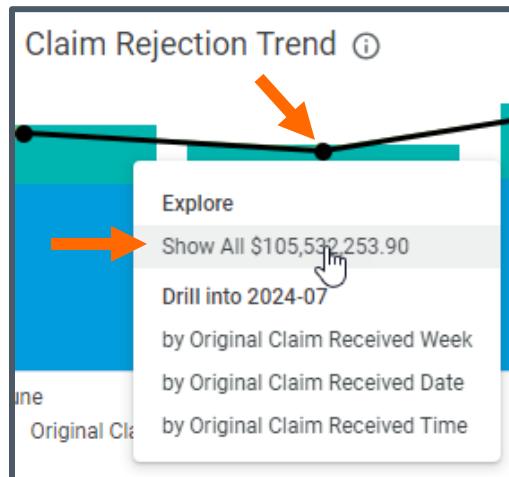
The following shows examples of clickable links in a tile/Look.



- **From the Look:**

- If the Look contains a table chart, you can continue with using the column options explained in this section.
- If the Look contains something other than a table chart, such as a bar chart or a line chart, click one of the interactive links in the chart. The Look details table chart will open. After you click the appropriate link, you can continue with using the column options explained in this section.

The following shows an example of a drilldown link in a bar chart.



Viewing a column header description of a Look table chart

This section explains how to view a column header description in a Look table chart.

To view a column header description of a Look table chart:

1. [View a Look table chart](#).

2. Hover over a column header.

The name of the column along with its description will open.

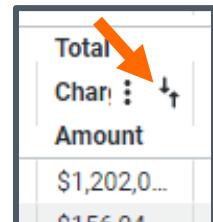
Account	Average
COLUMN NAME	
Account	
DESCRIPTION	
	The Waystar designated customer account name and ID.

Sorting by column for a Look table chart

This section explains how to sort a Look table chart by one or more of its columns.

To sort by column for a Look table chart:

1. [View a Look table chart](#).
2. Hover over a column header.
3. Click the arrow icon that will appear.
 - To sort in reverse (ascending or descending) order, click the up or down arrow icon that will appear.
 - To sort by more than one column, hold down the **[Shift]** key and then click the arrow icon on multiple columns.



Moving columns of a Look table chart

This section explains how to move a table column to the left or right inside a Look table chart.

To move a column of a Look table chart:

1. [View a Look table chart](#).
2. Click a column header and hold down the mouse button.
3. Drag the column to the left or the right.

When moving the column, a four-headed arrow will appear along with the column name.



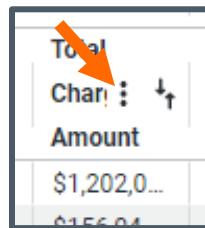
4. Release the mouse button to place the column.

Freezing a column of a Look table chart

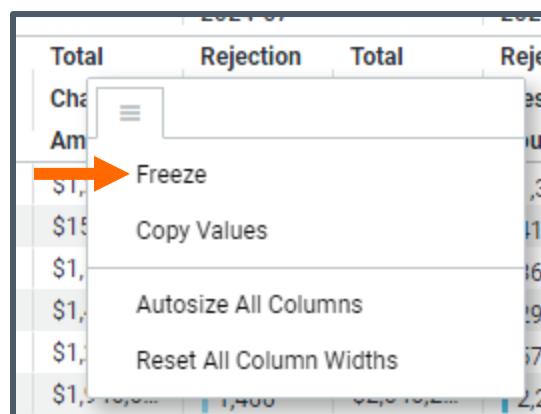
This section explains how to freeze a table column to the left side of the chart. The frozen column remains visible on the left side if you scroll horizontally. You can freeze more than one column.

To freeze a column of a Look table chart:

1. [View a Look table chart](#).
 2. Hover over a column header.
 3. Click the **Column Options** (three dot) icon that will appear.



4. From the dropdown that will open, select **Freeze**.



The frozen column remains visible on the left side if you scroll horizontally. You can freeze more than one column.

5. To unfreeze a column, click the **Column Options** (three dot) icon again, and select **Unfreeze**.

Copying column values of a Look table chart

This section explains how to copy values in the column, which you can then paste into a spreadsheet, text file, or a Looker filter.

To copy column values of a Look table chart:

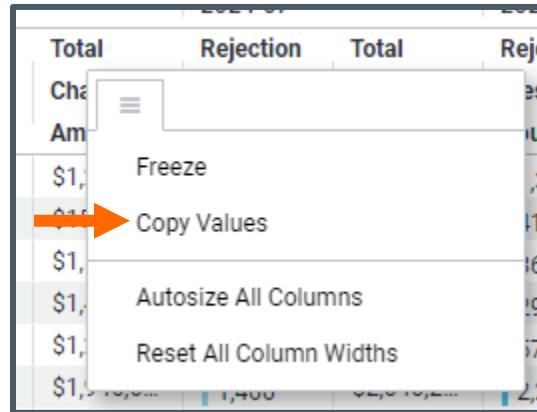
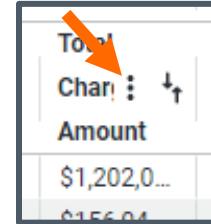
- ### 1. View a Look table chart.

- 2. Do any of the following:**

- To copy the column header and all column values:

- a. Hover over a column header.
 - b. Click the **Column Options** (three dot) menu that will appear.
 - c. From the dropdown that will open, select **Copy Values**.

The column header and the values in the column are now copied to your computer's clipboard.



- To copy a single cell:

- a. Click a cell within the table chart (be careful not to click on a link within the cell because the detail screen for that link will open).

A gray box will display around the cell.

- b. Copy the cell using the keyboard shortcuts **Ctrl+c** (Windows) or **Command-c** (Mac).

The cell value is now copied to your computer's clipboard.

- To copy multiple cells, do any of the following:

- Click-and-drag:

- i. Starting in a cell, click and drag your cursor to select multiple cells (be careful not to click on a link within the cell because the detail screen for that link will open).

A gray box will display around the cells.

- ii. Copy the cells using the keyboard shortcuts **Ctrl+c** (Windows) or **Command-c** (Mac).

The cell values are now copied to your computer's clipboard.

- [Shift] key:

- i. Click a cell (be careful not to click on a link within the cell because the detail screen for that link will open).

- ii. Hold down the [Shift] key and click in another cell.

All connected cells will display a gray box around them.

- iii. Copy the cells using the keyboard shortcuts **Ctrl+c** (Windows) or **Command-c** (Mac).

The cell values are now copied to your computer's clipboard.

- [Ctrl] key:

- i. Click a cell (be careful not to click on a link within the cell because the detail screen for that link will open).

- ii. Hold down the [Ctrl] key and click in another cell.

Those two cells will display gray boxes round them.

- iii. Click as many cells as desired.

- iv. Copy the cells using the keyboard shortcuts **Ctrl+c** (Windows) or **Command-c** (Mac).

The cell values are now copied to your computer's clipboard.

- Click-and-drag / [Shift] / [Ctrl]:

- i. Use a combination of the click-and-drag or [Shift] method to select multiple connected cells and then use the [Ctrl] key to select additional individual cells.

- ii. Click as many cells as desired.

- iii. Copy the cells using the keyboard shortcuts **Ctrl+c** (Windows) or **Command-c** (Mac).

The cell values are now copied to your computer's clipboard.

The following is an example using **click-and-drag** or **[Shift]** key and then the **[Ctrl]** key, as explained above.

4,743	\$1,572,9...	4,583	\$1,506,4...	369	\$288,55...	358	\$
4,616	\$1,462,6...	4,480	\$1,419,2...	296	\$229,25...	283	\$
1,985	\$1,221,3...	2,254	\$1,413,8...	576	\$254,85...	3	\$

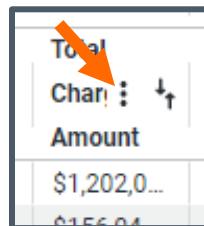
3. Paste the copied value(s) into a spreadsheet, text file, or Looker filter.

Autosizing column widths of a Look table chart

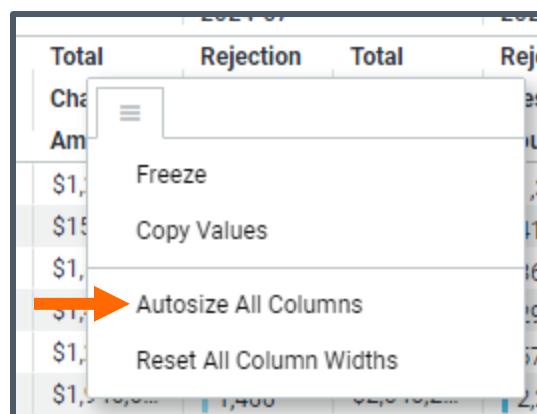
This section explains how to autosize column widths of a Look table chart to fit its column heading name or its longest data value, whichever is wider.

To autosize column widths of a Look table chart:

1. [View a Look table chart](#).
2. Hover over a column header.
3. Click the **Column Options** (three dot) icon that will appear.



4. From the dropdown that will open, select **Autosize All Columns**.



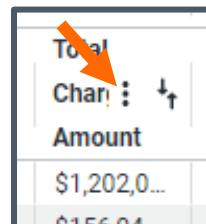
Column widths will fit their column heading name or their longest data value, whichever is wider.

Resetting column widths of a Look table chart

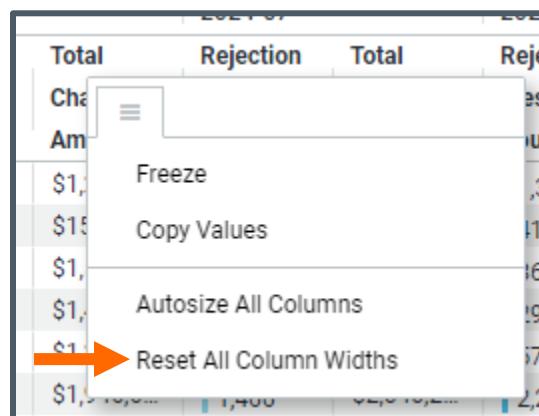
This section explains how to reset column widths of a Look table chart to its default setting.

To reset column widths of a Look table chart:

1. [View a Look table chart](#).
2. Hover over a column header.
3. Click the **Column Options** (three dot) icon that will appear.



4. From the dropdown that will open, select **Reset All Column Widths**.



Column widths will reset to their default setting.

Working with dashboards in Work Spaces

This section explains the various ways you can interact with dashboards, including creating your own custom ones.

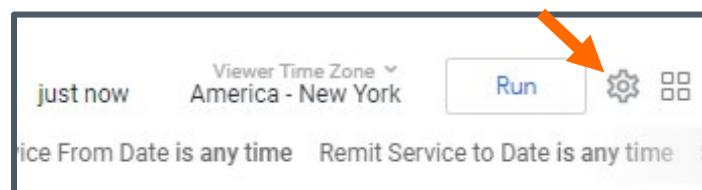
Adding a custom dashboard

The following explains how to add a user-defined custom dashboard (as compared to one created by Waystar) from a Look or an Explore.

Note: As explained in the following process, you can apply the Look or Explore non-custom filters as the dashboard filters rather than creating filters from scratch.

To add a custom dashboard:

1. Go to **ANALYTICS > Analytics > Work Spaces** and select the appropriate tab, such as Dashboard, Shared, or Personal.
2. From the Looks area of the list, select the appropriate Look.
3. From the opened Look, hover over the top-right corner of the screen, and then click the **Explore actions** (cog) icon that will appear.

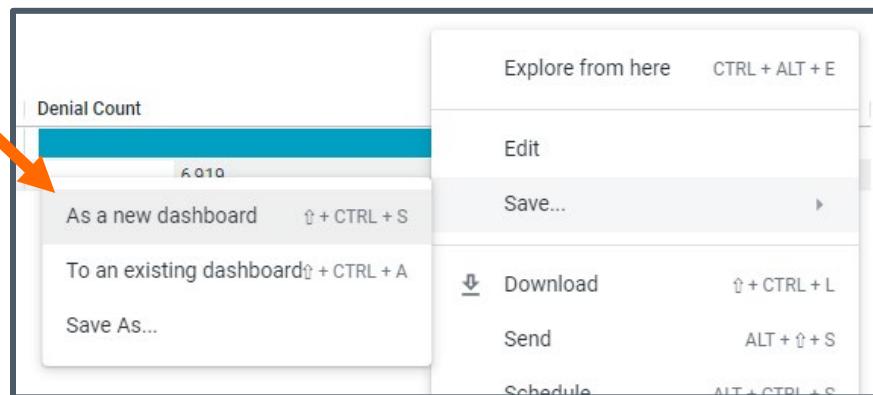


At this point, you can add a new dashboard from either the Look you selected or from the Explore that was used to create the Look.

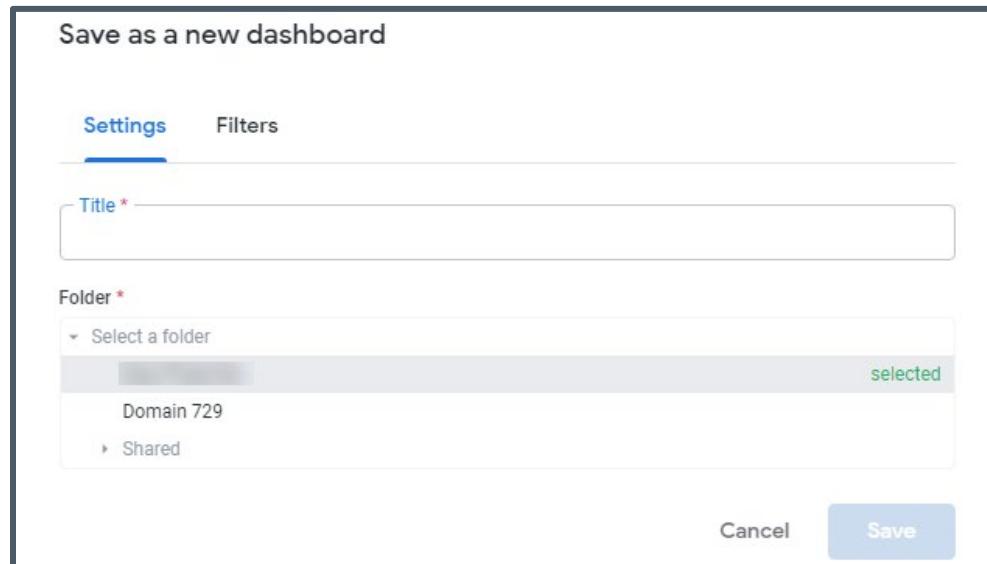
4. Do either of the following:
 - **Look:** If you want to add a new dashboard from the Look, continue with the next step.
 - **Explore:** If you want to add a new dashboard from the Explore, select **Explore from here** from the Look menu. After the Explore opens, click the **Explore actions** (cog) icon in the upper-right corner and continue with the next step.

The rest of these steps work for adding the dashboard from the Look or from the Explore.

5. From either the Look or the Explore menu, select **Save...**
6. From the flyout menu that will appear, select **As a new dashboard**.



The “Save as a new dashboard” screen will open.



Save as a new dashboard

Settings Filters

Title *

Folder *

Select a folder

Domain 729 selected

Shared

Cancel Save

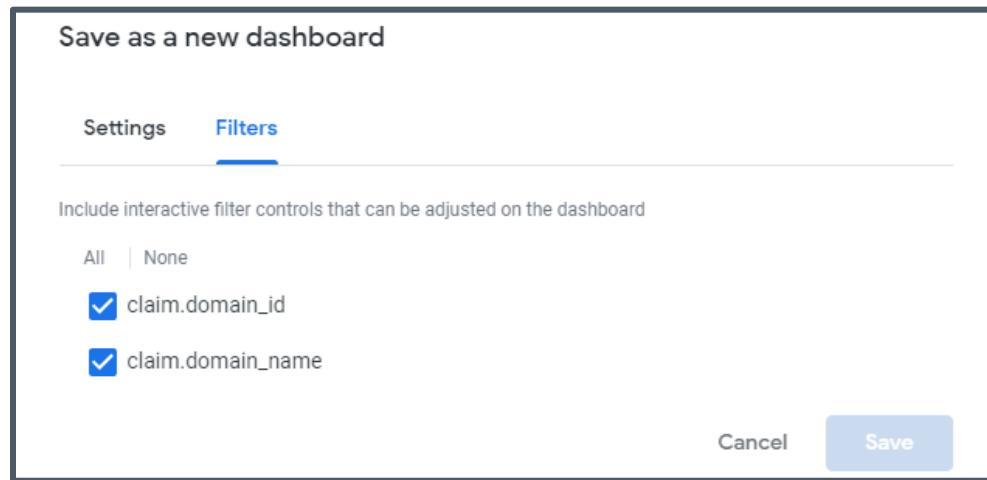
- From the **Settings** tab in the **Title** field, enter a name for your new dashboard.

The name that you enter applies to both the tile (the selected Look or Explore) and the dashboard. To change the tile name, see the [Renaming a tile](#) section.

- Select the folder where you want to save your dashboard.
- To add filters to the new dashboard, do ONE of the following:

- From the **Filters** tab, select the Look’s or Explore’s filters as the dashboard filters.
- Add filters manually; see [Updating dashboard filters](#) for information.

Note: Custom Look/Explore filters cannot become dashboard filters, but they do remain as tile filters.



Save as a new dashboard

Settings Filters

Include interactive filter controls that can be adjusted on the dashboard

All | None

claim.domain_id

claim.domain_name

Cancel Save

- Click the **Save** button.

The new custom dashboard will appear in the list on the Work Spaces screen and the Look or Explore you selected will appear as a tile on the dashboard. To add additional tiles to the dashboard, continue with the next section.

Editing a custom dashboard

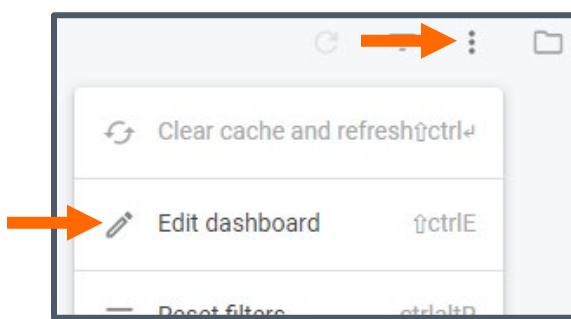
This section explains how to edit a custom dashboard. Keep in mind that you cannot edit a “Created by Waystar” dashboard; you can, however, copy that dashboard and then edit the copy.

Accessing the edit menu for a custom dashboard

The dashboard edit menu is available only for custom, user-defined dashboards. In other words, you cannot access the dashboard edit menu for dashboards that were created by Waystar.

To access a dashboard edit menu:

1. Go to **ANALYTICS > Analytics > Work Spaces** and select the appropriate tab, such as Dashboard, Shared, or Personal.
2. Select a user-defined custom dashboard (not created by Waystar).
The associated dashboard screen will appear.
3. Click the **Dashboard actions** (three-dot) menu in the upper-right corner.
4. From the menu that will open, select **Edit dashboard**.



The dashboard edit toolbar will open above the dashboard.



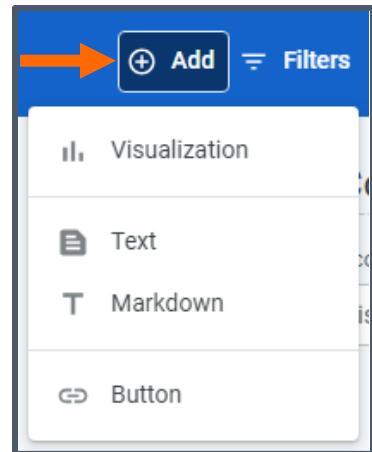
The screen will update to display a row of buttons at the top of the dashboard, which are explained in the following sections:

- [Adding a tile](#)
- [Adding a filter](#)
- [Updating settings](#)

Adding a tile

To add a tile to a custom dashboard:

1. [Access the dashboard edit menu](#) by selecting **Edit dashboard** from the **Dashboard actions** (three-dot) menu in the top-right corner of a dashboard.
2. From the edit menu toolbar above the dashboard, click the **Add** button. From the dropdown menu that will open, select from the following:
 - **Visualization** opens the Choose an Explore screen, allowing you to select an Explore data set and build a Look to be added to the selected dashboard. Once you have selected a data set from the Choose an Explore screen:
 - To create a Look, see the [Building a new Look](#) section for instructions.
 - If editing a tile (as explained in “Building a new Look”), you can navigate to the expanded version of the Explore report building tool by clicking the **Explore from Here** link at the top of the Edit Tile screen.



The screenshot shows the 'Edit Tile' interface. At the top, it says 'Edit Tile' and has buttons for 'Explore from Here', 'Cancel', and 'Save'. Below that is the tile title 'Avg Days to Pay (Primary)'. To the right are 'Time Zone' and 'Run' buttons. The main content area shows a chart with a legend for 'Remits' and 'Check Month is any time'. There are also 'Filters' and 'Visualization' tabs. At the bottom are various dashboard management buttons like 'Forecast' and 'Edit'.

- **Text** opens the Add Text screen for adding a text-based tile to the dashboard. Add a **Title**, **Subtitle**, and **Body** text. You can use the Markdown syntax to format the body text.

Renaming a tile

You can only rename tiles for custom dashboards (not for “Created by Waystar” dashboards; however, you can copy the Waystar dashboard and then edit that copy).

To rename a tile in a dashboard:

1. [Access the dashboard edit menu](#) by selecting **Edit dashboard** from the **Dashboard actions** (three-dot) menu in the top-right corner of a dashboard.
2. Once in edit mode, you can click any tile name and change it.
3. When finished renaming tiles, click the **Save** button on the right side of the blue edit menu toolbar above the dashboard.

Rearranging a tile

To rearrange a tile in a dashboard:

1. [Access the dashboard edit menu](#) by selecting **Edit dashboard** from the **Dashboard actions** (three-dot) menu in the top-right corner of a dashboard.
2. Grab a tile by clicking AND HOLDING the icon in the top-left corner of a tile.

ID	Claim Number	Total Charge Amount
1 2581617577000	875906020 ...	\$314,850.00
2 4472073258000	1036056360 ...	\$156,000.00
3 4791728359000	1062768110 ...	\$147,968.00
4 2732822487000	892431120 ...	\$140,171.00
5 4534538710000	1029781822 ...	\$138,882.00
6 3840645755000	991017480 ...	\$138,220.00
7 3271969926000	940242970 ...	\$136,940.00
8 2556336600000	872690480 ...	\$134,949.00
9 2842822451000	903313560 ...	\$134,949.00
10 4174736292000	1019808691 ...	\$134,631.00

3. Move it to the desired position in the dashboard.
4. Click the **Save** button on the right side of the blue edit menu toolbar above the dashboard.

Resizing a tile

To resize a tile in a dashboard:

1. [Access the dashboard edit menu](#) by selecting **Edit dashboard** from the **Dashboard actions** (three-dot) menu in the top-right corner of a dashboard.
2. Hover over the bottom-right corner of the desired tile to display the triangle icon.
3. Click the corner of the tile and hold down your left mouse button and resize the tile as desired:

Claim ID	Claim Number	Total Charge Amount
1 2581617577000	875906020 ...	\$314,850.00
2 4472073258000	1036056360 ...	\$156,000.00
3 4791728359000	1062768110 ...	\$147,968.00
4 2732822487000	892431120 ...	\$140,171.00
5 4534538710000	1029781822 ...	\$138,882.00
6 3840645755000	991017480 ...	\$138,220.00
7 3271969926000	940242970 ...	\$136,940.00
8 2556336600000	872690480 ...	\$134,949.00
9 2842822451000	903313560 ...	\$134,949.00
10 4174736292000	1019808691 ...	\$134,631.00

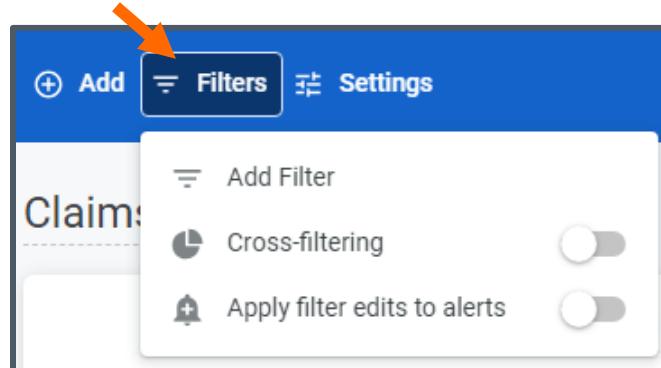
4. Click the **Save** button on the right side of the blue edit menu toolbar above the dashboard.

Adding a filter

To add a filter to a custom dashboard:

1. [Access the dashboard edit menu](#) by selecting **Edit dashboard** from the **Dashboard actions** (three-dot) menu in the top-right corner of a dashboard.
2. Click the **Filters** button.

A dropdown menu will open that lets you add a filter or toggle cross-filtering or apply filter edits to alerts.



3. To add a filter, from the dropdown, select **Add Filter**.

IMPORTANT: If a Look in the dashboard was created by Waystar, you must use this filtering tool to filter the Look data.

The Add Filter screen will open, populated with fields (dimensions or measures) from any Explores that were used in the creation of this dashboard's tiles, such as Claims, Denials, and Remits shown in the following example.



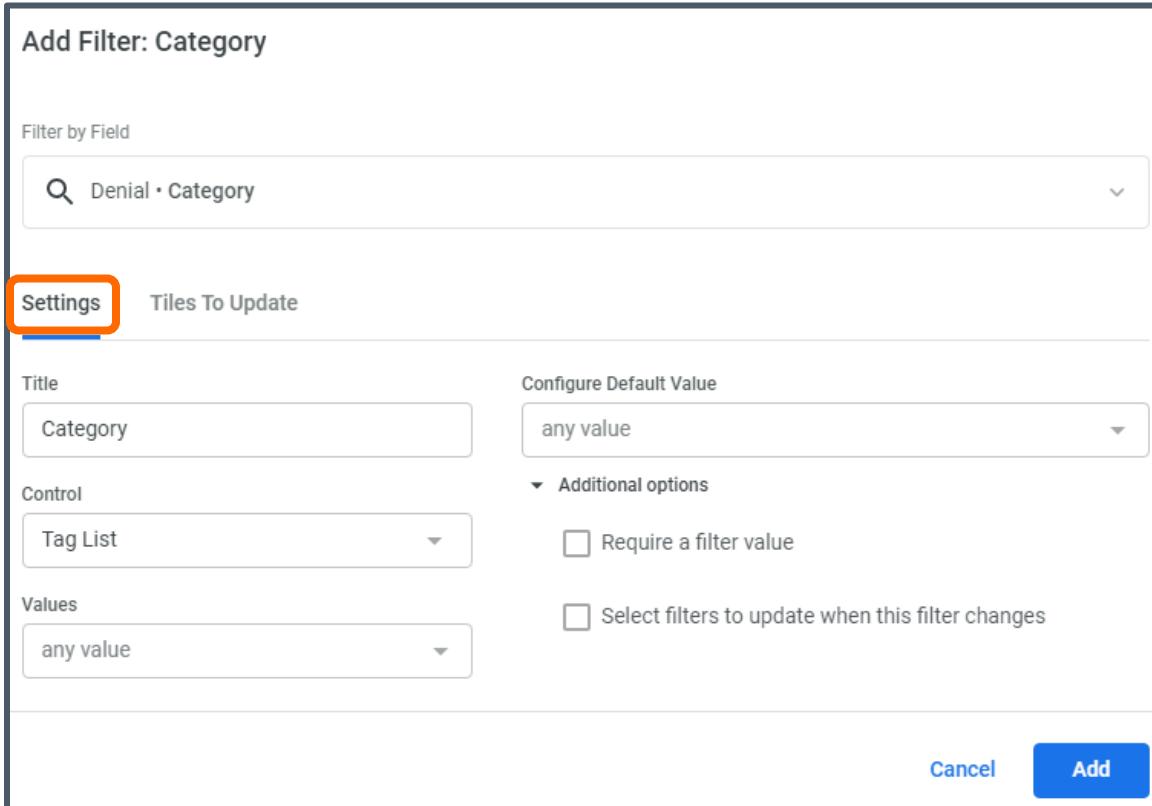
4. You can click the arrow to the left of an Explore to display its views, which can also be expanded to display the view's fields.
5. To locate a field to filter by, you can do either of the following:
 - In the **Filter by Field** search field, enter a field name. This displays that field where it exists in the Explores.
 - You can locate a field within an expanded Explore (with or without searching for it first).

- From an expanded Explore, click the appropriate field. For example, Claims > Claim > Payer > Payer Name (Account).

- Click the **Add** button.

The selected field name will appear as the **Filter by Field** and the **Settings** and **Tile To Update** tabs will appear on the Add Filter screen.

- From the **Settings** tab, you can do the following:



Add Filter: Category

Filter by Field

Denial • Category

Settings **Tiles To Update**

Title: Category

Configure Default Value: any value

Control: Tag List

Values: any value

Additional options:

- Require a filter value
- Select filters to update when this filter changes

Cancel **Add**

- Title:** Enter the title of the filter as you want it to appear on the dashboard. The title option automatically populates with the Filter by Field name.
- Control:** Select from a list of control types, which vary depending on the type of data you are filtering.
- Values:** To set specific value options for the filter, choose from the dropdown or enter the value options in this field. Leave the field blank to allow value options from the database to be surfaced, up to the maximum number of values available for that control. For numeric data, this field is replaced by the Min and Max fields.
- Configure Default Value:** Optionally, set the default value for the filter.
- Require a filter value:** Select the checkbox to require a value for the filter.
- Select filters to update when this filter changes:** Select the checkbox to link other filters to this filter.
- Add or Cancel buttons:** Click one of these buttons to save or cancel the new filter.

9. From the **Tiles To Update** tab, you can do the following:

Note: This tab lets you determine which tiles listen to the filter. It automatically will apply the filter to any tiles that were created from the same Explore as the filter and sets the value of Field to Filter to the same field as the field chosen for the filter.

Add Filter: Category

Filter by Field

Denial • Category

Settings **Tiles To Update**

All | None

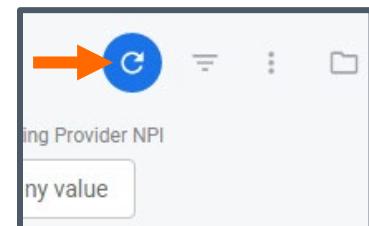
- Avg Days to Payer Receipt
- Avg Days to Pay (Primary)
- Avg Total Billed AR Days (Primary)
- Reimbursement Aging Summary
- Outstanding EOBs by Payer
- Workgroup Summary
- Denial Rate
- Denials by Workflow Stage
- Denials by Workgroup
- Top 10 Denials by Provider

Field to Filter
Select a field...
Denial • Category

Cancel Add

- All or None column:** Use to turn the filter on or off for all tiles. When All is selected, the available tiles will be “highlighted” (as in they won’t be grayed out).
- Field to Filter column:** For each tile, choose which field will be affected by the filter, or choose not to apply the filter to an individual tile. If you select a field that is already used in an existing filter, any tiles filtered by the existing filter are unavailable to the new filter.
- Add or Cancel buttons:** Click one of these buttons to save or cancel the new filter.

10. To test your filter, click the **Reload** button in the upper-right corner of the dashboard.



Updating dashboard filters

Filters may be applied when [adding a new custom dashboard](#); however, you can redefine the parameters for any of these preset filters or you can [add a new filter](#). Redefining these filters will update all impacted dashboard tiles.

To update a dashboard filter:

1. Go to **ANALYTICS > Analytics > Work Spaces** and select the appropriate tab, such as Dashboard, Shared, or Personal.
2. From the Dashboards area of the list, select the appropriate dashboard.

The dashboard will load. If the dashboard has any applied filters, they will display as filter fields above the dashboard.

The screenshot shows the 'AR Performance Dashboard' title. Below it are several filter fields: 'Account' (is any value), 'Payer Name' (is any value), 'Claim Received Date' (is from 2020/04/01 until 2020/07/31), 'Remit Received Date' (is from 2020/04/01 until 2020/07/31), 'Service From Date' (is any time), 'Service To Date' (is any time), and 'Claim W' (is any value). Below the filters, there are two large numerical tiles: '14 78' and '8 81'.

3. To update existing filters:

- a. Click any filter value field.
Dropdown fields will appear below the value field.
- b. Update filters using the dropdown fields.

4. To add additional values to a filter:

- a. Click any filter value field.
- b. Click the + icon to the right of a dropdown field.
- c. Complete the added OR field value.

The screenshot shows a 'Service From Date' filter field with the value 'is on 2022/05/25'. Below it, an 'OR' condition is being added, consisting of a dropdown menu ('is on the day') and a date input field ('2022/05/25'). An orange arrow points to the date input field.

The screenshot shows the completed OR condition. The dropdown menu is set to 'is on the day' and the date is '2022/05/25'. An orange arrow points to the 'Add' button in the bottom right corner of the input field.

- d. Repeat as needed.

5. Once you are satisfied with your filter changes, click the **Reload** button in the upper-right corner of the dashboard.

The screenshot shows the upper-right corner of the dashboard. A large orange arrow points to a blue circular button with a white 'C' icon, which is the 'Reload' button.

Updating settings

To update settings for a custom dashboard:

1. [Access the dashboard edit menu](#) by selecting **Edit dashboard** from the **Dashboard actions** (three-dot) menu in the top-right corner of a dashboard.
2. Click the **Settings** button.



The Settings screen will open.

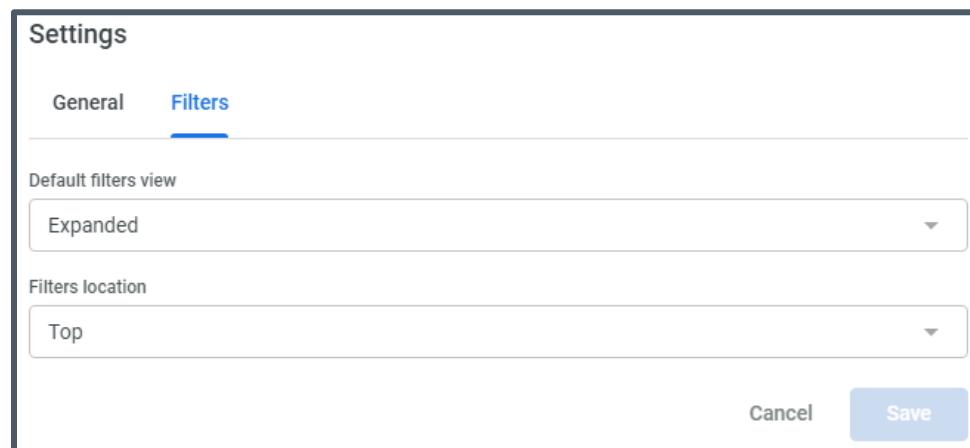
3. From the **General** tab, you can do the following:

The screenshot shows the 'Settings' screen with the 'General' tab selected. On the left, there's a list of tiles with small icons next to them. On the right, there are corresponding dropdown menus for each tile, labeled 'Refresh frequency'. At the bottom right of the screen are 'Cancel' and 'Save' buttons. A blue arrow points to the 'Automatically refresh dashboard' toggle switch, which is currently off.

Tile	Refresh frequency
6 Avg Days to Payer Receipt	Does not refresh
6 Avg Days to Pay (Primary)	Does not refresh
6 Avg Total Billed AR Days (Primary)	Does not refresh
Reimbursement Aging Summary	Does not refresh
Outstanding EOBS by Payer	Does not refresh
Denial Rate	Does not refresh
Denials by Workflow Stage	Does not refresh
Denials by Workgroup	Does not refresh
Top 10 Denials by Provider	Does not refresh
Top 10 Denials by Payer	Does not refresh
Top 10 Denials by Procedure	Does not refresh
Top 10 Denials by Reason Code	Does not refresh
Denials by Category	Does not refresh

- **Timezone:** Select the time zone in which your dashboard will be run.
- **Run on load:**
 - If enabled, dashboard data automatically loads when the dashboard is first opened.
 - If disabled, the dashboard does not display any data until the reload data icon is clicked.
- **Allow full screen mode for visualizations:** When enabled, allows you to view visualizations in full-screen mode.
- **Automatically refresh dashboard:**
 - To set autorefresh for a dashboard and all its tiles:
 - a. Enable the **Automatically refresh dashboard** toggle.
 - b. Select a refresh frequency to automatically update the dashboard and all its tiles.
 - c. To adjust the frequency for any individual tiles, do so in the **Tile** column, where each tile on the dashboard is listed. Click the dropdown for that tile in the **Refresh frequency** column, select **Refresh every**, and then set your frequency.
 - d. Click the **Save** button to save your changes.
 - To set autorefresh for individual tiles but not for the dashboard:
 - a. Disable the **Automatically refresh dashboard** toggle (if currently enabled).
 - b. In the **Refresh frequency** column, click the dropdown for a tile to auto-refresh.
 - c. Select **Refresh every**, and then set your frequency.
 - d. For any tiles you do not want to auto-refresh, leave the setting as **Does not refresh**.
 - e. Click the **Save** button to save your changes.

4. On the **Filters** tab:



- **Default filters view:** From the dropdown, select from the following:
 - **Expanded:** The filter toolbar shows on page load and filters are shown by default.
 - **Collapsed:** The filter toolbar does not show on page load and filters are hidden by default.
 - **Filters location:** From the dropdown, select **Top** or **Right**.
5. Click the **Save** button to save the change.

Managing a dashboard from the Work Spaces list

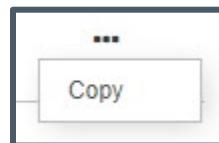
You can perform the actions defined in this section on dashboards that appear in the list on the Work Spaces screen.

Keep in mind that there are dashboards that Waystar created along with any custom dashboards that you created. The two types of dashboards allow for different actions that you can perform. For example, you cannot edit a “Created by Waystar” dashboard, but you can copy it and then edit that copy.

To manage a dashboard from the Work Spaces list:

1. Go to **ANALYTICS > Analytics > Work Spaces** and select the appropriate tab, such as Dashboard, Shared, or Personal.
2. From the Dashboards area of the list, locate the appropriate dashboard, and then click the three-dot menu on the far right.

The menu will display actions based on whether the dashboard is “Created by Waystar,” which only allows you to copy the dashboard.



Custom dashboards allow you to perform more actions. Keep in mind that after you make a copy of a “Created by Waystar” dashboard, that dashboard becomes custom, and you would then see this menu.



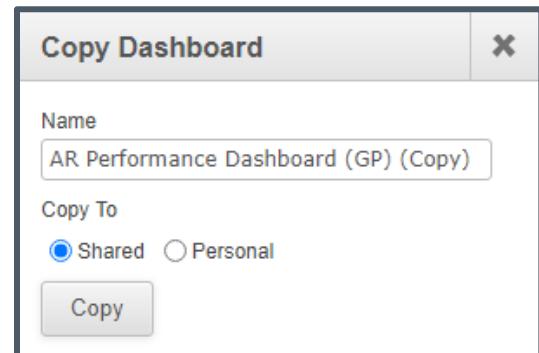
3. From the menu, select the appropriate action:
 - **Rename:** Opens the Rename Dashboard screen.
 - a. In the **Name** field, enter an appropriate name for the dashboard
 - b. Click the **Rename** button.The dashboard will now appear in the list under the new name.
 - **Trash:** Opens the Move Dashboard to Trash screen. If you’re sure you want to move the dashboard to the Trash folder, click the **Yes** button.

A screenshot of a "Rename Dashboard" dialog box. The title bar says "Rename Dashboard" with a close button. The main area has a "Name" label above a text input field containing "AR Performance Dashboard (GP)". At the bottom is a "Rename" button.A screenshot of a "Move Dashboard to Trash" dialog box. The title bar says "Move Dashboard to Trash" with a close button. The main area contains the text "Are you sure you want to move this item to Trash?". At the bottom is a "Yes" button.

- **Copy:** Opens the Copy Dashboard screen. This action allows you to copy custom or “Created by Waystar” dashboards.

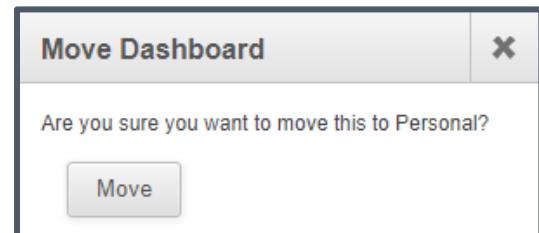
- In the **Name** field, type the name you want for the dashboard.
- From the Copy To radio buttons, select to copy it to the **Shared** folder or your **Personal** folder.
- Click the **Copy** button.

The dashboard is copied as a custom dashboard into the folder you specified. If it was a “Created by Waystar” dashboard, you can now perform all actions defined in this section.



The dialog box is titled "Copy Dashboard". It has a "Name" field containing "AR Performance Dashboard (GP) (Copy)". Below it is a "Copy To" section with two radio buttons: "Shared" (selected) and "Personal". At the bottom is a "Copy" button.

- **Move:** Opens the Move Dashboard screen. If you’re sure you want to move the dashboard to the appropriate folder (based on where the dashboard is currently located), click the **Move** button. The dashboard will now appear within the indicated folder.



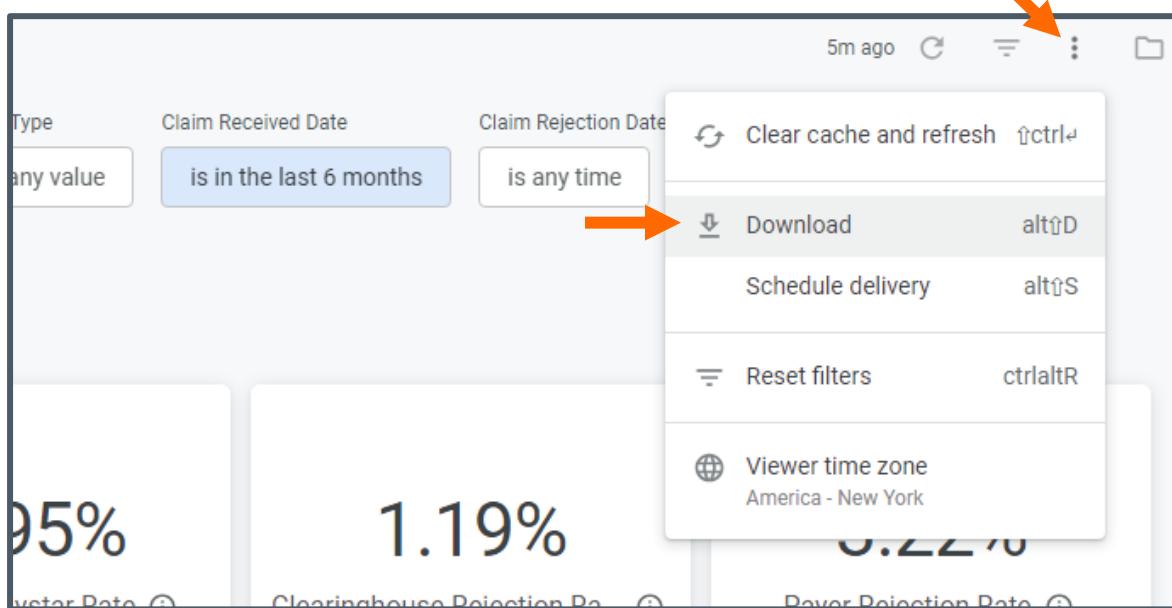
The dialog box is titled "Move Dashboard". It contains the message "Are you sure you want to move this to Personal?". At the bottom is a "Move" button.

Downloading data for the entire dashboard

This section explains how to download dashboard data as CSV files or a PDF.

To download dashboard data:

1. Go to **ANALYTICS > Analytics > Work Spaces** and select the appropriate tab, such as Dashboard, Shared, or Personal.
2. From the Dashboards area of the list, select the appropriate dashboard.
3. From the dashboard, click the **Dashboard actions** (three-dot) icon.
4. From the dropdown menu that will open, select **Download**.

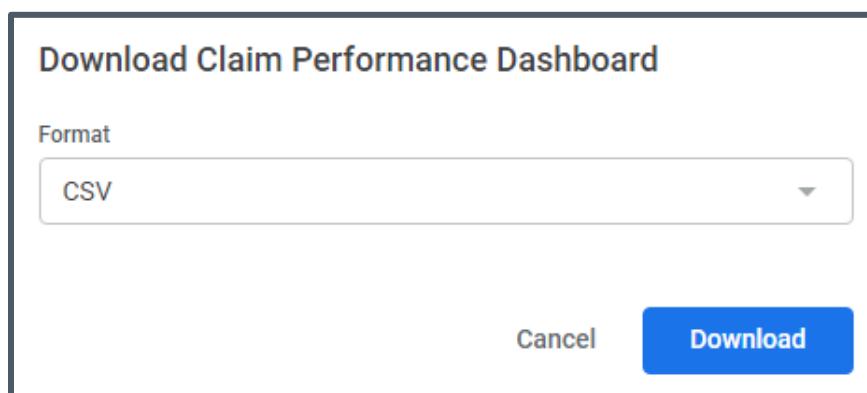


5. Continue with the instructions for downloading CSV files or a PDF:

- **Download as CSV files:**

- a. From the Download [dashboard name] screen that will open, select **CSV** from the dropdown.
- b. Click the **Download** button.

A zipped collection will download with each dashboard tile rendered in a separate CSV file.



- **Download as a PDF:**

- From the Download [dashboard name] screen that will open, complete the following fields:

The dialog box has a title 'Download Claim Performance Dashboard'. It contains the following fields:

- Format:** A dropdown menu set to 'PDF'.
- Paper Size:** A dropdown menu set to 'Fit Page To Dashboard'.
- Options:** Two checkboxes:
 - Expand tables to show all rows (i)
 - Arrange dashboard tiles in a single column

At the bottom are three buttons: 'Open in Browser', 'Cancel', and a large blue 'Download' button.

- **Format:** From the dropdown, select **PDF**.
 - **Paper size:** From the dropdown, select the paper size that best displays your dashboard data. Large visualizations or groups of overlapping dashboard tiles may require resizing to cleanly fit on the PDF page.
 - **Expand tables to show all rows:** When selected, tables expand to display all their information—even if the table size is larger than the allocated size for each table in the PDF. Because of this, large tables might render in plain text or limit the displayed rows.
 - **Arrange dashboard tiles in a single column:** When selected, the PDF displays the dashboard tiles in a single vertical column.
- When finished with your selections, do either of the following:
 - To open the PDF in a new browser tab, click the **Open in Browser** button.
 - To download the PDF to your system, click the **Download** button.

Packaged reporting

While Analytics Peak gives you the power to build and customize ad-hoc reporting, we include a number of Waystar-created dashboards and individual Looks to help you get started with the Analytics platform. These dashboards and Looks will display **Created by Waystar** beneath the title.

For a full list of the Waystar-created dashboards and Looks that are available with your Peak solution, along with their associated descriptions, see the [Analytics Packaged Reporting Guide](#).

To access these dashboards and Looks:

1. Go to **ANALYTICS > Analytics > Work Spaces > Packages**.
2. From the **Packages** dropdown option(s) in the left pane, click an appropriate package.
3. From the results list, click the thumbnail or name of a dashboard or Look to open it.

Work Spaces

Dashboards

- AR Performance Dashboard
Created by Waystar
- Benchmark Comparison Dashboard
Created by Waystar
- Claim Performance Dashboard
Created by Waystar
- Denials Dashboard
Created by Waystar

Looks

- \$0 Paid Claims by Payer
Created by Waystar

Explore

Go to the **ANALYTICS > Analytics > Explore** screen to perform ad-hoc data analyses, and build new Looks (as this section explains) and [dashboard tiles](#) using a wide range of pre-defined dimensions and measures associated with data sets/applications that you have access to.

The screenshot shows the 'Analytics Peak' interface under the 'ANALYTICS' menu. The top navigation bar includes links for MY WORK, CLAIMS PROCESSING, PATIENT TOOLS, ANALYTICS (selected), MEDICARE, ACCOUNT, and Payments. Below the navigation is a sub-menu with options: Work Spaces, Explore (selected), Schedules, Settings, and Data Dictionary. A dropdown menu 'Select an area to Explore:' is set to 'Claims (Latest Instance)'. The main area is titled 'Explore' and contains a sidebar for 'Claims' fields. The sidebar has sections for 'Find a Field' (with a search input), 'All Fields' (selected), and 'In Use'. It lists various fields like Custom Fields, Claim, Claim Other Procedure, Condition, Diagnosis, Note, Occurrence, Payer, Rejection, Service Line, and Subscriber Insurance. To the right of the sidebar is a large panel for selecting dimensions or measures, featuring tabs for 'Data' (selected), 'Results', and 'Add calculation'. At the top of this panel are buttons for 'Filters', 'Visualization', and 'Run'. Below the tabs, there are 'Row Limit' and 'Totals' checkboxes. A message at the bottom of the panel says 'Select some dimensions or measures.' with a small icon.

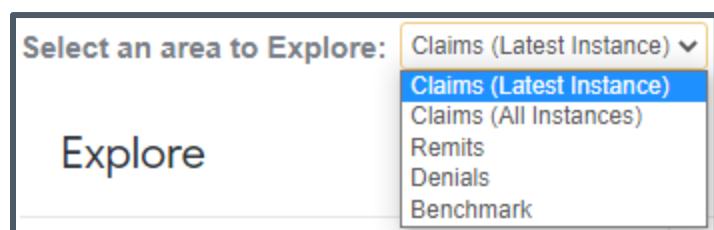
Building a new Look

This section explains how to build a new Look. This process includes:

- Adding reporting attributes (dimensions and measures) to the Look data table
- Applying filters
- Applying additional customizations (e.g., setting your data table Row Limit).

To build a new Look on the Explore page:

1. Go to **ANALYTICS > Analytics > Explore**.
2. From the **Select an area to Explore** dropdown, select:
 - **Claims (Latest Instance), Claims (All Instances)** to see all instances of claims and get a deeper understanding of claims history.
 - **Remits, Denials, or Benchmark** to run Looks on the associated Waystar product data.



Keep in mind:

- If you have access to multiple data sets and you do not make a selection from this dropdown, Claims (Latest Instance) data will load by default.
- The Benchmark data set is used only if you are looking to overlay benchmarking values onto a Look. For more information on merging benchmarking values with reporting, see the [Analytics Benchmarking](#) section.

Additional information – Data analysis process

When creating Looks, use the following conceptual process to determine what data you need to include in your Look and how it should be built:

- Identify any questions that you're looking to answer with the data. For instance, how many claims are being submitted from an account in a month and how many of those claims are being rejected by the payer?
- Search for/locate the dimensions and measures needed to answer the identified questions (use the [Data Dictionary](#) to find descriptions).
- [Explore dimension and measure relationships](#) via your generated Look.
- Glean actionable information from the analyzed data.

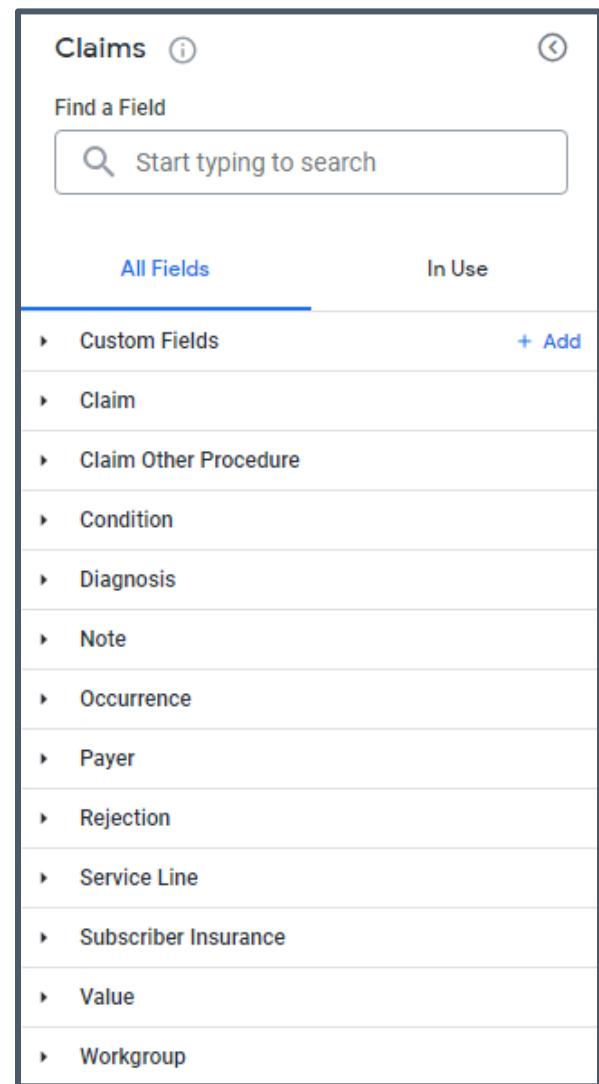
3. To find **claims**, **remits**, or **denials** attributes, use one of the following options:

- **Option 1** – Use the Search menu in the field-picker area on the left side of the screen to find the claims, remits, or denials attributes you're looking to report on.
- **Option 2** – Locate the claims, remits or denials attributes you are looking to report on by clicking a data category dropdown (e.g., **Claim**, **Condition**, etc.) in the **All Fields** section of the field-picker area.
- **Option 3** – Click the **+ Add** link to the right of the **Custom Fields** dropdown if you would like to build a custom reporting attribute with a custom format and/or filter. Waystar has worked tirelessly to build a comprehensive list of claims, remits, and denials attributes in Analytics Peak to help you perform effective ad hoc analysis; however, the Custom Fields tool is available for **advanced users** who would like to take their analysis a step further. For Looker documentation on building custom reporting attributes using the Custom Fields action, click [HERE](#).

Note: Use the [Data Dictionary](#) to find descriptions of the full list of Explore reporting attributes.

To help you create more performant Looks, the Explore claims, remits, and denials data are categorized into two different types:

- **Dimensions:** Filter/view data based on data slices/descriptors (e.g., claims dates, procedure codes, provider information, etc.). Examples of dimensions include:
 - An attribute, which has a direct association to another attribute/column in a Look data table.
 - A fact or numerical value.
 - A derived value computed based on the values of other fields in a table.
- **Measures:** Aggregates/summations (e.g., total charge amount, claim count, etc.) that you will apply to dimensions. measures are displayed as orange links in the field picker.
Note: If you add only measures to a data table, you will only see one row of data in a generated Look.



The screenshot shows a search interface for 'Claims'. At the top, there's a search bar with the placeholder 'Start typing to search'. Below it, a table lists various reporting attributes under the heading 'All Fields'. The table has two columns: 'All Fields' and 'In Use'. A blue horizontal bar highlights the 'All Fields' column. On the far right of the table, there's a '+ Add' button. The listed attributes include: Custom Fields, Claim, Claim Other Procedure, Condition, Diagnosis, Note, Occurrence, Payer, Rejection, Service Line, Subscriber Insurance, Value, and Workgroup. The 'Claim' attribute is currently selected, indicated by a blue border around its row.

4. Click a dimension under a data category dropdown (e.g., **Service Line > DIMENSIONS > Procedure Code**) to add the selected value to the data table on the right side of the screen. The selected attribute will be included in the generated Look.

If desired, click the dimension a second time to remove it from the data table.

Example scenario

To report on the number of submitted instances of procedure codes within a specified timeframe (e.g., by **Claim Rejection Date**) and the associated charge amounts, click the **Service Line > DIMENSIONS > Procedure Code** dimension and **Service Line > MEASURES > Charge Amount** and **Line Count** measures.

IMPORTANT: It is best practice to combine only attributes that are within the same data category. For example, you should combine a dimension under the **Service Line** data category dropdown only with a measure in that dropdown.

The following actions buttons are available when hovering over an attribute or upon adding it to your data table:



- Pivot data:** Add the selected value to the Look and transpose the reported data *horizontally* in your data table.

Example scenario

To parallel the **example scenario** provided earlier in this step, pivot the **Service Line > DIMENSIONS > Procedure Code** and click the **Service Line > MEASURES > Charge Amount** and **Line Count**

measures (not pivoted). This will generate a horizontal view of the number of submitted instances of procedure codes and the associated charge amounts.

Additional information on pivoting

Pivoting data only changes how the data is presented in the generated Look data table. Additionally, only dimensions can be pivoted to view the associated data horizontally. Pivoting may be beneficial if you are adding multiple dimensions, and you want to view the associated data horizontally. Pivoting is also helpful if you have a lot of rows in your table and you want to reduce the need to scroll to find data.

- Filter by field:** Add the value to the Filters menu at the top of the Explore page where you can filter (i.e., remove values that do not meet your criteria) your generated Look accordingly.

All Fields	In Use
Rejection	
Service Line	1
DIMENSIONS	
Contract Code	
CPT Description	
Drug Info	
Line Control Number	
Line Note	
Modifier 1	
Modifier 2	
Modifier 3	
Modifier 4	
Procedure Code	
Procedure Code Type Description	
Revenue Code	
Sequence	
Service From Date	
Sequence	
Service From Date	
Service To Date	
Units	
MEASURES	
Charge Amount	
Line Count	
Total Units	

- c. **Info:** View a Waystar definition of the value. These definitions are also provided in the [Data Dictionary](#).
 - d. **ADD CUSTOM FIELD:** Depending on the selected dimension/measure and whether the button is available for that value, use this button to create a custom measure based on the selected dimension or to create a filtered custom measure based on the selected measure. For more information on the ADD CUSTOM FIELD button, click [HERE](#).
5. To review all values added to your Look, click the **In Use** column in the field-picker area.

All Fields In Use

▼ Service Line

Procedure Code
Charge Amount
Line Count

Clear all Clear fields, keep filters

6. *Optional.* Perform the following, optional steps to further customize your Look filters and data table:
- a. Apply a secondary field qualifier from the first field dropdown in the **Filters** section.
 - b. Apply/reassign tertiary, quaternary, etc. field qualifiers as necessary:

Filters

Claim Rejection Quarter quarter

+ Filter + New group + Co

is in the last
is on the day
is in range
is before
is on or after
is in the year
is in the month
is this
is next
is previous
is
is null
is any time
is not null
matches a user attribute
matches (advanced)

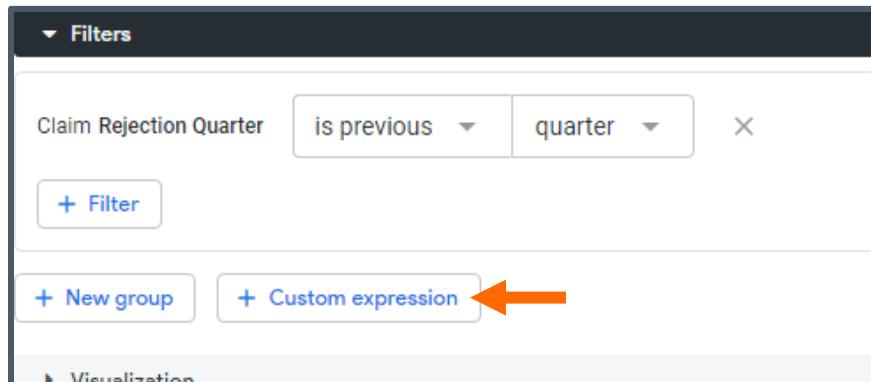
Row Limit Totals

Data Results

Service Line Procedure Code Service Line Charge Amount Service Line Line Count

Press "Run" to explore this data.

- c. Click the **Custom expression** button.



The Custom Filter menu will open.

As you type, assistance for writing correct expressions will appear here. Keyboard only users: Press Shift and Escape to escape text editor.

- d. You can manually build custom filters for your Look using the following functions and operators:
- **Mathematical:** Number-related functions.
 - **String:** Word-and-letter-related functions.
 - **Dates:** Date-and-time-related functions.
 - **Logical Transformation:** Includes Boolean (true or false) functions and comparison operators.
 - **Positional Transformation:** Retrieves values from different rows or pivots.
- For Looker descriptions of the full list of the functions and operators available for building custom filters, click [HERE](#).
- e. To sort the generated Look data accordingly, click a dimension/measure heading in your data table.

- The sorting action can be applied both before and after a Look has been generated.
- All the generated data will be sorted according to the selected attribute (Service Line > Line Count sorting is applied in the image above).
- Click the attribute heading once to sort the generated data in descending order (high to low). Click the attribute heading a second time to reverse the sorting (low to high).

f. Apply any of the following Look table options:

- **Row Limit:** Assign a row limit per page for the Look.

The Row Limit is set to 500 rows by default; however, you can reset this field to improve the Look generation speed or to filter the generated data to only show the specified number of rows.

Tip – Using row limit to create top data Looks

Resetting the Row Limit is a helpful tool for generating *top* data. For instance, apply descending sorting (high to low) to a Charge Amount attribute in a data table and set the Row Limit to 10 to view the top 10 Charge Amounts for a group of data.

- **Totals:** If this checkbox is clicked, a row will be added at the bottom of the data table displaying numerical measure value totals.

Additional information on totals

If you apply a Row Limit, the total may seem incorrect. This is because the total will display the total aggregate amount for *all* the filtered data—even for items that may not show up with your applied Row Limit.

Columns that count unique items might not calculate the total as expected since the same item might be included in several queried categories but counted only as one unique item in the totals.

- If necessary, drag and drop any added attributes in your data table to rearrange the associated data in the generated Look table:



A preview of your table—with your selections applied—will display near the bottom of the Look screen.

7. To add additional values to a filter field, click the + icon to the far right and add a new **AND/OR** field value. For additional information, click [HERE](#) for Looker documentation.
8. When you are satisfied with your data table and filter selections, click the **Run** button at the top of the screen or press **Enter** on your keyboard to produce your Look.
9. When you've finished building a new Look, you can stay in Explore to manage your [Look data table](#) or [Look visualization](#).

Opening Looks in Explore

This section explains how to open an existing Look (Waystar-created or custom) in Explore. After you open the Look in Explore you'll be able to manage the report data ([Look chart \(data table\)](#) or [Look visualization](#)).

Note: If you [build a new Look](#), that's done from Explore, so when you've finished building a new Look, you can stay in Explore to [manage the new Look](#).

Opening a Look from Work Spaces

To open a Look from Work Spaces:

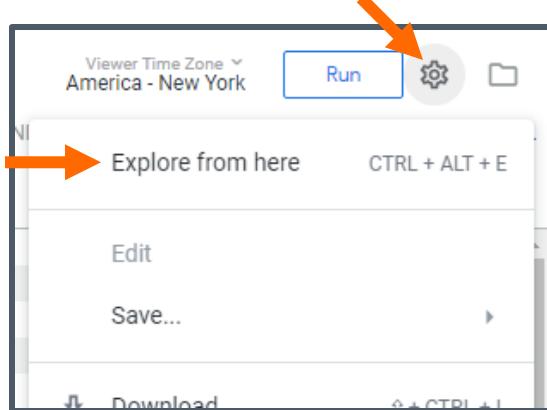
1. Go to **ANALYTICS > Analytics > Work Spaces** and select the appropriate tab, such as Dashboard, Shared, or Personal.
2. From the Looks list, locate the appropriate Look. This can be a Waystar-created or custom Look.
3. Click the thumbnail on the left or the name of the Look on the right.



The Look will open.

4. Hover over the top-right corner of the screen, and then click the **Explore actions** (cog) icon that will appear.
5. From the menu that will open, select **Explore from Here**.

The Explore screen will open.



6. Continue with [Managing Looks in Explore](#).

Opening a Look from a dashboard

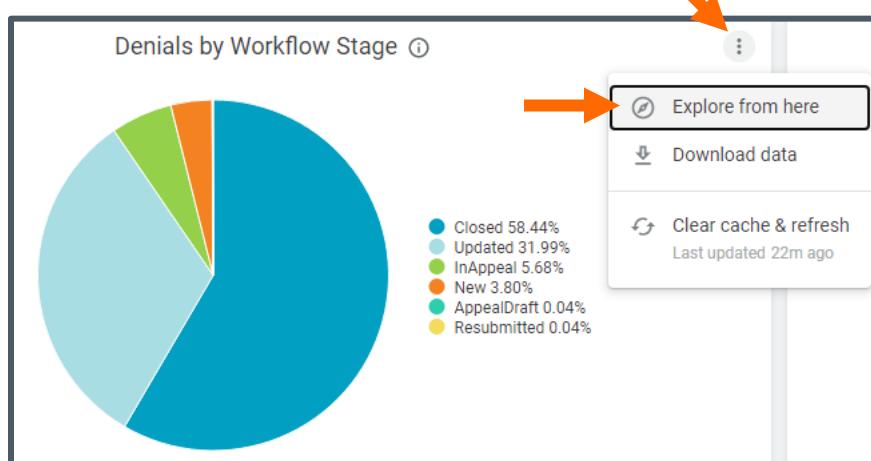
1. Go to **ANALYTICS > Analytics > Work Spaces** and select the appropriate tab, such as Dashboard, Shared, or Personal.
2. From the Dashboards area of the list, locate the appropriate dashboard. This can be a Waystar-created or custom dashboard.
3. Click the thumbnail on the left or the name of the dashboard on the right.



The dashboard will open. Looks display in a dashboard as tiles.

4. Locate the appropriate tile/Look and click the three-dot icon in the top-right corner of the tile.
5. From the menu that will open, select **Explore from here**.

The Explore screen will open.



6. Continue with [Managing Looks in Explore](#).

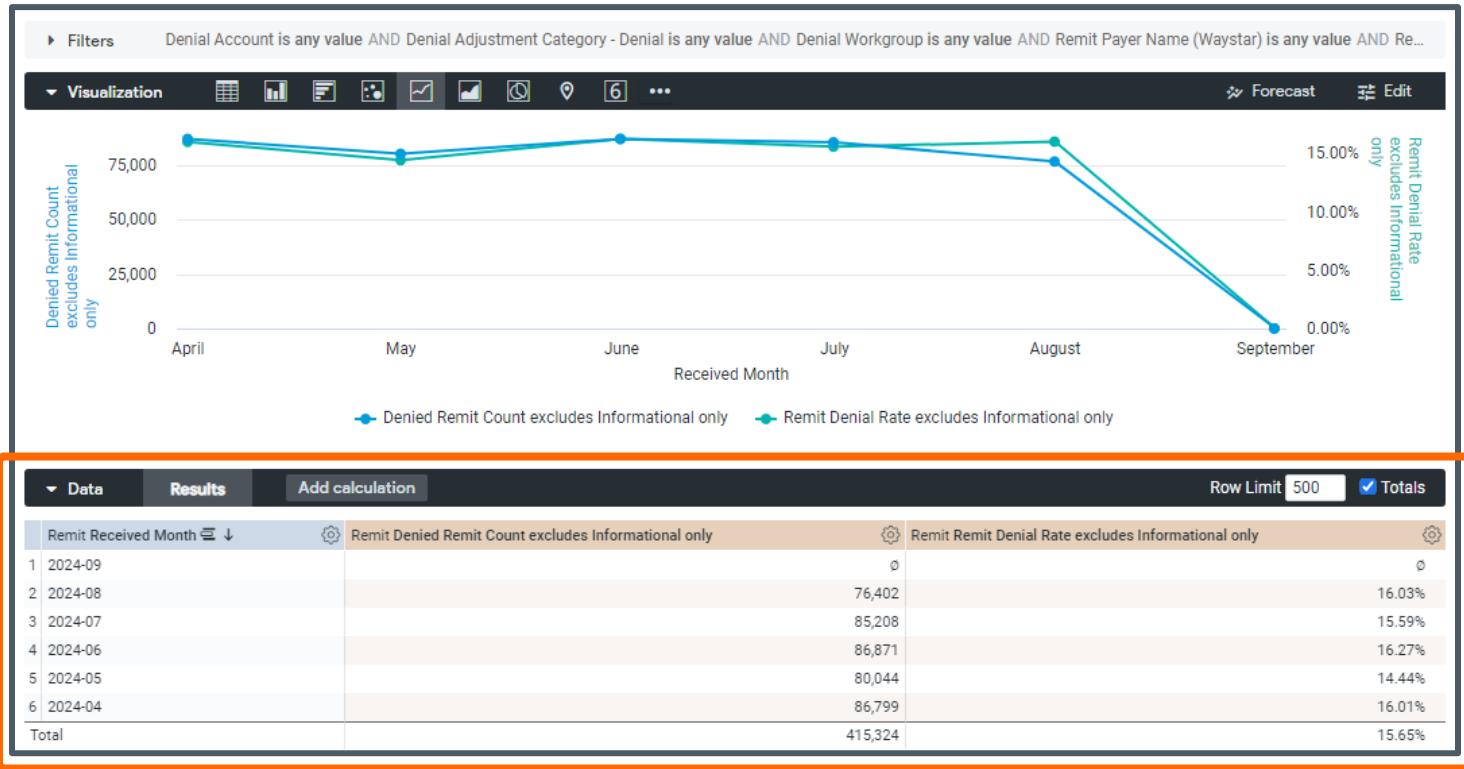
Managing Looks in Explore

This section explains how to manage reported data, which is available in two parts:

- In the data table
- In an eye-catching visualization.

Managing a Look data table

After [opening a Look in Explore](#), a data table will display near the bottom of the **ANALYTICS > Analytics > Explore** screen under the Data toolbar, providing a full breakdown of the reported data. You can click the data toolbar to open and close the data table.



Look data table toolbar

After [opening a Look in Explore](#), the following actions/view options are available in the Data toolbar above the reported data table on the **ANALYTICS > Analytics > Explore** screen:

- **Row Limit:** The field is on the right side of the Data toolbar. You can use it to assign a row limit per page for the Look.

The Row Limit is set to 500 rows by default; however, you can reset this field to improve the Look generation speed or to filter the generated data to only show the specified number of rows.

Tip – Using row limit to create top data Looks

Resetting the Row Limit is a helpful tool for generating *top* data. For instance, apply descending sorting (high to low) to a Charge Amount attribute in a data table and set the Row Limit to 10 to view the top 10 Charge Amounts for a group of data.

- **Totals:** The checkbox is on the right side of the Data toolbar. If enabled, it will add a row at the bottom of the table displaying numerical measure value totals.
 - If you apply a Row Limit, the total may seem incorrect. This is because the total will display the total aggregate amount for *all* the filtered data—even for items that may not show up with your applied Row Limit.
 - Columns that count unique items might not calculate the total as expected since the same item might be included in several queried categories but only counted as one unique item in the totals.
 - Some table calculations that perform aggregations calculate totals using the values in the total row, not using the values in the data column. For example, calculations using percentile or median might not add up as expected.

Sorting data

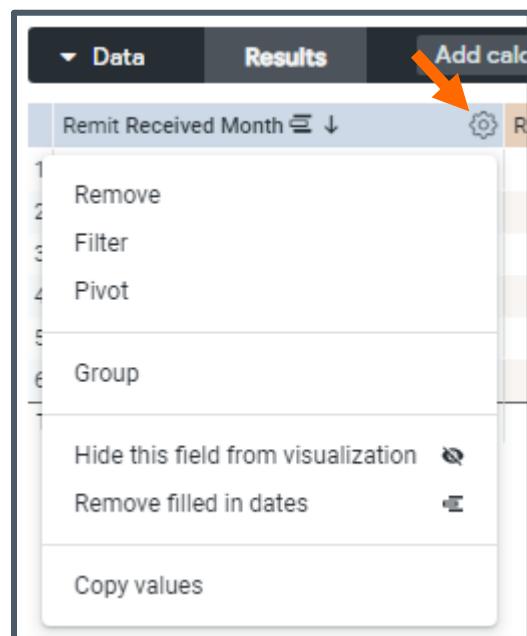
After [opening a Look in Explore](#), and if sorting is available for an attribute, click the appropriate column heading to sort the associated data. Click the column heading a second time to reverse the previously applied sorting (ascending vs. descending).

Chart (data table) actions

To perform actions on attributes after [opening a Look in Explore](#), begin by clicking the cog icon in the column header for the associated attribute.

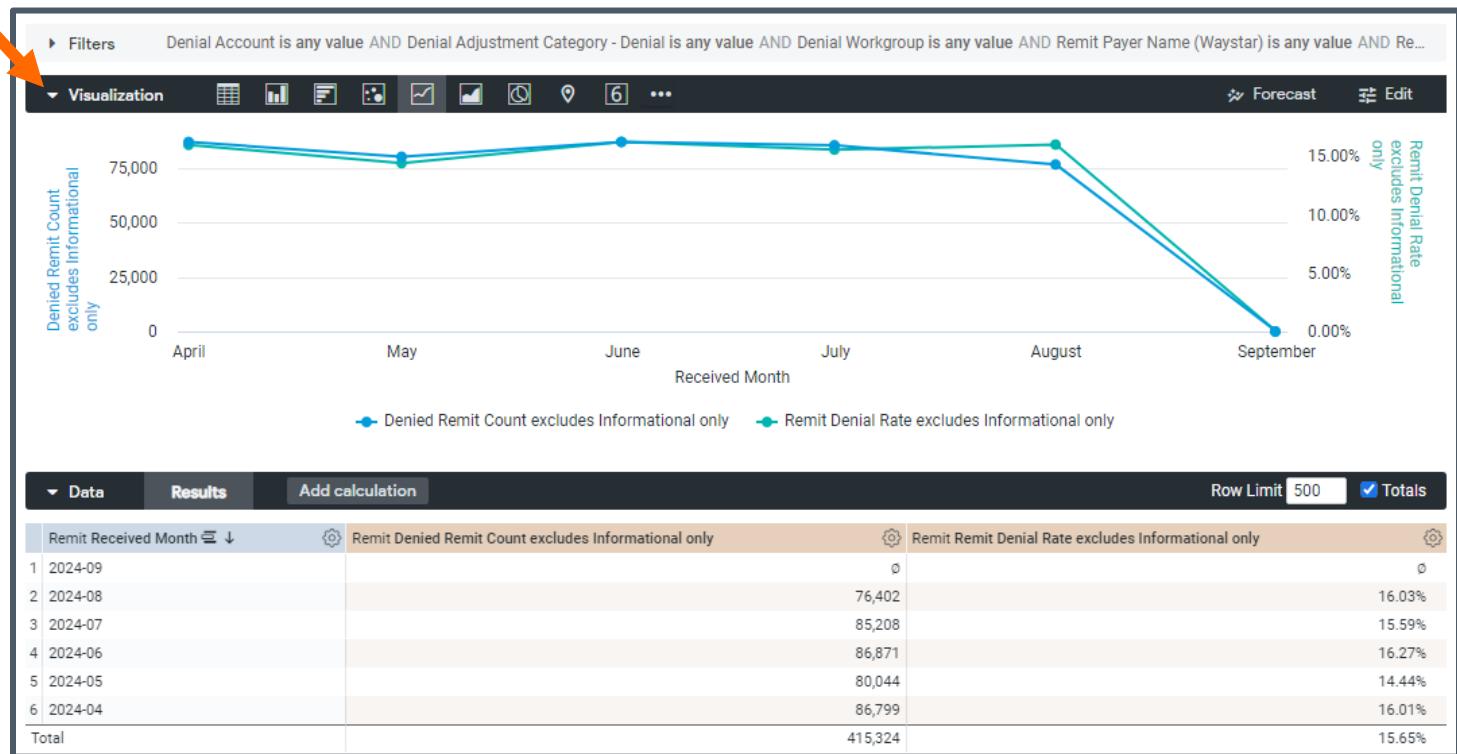
A dropdown menu will open.

- **Remove:** Remove the attribute from the Look grid.
- **Filter:** Add the attribute to the Look filter list.
- **Pivot:** Transpose the reported data horizontally in your table. For more information on the Pivot action, see the [Building a new Look](#) section.
- **Group:** Create a group by field.
- **Hide this field from visualization or Show in visualization:** Remove the attribute from the [visualization](#) displayed above the data table, or if it was previously hidden, unhide/show the field in the visualization.
- **Fill in missing dates or Remove filled in dates:** Some Looks may generate values that follow a predictable pattern, such as dates. If available for your Look, use this action to add missing dates or other values into your data table/visualization that weren't available when the Look was initially generated. For example, if you are charting a series of dates and some of the days are not in your generated data, this action will fill in those missing dates appropriately.
Or if the dates were previously filled in, you can remove those dates.
- **Copy values:** Copy the reported column data to your clipboard to be pasted as desired.



Managing a Look visualization

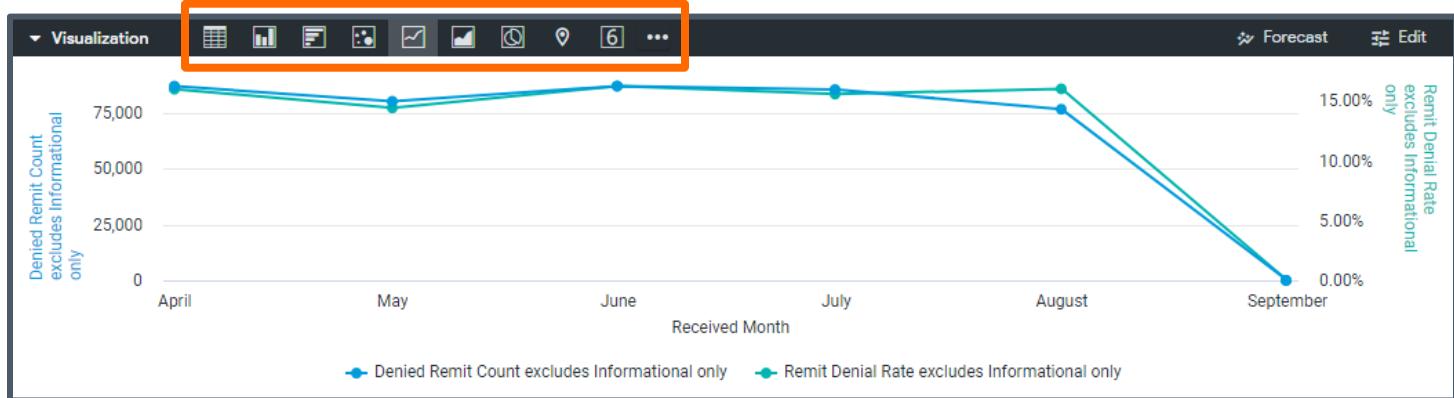
After [opening a Look in Explore](#), click the **Visualization** toolbar above the data table to view the visualization. When the visualization area is expanded, your Look data will display graphically.



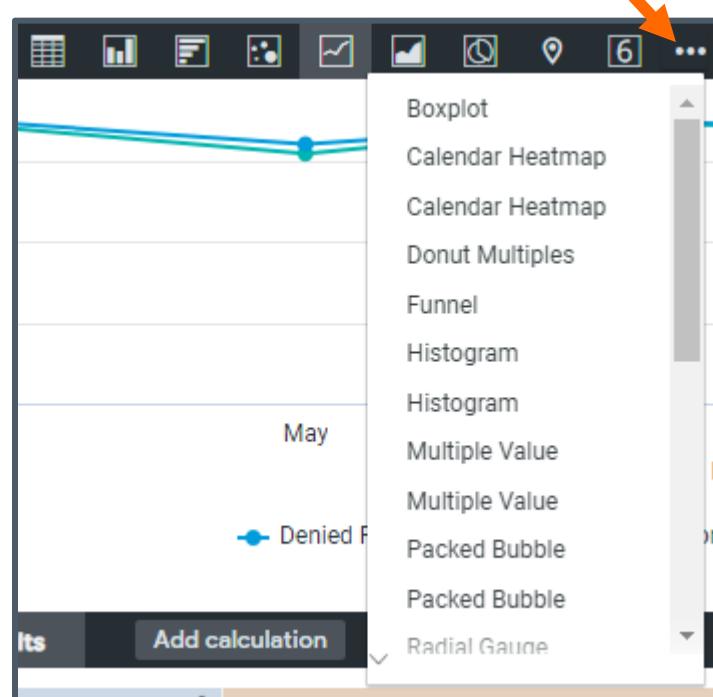
Choosing a Look visualization type

After [opening a Look in Explore](#), the visualization type default is the **Table chart (data table)**. You can change the visualization to different charts, maps, and other graphics depending on how you want to use the Look data. For example, a Column visualization may be most beneficial for comparing categories of data, but a Scatterplot or Line chart may be best for representing data over time.

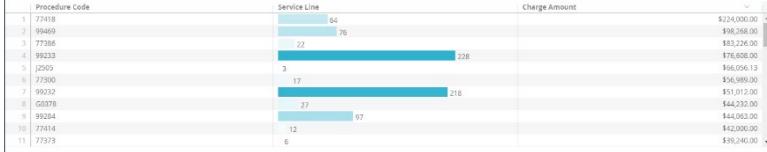
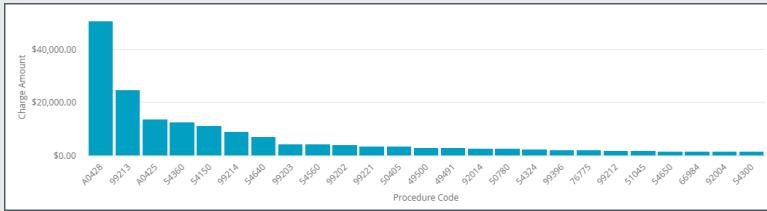
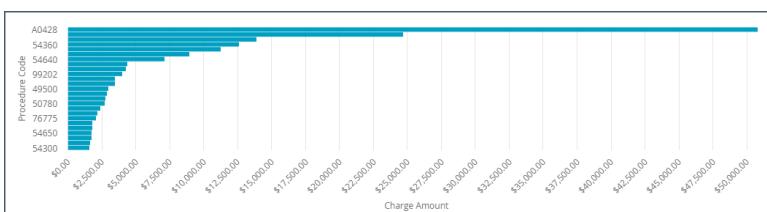
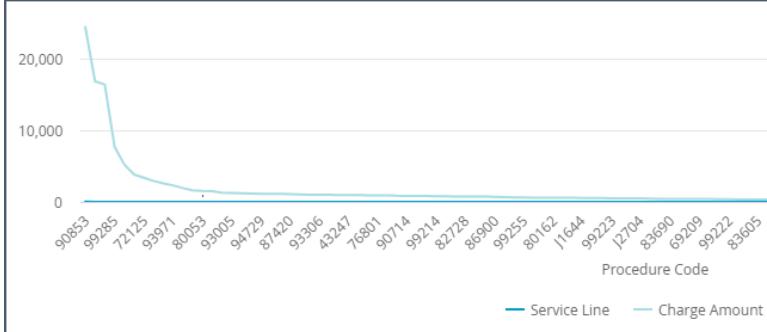
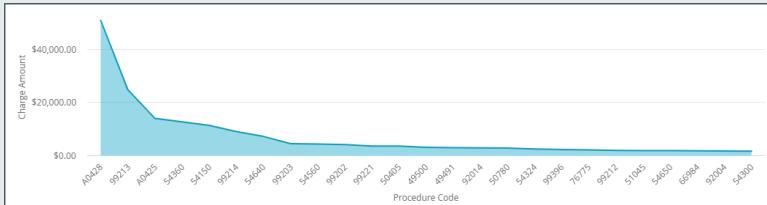
To change the visualization type, simply click any of the options in the Visualization toolbar.

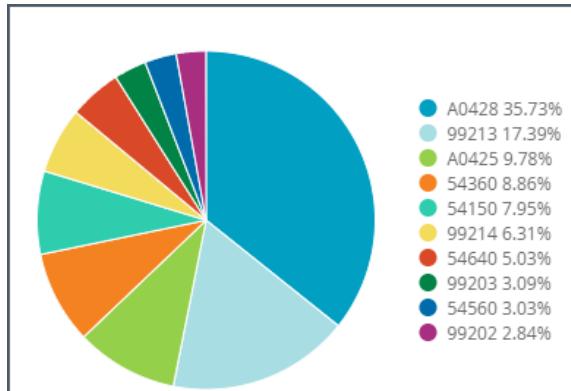
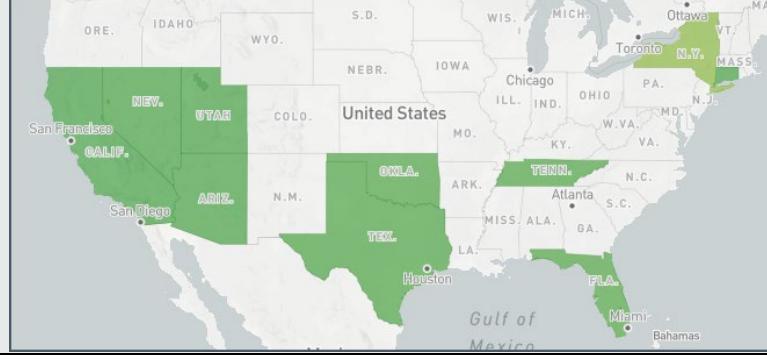


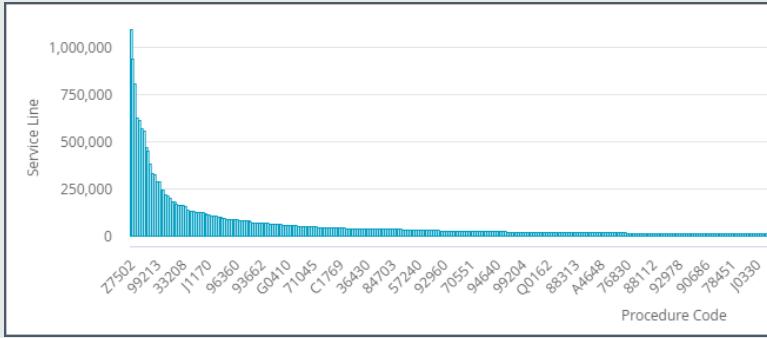
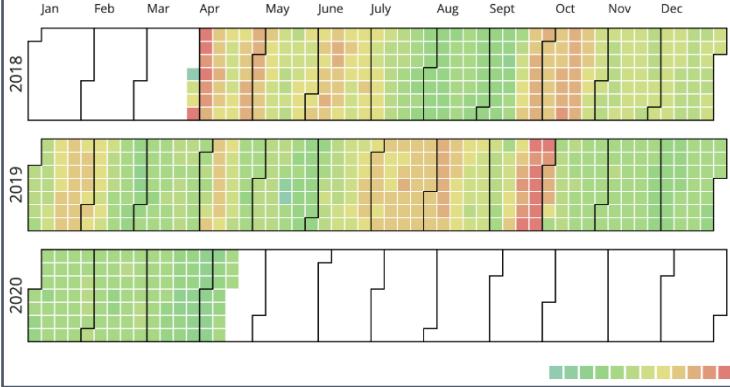
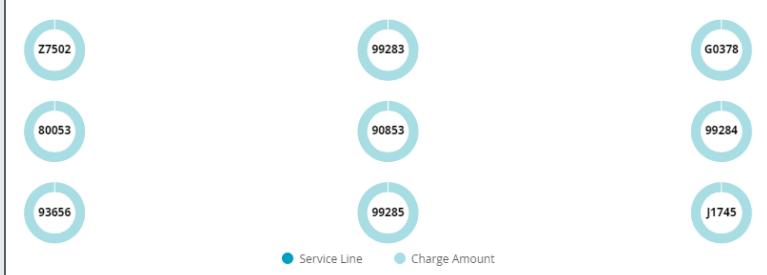
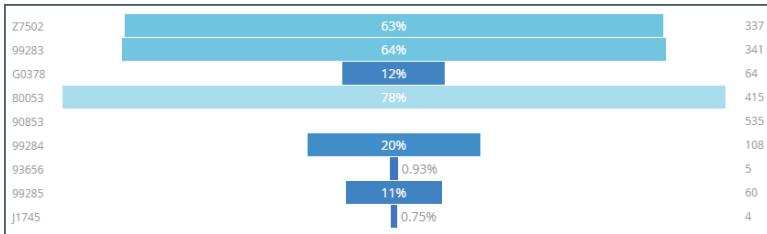
To access additional visualizations, click the three-dot icon to the right of the visualization icons.

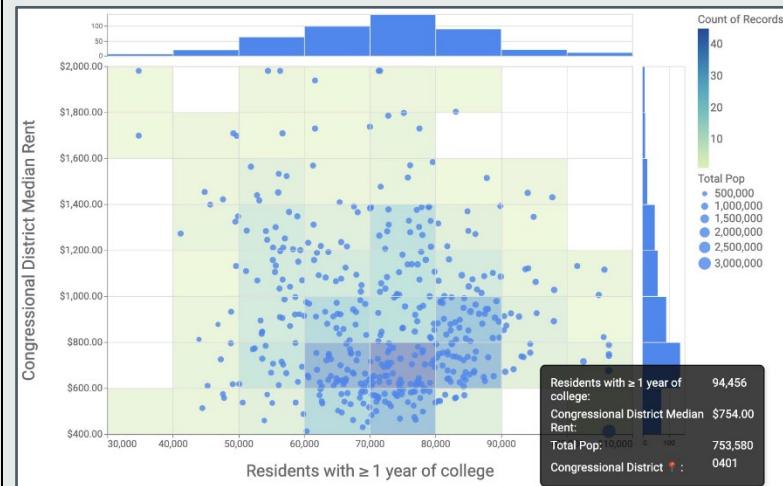
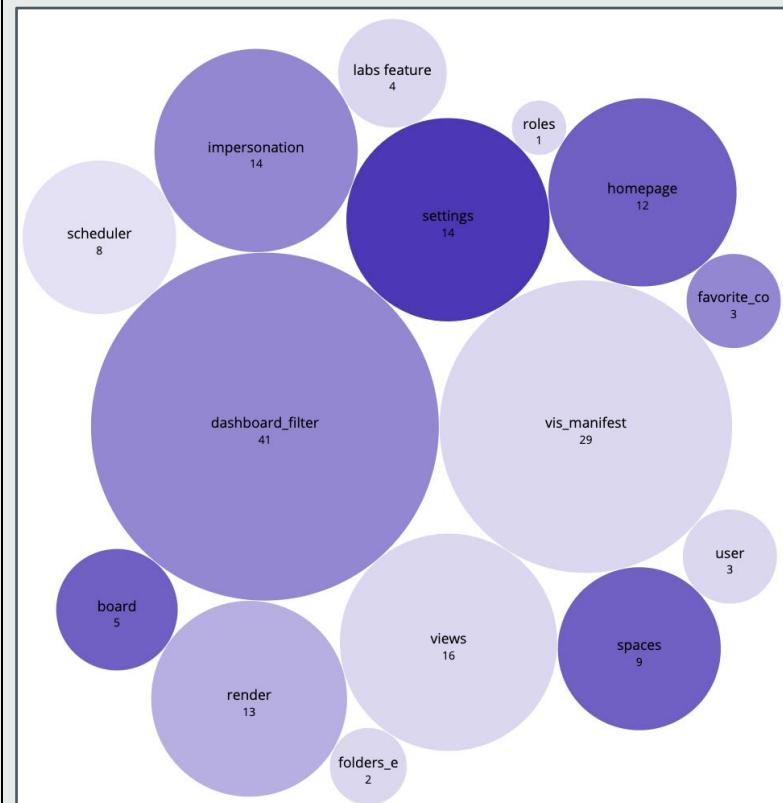


The following table provides descriptions and screenshot examples of each type of visualization:

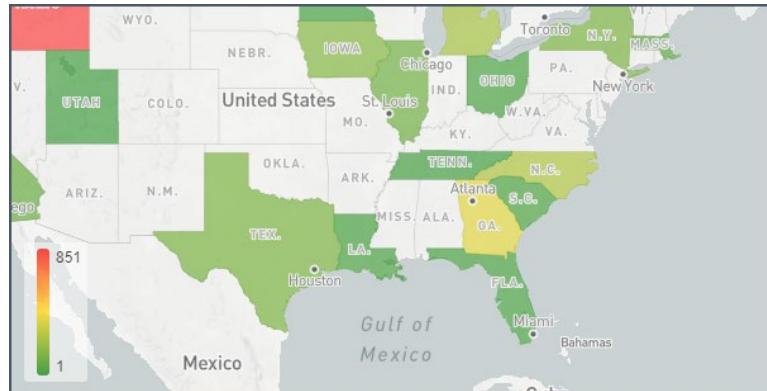
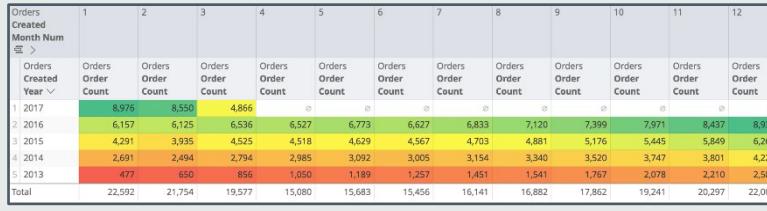
Visualization Type	Toolbar Button	Description	Visualization Example
Table		The Table chart displays a combination of the data values displayed in your data table and a bar chart representing the measure in your left-most column.	
Column		Column and Bar charts are useful for showing comparisons between categories of data, or for comparing changes for multiple groups over the same period of time.	
Bar			
Scatterplot		Scatterplots are useful for determining groupings and/or trends for categories of data, or for comparing changes for multiple groups over the same period of time.	
Line		Line charts are useful for determining data trends over a specified period of time.	
Area		Area charts are similar to Line charts in that they effectively highlight data trends, but Area charts are especially helpful if you are looking to stack measures to compare the associated aggregate data.	

Visualization Type	Toolbar Button	Description	Visualization Example										
Pie		<p>Pie charts are useful for illustrating the proportions that several components contribute to a whole.</p> <p>Requirement: To load the Pie chart visualization, you must add only one dimension and one measure, and the data table Row Limit must be at or under 50 rows.</p>	 <table border="1"> <tr> <td>A0428 35.73%</td> </tr> <tr> <td>99213 17.39%</td> </tr> <tr> <td>A0425 9.78%</td> </tr> <tr> <td>54360 8.86%</td> </tr> <tr> <td>54150 7.95%</td> </tr> <tr> <td>99214 6.31%</td> </tr> <tr> <td>54640 5.03%</td> </tr> <tr> <td>99203 3.09%</td> </tr> <tr> <td>54560 3.03%</td> </tr> <tr> <td>99202 2.84%</td> </tr> </table>	A0428 35.73%	99213 17.39%	A0425 9.78%	54360 8.86%	54150 7.95%	99214 6.31%	54640 5.03%	99203 3.09%	54560 3.03%	99202 2.84%
A0428 35.73%													
99213 17.39%													
A0425 9.78%													
54360 8.86%													
54150 7.95%													
99214 6.31%													
54640 5.03%													
99203 3.09%													
54560 3.03%													
99202 2.84%													
Google Maps		<p>Google Maps charts allow you to visualize geographic data on responsive and interactive maps. These maps also provide significant control of the way that map points are plotted.</p> <p>Requirement: To load a Google Maps chart visualization, you must add at least one location-based dimension.</p>											
Single Value		<p>Single Value visualizations are helpful when you are looking to provide a snapshot/overview of a data set using a single value.</p> <p>Turn on the Comparison > Show Comparison visualization setting to add a data point to the Single Value as a comparison (shown in image to the right).</p> <p>Quick Tip Save the associated Look to a dashboard to purpose the Single Value visualization as a dashboard label.</p>	<p>\$50,800.00 Service Line Charge Amount</p> <p>A0428 Service Line Procedure Code</p>										

Visualization Type	Toolbar Button	Description	Visualization Example
Boxplot	Dropdown Option	<p>Boxplot charts help you visualize the distribution and spread of values in your data. Boxplots can be especially useful for comparing values across categories.</p> <p>Requirement: To load the Boxplot chart, you must add at least one dimension and two to five measures. Your measures must be ordered left to right in order of minimum, first quartile, median, third quartile, and maximum.</p>	
Calendar Heatmap	Dropdown Option	<p>Calendar Heatmap carts display a date dimension and measure to find trends (or anomalies) over time at the year, month, and week levels.</p>	
Donut Multiples	Dropdown Option	<p>Donut Multiples charts are useful for grouping and highlighting data points.</p> <p>Requirement: To load the Donut Multiples chart, you must add at least one pivot, or multiple measures and no pivots.</p>	
Funnel	Dropdown Option	<p>Funnel charts are best used to understand events in a process.</p>	

Visualization Type	Toolbar Button	Description	Visualization Example
Histogram	Dropdown Option	Histogram charts are useful for quickly binning measures within 5,000 rows.	 <p>Congressional District Median Rent</p> <p>Residents with ≥ 1 year of college: 94,456</p> <p>Congressional District Median Rent: \$754.00</p> <p>Total Pop: 753,580</p> <p>Congressional District #: 0401</p>
Multiple Value	Dropdown Option	<p>Multiple Value charts are an effective layout for grouping similar types of content or related metrics.</p> <p>Requirement: To load the Multiple Value chart, you need one to ten measures including those used for comparisons.</p>	 <p>Multiple Value</p> <p>CA</p> <p>State Abbreviation</p> <p>Married Households: 6,437,416</p> <p>State Income per Capita: \$35,021.00</p> <p>State Median Age: 36.3</p> <p>16% of 39,148,760 Total Pop</p>
Packed Bubble	Dropdown Option	<p>Packed Bubble charts display two numeric values simultaneously. Sizes and colors of the bubbles make it easy to visualize outliers between measures and give a general sense of the distribution for the measures.</p> <p>Requirement: To load the Packed Bubble chart, you need one dimension and two measures.</p>	 <p>dashboard_filter 41</p> <p>vis_manifest 29</p> <p>settings 14</p> <p>homepage 12</p> <p>scheduler 8</p> <p>impersonation 14</p> <p>roles 1</p> <p>favorite_co 3</p> <p>user 3</p> <p>board 5</p> <p>views 16</p> <p>spaces 9</p> <p>render 13</p> <p>folders_e 2</p>

Visualization Type	Toolbar Button	Description	Visualization Example						
Radial Gauge	Dropdown Option	<p>Radial Gauge charts display a single value that measures progress toward a goal.</p> <p>Requirement: To load the Radial Gauge chart, use up to one dimension and up to two measures.</p>							
Sankey	Dropdown Option	<p>Sankey charts represent the movement of data from one entity to another. The width of the arrows are proportional to the weight, or quantity, of the flow.</p> <p>Requirement: To load the Sankey chart, you need at least two dimensions and one measure.</p>							
Single Record	Dropdown Option	The Single Record chart displays the data point in the top row of your data table with the associated attributes.	<table border="1"> <tr> <td>Procedure Code</td> <td>77418</td> </tr> <tr> <td>Service Line</td> <td>64</td> </tr> <tr> <td>Charge Amount</td> <td>\$224,000.00</td> </tr> </table>	Procedure Code	77418	Service Line	64	Charge Amount	\$224,000.00
Procedure Code	77418								
Service Line	64								
Charge Amount	\$224,000.00								
Static Map (Points)	Dropdown Option	<p>Static Map (Points) charts are useful for plotting data represented by points on a map.</p> <p>Requirement: To load the Static Map (Points) chart, you must add one measure, at least one dimension and have no visible pivots. The first dimension in your data must be a location-based attribute.</p>							

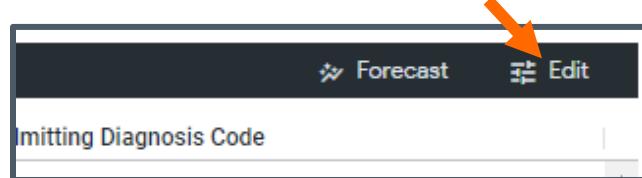
Visualization Type	Toolbar Button	Description	Visualization Example
Static Map (Regions)	Dropdown Option	<p>Static Map (Regions) charts are useful for plotting data regionally.</p> <p>Requirement: To load the Static Map (Points) chart, you must add one measure, at least one dimension and have no visible pivots. The first dimension in your data must be a location-based attribute.</p>	
Table (Legacy)	Dropdown Option	<p>Table (legacy) charts accept dimensions, measures, pivots, table calculations, custom fields, and row or column totals. They support up to 5,000 rows; 50 or fewer columns are recommended.</p>	
Timeline	Dropdown Option	<p>Timeline charts help you visualize the relationship between groups of events so you can compare the timespans over which these events took place.</p>	
Waterfall	Dropdown Option	<p>Waterfall charts help you visualize how a sequence of positive and negative values adds up to a total. These charts are often used in financial data to show how various profits and losses make up a total; however, waterfalls can also be used to more generally illustrate how different categories contribute to a total, especially if the data contains positive and negative values.</p>	
Word Cloud	Dropdown Option	<p>Word Cloud charts can be used to highlight popular values or show the frequency of text data using font size and color. In a Word Cloud chart, more prominent values are displayed with a larger font size than less prominent values.</p> <p>Requirement: To load the Word Cloud chart, you must add only one dimension and one measure.</p>	

Modifying visualization settings

This section explains the settings available to fully customize the visualization from the default configuration.

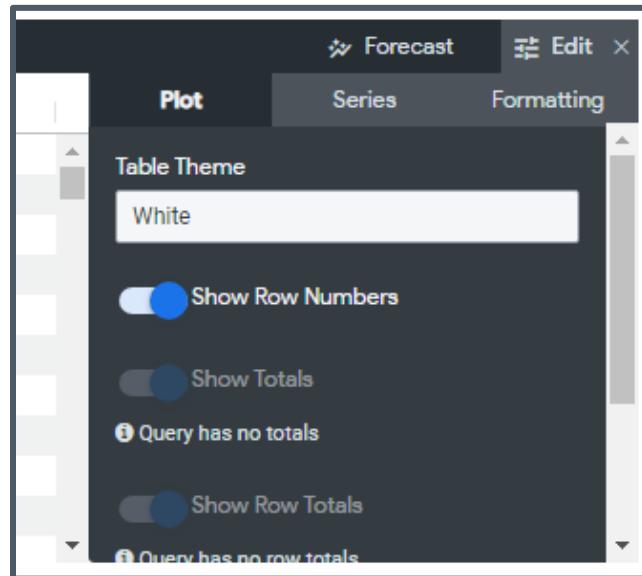
To modify your visualization settings:

1. [Open a Look in Explore](#).
2. *Optional.* [Choose the visualization type](#).
3. From the Explore screen, click the **Edit** button on the right side of the Visualization toolbar.



The Edit menu will open to the Plot tab. The menu options are based on the type of visualization used, so the menu you see might look different from this example.

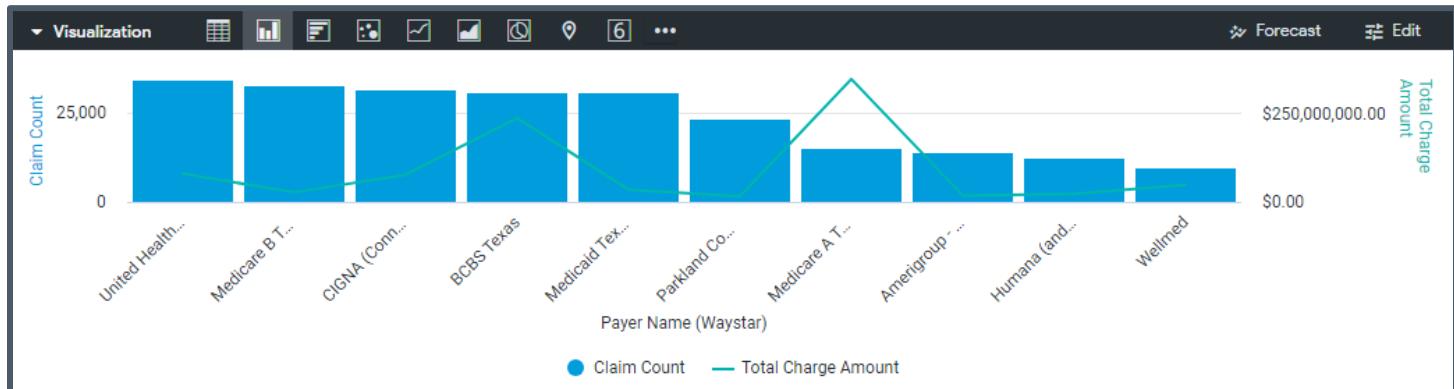
4. For more information on the available settings for each visualization type, click [HERE](#) for Looker documentation.



Visualization example: Claim Count by Total Charge Amount

The visualization below displays a combination of a Column and Line chart, which indicates claim count by total charge amount.

- The Column area of the chart indicates the claim count.
- The Line represents the corresponding total charge amount.



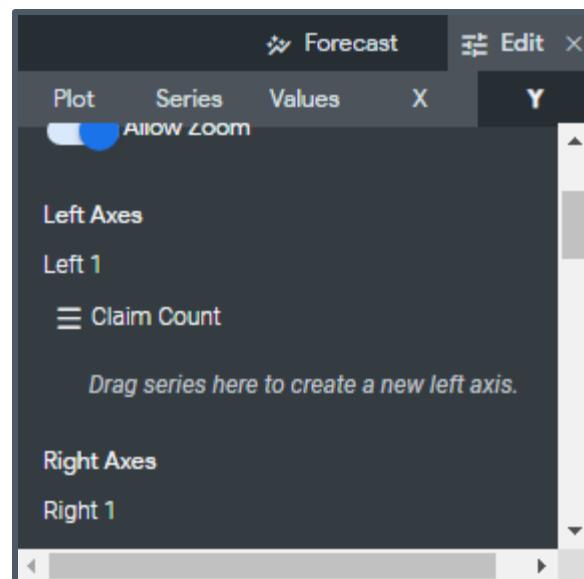
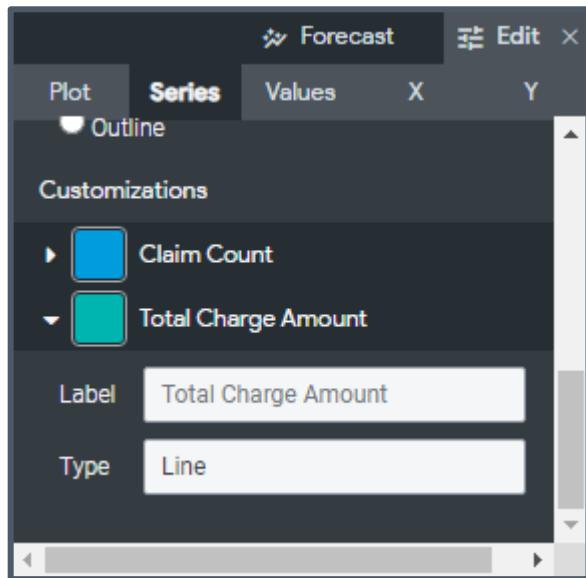
The following visualization settings were applied to build this chart:

Series tab:

- The Claim Count data series was set up as a **Column** visualization **Type**.
- The Total Charge Amount data series was set up as a **Line** visualization **Type** as shown in the following example.

Y tab:

- The Claim Count data series was added (dragged and dropped) to the **LEFT AXES** of the chart as shown in the following example.
- The Total Charge Amount data series was added (dragged and dropped) to the **RIGHT AXES** of the chart.

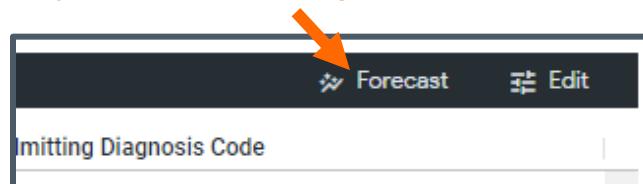


Forecasting visualizations

Your user account must have the appropriate permissions to create forecasts.

For an analyst to quickly add data projections to new or existing Explore queries to help users predict and monitor specific data points, [open a Look in Explore](#), and then the analyst can use the **Forecast** button on the right side of the Visualization toolbar. Forecasted Explore results and visualizations can be added to dashboards and saved as Looks.

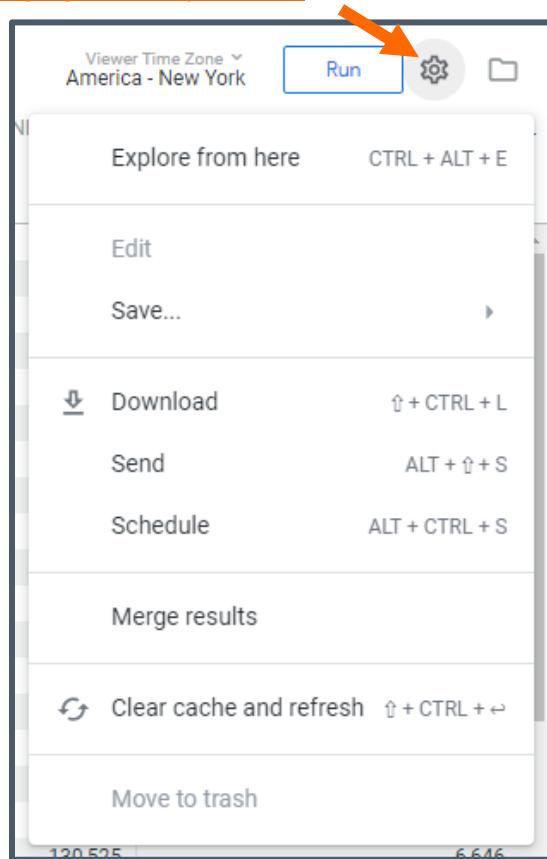
For complete details, see the [Analytics Peak Forecasting Guide](#).



Look “Explore actions” menu

After [opening a Look in Explore](#), you can save it to a Work Spaces location, download it in a spreadsheet, and more. Click the **Explore actions** icon in the right-hand corner of the screen to perform actions.

For complete details, see the [Managing a displayed Look](#) section.



Analytics scheduling

The Analytics scheduling tool allows you to schedule recurring updates to dashboards and Looks, which can be set up to auto-generate at a number of different cadences (daily, weekly, etc.) and to include any of the attributes, [table customizations](#), and [visualization customizations](#) described in other parts of this guide. Scheduling can be set up for both Waystar-created and user-defined reporting.

While the [ANALYTICS > Analytics > Schedules](#) tab is your hub for managing the reporting schedules you have created, Analytics scheduling can be accessed in a number of different locations in the Analytics application. See the sections below for details on the associated screen and/or action.

Creating a new reporting schedule

This section explains how to create a recurring schedule for the Analytics application to auto-generate and distribute a dashboard and an individual Look.

Creating a new dashboard schedule

To create a new schedule for Analytics to auto-generate and distribute a dashboard:

1. Go to **ANALYTICS > Analytics > Work Spaces** and select the appropriate tab, such as Dashboard, Shared, or Personal.
2. Locate and click the dashboard you would like to create the schedule for.
The selected dashboard screen will load.
3. Click the **Dashboard actions** (three-dot) icon in the top-right corner of the dashboard:
4. From the dropdown menu, click **Schedule delivery**.

The screenshot shows the 'Claim Performance Dashboard' with three main KPIs: Perfect Pass Rate (95.91%), Clean after Waystar Rate (96.99%), and Clearinghouse Rejection Rate (1.19%). Below these are two charts: 'Claim Submission Trend' (bar chart for Claim Count) and 'Claim Projection Trend' (line chart for Total Charge Amount). A context menu is open in the top-right corner, with an orange arrow pointing to the 'Schedule delivery' option in the list.

Analytics Peak

Work Spaces Explore Schedules Settings Data Dictionary

Claim Performance Dashboard

just now Clear Reset filters Download Clear cache and refresh Schedule delivery Viewer time zone

95.91% Perfect Pass Rate 1.24% Previous Month Change

96.99% Clean after Waystar Rate 0.93% Previous Month Change

1.19% Clearinghouse Rejection Rate

85,381 Claim Count Rejected By Payer

Claim Submission Trend

Original Claim Received Month

Claim Count Total Charge Amount

Claim Projection Trend

The Schedule Delivery screen will open.

- In the **Schedule Name** field, enter an appropriate schedule name (e.g., Daily Benchmark Comparison). You will use this name to locate the schedule.

Schedule Delivery

Settings **Filters** **Advanced options**

Schedule Name
Benchmark Comparison Dashboard

Recurrence **Time**
Daily 06:00

Destination
Email

Email *
john.smith@company.com
e.g. test@example.com

Format
PDF

Test now **Cancel** **Save**

- In the **Recurrence** dropdown, select the schedule recurrence. Secondary fields will open based on your selection. Complete those fields as appropriate.

Datagroup update: The Analytics application will auto-generate the reporting when data is loaded/refreshed in Waystar for the user-defined data group (Claim, Remit, or Denial). When this trigger is selected, the Schedule [dashboard name] screen will update, allowing you to define the data group trigger.

- In the **Destination** dropdown, select from the following:

- Email** sends an email with a link to the scheduled report on the **ANALYTICS > Analytics > Schedules > Exports** screen.
- FTP** appears only if the FTP feature is enabled at the domain or child-account level. It saves the scheduled report in your organization's default domain FTP location inside the Download folder. You'll also receive an email letting you know the report finished processing and the email will provide a link to the **ANALYTICS > Analytics > Schedules > Exports** screen.

Daily Benchmark Comparison Get

Recurrence **Time**
Daily 06:00

Send now

Monthly

Weekly

Daily

Hourly

Minutes

Specific months

Specific days

Datagroup update

Save

8. If necessary, update the **Email** address where the scheduled reporting will be delivered. The email address saved to your Waystar account profile will be entered here by default.

To have the scheduled reporting delivered to a group, set up the appropriate email addresses in a comma-delimited list (e.g., john.doe@waystar.com, jane.doe@waystar.com, etc.) in the **Email** field.

9. From the **Format** dropdown, select one of the following:

- **CSV zip file:** When the reporting is auto-generated:
 - The emailed link will direct you to the **ANALYTICS > Analytics > Schedules > Exports** screen. After clicking the link in the email (you must be logged into Waystar for the link to work), the Exports screen will open, and a zipped CSV file of the reported dashboard data will display.
 - If you selected FTP, the zipped report CSV file also appears in your organization's default domain FTP location inside the Download folder.
 - The generated data will also appear in the Exports list, allowing you to download/access the data at any time. See the [Downloading exported/generated reports](#) section for more information on how to download auto-generated reporting.
- **PDF:** When the reporting is auto-generated:
 - The emailed link will direct you to the **ANALYTICS > Analytics > Schedules > Exports** screen. After clicking the link in the email (you must be logged into Waystar for the link to work), the Exports screen will open, and a PDF of the reported dashboard data will automatically download to your system.
 - If you selected FTP, the report PDF also appears in your organization's default domain FTP location inside the Download folder.
 - The generated data will also appear in the Exports list, allowing you to download/access the data at any time. See the [Downloading exported/generated reports](#) section for more information on how to download auto-generated reporting.
- **PNG visualization:** When the reporting is auto-generated:
 - The emailed link will direct you to the **ANALYTICS > Analytics > Schedules > Exports** screen. After clicking the link in the email (you must be logged into Waystar for the link to work), the Exports screen will open, and an image file (.PNG) of the generated dashboard visualization will automatically download to your system.
 - If you selected FTP, the visualization image also appears in your organization's default domain FTP location inside the Download folder.
 - The generated data will also appear in the Exports list, allowing you to download/access the data at any time. See the [Downloading exported/generated reports](#) section for more information on how to download auto-generated reporting.
 - For more information on Analytics visualizations, see the [Look visualization](#) section.

10. If necessary, add to and/or modify the dashboard filters by going to the **Filters** tab. These filters will be applied to all upcoming reporting for this schedule.

Schedule Delivery

Settings **Filters** Advanced options

Billing Provider Specialty

Billing Provider Classification

Patient State

Claim Type

Payer

Place of Service

Test now **Cancel** **Save**

11. If necessary, go to the **Advanced options** tab to define additional customizations for your schedule. The options available in this menu depend on the selected format of your delivery.

12. If desired, click the **Test now** button to send a test version of the dashboard to the specified email address; if you selected FTP, the test report also appears in your organization's default domain FTP location inside the Download folder.

This test will mirror the recurring reporting that will be delivered based on this schedule.

13. When finished setting up the schedule, click the **Save** button.

Schedule Delivery

Settings Filters **Advanced options**

Expand tables to show all rows 

Arrange dashboard tiles in a single column

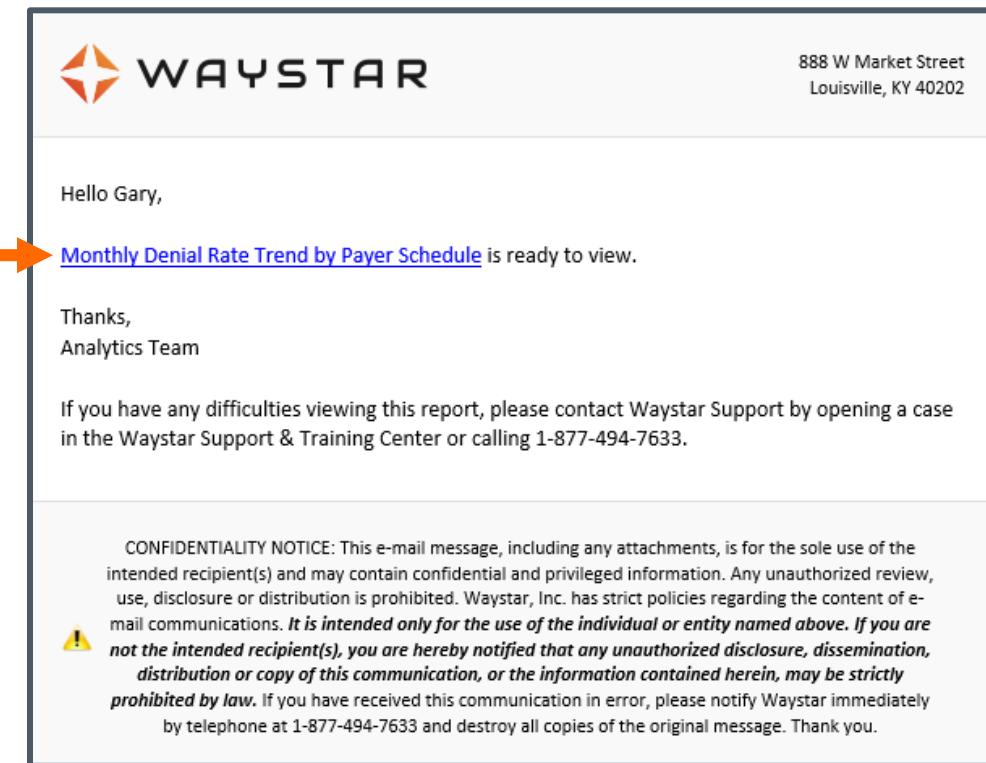
Paper size

Delivery timezone

Test now **Cancel** **Save**

A link to the scheduled reporting will be delivered to the specified email address(es) at the first date/time as defined in your schedule—and on all future recurring dates.

Note: To access the reported data, you must be logged into Waystar before you click the link.



Hello Gary,

 [Monthly Denial Rate Trend by Payer Schedule](#) is ready to view.

Thanks,
Analytics Team

If you have any difficulties viewing this report, please contact Waystar Support by opening a case in the Waystar Support & Training Center or calling 1-877-494-7633.

CONFIDENTIALITY NOTICE: This e-mail message, including any attachments, is for the sole use of the intended recipient(s) and may contain confidential and privileged information. Any unauthorized review, use, disclosure or distribution is prohibited. Waystar, Inc. has strict policies regarding the content of e-mail communications. *It is intended only for the use of the individual or entity named above. If you are not the intended recipient(s), you are hereby notified that any unauthorized disclosure, dissemination, distribution or copy of this communication, or the information contained herein, may be strictly prohibited by law.* If you have received this communication in error, please notify Waystar immediately by telephone at 1-877-494-7633 and destroy all copies of the original message. Thank you.

14. Click this link to be directed to the **ANALYTICS > Analytics > Schedules > Exports** screen where the dashboard data (as defined in your schedule) will automatically download to your system. If you selected FTP, the report also appears in your organization's default domain FTP location inside the Download folder.

The generated data will also be included in the Exports list, allowing you to download/access the data at any time. For more information, see the [Downloading exported/generated reports](#) section.

Creating a new Look schedule

This section explains how to create a new schedule for Analytics to auto-generate and distribute an individual Look.

To create a new Look schedule:

1. Go to **ANALYTICS > Analytics > Work Spaces** and select the appropriate tab, such as Dashboard, Shared, or Personal.
2. Locate and click the Look you would like to create the schedule for.
The selected Look screen will load.
3. From the opened Look, hover over the top-right corner of the screen, and then click the **Explore actions** (cog) icon that will appear.
4. From the dropdown menu, select **Schedule**.

The screenshot shows the Waystar Analytics interface with the 'Analytics Peak' dashboard selected. The main content area displays a 'Claim Lag Summary' report with four rows of data. The columns are: Account, Average Waystar Lag Days, Average Payer Lag Days, Average Charge Lag Days, and Average Life Cycle Days. The data is as follows:

	Account	Average Waystar Lag Days	Average Payer Lag Days	Average Charge Lag Days	Average Life Cycle Days
1	Waystar Training Account (5076)	0	0	0	0
2	America Healthcare Inc (729)	0	0	0	0
3	America Healthcare Hospital (4520)	0.25	12.54	22.76	23.01
4	America Healthcare Primary Care (188)	0.19	9.92	22.81	23.00
Totals		0.19	10.25	22.80	23.00

In the top right corner of the report area, there is a context menu with several options: Run, Explore from here, Edit, Save..., Download, Send, Schedule, Merge results, Clear cache and refresh, and Move to trash. Two orange arrows highlight the 'Run' button and the 'Schedule' option in the menu.

The Schedule [Look name] screen will open. See the orange callouts and their corresponding steps below.

Schedules

Claim Lag Summary

Give your schedule a name.

Where should this data go?

Email

Format data as

Trigger

Deliver this schedule

- In the **Give your schedule a name** field, enter an appropriate schedule name (e.g., Daily AR Days Trend Schedule). You will use this name to locate the schedule in the Analytics application.

Note: After the schedule is saved, you will not be able to rename it. You can, however, create a copy of the schedule and apply the desired name to the copy. For instructions on duplicating an existing schedule, see the [Duplicating a schedule](#) section.

- Click one of the **Where should this data go?** selections.

- Email** sends a link to the scheduled report on the **ANALYTICS > Analytics > Schedules > Exports** screen.

Note: The following FTP selection appears only if the FTP feature is enabled at the domain or child-account level.

- FTP** saves the scheduled report in your organization's default domain FTP location inside the Download folder. You'll also receive an email letting you know the report finished processing and the email will provide a link to the **ANALYTICS > Analytics > Schedules > Exports** screen.

- If necessary, update the **Email** address where the scheduled reporting will be delivered. The email address saved to your Waystar account profile will be entered here by default.

To have the scheduled reporting delivered to a group, set up the appropriate email addresses in a comma-delimited list (e.g., john.doe@waystar.com, jane.doe@waystar.com, etc.) in the **Email** field.

8. Select one of the following options from the **Format data as** section:

Note: If you selected FTP, the report also appears in your organization's default domain FTP location inside the Download folder.

- **CSV:** When the reporting is auto-generated, the delivered link will direct you to the **ANALYTICS > Analytics > Schedules > Exports** screen and a .csv spreadsheet of the reported data will automatically download to your system.
- **XLSX:** When the reporting is auto-generated, the delivered link will direct you to the **ANALYTICS > Analytics > Schedules > Exports** screen and a .xlsx spreadsheet of the reported data will automatically download to your system.
- **JSON – Simple:** When the reporting is auto-generated, the delivered link will direct you to the **ANALYTICS > Analytics > Schedules > Exports** screen and a JSON (JavaScript Object Notation) file of the reported data will automatically download to your system.
- **Text:** When the reporting is auto-generated, the delivered link will direct you to the **ANALYTICS > Analytics > Schedules > Exports** screen and a text file of the reported data will automatically download to your system.
- **HTML:** When the reporting is auto-generated, the delivered link will direct you to the **ANALYTICS > Analytics > Schedules > Exports** screen and an HTML file of the reported data will automatically download to your system.

Looks data in the above formats will be available on the **Schedules > Exports** screen, allowing you to download/access the data at any time. For more information on how to download auto-generated reporting, see the [Downloading exported/generated reports](#) section.

Note: When reporting is auto-generated and a link is delivered to your email address, you must be logged in to Waystar upon clicking the link to access the reported data.

9. Select one of the following options from the **Trigger** section:

- **Repeating interval:** The Analytics application will auto-generate the reporting at a user-defined, recurring interval. You will define this interval in the next step below.
Note: Waystar recommends that you use the **Repeating interval** trigger for more consistent and helpful reporting.
- **Datagroup update:** The Analytics application will auto-generate the reporting when data is loaded/refreshed in Waystar for the user-defined data group (Claim, Remit, or Denial). When this trigger is selected, the **Schedule [Look name]** screen will update, allowing you to define the data group trigger.

10. Select one of the following date range values from the **Deliver this schedule** section to define the interval at which the automated reporting will be delivered to you:

- Daily
- Weekly
- Monthly
- Hourly
- By minute

After selecting the predefined interval, the **Deliver this schedule** section will update, prompting you to provide more details around when the reporting will be delivered.

11. If necessary, add to and/or modify the Look filters in the **Filters** menu. These filters will be applied to all upcoming reporting for this schedule.

12. If necessary, click the **Advanced options** dropdown to expand the corresponding menu and define additional customizations for your schedule. The options available in this menu depend on the selected format of your delivery.

IMPORTANT: By default, scheduled Looks will include only the first 500 generated results. Please be sure to select **All Results** from the **Limit** section under **Advanced options** to have *all* generated results included in the scheduled delivery.

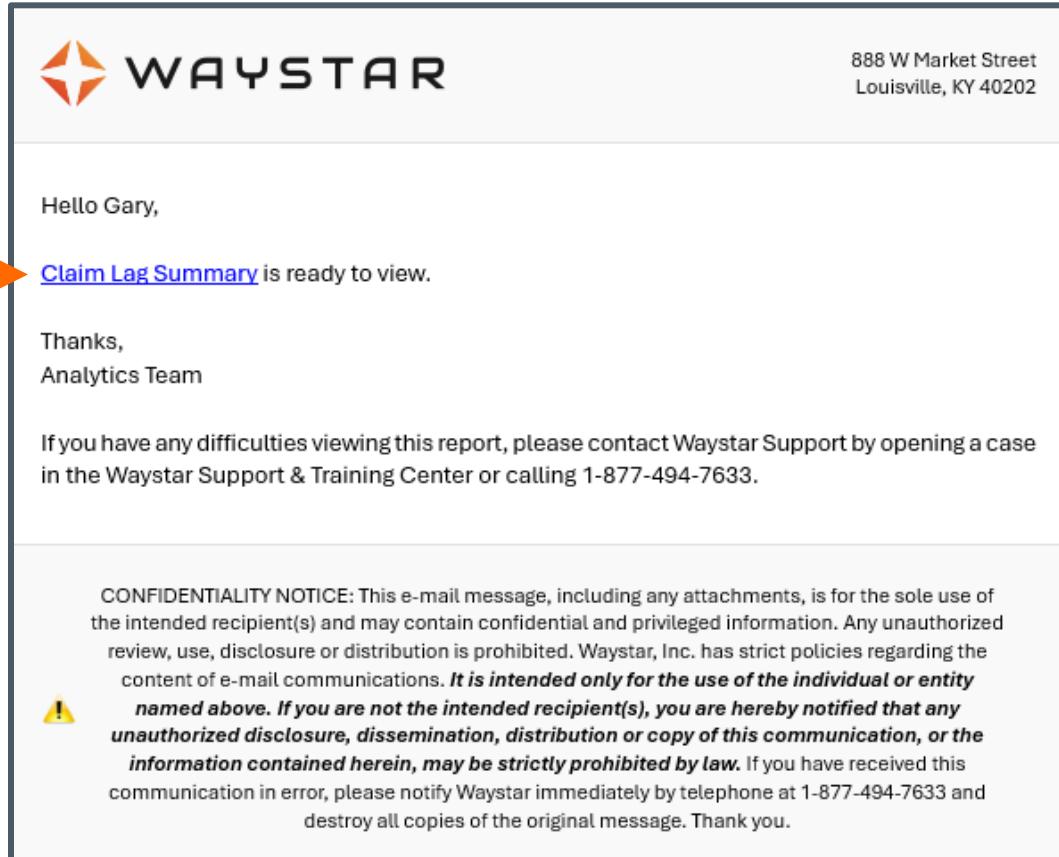
The screenshot shows the 'Advanced options' configuration screen. It includes sections for 'Send this schedule if' (set to 'there are either results or no results'), 'Format options' (with checkboxes for 'Apply visualization options' and 'Formatted data values' both checked), 'Timezone' (set to 'America - New York'), and 'Limit' (with 'Results in Table' selected). A 'Send Test' button is at the bottom left, and a status bar at the bottom right indicates 'Unsaved Changes' with 'Cancel' and 'Save All' buttons.

13. If desired, click the **Send Test** button to send a test version of the Look to the specified email address; if you selected FTP, the test report also appears in your organization's default domain FTP location inside the Download folder. This test will mirror the recurring reporting that will be delivered as a result of this schedule.

14. When satisfied with the entries above, click the **Save All** button to schedule your reporting.

A link to the scheduled reporting will be delivered to the specified email address(es) at the first date/time as defined in your schedule—and on all future recurring dates.

Note: To access the reported data, you must be logged into Waystar before you click this link.



The screenshot shows an email from Waystar. The header includes the Waystar logo and address: 888 W Market Street, Louisville, KY 40202. The body of the email starts with "Hello Gary," followed by a blue link "Claim Lag Summary" with an orange arrow pointing to it. Below the link, the message continues with "Thanks, Analytics Team". A note at the bottom states: "If you have any difficulties viewing this report, please contact Waystar Support by opening a case in the Waystar Support & Training Center or calling 1-877-494-7633." A yellow warning icon with an exclamation mark is present, followed by a confidentiality notice: "CONFIDENTIALITY NOTICE: This e-mail message, including any attachments, is for the sole use of the intended recipient(s) and may contain confidential and privileged information. Any unauthorized review, use, disclosure or distribution is prohibited. Waystar, Inc. has strict policies regarding the content of e-mail communications. ***It is intended only for the use of the individual or entity named above. If you are not the intended recipient(s), you are hereby notified that any unauthorized disclosure, dissemination, distribution or copy of this communication, or the information contained herein, may be strictly prohibited by law.*** If you have received this communication in error, please notify Waystar immediately by telephone at 1-877-494-7633 and destroy all copies of the original message. Thank you."

Click this link to be directed to the **ANALYTICS > Analytics > Schedules > Exports** screen where the Look data (as defined in your schedule) will automatically download to your system.

The generated data will also be included in the Exports list, allowing you to download/access the data at any time. For more information on how to download auto-generated reporting, see the [Downloading exported/generated reports](#) section.

Working with existing schedules

After creating schedules for your dashboards and/or Looks, go to the **ANALYTICS > Analytics > Schedules** tab to view and manage those schedules. All dashboard and Look schedules you have created will be listed on this screen.

Editing a schedule

This section explains how to edit an existing schedule.

To edit a schedule:

1. Go to the **ANALYTICS > Analytics > Schedules > Schedules** screen.
All dashboard and Look schedules you created will display on this screen.
2. Hover over a schedule row and from the Action menu that will open, click the **Edit** button.

The screenshot shows the Analytics Peak interface with the 'Schedules' tab selected. The main area displays a list of scheduled reports with columns for Name, Scheduled, Report, Domain, Account, Owner, Updated, and Last Time Run. Two rows are visible: 'Claim Lag Summary' (Look) and 'AR Performance Dashboard - Custom' (Dashboard). An orange arrow points to the 'Edit' button in the bottom right corner of the 'AR Performance Dashboard' row. A red box highlights the 'Type' column header and the 'Look' and 'Dashboard' entries in the results table.

Name	Scheduled	Report	Domain	Account	Owner	Updated	Last Time Run	Type	Summary
Claim Lag Summary	At 06:00 AM	Claim Lag Summary				08/15/2024 01:29 PM	9/12/2024 6:01:46 AM	Look	
AR Performance Dashboard - Custom	At 06:00 AM	AR Performance Dashboard - Custom				08/12/2024 03:59 PM	9/12/2024 6:01:44 AM	Dashboard	

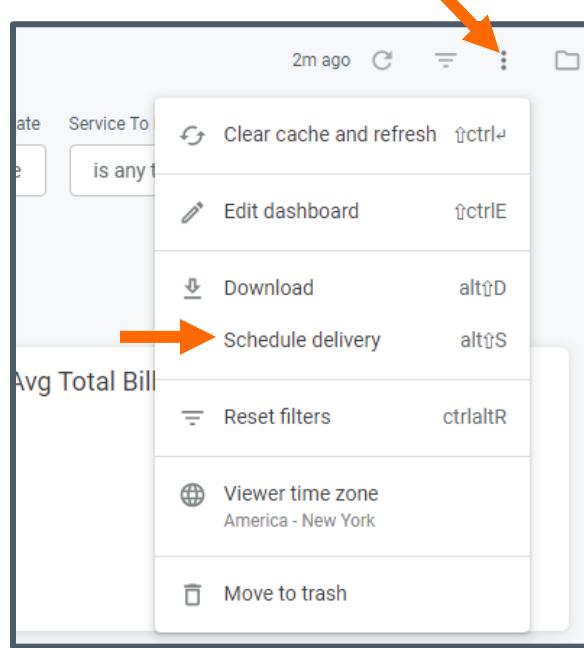
The associated dashboard/Look will open.

3. Do one of the following based on whether you selected a dashboard or Look:

- **Dashboard:**

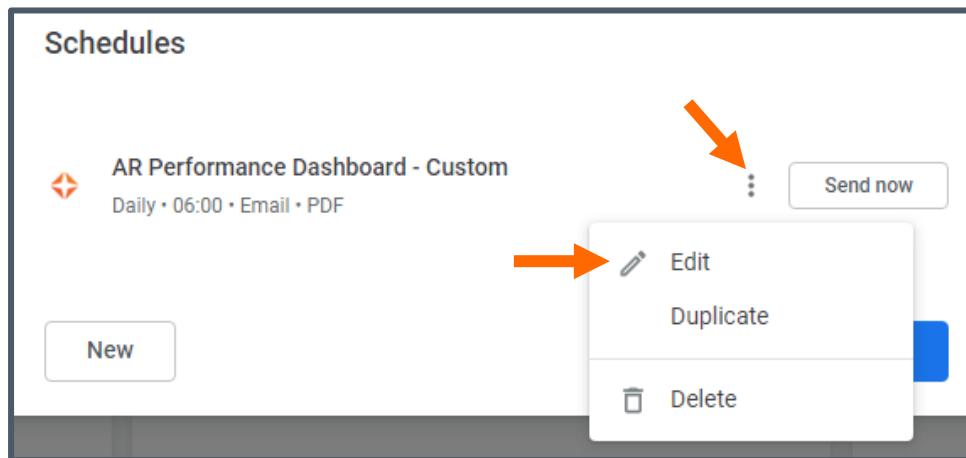
Note: The dashboard's Schedule screen might open automatically, in which case you can skip these steps and edit your schedule by going to the instructions in the [Creating a new dashboard schedule](#) section.

- a. From the dashboard, click the **Dashboard actions** (three-dot) icon in the upper-right corner of the screen.
- b. From the dropdown menu that will open, select **Schedule Delivery**.



The Schedules screen will open.

- c. Click the **More options** (three-dot) icon.
- d. From the dropdown menu that will open, select **Edit**.



The Schedule screen will open.

- e. To edit the schedule, see the instructions in the [Creating a new dashboard schedule](#) section.

- **Look:**

- From the opened Look, hover over the top-right corner of the screen, and then click the **Explore actions** (cog) icon that will appear.

Analytics Peak

Work Spaces Explore Schedules Settings Data Dictionary

Claim Lag Summary

4m ago Viewer Time Zone: America - New York

Run

Filters: Claim Payer Name (Waystar) is any value AND Claim Billing Provider Name is any value AND Claim Billing Provider Npi is any value AND Claim Facility Npi is any value AND Claim Facility Name is an...

Account	Average Waystar Lag Days	Average Payer Lag Days	Average Charge Lag Days	Average Life Cycle Days
1 Waystar Training Account (5076)	0	0	0	0
2 America Healthcare Inc (729)	0	0	0	0
3 America Healthcare Hospital (4520)	0.25	12.54	22.76	23.01
4 America Healthcare Primary Care (188)	0.19	9.92	22.81	23.00
Totals	0.19	10.25	22.80	23.00

- From the dropdown that will open, select **Schedule**.

Claim Lag Summary

6m ago

Provider Name is any value AND Claim Billing Provider Npi is any value AND Claim...

Days Average Payer Lag Days Average Charge Lag Days Average

0	0	0	0
0	0	0	0
0.25	12.54	22.76	
0.19	9.92	22.81	
0.19	10.25	22.80	

Explore from here CTRL + ALT + E

Edit

Save...

Download ⇩ ⌘ + CTRL + L

Send ALT + ⌘ + S

Schedule ALT + CTRL + S

Merge results

Clear cache and refresh ⌘ + CTRL + ↻

Move to trash

The Schedule [name of Look] screen will open.

- To edit the schedule, see the instructions in the [Creating a new Look schedule](#) section.

Creating a new schedule for a selected dashboard/Look

While editing an existing dashboard/Look schedule you can also create a schedule. The schedule will be for that selected dashboard/Look. You can also create schedules from scratch using the instructions in the [Creating a new reporting schedule](#) section.

To create a new schedule while editing an existing schedule:

1. Go to the **ANALYTICS > Analytics > Schedules > Schedules** screen.

All dashboard and Look schedules you created will display on this screen.

2. Hover over a schedule row and from the Action menu that will open, click the **Edit** button:

The screenshot shows the Analytics Peak interface with the 'Schedules' tab selected. The main area displays two results in a table format. An orange arrow points to the 'Edit' button located at the bottom right of the table row for the 'AR Performance Dashboard - Custom' entry. A red box highlights the 'Type' column, which shows 'Look' for the first row and 'Dashboard' for the second row. The table columns include Name, Scheduled, Report, Domain, Account, Owner, Updated, Last Time Run, Type, and Summary.

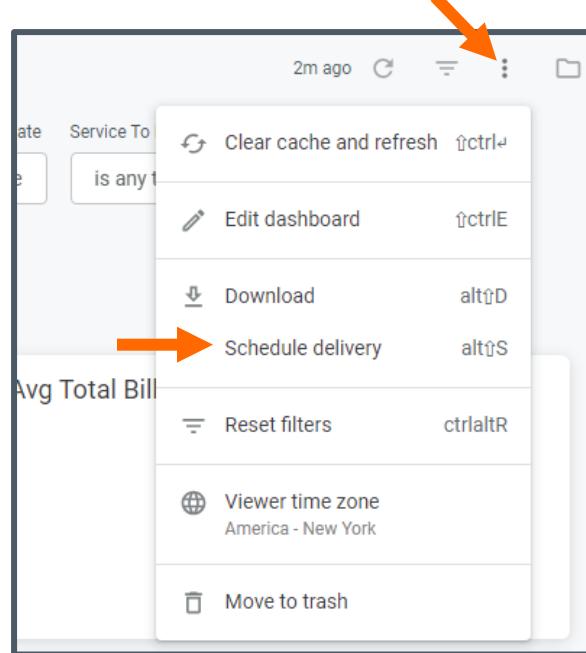
Name	Scheduled	Report	Domain	Account	Owner	Updated	Last Time Run	Type	Summary
Claim Lag Summary	At 06:00 AM	Claim Lag Summary				08/15/2024 01:29 PM	9/12/2024 6:01:46 AM	Look	
AR Performance Dashboard - Custom	At 06:00 AM	AR Performance Dashboard - Custom				08/12/2024 03:59 PM	9/12/2024 6:01:44 AM	Dashboard	

The associated dashboard/Look will open.

3. Do one of the following based on what you selected:

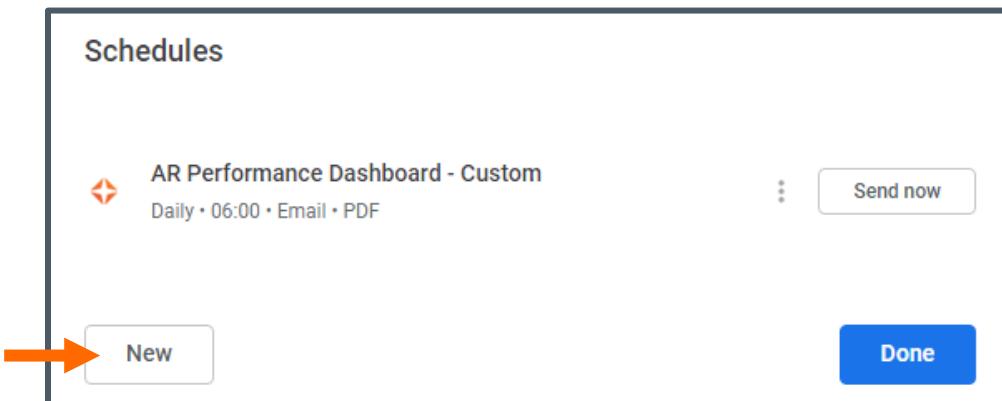
- **Dashboard:**

- From the dashboard, click the **Dashboard actions** (three-dot) icon in the upper-right corner of the screen.
- From the dropdown menu that will open, select **Schedule Delivery**.



The Schedules screen will open.

- Click the **New** button.



The Schedule screen will open.

- To edit the schedule, see the instructions in the [Creating a new dashboard schedule](#) section.

- **Look:**

- From the opened Look, hover over the top-right corner of the screen, and then click the **Explore actions** (cog) icon that will appear.
- From the dropdown menu that will open, select **Schedule**.

Analytics Peak

Claim Lag Summary

just now

Viewer Time Zone: America - New York

Run

Explore from here CTRL + ALT + E

Filters: Claim Payer Name (Waystar) is any value AND Claim Billing Provider Name is any value AND Claim Billing Provider Npi is any value AND

	Account	Average Waystar Lag Days	Average Payer Lag Days	Average Charge Lag Days
1	Waystar Training Account (5076)	0	0	0
2	America Healthcare Inc (729)	0	0	0
3	America Healthcare Hospital (4520)	0.25	12.54	22.76
4	America Healthcare Primary Care (188)	0.19	9.92	22.81
Totals		0.19	10.25	22.80

Edit

Save...

Download

Send

Schedule

Merge results

Clear cache and refresh

Move to trash

The Schedule [name of Look] screen will open.

- c. From the left pane, click the **New** button.

Schedule Claim Lag Summary

Schedules	 New
Give your schedule a name.	
Claim Lag Summary	
Email > CSV > Daily	
Where should this data go?	
<input checked="" type="radio"/> Email 	
<input type="radio"/> FTP 	
Email	Email *

A new schedule name will appear in the left pane with a number after it.

- d. Update the **Give your schedule a name** field.

Schedule Claim Lag Summary

Schedules	New
Give your schedule a name.	
Claim Lag Summary	
Email > CSV > Daily	 Claim Lag Summary 2
Where should this data go?	
<input checked="" type="radio"/> Email 	
<input type="radio"/> FTP 	
Email	Email *

- e. To complete the schedule, see the instructions in the [Creating a new Look schedule](#) section.

Duplicating a schedule

Duplicating a schedule can be beneficial if, for example, you have an existing schedule but want a different delivery cadence.

To duplicate a schedule:

1. Go to the **ANALYTICS > Analytics > Schedules > Schedules** screen.
All dashboard and Look schedules you created will display on this screen.
2. Hover over a schedule row and from the Action menu that will open, click the **Edit** button:

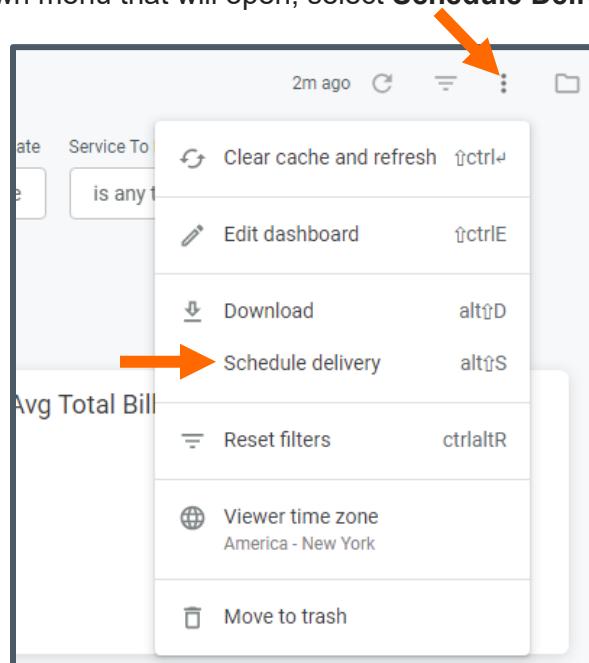
The screenshot shows the 'Analytics Peak' interface with the 'Schedules' tab selected. There are two results listed: 'Claim Lag Summary' (Look type) and 'AR Performance Dashboard - Custom' (Dashboard type). A red arrow points to the 'Edit' button located at the bottom right of the second row. The top navigation bar includes 'MY WORK', 'CLAIMS PROCESSING', 'PATIENT TOOLS', 'ANALYTICS', 'MEDICARE', 'ACCOUNT', and 'Payments'. The left sidebar has 'Work Spaces', 'Explore', 'Schedules' (selected), 'Exports', and 'Reassign Schedules'.

The associated dashboard/Look will open.

3. Do one of the following based on what you selected:

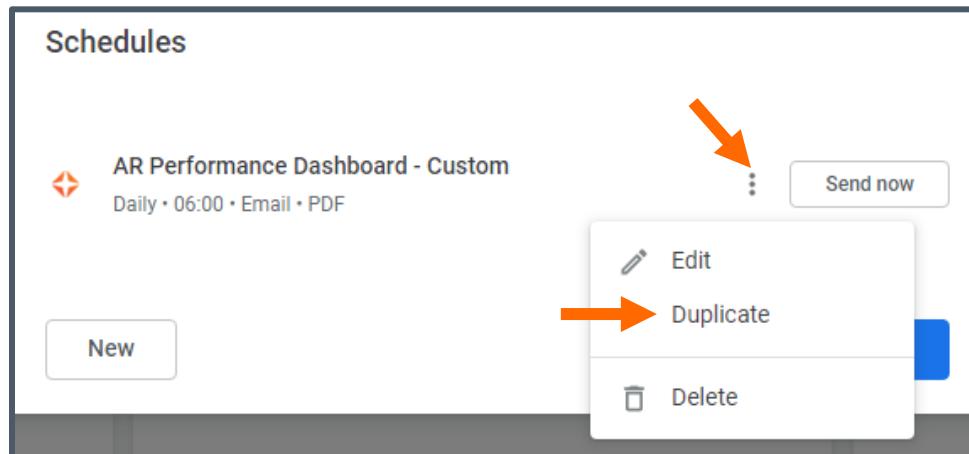
- **Dashboard:**

- a. From the dashboard, click the **Dashboard actions** (three-dot) icon in the upper-right corner of the screen.
- b. From the dropdown menu that will open, select **Schedule Delivery**.



The Schedules screen will open.

- c. Click the **More options** (three-dot) icon.
- d. From the dropdown menu that will open, select **Duplicate**.



The Schedule screen will open as a copy/duplicate of the selected dashboard.

- e. Update the schedule name to differentiate it from the existing schedule.
- f. To edit the schedule, see the instructions in the [Creating a new dashboard schedule](#) section.

- **Look:**

- a. From the opened Look, hover over the top-right corner of the screen, and then click the **Explore actions** (cog) icon that will appear.
- b. From the dropdown menu that will open, select **Schedule**.

	Account	Average Waystar Lag Days	Average Payer Lag Days	Average Charge Lag Days
1	Waystar Training Account (5076)	0	0	0
2	America Healthcare Inc (729)	0	0	0
3	America Healthcare Hospital (4520)	0.25	12.54	22.76
4	America Healthcare Primary Care (188)	0.19	9.92	22.81
Totals		0.19	10.25	22.80

The Schedule [name of Look] screen will open.

- c. From the left pane, hover over the schedule you want to duplicate.
- d. Click the **Duplicate** icon to the right of the schedule name.

Schedule Claim Lag Summary

Schedules	New
Claim Lag Summary	  
Email > CSV > Daily	
Claim Lag Summary - Weekly	
Email > CSV > Weekly	

Give your schedule a name.

Where should this data go?

 Email  FTP

Email Email *

A new schedule name will appear in the left pane with the word “Copy” after it.

- e. Update the **Give your schedule a name** field.

Schedule Claim Lag Summary

Schedules	New
Claim Lag Summary	
Email > CSV > Daily	
Claim Lag Summary - Weekly	
Email > CSV > Weekly	
Claim Lag Summary Copy	
Email > CSV > Daily	

Give your schedule a name.

Where should this data go?

 Email  FTP

Email Email *

- f. To complete the copied/duplicated schedule, see the instructions in the [Creating a new Look schedule](#) section.

Deleting a schedule

This section explains how to delete schedules. You can only delete your own schedules.

Note: Your domain administrator (DA) or your Waystar representative can also delete schedules.

To delete an existing schedule:

1. Go to the **ANALYTICS > Analytics > Schedules > Schedules** screen.
All dashboard and Look schedules you created will display on this screen.
2. Hover over a schedule row and from the Action menu that will open, click the **Edit** button:

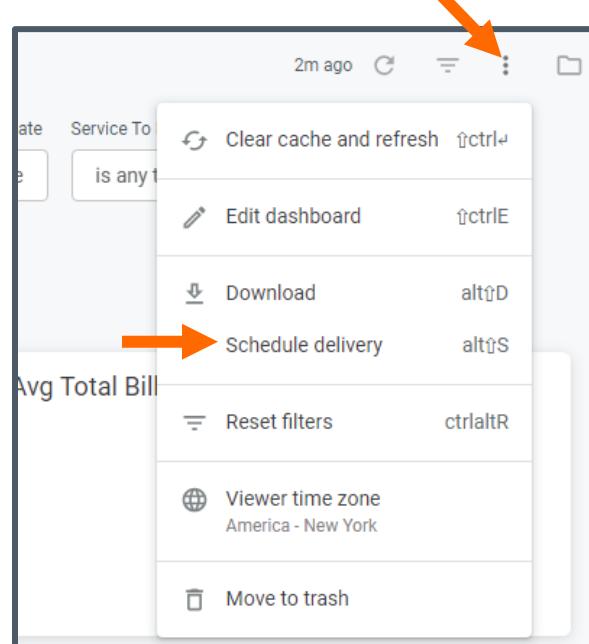
The screenshot shows the 'Analytics Peak' interface with the 'Schedules' tab selected. The main area displays two results: 'Claim Lag Summary' and 'AR Performance Dashboard - Custom'. The 'AR Performance Dashboard - Custom' row has a blue arrow pointing to its 'Edit' button. To the right of the table, there is a column header for 'Type' with a red box around it, and a row for 'Dashboard' with a red box around it.

Name	Scheduled	Report	Domain	Account	Owner	Updated	Last Time Run	Type	Summary
Claim Lag Summary	At 06:00 AM	Claim Lag Summary				08/15/2024 01:29 PM	9/12/2024 6:01:46 AM	Look	
AR Performance Dashboard - Custom	At 06:00 AM	AR Performance Dashboard - Custom				08/12/2024 03:59 PM	9/12/2024 6:01:44 AM	Dashboard	

The associated dashboard/Look will open.

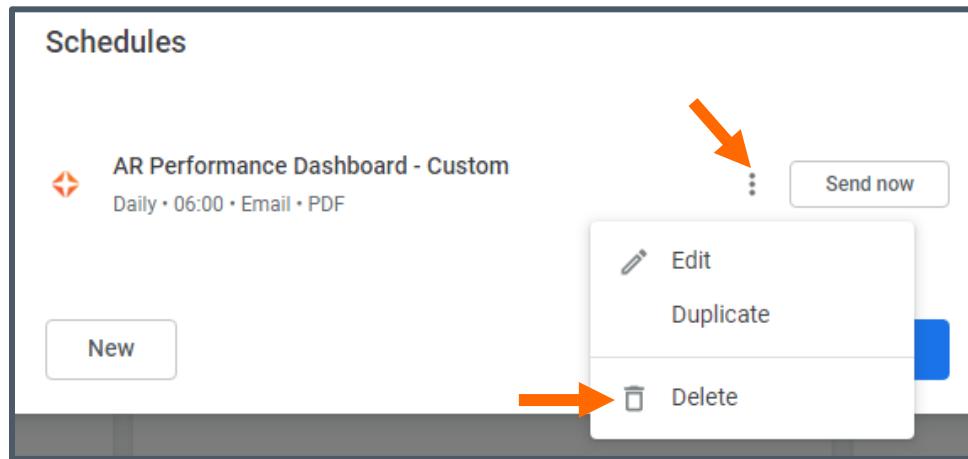
3. Do one of the following based on what you selected:

- **Dashboard:**
 - a. From the dashboard, click the **Dashboard actions** (three-dot) icon in the upper-right corner of the screen.
 - b. From the dropdown menu that will open, select **Schedule Delivery**.



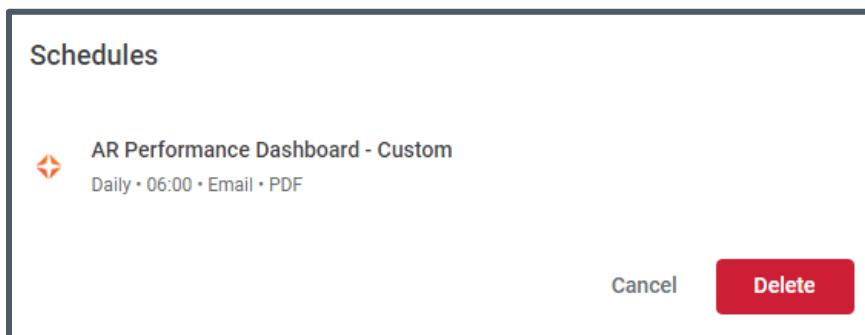
The Schedules screen will open.

- c. Click the **More options** (three-dot) icon.
- d. From the dropdown, select **Delete**.



The Schedules confirmation screen will open.

- e. Click the **Delete** button.



- **Look:**

- From the opened Look, hover over the top-right corner of the screen, and then click the **Explore actions** icon that will appear.
- From the dropdown menu that will open, select **Schedule**.

Analytics Peak

Claim Lag Summary

just now

Viewer Time Zone: America - New York

Run

Schedule

	Account	Average Waystar Lag Days	Average Payer Lag Days	Average Charge Lag Days
1	Waystar Training Account (5076)	0	0	0
2	America Healthcare Inc (729)	0	0	0
3	America Healthcare Hospital (4520)	0.25	12.54	22.76
4	America Healthcare Primary Care (188)	0.19	9.92	22.81
Totals		0.19	10.25	22.80

The Schedule [name of Look] screen will open.

- From the left pane, hover over the appropriate Look schedule, and then click the delete X icon.
- The Look schedule will immediately delete; however, if you did NOT mean to delete the schedule after you click the delete icon, then click the **Cancel** button at the bottom of the screen.

Schedules

New

Claim Lag Summary

Email > CSV > Daily

Claim Lag Summary - Weekly

Email > CSV > Weekly

Give your schedule a name.

Give your schedule a name.

Claim Lag Summary

Where should this data go?

Email

FTP

Downloading exported/generated reports

When a scheduled dashboard/Look report is delivered to you via email, the link in the email will direct you to the **ANALYTICS > Analytics > Schedules > Exports** screen (explained in this section) where the reporting will automatically download to your system with the user-defined specifications/settings/formatting.

Note:

- You must be logged in to Waystar upon clicking the link in the email to access the reported data.
- The person who scheduled the report is the only one who can go to the Exports screen to download the report at any time.

To download an exported/generated dashboard/Look report:

1. Go to the **ANALYTICS > Analytics > Schedules > Exports** screen.
2. Hover over an export row and from the Action menu that will open, click the **Download** button.

The screenshot shows the Waystar Analytics Peak interface. At the top, there are navigation tabs: MY WORK, CLAIMS PROCESSING, PATIENT TOOLS, ANALYTICS (which is selected), MEDICARE, and ACCOUNT. Below these are sub-tabs: Payments, Work Spaces, Explore, Schedules (which is selected and highlighted in orange), Settings, and Data Dictionary. On the left, a sidebar has three options: Schedules, Exports (which is selected and highlighted in orange), and Reassign Schedules. The main area is titled 'Exports' and contains a table of results. The table columns are: Downloaded (sorted by date), Schedule, File Name, Owner, Recipient(s), and Status. There are five rows in the table. The first row has a red arrow pointing to the 'Download' button in the Action menu. The other four rows have their status listed as 'Complete'. The table header includes sorting arrows for all columns except Status.

Downloaded	Schedule	File Name	Owner	Recipient(s)	Status
9/12/2024 4:07:54 AM	Daily Benchmark Comparison GJP	Daily Benchmark Comparison GJP.pdf	[REDACTED]	[REDACTED]	Complete
9/12/2024 4:06:48 AM	Claim Lag Summary	Claim Lag Summary	[REDACTED]	[REDACTED]	Complete
9/12/2024 4:06:48 AM	Claim Lag Summary	Claim Lag Summary.csv	[REDACTED]	[REDACTED]	Complete
9/14/2024 4:07:34 AM	Claim Lag Summary	Claim Lag Summary.csv	[REDACTED]	[REDACTED]	Complete

The dashboard/Look will download to your system with the specifications/settings/formatting as defined when the reporting was scheduled.

To create a new schedule for a dashboard or Look, see the [Creating a new dashboard schedule](#) and [Creating a new Look schedule](#) sections.

Reassigning schedules

Reassigning a schedule

This section explains how your **Domain Administrator (DA)** or a **Waystar representative** can reassign existing schedules to a different owner.

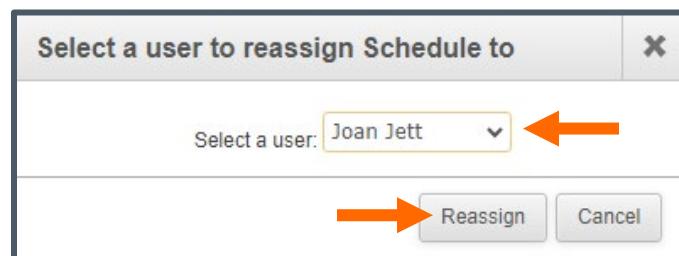
To reassign a schedule:

1. The **Domain Administrator (DA)** or a **Waystar representative** will go to the **ANALYTICS > Analytics > Schedules > Reassign Schedules** screen.
2. Hover over a dashboard or Look row and from the Action menu that will open, click the **Reassign** button.

The screenshot shows the Waystar Analytics Peak interface. The top navigation bar includes links for MY WORK, CLAIMS PROCESSING, PATIENT TOOLS, ANALYTICS (which is currently selected), MEDICARE, and ACCOUNT. Below the navigation is a search bar with placeholder text 'Search Analytics Peak'. The main content area is titled 'Analytics Peak' and has tabs for Work Spaces, Explore, Schedules (which is underlined in red), Settings, and Data Dictionary. On the left, there's a sidebar with buttons for Schedules, Exports, and Reassign Schedules (also highlighted with an orange arrow). The main table is titled 'Reassign Schedules' and shows '29 Results'. It has columns for Name, Scheduled Time, Datagroup, Report, Owner, Recipients, and Updated. One row is selected, and an orange arrow points to the 'Reassign' button in the action menu for that row. Other visible buttons in the action menu include 'Delete' and 'History'.

The “Select a user to reassign Schedule to” screen will open.

3. From the **Select a user** dropdown, select the appropriate user.
4. Click the **Reassign** button.



The schedule will now process for the selected user, following the originally set options.

To edit a schedule, see the [Editing a schedule](#) section.

Deleting “reassigned” schedules

This section explains how to delete a schedule from the Reassign Schedules screen. This action deletes the schedule itself, as also explained in the [Deleting a schedule](#) section.

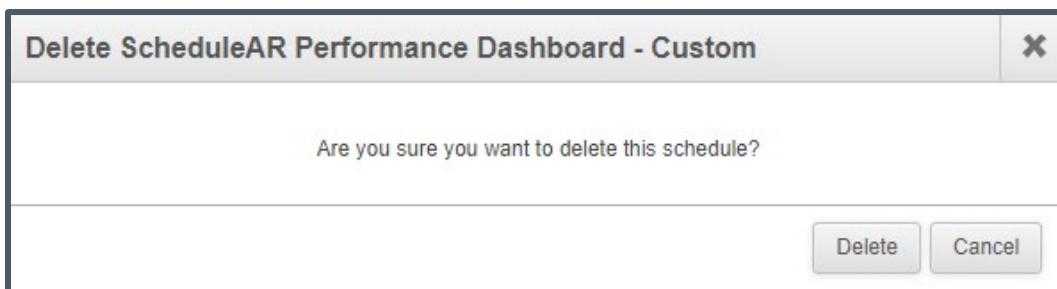
To delete a reassigned schedule:

1. Go to the **ANALYTICS > Analytics > Schedules > Reassign Schedules** screen.
2. Hover over a dashboard or Look row and from the Action menu that will open, click the **Delete** button.

The screenshot shows the Waystar Analytics Peak interface. The top navigation bar includes links for MY WORK, CLAIMS PROCESSING, PATIENT TOOLS, ANALYTICS (which is currently selected), MEDICARE, and ACCOUNT. Below the navigation is a search bar with placeholder text "Search Analytics Peak". The main content area is titled "Analytics Peak" and has tabs for Work Spaces, Explore, **Schedules** (which is underlined in red), Settings, and Data Dictionary. On the left, there's a sidebar with links for Schedules, Exports, and Reassign Schedules (also underlined in red). The main table is titled "Reassign Schedules" and shows "29 Results". The columns include Name, Scheduled Time, Datagroup, Report, Owner, Recipients, and Update Date. One row is highlighted in blue, and an orange arrow points to the "Delete" button in the action menu for that row. The "Delete" button is located next to the "Reassign" button in the row's action column.

The Delete screen will open.

3. Click the **Delete** button.



Viewing reassigned schedule history

This section explains how to view the history of the reassigned schedule, which will display the reassignment actions taken against the schedule.

To view reassigned schedule history:

1. Go to the **ANALYTICS > Analytics > Schedules > Reassign Schedules** screen.
2. Hover over a dashboard or Look row and from the Action menu that will open, click the **History** button.

The screenshot shows the Waystar Analytics Peak interface. At the top, there's a navigation bar with tabs: MY WORK, CLAIMS PROCESSING, PATIENT TOOLS, ANALYTICS (which is currently selected), MEDICARE, and ACCOUNT. Below the navigation bar, the title 'Analytics Peak' is displayed. Underneath the title, there are several tabs: Work Spaces, Explore, **Schedules** (which is underlined in red), Settings, and Data Dictionary. On the left side, there's a sidebar with three main categories: Schedules, Exports, and Reassign Schedules (also highlighted with a red border). The main content area is titled 'Reassign Schedules' and shows '29 Results'. It contains a table with columns: Name, Scheduled Time, Datagroup, Report, Owner, Recipients, and Upd. The first row in the table has a red arrow pointing to the 'History' button in the action menu. The table also includes a 'Reassign' button for each row.

The History screen will open.

The screenshot shows the 'History' screen. At the top, it says 'History' and has a close button ('X'). Below that, there are three input fields: 'Date Created', 'Created By', and 'Description'. The 'Date Created' field shows '8/8/2024 11:52:08 AM'. The 'Created By' field shows 'Waystar CsRep'. The 'Description' field shows 'The ownership has changed from Waystar CsRep to [redacted]'. The entire 'History' screen is enclosed in a black border.

- **Date Created:** The date of the reassignment.
- **Created By:** The person who reassigned the schedule.
- **Description:** The description of the reassignment action taken.

Analytics Benchmarking

Overview

Use Analytics Benchmarking to apply custom benchmark values to your Looks and dashboards to better understand how your organization and payers are performing in comparison to other Waystar clients/payers. Analytics Benchmarking allows you to take your comparative analysis a step further by giving you the power to assign benchmarking with custom Analytics attributes (use the [Data Dictionary](#) to find descriptions).

For example, you can compare how quickly your payers (broken down by Payer Class) are returning remittances when compared to an average for all other Waystar payers.

Analytics Peak allows you to perform benchmarking analysis using a few different methods:

- Use the Waystar-created **Benchmark Comparison Dashboard** to compare your organizational/payer **Claim Performance**, **Payment Performance**, and **Denial Performance**.
For more information on the Benchmark Comparison Dashboard, see the [Analytics Packaged Reporting Guide](#).
- To perform further, customized comparative analysis, copy reporting (Look tiles) from the **Benchmarking Comparison Dashboard** and [modify the reported queries](#) (benchmarking data and standard data sets).
- [Merge a net-new Look with custom benchmarking](#).

Benchmark Comparison Dashboard – Custom Benchmarking Analysis

The **Benchmark Comparison Dashboard** was designed to help you compare your organizational/payer claim, payment, and denial performance to other Waystar clients/payers; however, with **Analytics Peak** you can copy this dashboard data and customize it to perform more targeted benchmarking analysis.

To perform custom benchmarking analysis with the Benchmark Comparison Dashboard:

1. Create a copy of the Benchmark Comparison Dashboard

To perform additional benchmarking analysis using data from the Waystar-created Benchmark Comparison Dashboard, you must first copy the dashboard data and save it for editing.

- Go to **ANALYTICS > Analytics > Work Spaces > Dashboard**.
- Locate the **Benchmark Comparison Dashboard**.
- Click the three-dot icon to the right of the dashboard, and from the dropdown menu that will open, select **Copy**.

Analytics Peak

Work Spaces Explore Schedules Settings Data Dictionary

Dashboard	Work Spaces
Packages	AR Performance Dashboard Created by Waystar
Shared	AR Performance Dashboard Created by Waystar
Favorites	Benchmark Comparison Dashboard Created by Waystar
Personal	Benchmark Comparison Dashboard Created by Waystar
Trash	Benchmark Comparison Dashboard Created by Waystar

Description

Provides insight into the back end claim follow up, payment performance, and denial outcomes. ♥ ...

Provides insight into the back end claim follow up, payment performance, and denial outcomes. ♥ ...

The Benchmark Comparison Dashboard provides a number of files/Looks which will allow you to ...

Copy

The Copy Dashboard screen will open.

- In the **Name** field, enter an appropriate name for the copied dashboard. You will use this name to locate the copied dashboard.
- Under **Copy To**, select the **Shared** or **Personal** radio button.

For more information on the **Shared** and **Personal** tabs, see the [Work Spaces](#) section.

- Click the **Copy** button.
- The dashboard copy will be added to the selected tab.
- Click the appropriate Work Spaces tab (**Shared** or **Personal**) from the menu on the left side of the screen, depending on where you saved the dashboard copy.
 - Locate and click your dashboard copy in the **Dashboards** section.
- Your dashboard copy will appear.
- To modify the dashboard, continue with the next step.

Copy Dashboard

Name

Benchmark Comparison Dashboard (Copy)

Copy To

Shared Personal

Copy

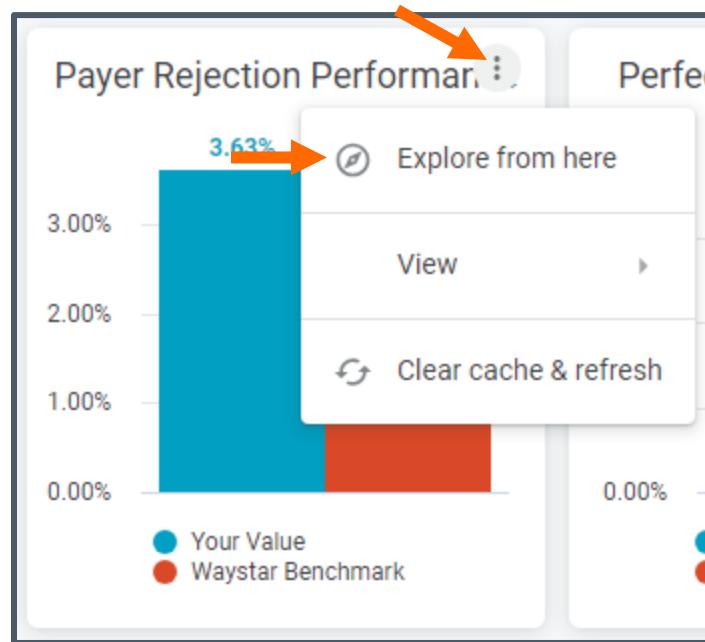
2. Modify the dashboard tiles for further benchmarking analysis

After you create a copy of the Benchmark Comparison Dashboard, you can edit any of the displayed dashboard tiles/Looks for further benchmarking analysis.

To modify the benchmarking values and data points (from the Claim, Remit, and Denial data sets) for a dashboard tile/Look:

- a. [Create a copy of the dashboard.](#)
- b. Open the copied benchmark dashboard.
- c. Hover over the dashboard tile/Look you would like to use for additional benchmarking analysis and click the **Tile actions** (three-dot) icon in the top-right corner.
- d. From the dropdown menu that will open, select **Explore from here**.

The dropdown menu might look different from the following example based on the type of tile you are modifying.



The Merged Results screen will open.

The screenshot shows the 'Merged Results' screen in the Analytics Peak application. On the left, there's a sidebar with 'Source Queries' (Claim and Benchmark) and a 'Merge Rules' section where 'Claim Primary' is selected for merging with 'Benchmark' via 'Merge Match'. Below this is a 'Visualization' toolbar with tabs for 'Data', 'Results' (which is selected), and 'Add calculation'. It displays a table with three rows: 'Merge Match' (1 Match), 'Claim Payer Rejection Rate' (3.63%), and 'Totals' (2.52%).

- **MERGE RULES:** Indicates which Explore data set (Claim, Remit, or Denial) was merged with the benchmarking values.
- **Visualization:** Click the Visualization toolbar to open it. It will display a chart-based visualization of the reported data and benchmarking values. The visualization key/legend indicates the reported Claim, Remit, or Denial data as **Your Value** while the applied benchmarking is shown as **Waystar Benchmark**. For more information on Analytics visualizations and instructions on how to view the Look data/benchmarking as a different visualization type, see the [Look visualization](#) section.
- **Data:** Displays a data table, indicating which data set (from Claim, Remit, or Denial) and benchmarking values were added to the Look as dimensions and measures.

Note: Use the [Data Dictionary](#) to find descriptions of the available benchmarking values that can be applied to a Look.

The Merged Results screen provides the following action items, allowing you to modify the existing benchmarking values, modify the existing reported data, and add new queries (benchmarking and/or data set queries).

3. To modify the applied benchmarking values:

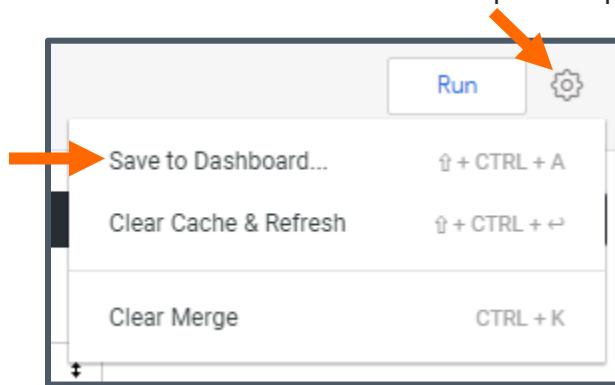
- In the **Source Queries** pane on the left of the Merged Results screen for the copied benchmark dashboard, click the cog icon to the right of **Benchmark**.
- From the dropdown menu that will open, select **Edit**.

The screenshot shows the 'Merged Results' screen. On the left, under 'Source Queries', there is a list with 'Claim' and 'Benchmark'. Below this list is a blue button labeled 'Add Query'. To the right of the list, there is a 'Primary' label with a gear icon. A context menu is open over the 'Benchmark' entry, containing the following options: 'Edit' (highlighted with a red arrow), 'Rename', 'Make Primary', and 'Delete'. To the right of the menu, a section titled 'MERGE RULES' is visible, showing 'Claim Primary' and a dropdown menu set to 'Merge Match'. The entire interface has a light gray background.

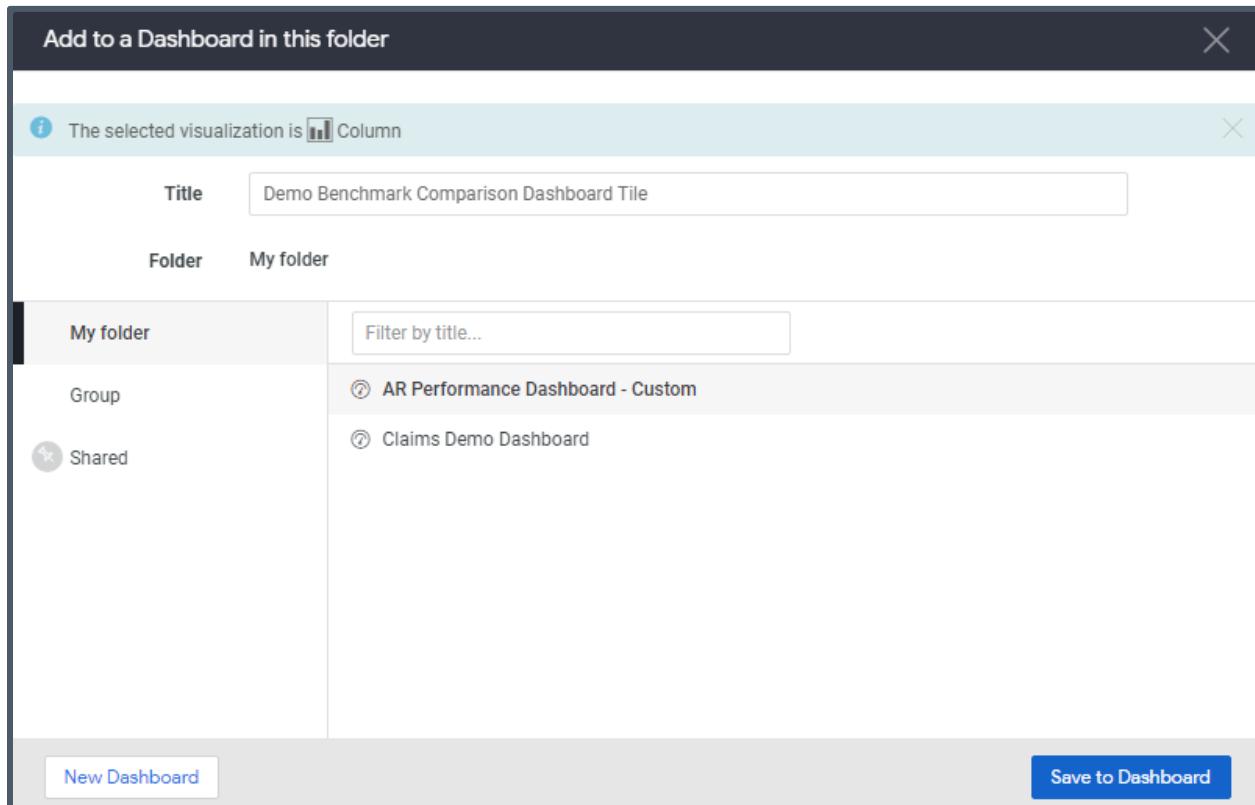
The Merge Query screen will open, providing the standard Analytics Explore interface.

The screenshot shows the 'Merge Query' screen with a blue header bar containing 'Merge Query', 'Explore from Here', 'Cancel', and 'Save' buttons. Below the header is a search bar with the placeholder 'Start typing to search'. The main area is titled 'Edit Query'. On the left, there is a sidebar titled 'Benchmark' with a 'Find a Field' search bar and a list of fields categorized under 'All Fields' and 'In Use'. The 'All Fields' section includes 'Custom Fields' (with '+ Add' and '1'), 'Adjustment', 'Claim' (with '1'), 'Claim Line', 'Rejection', 'Remark', 'Remit', and 'Remit Line'. The 'In Use' section is currently empty. To the right of the sidebar is a data visualization area. At the top of this area are 'Filters' and 'Visualization' tabs. Below them is a toolbar with 'Data' (selected), 'Results' (highlighted with a blue box), and 'Add calculation' buttons. The 'Row Limit' is set to 500, and the 'Totals' checkbox is unchecked. The results table shows one match for 'Merge Match' with a value of 'Claim Payer Rejection Rate ↓' and '2.52%'. The table has columns for 'Match' and 'Value'. The overall interface is clean and modern, typical of a business intelligence tool.

- c. If necessary, update the query name (displayed as **Edit Query** by default) in the top-left corner of the Merge Query screen. This name will display for the corresponding query on the previous Merge Results screen.
 - d. To modify the benchmarking values, use the principles and attribute definitions documented in the [Explore](#) section.
 - e. Once you are satisfied with your dimension, measure, and filter selections, click the **Run** button near the upper-right corner of the screen or press the [**Enter**] key on your keyboard.
The benchmarking query results will display.
 - f. Click the **Save** button in the upper-right corner of the screen.
The Merged Results screen will reopen.
- g. To refresh the dashboard tile/Look with your updated benchmarking values/filters, click the **Run** button at the top of the Merged Results screen.
4. When you are satisfied with your updates, click the cog icon in the top-right corner of the Merged Results screen, and then select the **Save to Dashboard** dropdown option.



The “Add to a Dashboard in this folder” screen will open.



5. Do ONE of the following:

- To add the modified dashboard tile/Look to a new or existing dashboard, update the following information:
 - **Title:** Enter an appropriate name for the modified dashboard tile/Look.
 - **Folder:** Select the appropriate Analytics Work Spaces location (**Personal** or **Shared**) and then the specific dashboard where you would like the modified tile/Look to be added.
For more information on the **Shared** and **Personal** tabs, see the [Work Spaces](#) section.
 - To add the modified dashboard tile/Look to a new dashboard, click the **New Dashboard** button in the lower-left corner of the “Add to a Dashboard in this folder” screen.
6. To save the modified dashboard tile/Look to the specified dashboard, click the **Save to Dashboard** button.

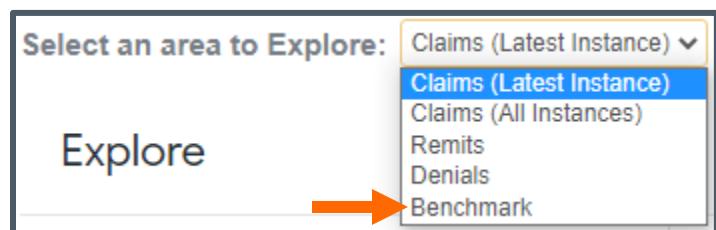
Custom benchmarking analysis with a net-new Look

In addition to using the Waystar-created **Benchmark Comparison Dashboard** to compare your organizational/payer claim, payment, and denial performance, you can also build completely new Looks and merge that reported data with custom benchmarking values. This is helpful if you're trying to find answers to questions that you may not be able to gather from the Waystar-created dashboard alone.

Note: When merging, report data is restricted to 5,000 rows of the primary source and secondary source.

To build a net-new Look and merge it with custom benchmarking:

1. Go to **ANALYTICS > Analytics > Explore**.
2. From the **Select an area to Explore** dropdown, select **Benchmark**.
3. To build the benchmarking scenario that you would like merged with the new Look, use the principles and attribute definitions documented in the [Explore](#) section.

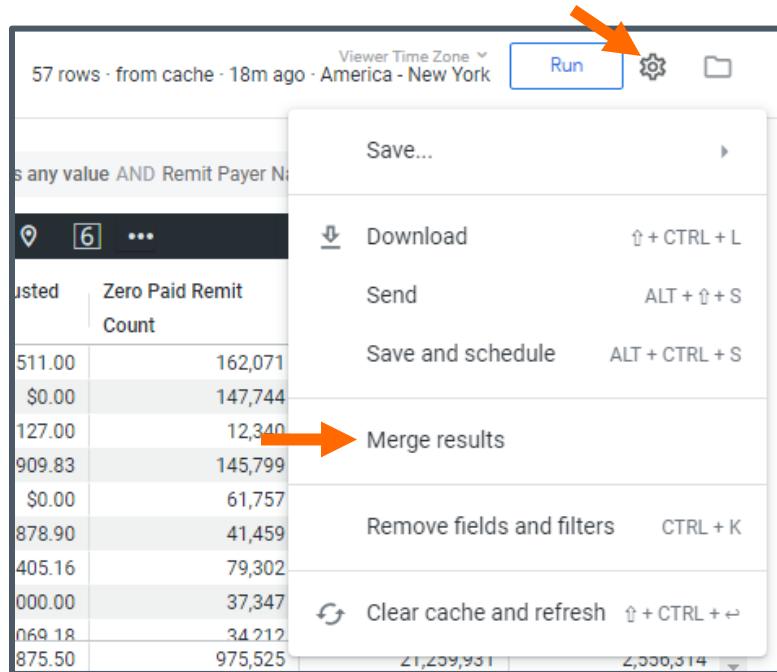


IMPORTANT: While some benchmarking dimensions and measures may overlap with existing attributes available for other data sets (Claim, Remit, and Denial), some attributes apply specifically to benchmarking. Use the [Data Dictionary](#) to find descriptions.

4. Once you are satisfied with your dimension, measure, and filter selections, click the **Run** button at the top of the screen or press the **[Enter]** key on your keyboard.

The benchmarking query results will display.

5. Click the **Explore actions** (cog) icon in the top-right corner of the Explore screen.
6. From the dropdown menu that will open, select **Merge results**.



The Choose an Explore screen will open.

7. Select the Analytics data set (**Claim**, **Denial**, or **Remit**) that you would like to use to create the new Look.
- The screen will transition to the Merge Query screen.
8. If necessary, update the query name (displayed as **Edit Query** by default) in the top-left corner of the Merge Query screen. This name will display for the corresponding query on the previous Merge Results screen.

9. To build the new Look that will be overlaid with the previously built benchmarking scenario, use the principles and attribute definitions documented in the [Explore](#) section.
- IMPORTANT:** While the dimensions, measures, filters, visualization settings, and data table settings you apply for the new Look do not *have* to match your selections in the corresponding benchmarking scenario, ***it is recommended*** that you build the Look to mirror your benchmarking scenario in order for the data sets to correlate in a sensible manner.

10. Once you are satisfied with your dimension, measure, and filter selections, click the **Run** button in the top-right corner of the screen or press the [**Enter**] key on your keyboard.

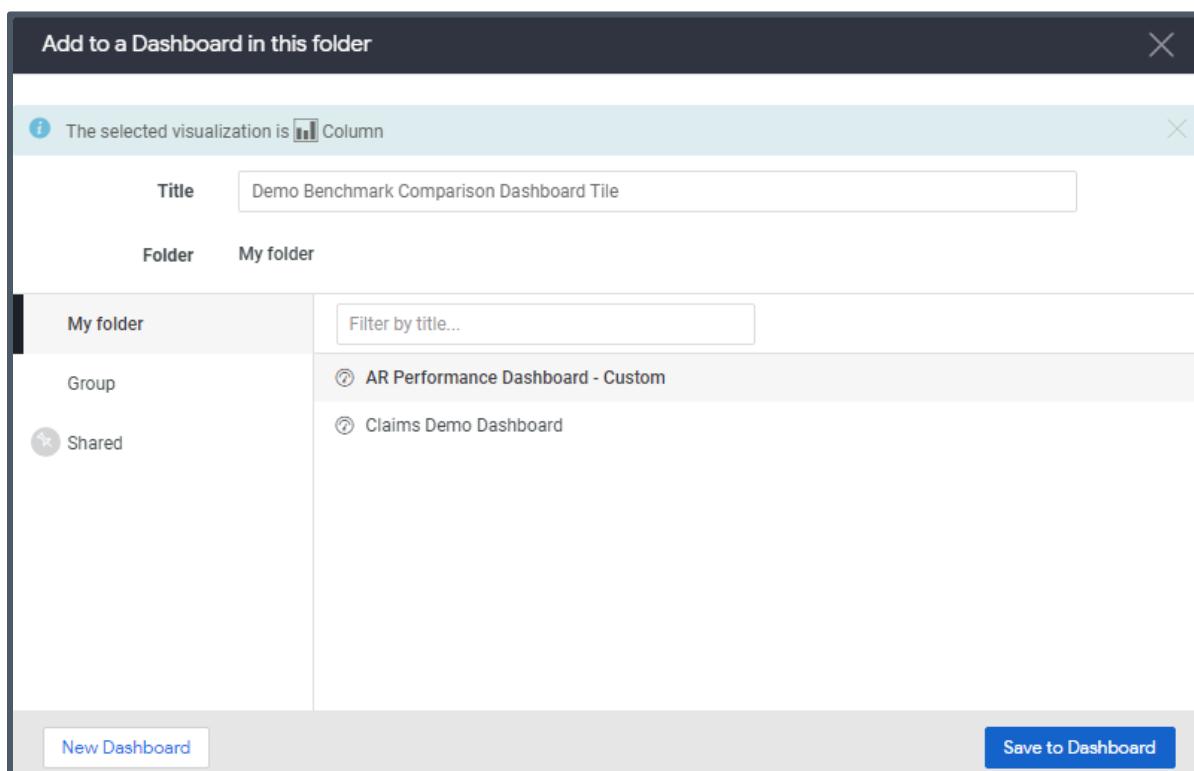
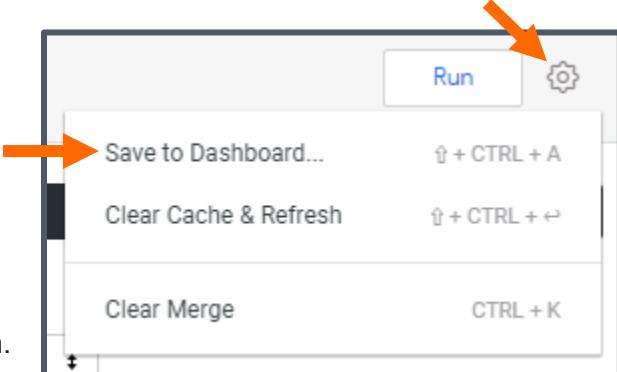
The Look query results will display.

11. Click the **Save** button.

The Merged Results screen will reopen, providing both the benchmarking values and the Look query you selected on the previous screens.

12. Click the **Run** button to generate the merged Look.
13. If necessary, click the **Visualization** toolbar above the data table to expand the Visualization menu and view a chart-based display of the merged data.
14. Click the cog icon in the top-right corner of the screen and select **Save to Dashboard** from the dropdown menu.

The “Add to a Dashboard in this folder” screen will open.



IMPORTANT: Because a merged Look has been built from disparate data sets (Benchmarking versus Claim, Denial, or Remit), they cannot be saved as a standalone Look and must be added to a dashboard.

15. Do ONE of the following:
 - Enter the following information to add the Look to a new or existing dashboard:
 - **Title:** Enter an appropriate name for the modified dashboard tile/Look.
 - **Folder:** Select the appropriate Analytics Work Spaces location (**Personal** or **Shared**) and then the specific dashboard where you would like the modified tile/Look to be added.
For more information on the **Shared** and **Personal** tabs, see the [Work Spaces](#) section.
 - To add the modified dashboard tile/Look to a new dashboard, click the **New Dashboard** button in the lower-left corner of the “Add to a Dashboard in this folder” screen.
16. To save the modified dashboard tile/Look to the specified dashboard, click the **Save to Dashboard** button.

Data Dictionary

The **ANALYTICS > Analytics > Data Dictionary** screen provides descriptions and a crosswalk for the 835 and 837 loops and segments of claim submissions and remits and how they correspond to the column headers in Analytics reports.

Selecting a dataset

This section explains how to select a specific dataset for the data dictionary.

To select a dataset:

1. Go to **ANALYTICS > Analytics > Data Dictionary**.
2. From the **Dataset** dropdown menu, select one of the following: **All**, **Claims**, **Denials**, or **Remits**.

The screenshot shows the Analytics Peak interface. At the top, there are navigation tabs: MY WORK, CLAIMS PROCESSING, PATIENT TOOLS, ANALYTICS, and ACCOUNT. Below these, the title "Analytics Peak" is displayed. Underneath the title, there are several tabs: Work Spaces, Explore, Schedules, Settings, and Data Dictionary, with "Data Dictionary" being the active tab. On the left, a sidebar titled "Data Dictionary" contains a "Dataset:" dropdown menu. The dropdown is open, showing four options: All, Claims, Denials, and Remits. An orange arrow points to the "Claims" option, which is highlighted with a blue background. To the right of the dropdown is a "Download" button. Below the dropdown is a search bar with the placeholder "Segment or Description" and a "Search" button. The main content area displays a table with three columns: Dataset, Waystar Label, and Description. The visible rows are: Denials, Package Activity Package Status, The status of the package.; Denials, Package Activity Printed Date, The date printed from the print vendor.; and Denials, Package Activity Printed Date, The date printed from the print vendor. The bottom of the table is cut off by a horizontal ellipsis.

Dataset	Waystar Label	Description
Denials	Package Activity Package Status	The status of the package.
Denials	Package Activity Printed Date	The date printed from the print vendor.
Denials	Package Activity Printed Date	The date printed from the print vendor.

Searching for a description

To search for a description:

1. Go to **ANALYTICS > Analytics > Data Dictionary**.
2. In the **Search** field, type a word, number, or phrase.
3. Click the **Search** button.

Search results will display below the search field.

The screenshot shows the Waystar Analytics Peak interface. At the top, there's a navigation bar with links for MY WORK, CLAIMS PROCESSING, PATIENT TOOLS, ANALYTICS (which is currently selected), ACCOUNT, and ADMIN. Below the navigation bar, the title 'Analytics Peak' is displayed, followed by a sub-menu with links for Work Spaces, Explore, Schedules, Settings, and Data Dictionary (which is underlined, indicating it's the active page). The main content area is titled 'Data Dictionary'. It features a search form with a 'Dataset' dropdown set to 'Claims' and a 'Download' button. The 'Search' field contains the text 'admission', with an orange arrow pointing to it. Below the search form is a table listing data descriptions. The table has columns for 'Dataset', 'Waystar Label', 'Description', and 'Transaction/Loop Segment'. The first four rows of the table are as follows:

Dataset	Waystar Label	Description	Transaction/Loop Segment
Claims	Admission Date	The patient's admission date for the associated service on the claim.	Loop 2300 Segment DTP03 Qualifier DTP01(435)
Claims	Admit Source	The code indicating the source of the referral for the admission or visit.	Loop 2300 Segment CL102
Claims	Admit Type	The basic types of admission for Inpatient hospital stays and a code indicating the priority of this admission.	Loop 2300 Segment CL101
Claims	Diagnosis Code Present Admission	Diagnosis Code Present on Admission	Loop 2300, Segment HI

At the bottom of the table, it says 'Results 1 - 4 of 4'. There are navigation buttons for previous and next pages, and a 'Page' dropdown showing '1 of 1'. To the right, there's a 'Per Page' dropdown set to '25'.

Sorting and navigating the data dictionary

To sort and navigate the list of descriptions:

1. Go to **ANALYTICS > Analytics > Data Dictionary**.
2. Do any of the following:
 - To sort the list of descriptions, click the **Waystar Label** column header. Click the column header again to reverse the sort.
 - To move between pages, use the navigation buttons at the bottom of the list.
 - To select how many descriptions you want to display on the screen, use the **Per Page** dropdown in the bottom-right of the screen.

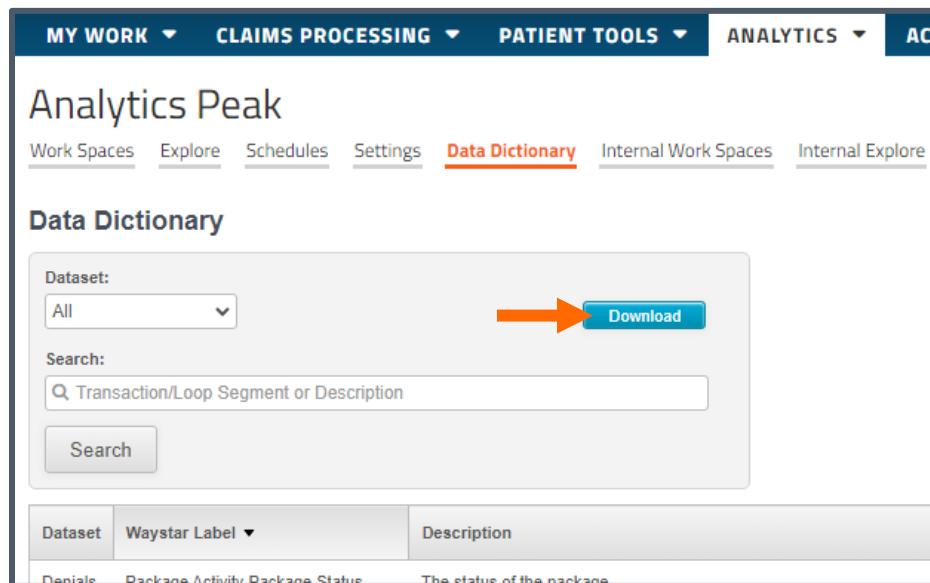
Downloading data dictionary datasets

This section explains how to download all or a specific data dictionary dataset to a CSV file.

Note: Regardless of any search performed on the dataset, the download will include all descriptions.

To download data dictionary datasets:

1. Go to **ANALYTICS > Analytics > Data Dictionary**.
2. Click the **Download** button.



The Download screen will open.

3. From the **Dataset** dropdown, select a dataset (All, Claims, Denials, or Remits).
4. From the **Filename** field, review and update as appropriate the filename you want to use for the CSV file.
5. Click the **Download Dataset** button.

Your browser's Save As screen will open.

6. Go to the folder where you want to save the file and click the **Save** button.

The CSV file will save to the specified location.

Settings

The **ANALYTICS > Analytics > Settings** screens allow you to configure your user settings and—if you are licensed for Denial Management—how denials data is displayed/calculated throughout the Analytics solution.

- **User Settings:** Configure your default user settings:

The screenshot shows the 'Analytics' section of the Waystar platform. At the top, there are tabs for 'CLAIMS PROCESSING', 'ANALYTICS' (which is selected), 'ACCOUNT', and 'ADMIN'. Below these, the 'Analytics' section has tabs for 'Work Spaces', 'Explore', 'Schedules', 'Settings' (which is selected and highlighted in red), and 'Data Dictionary'. On the left, a sidebar has 'User Settings' selected and highlighted in orange, while 'Denial Settings' is also listed. The main content area is titled 'User Settings' and contains the following configuration options:

- 'Select a timezone:' dropdown set to 'America - New York'.
- 'Default Workspace:' radio buttons for 'Shared Folder' (selected) and 'Package:'.
- A dropdown menu for 'Revenue Cycle Report Package'.
- A checked checkbox for 'Enable Show All Packages in Shared Folder'.

A blue 'Save Settings' button is at the bottom of the form.

- **Select a timezone:** Set the default time zone applied to all Looks and dashboards throughout the Analytics solution.
- **Default Workspace:** Set your default Work Spaces tab that will open when you go to ANALYTICS > Analytics > Work Spaces. Either select your Shared analytics to open or for a specific Waystar-created package of analytics to open.
- **Enable Show All Packages in Shared Folder:** Select the checkbox if you want to display your organization's custom dashboards/Looks together with Waystar-created packages within your Shared folder on your Work Spaces screen.

We recommend using the Packages tab for Waystar-created packages and the Shared tab for your organization's custom analytics.

- **Denial Settings:** Includes links to the following Denial Management > Settings screens:

These settings are available only if you are licensed for **Denial Management**. For more information on the above Denial Settings screens, see the **Settings** section of the [Denial Management User Guide](#).

The screenshot shows a software interface titled "Analytics Peak". At the top, there is a navigation bar with tabs: "MY WORK", "CLAIMS PROCESSING", "PATIENT TOOLS", "ANALYTICS", and "MEDIC". Below the navigation bar, the main title is "Analytics Peak". Underneath the title, there is a horizontal menu with links: "Work Spaces", "Explore", "Schedules", "Settings" (which is highlighted in red), and "Data Dictionary". On the left side, there is a sidebar with two main categories: "User Settings" and "Denial Settings". The "Denial Settings" category is currently selected, as indicated by the orange border around its name. Under "Denial Settings", there are four sub-links: "Categories", "Automatic Closing Rules", "General Settings", and "Denial Tags". Below these sub-links, there are two checkboxes: "Show Nonprocessing Child Cust Denials:" with a checked checkbox and "Show Unlinked Denials:" with an unchecked checkbox. At the bottom of the sidebar is a blue "Save" button.

- **Categories:** Manage existing denial categories and create new denial categories.
- **Automatic Closing Rules:** Configure automated closing of denied service lines and apply an optional limit to the value of service lines that can be closed without approval.
- **General Settings:** Configure how Denied Amount is calculated in Denial Management and thusly Analytics.
- **Denial Tags:** Assign tags to denials to simplify the process of categorizing and/or auto-closing denials.
- **Show Nonprocessing Child Cust Denials:** Select the checkbox to have your analytics include your organization's non-processing child account denials.
- **Show Unlinked Denials:** Select the checkbox to have your analytics include denials that are not linked to a claim.

Revision log

Date	Description	Version
October 2024	<ul style="list-style-type: none">Added the “Opening Looks in Explore” sectionUpdated the “Managing Looks in Explore” section	13
October 2024	<ul style="list-style-type: none">Added the “Using column options for Look table charts” sectionUpdated map visualizations to Google MapsAdded additional Looker information for AND/OR filter optionsAdded how to download Data Dictionary datasetsProvided a note for “Deleting schedules” that your DA or Waystar representative can also delete schedulesAdded the “Reassigning schedules” section	12
May 2024	Added “AND” filter to the "Updating Look filters" section	11
September 2023	<ul style="list-style-type: none">Added the “Opening a dashboard/Look from a Look” sectionAdded visualizations to the Look visualization section: Calendar Heatmap, Histogram, Multiple Value, Packed Bubble, Radial Gauge, SankeyMoved the visualization appendix information to the Look visualization sectionUpdated the Analytics scheduling with new screenshots and processes where appropriateUpdated the Analytics Benchmarking section with new screenshots and processes where appropriateRemoved the Dimensions and Measures Glossary sectionAdded the Data Dictionary section	10