Analytics Peak User Guide

V13 – October 2024

WAYSTAR

Contents

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).

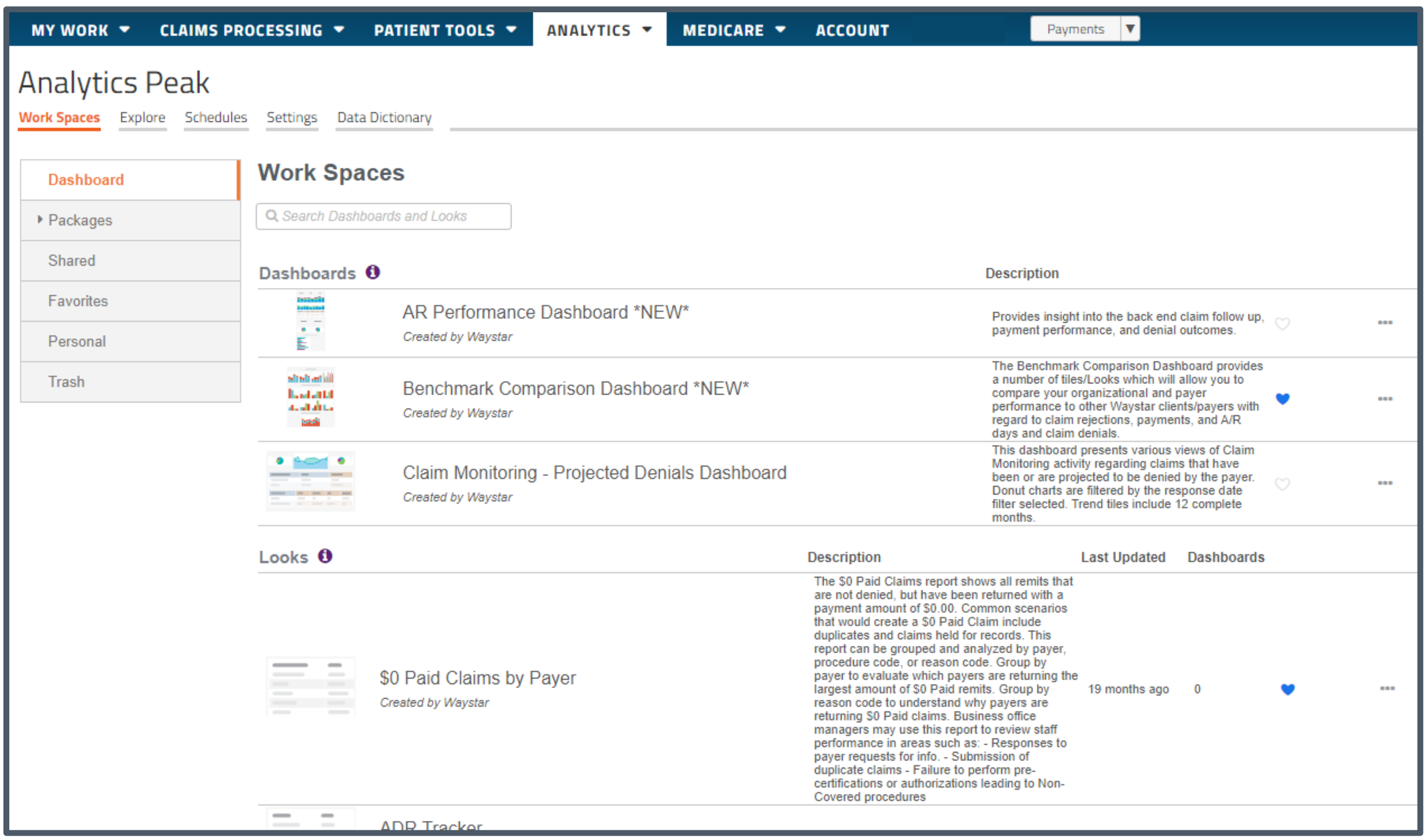
Note: Users can only view Analytics data for the Waystar applications they have access to. For example, to view claims reporting, users will need to have basic claims permissions and likewise for remits.

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.

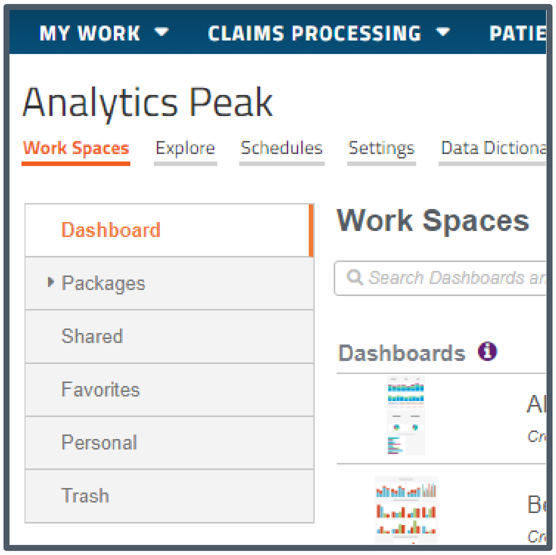
Work Spaces

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.



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

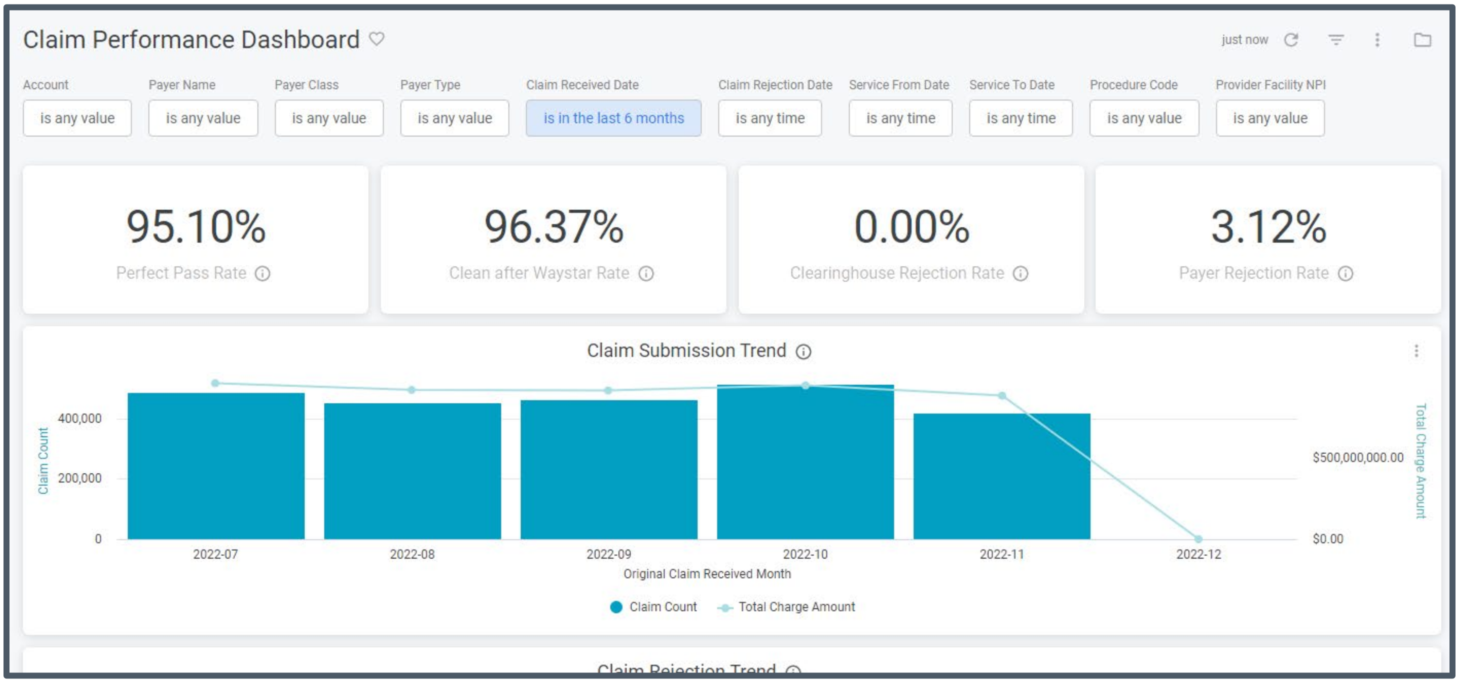


- **Dashboard**: Your default dashboard that you set up in Analytics User Settings. (not to be confused with the Analytics dashboards listed under Work Spaces).
- **Packages**: The Waystar-provided dashboards/Looks that you have available to you. For example, this may contain the Revenue Cycle Report 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.

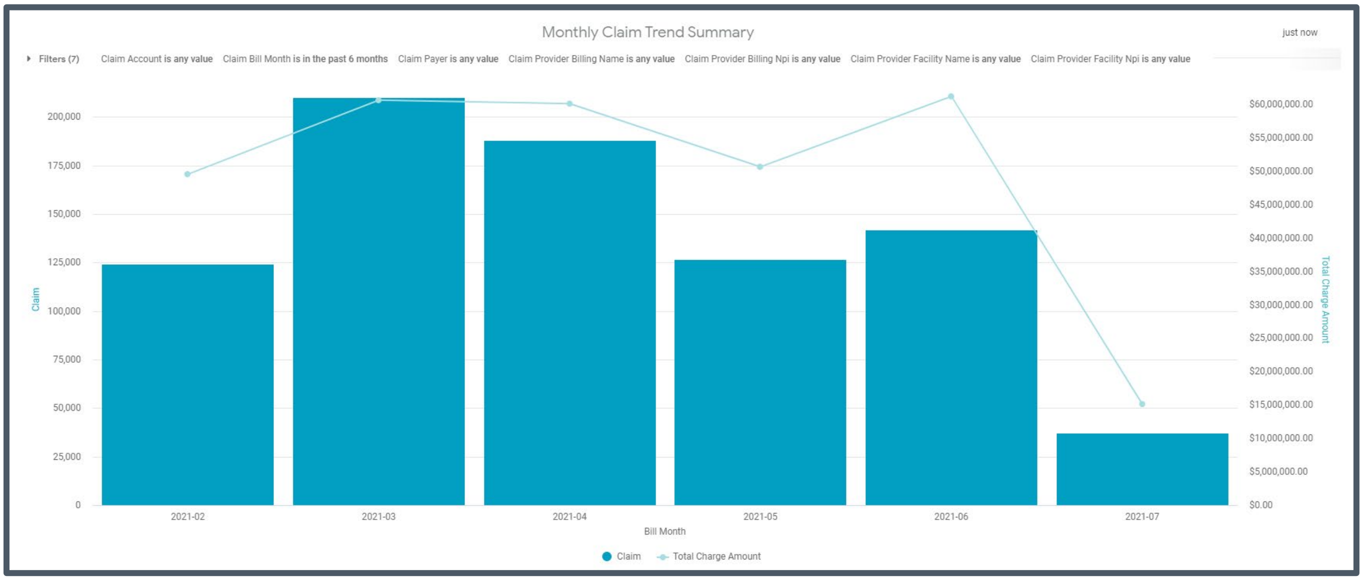
Analytics reporting is broken down into two types (dashboards and Looks), as the following explains:

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



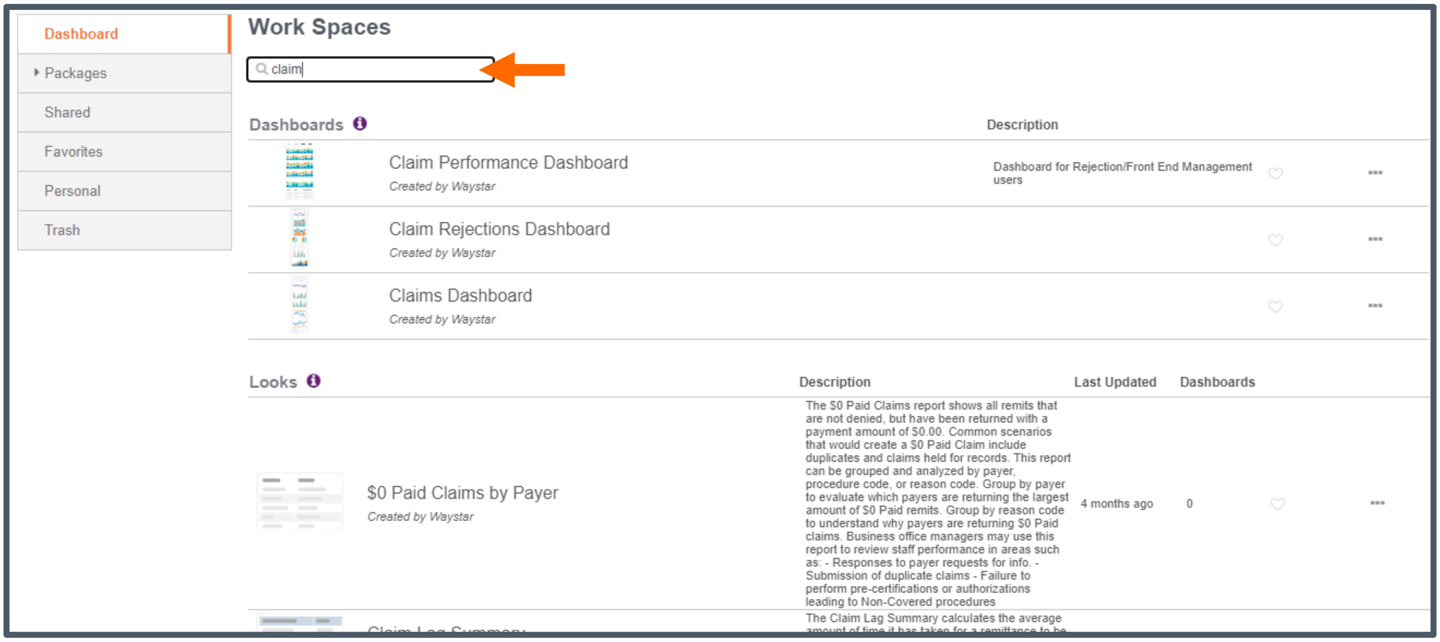
- **Looks:** Waystar-created or custom user-defined reports created from a wide range of attributes called dimensions and measures (use the Data Dictionary to find descriptions). You can save Looks, share them with other people in your organization, and include them in a dashboard.

  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.



Managing Work Spaces dashboards/Looks

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

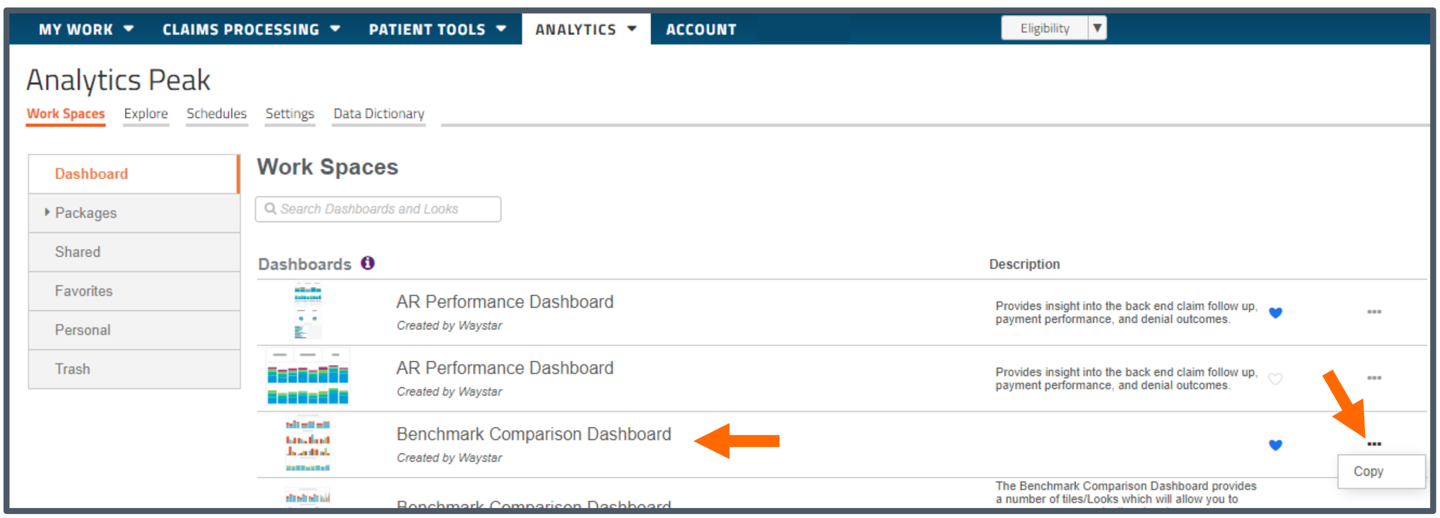
- **Copy dashboards and Looks**: You can copy any dashboard or Look. When you copy Waystar-created dashboards/Looks, you can then turn them into custom, user-defined dashboards/Looks that will allow you to perform various actions.
- **Favorites**: You can set any dashboard or Look as a favorite, in which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

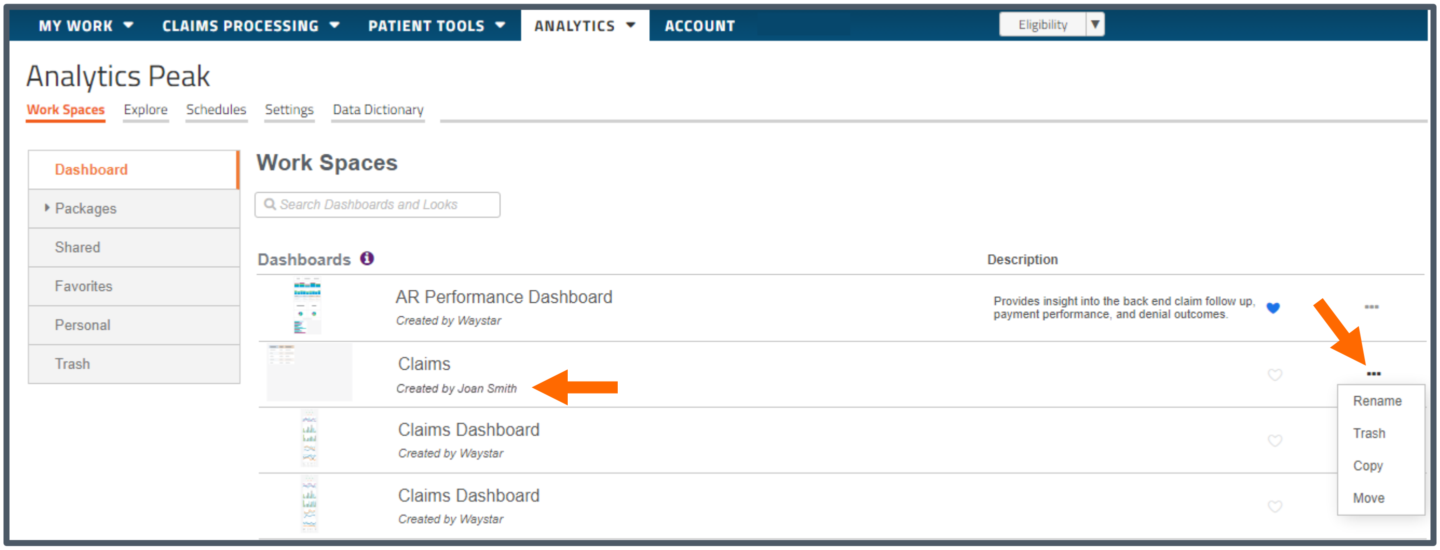
To perform actions with dashboards and Looks:

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.



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

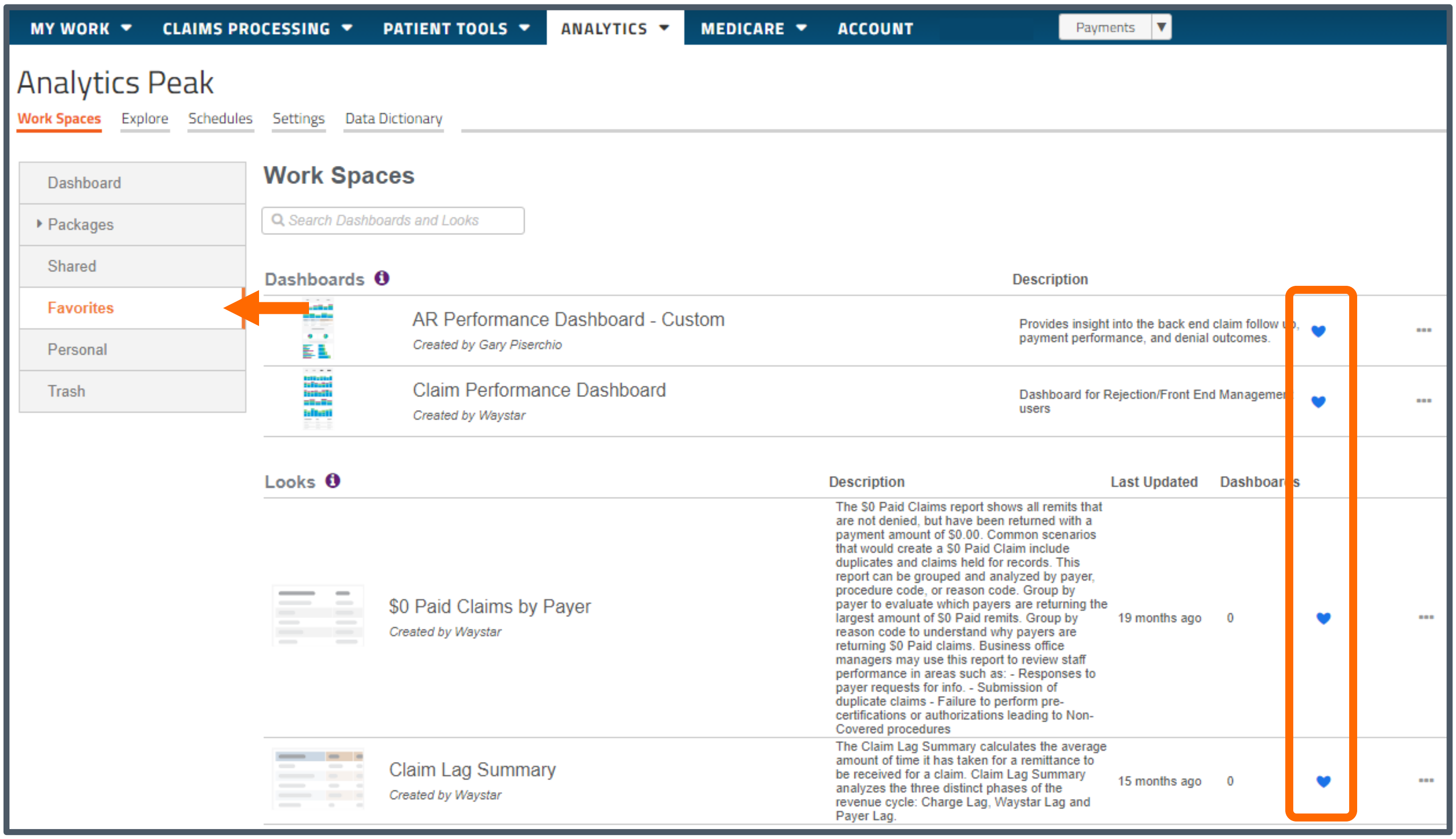


The following describes each action item:

- **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.



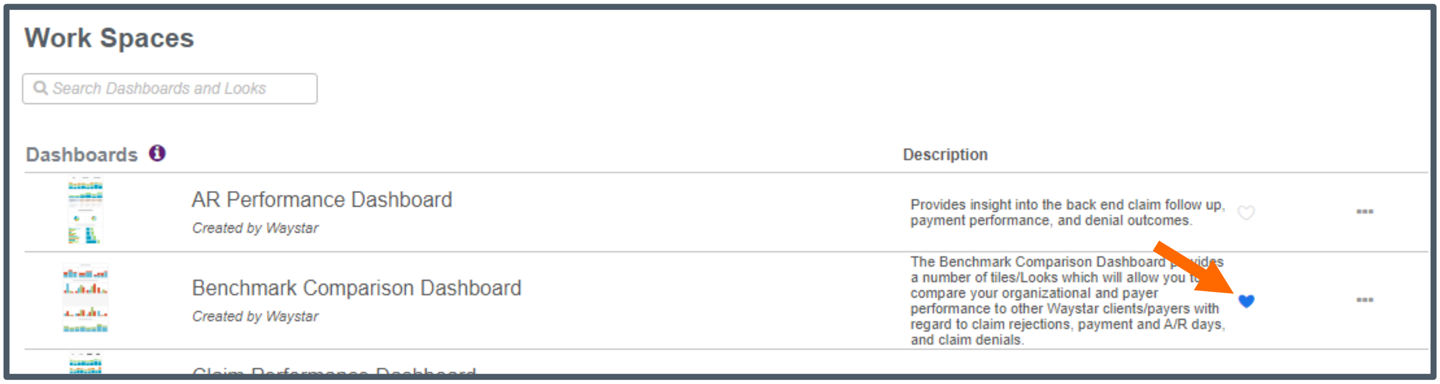
To mark/unmark dashboards/Looks as favorites:

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.



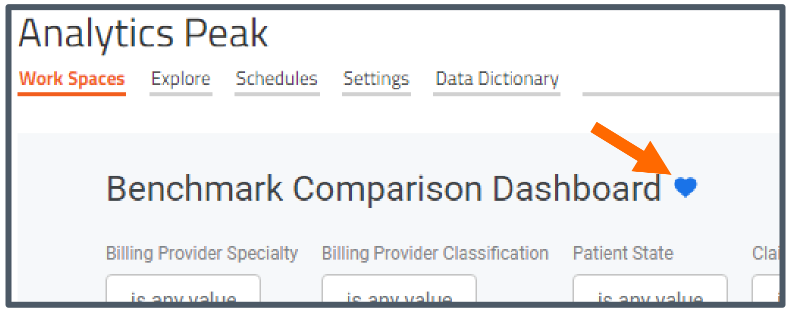
You can also mark/unmark dashboards/Looks after opening them.

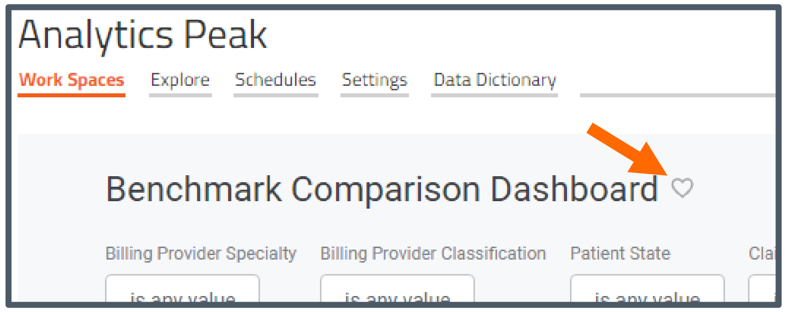
3. From **ANALYTICS** > **Analytics** > **Work Spaces**, click the thumbnail or name of any dashboard/Look in the worklist to open it.

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

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

   A blue heart indicates a favorite.





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.

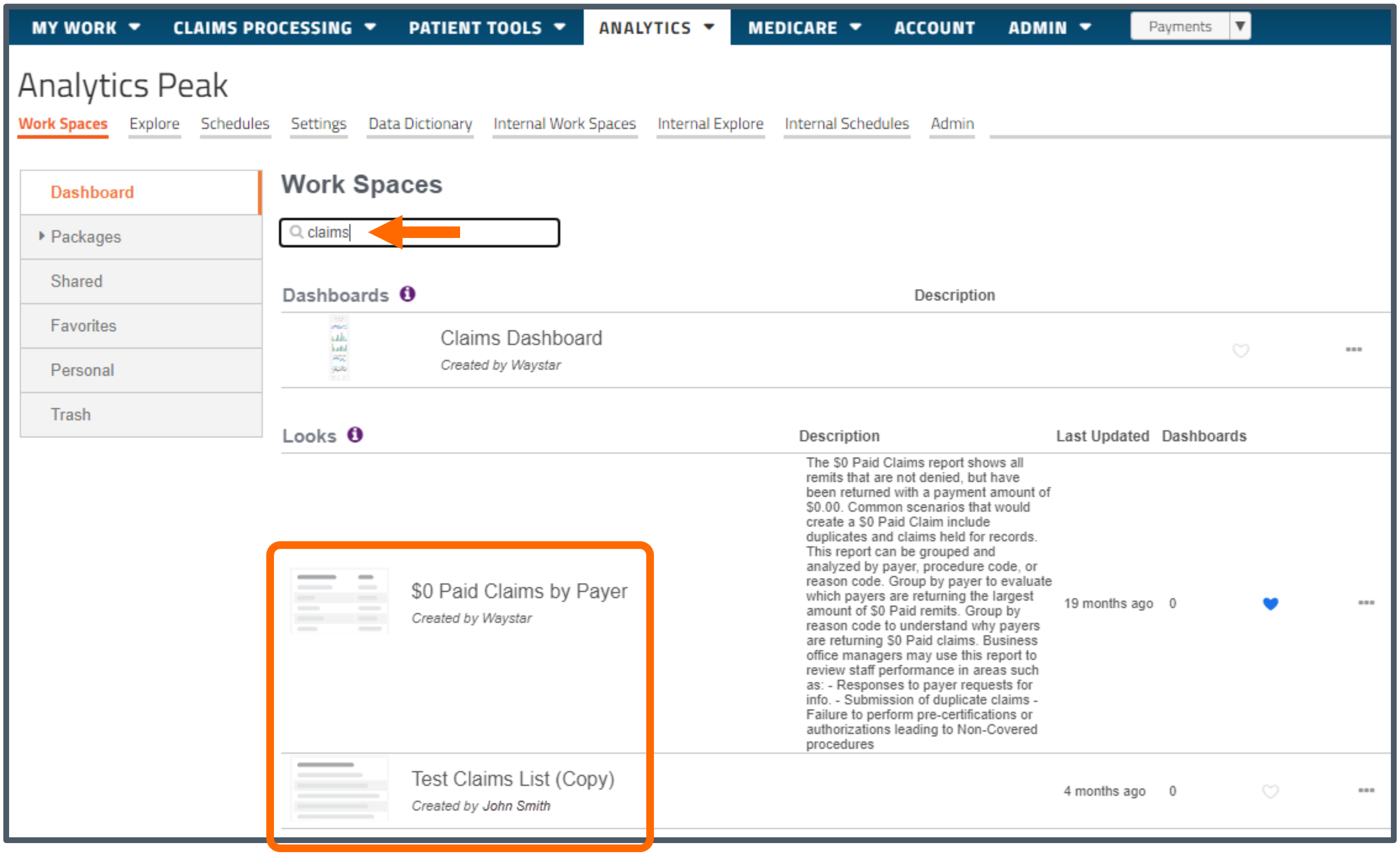
Viewing a Look

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

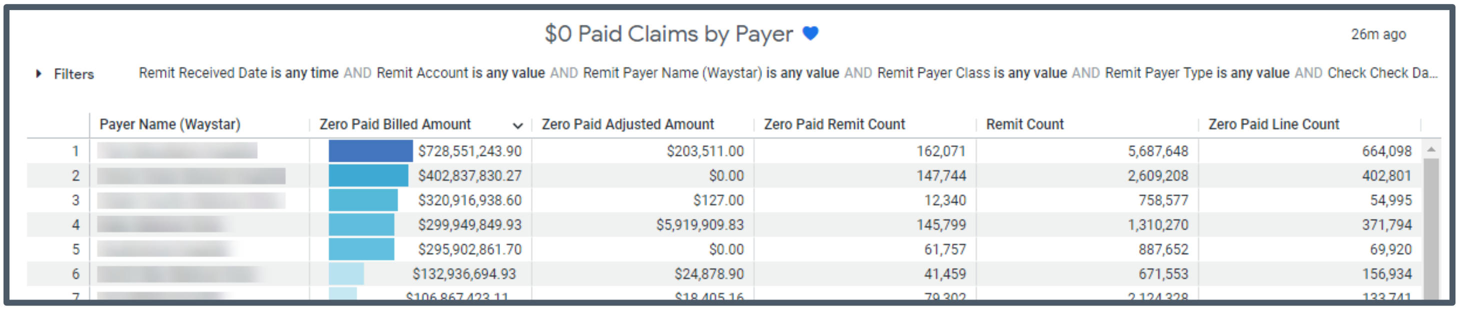
To view a Look:

1. Go to **ANALYTICS** > **Analytics** > **Work Spaces** and select the appropriate tab, such as Dashboard, Shared, or Personal.
2. 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.



The most current version of the Look will display:

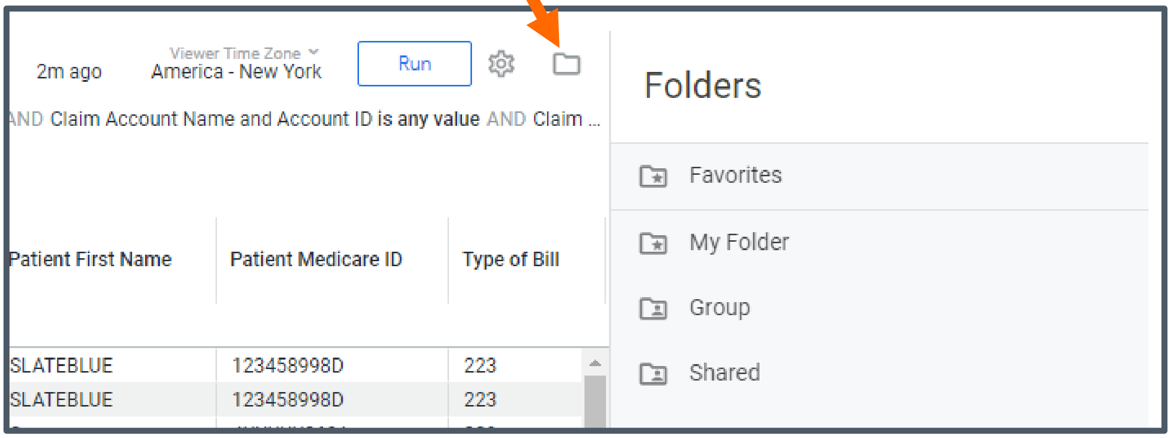


Opening a dashboard/Look from a Look

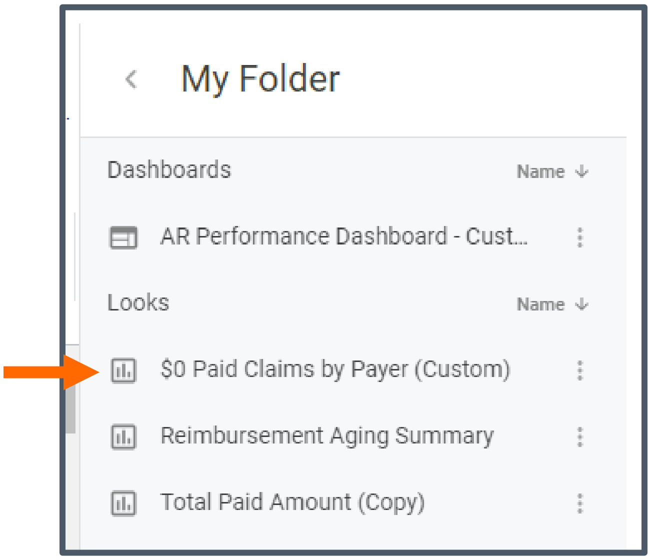
When viewing a Look, you can open other dashboards/Looks.

To view dashboards/Looks from a Look:

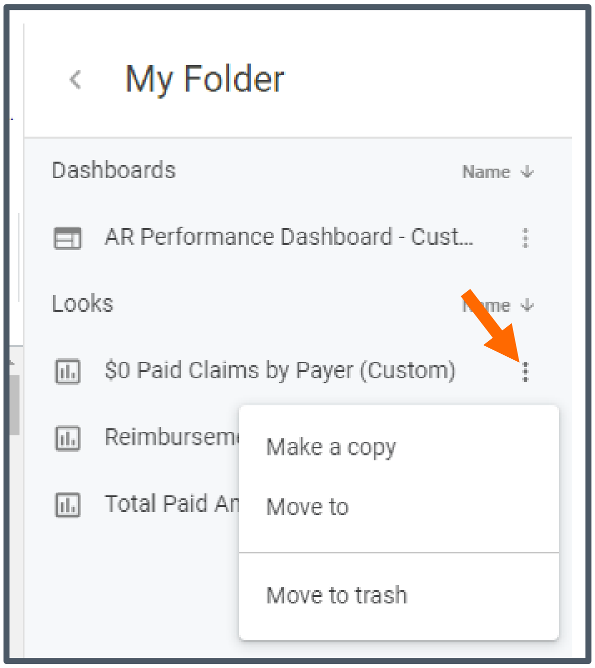
1. View a Look.
2. From the opened Look, hover over the top-right corner of the screen, and click the **Folder** icon.
   A menu of folders will open.

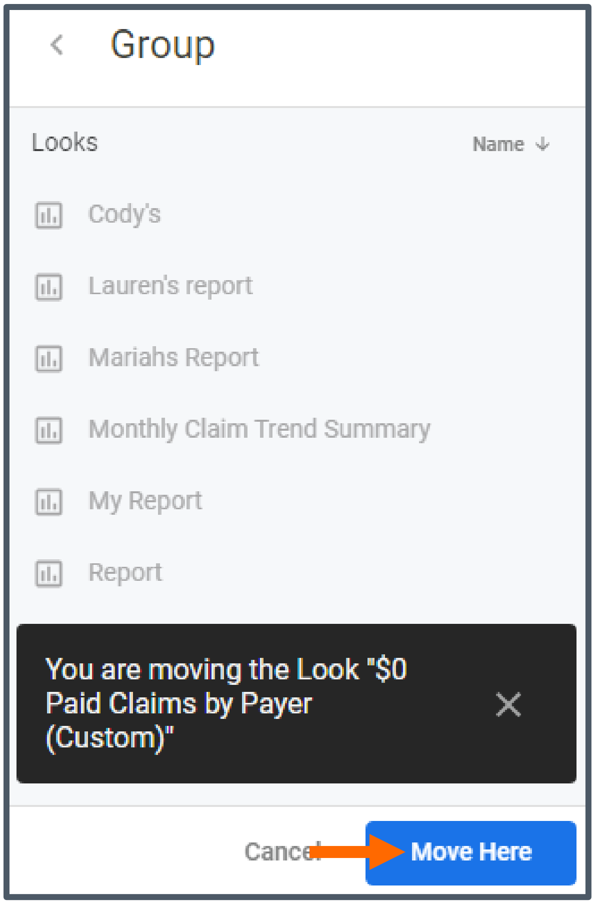


3. Select one of the folders: **Favorites**, **My Folder**, **Group**, or **Shared**.
   The folder will open and when available, a list of dashboards and/or Looks will also appear.
4. To open a dashboard/Look, from the selected folder, click any displayed dashboard or Look.



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:





- **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

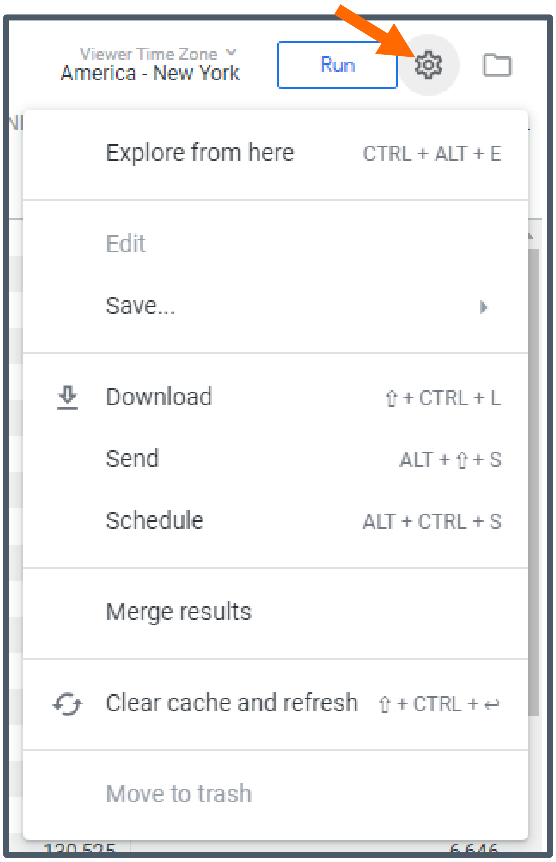
This section explains how to manage individual Looks.

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

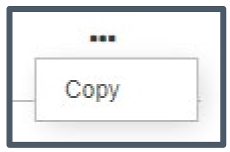
You can perform the actions defined in this section on Looks that appear in the list on the Work Spaces screen.

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.

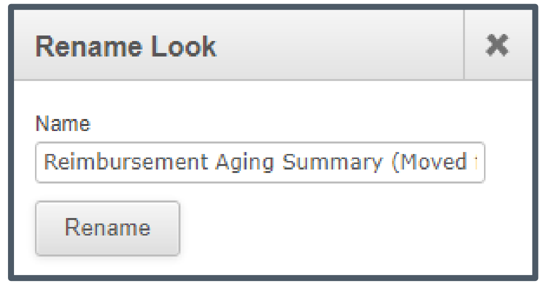
   Or is a **custom Look** that allows you to perform more actions. Keep in mind that after you make a copy of a “Created by Waystar” Look, that copied Look is now custom and you would then see this menu.

3. From the menu, select the appropriate action:

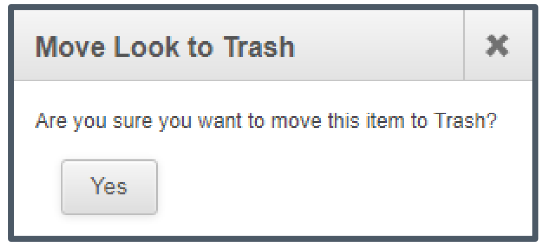
- **Rename**: Opens the Rename Look screen.
  a. In the **Name** field, enter an appropriate name for the Look
  b. Click the **Rename** button.

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



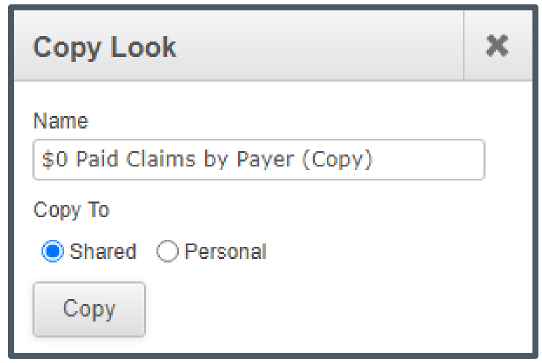
- **Trash**: Opens the Move Look to Trash screen. If you’re sure you want to move the Look to the Trash tab, click the **Yes** button.

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

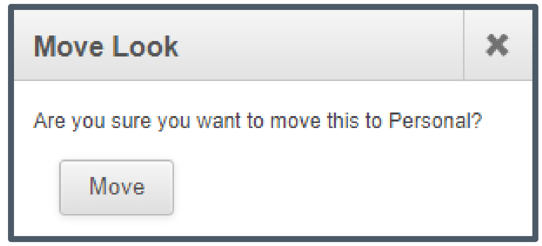


- **Copy**: Opens the Copy Look screen. This action allows you to copy custom or “Created by Waystar” Looks.
  a. In the **Name** field, type the name you want for the Look.
  b. From the Copy To radio buttons, select to copy it to the **Shared** folder or your **Personal** folder.
  c. Click the **Copy**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



- **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.



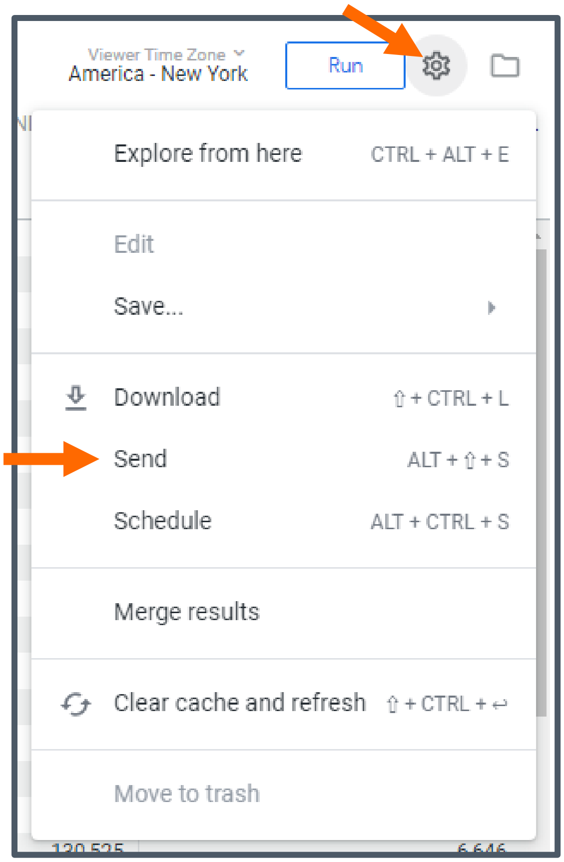
Sending an individual Look

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

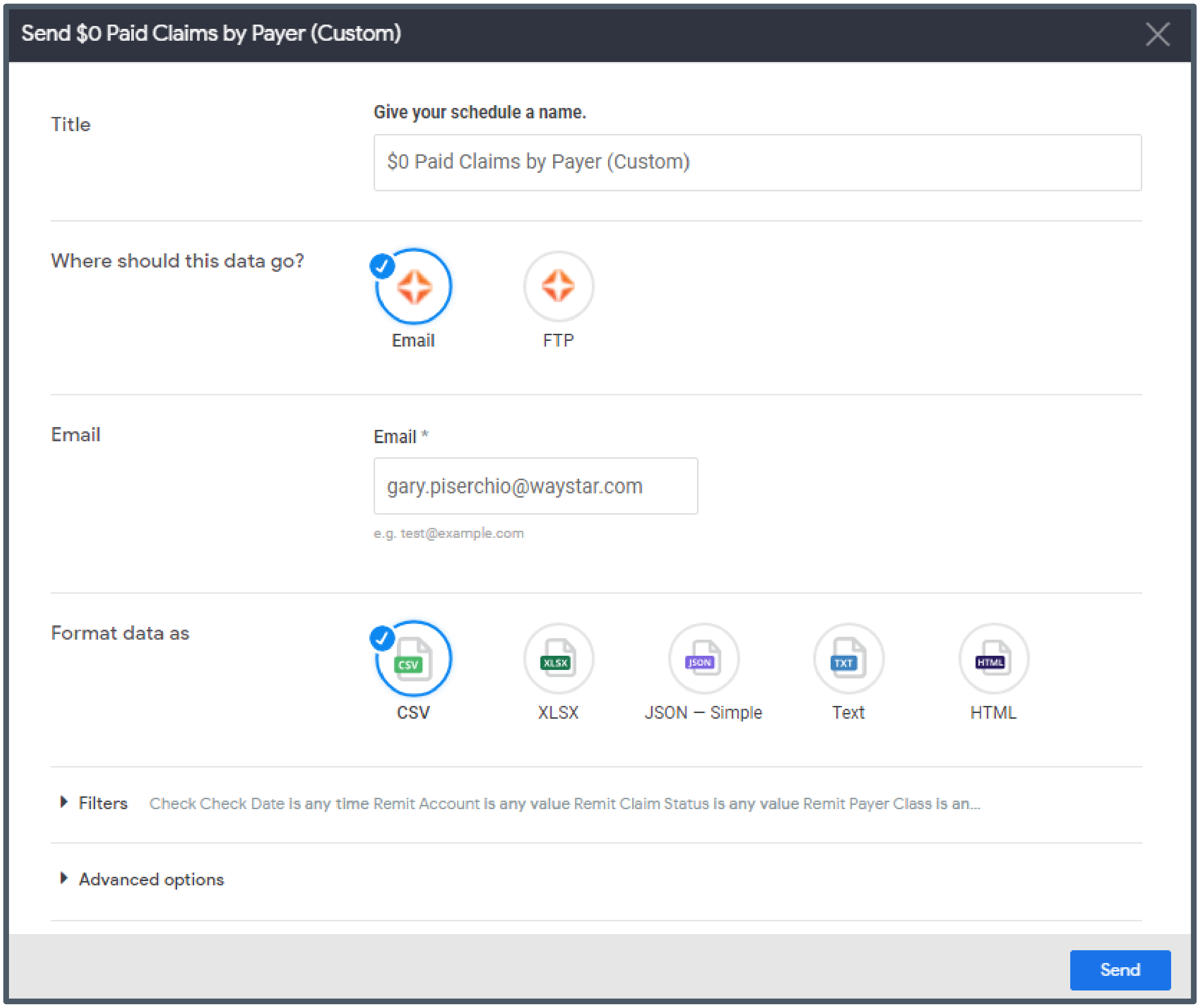
To send a one-time Look link to your email address:

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.



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.

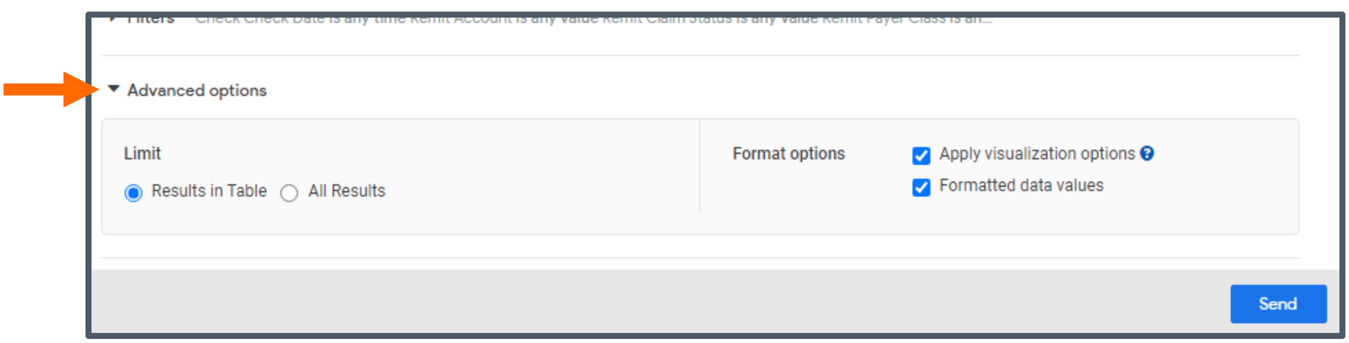
  – **HTML**: The delivered link will direct you to the **Analytics** > **Schedules** > **Exports** screen and an HTML file of the reported data will automatically download to your system.

  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.

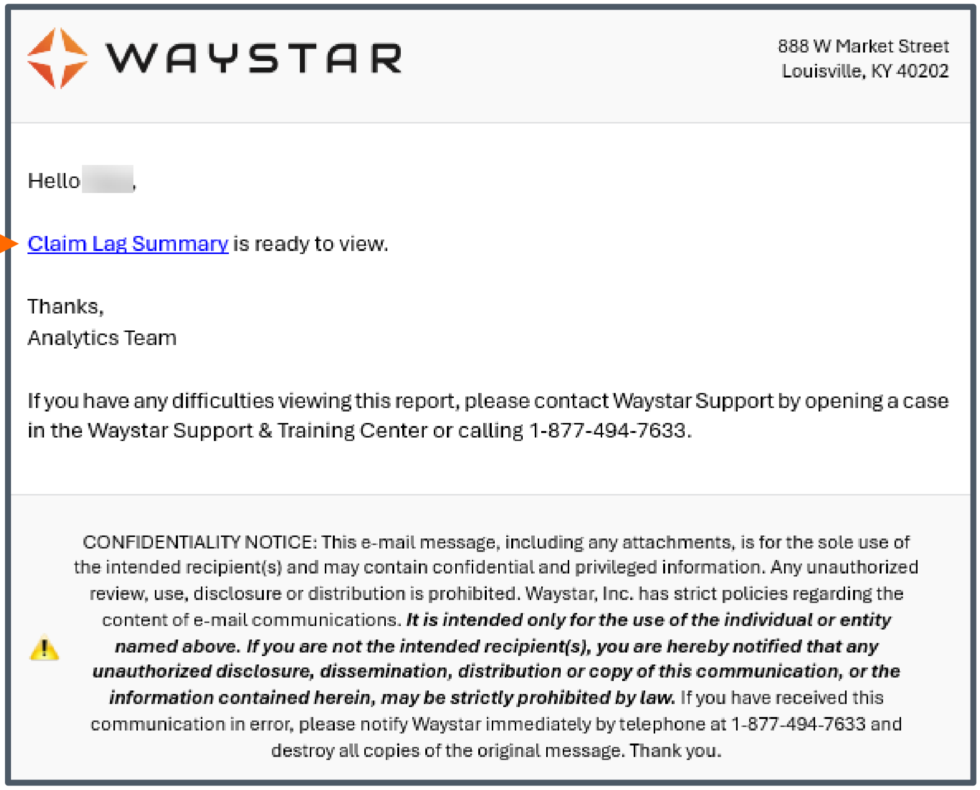
- **Advanced options**: If necessary, click to expand the advanced options to define additional customizations for your delivery. The options available in this menu depend on the selected format of your delivery.

  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.



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):


888 W Market Street
Louisville, KY 40202

Hello ,

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.

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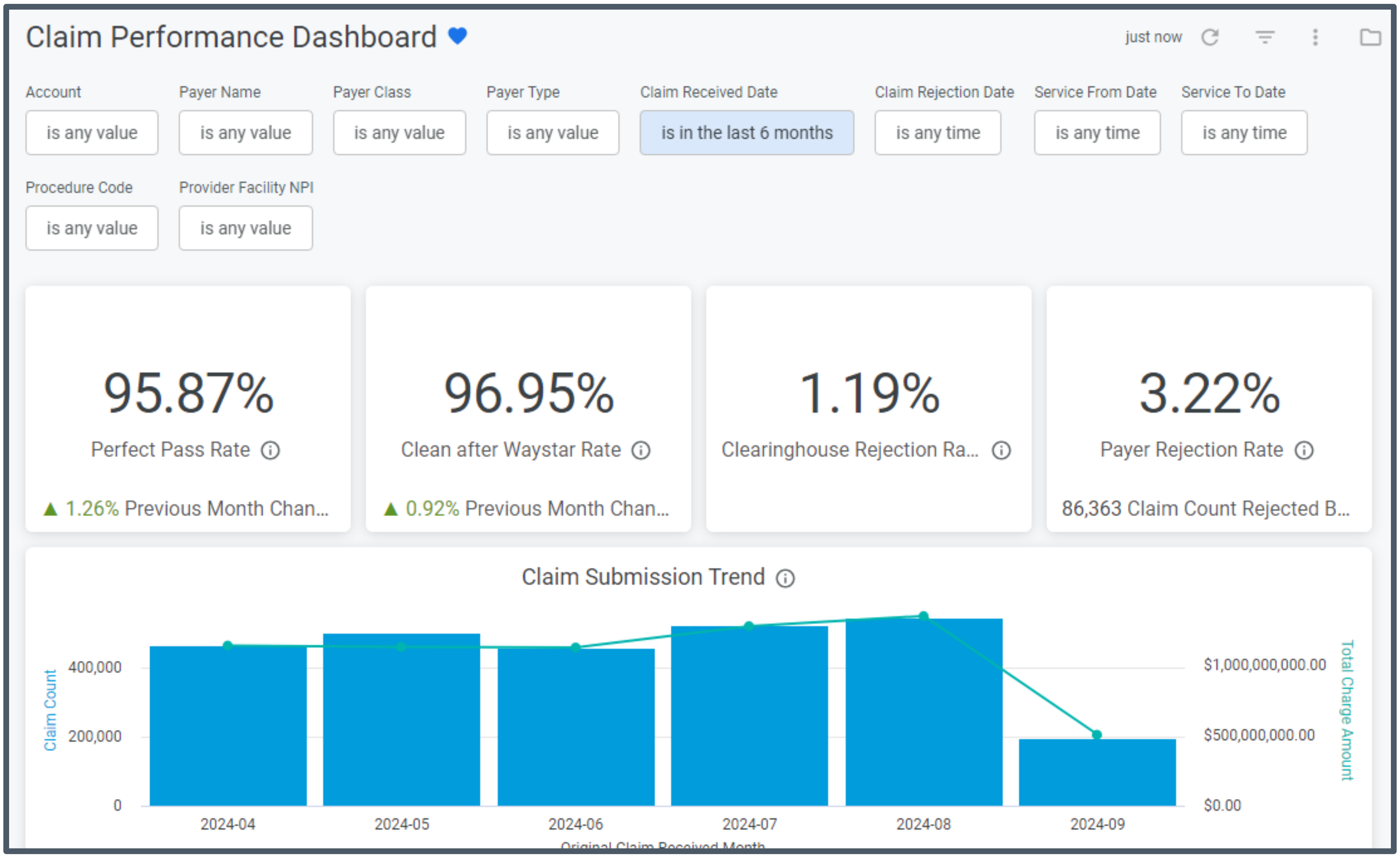
To view the linked reported data:

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

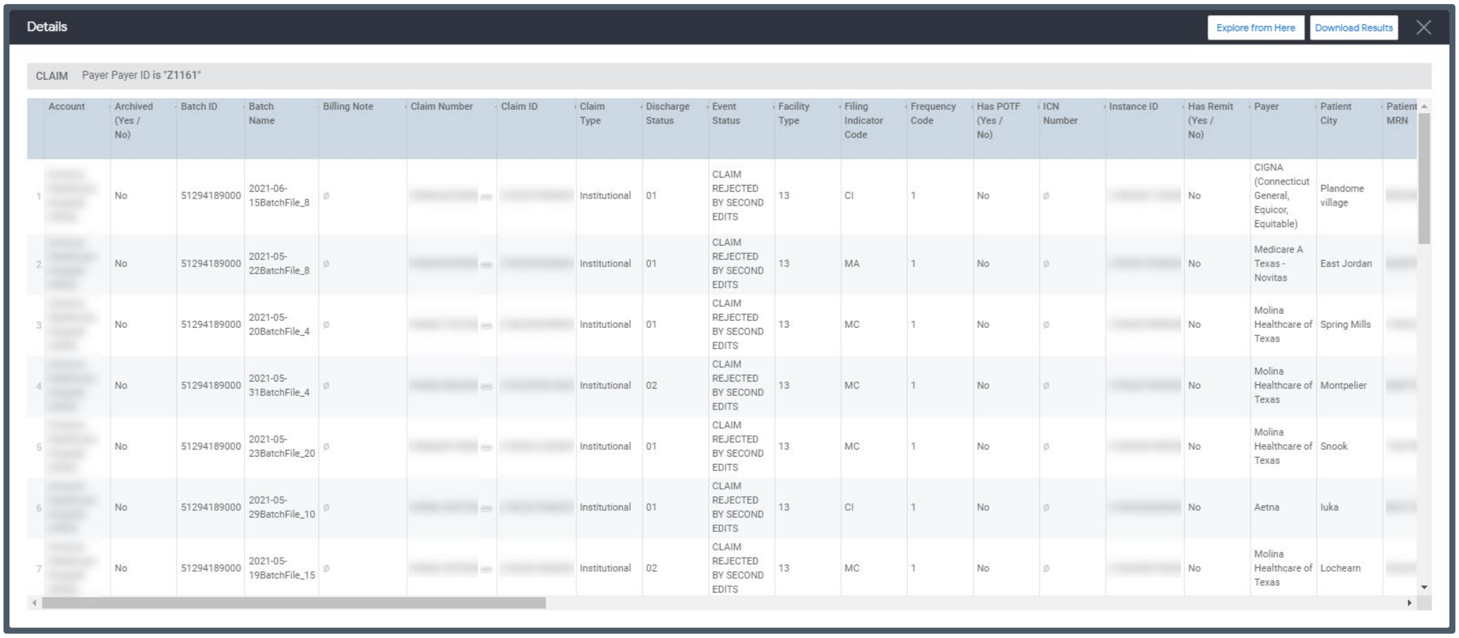
   The **ANALYTICS** > **Analytics** > **Schedules** > **Exports** screen will open.
3. The download process will automatically begin, opening a Download screen from which you can download the reported data file to your system.
   - The generated data will be included in the **Exports** list, allowing you 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.



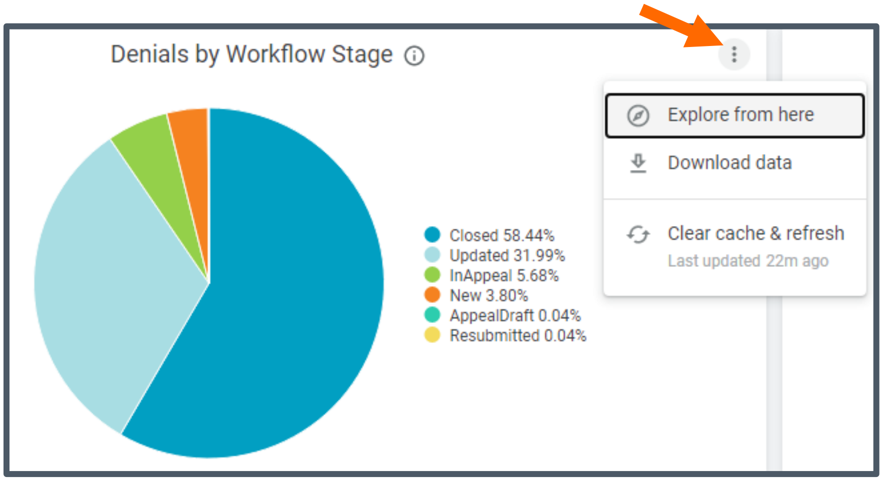
To load the Details screen that displays a preview of the associated data, click a numerical link or an interactive chart item (e.g., bar chart, point on a line chart, etc.) on these tiles.



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.



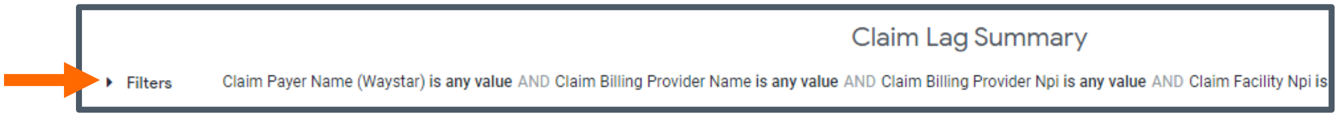
Updating Look filters

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.



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

- 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.

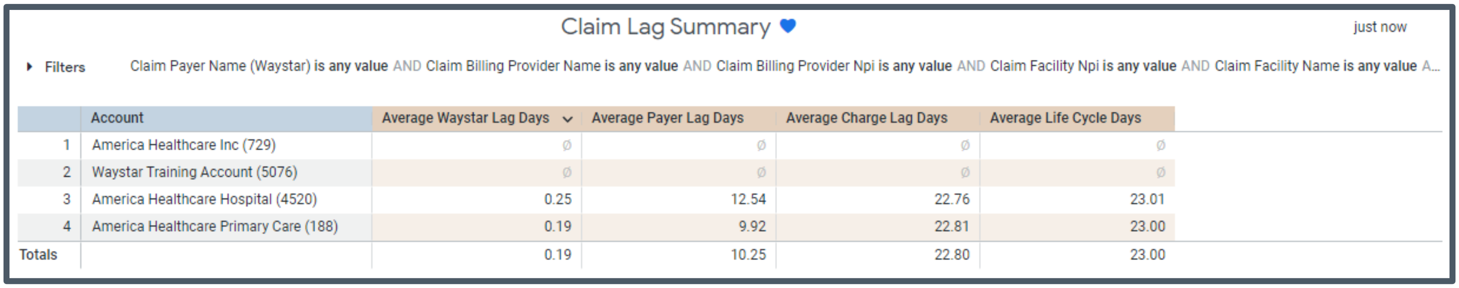
Downloading individual Look data

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

To download individual Look data:

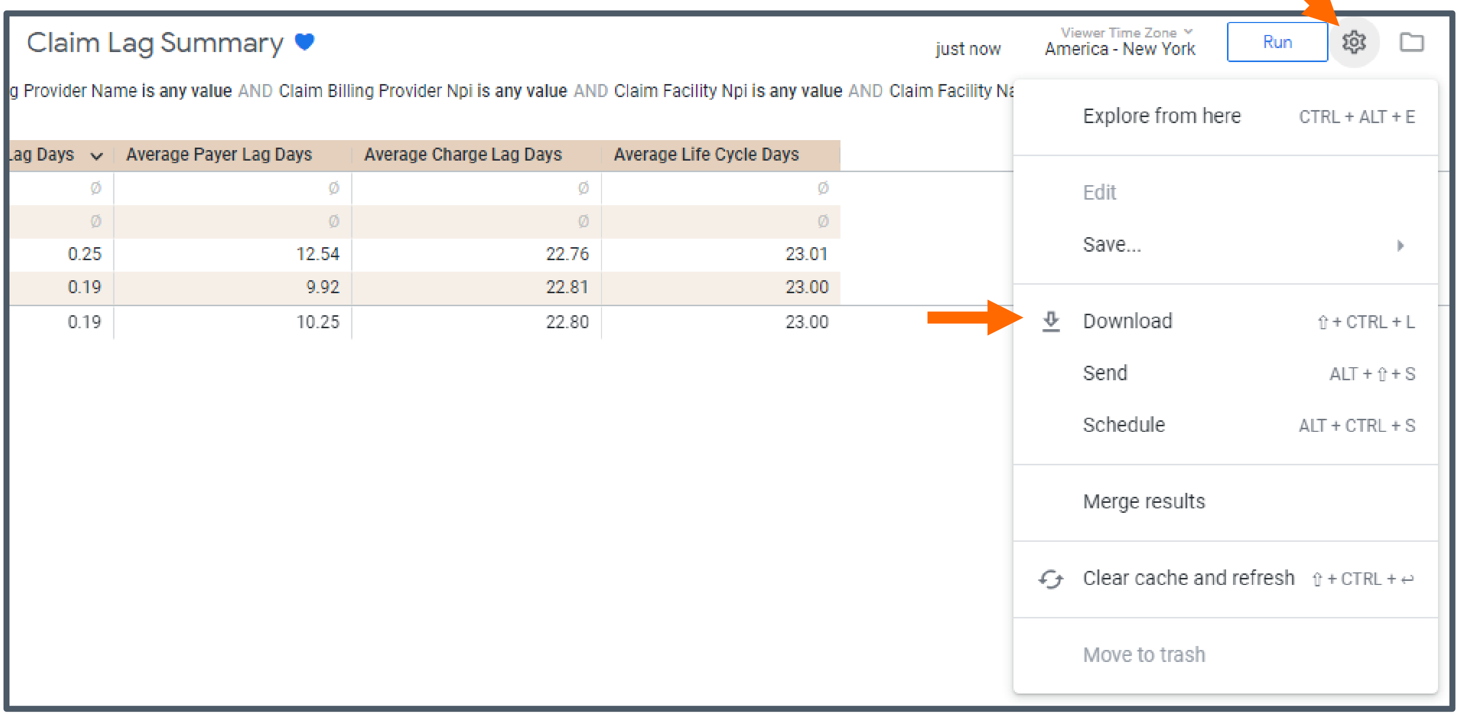
1. Go to **ANALYTICS** > **Analytics** > **Work Spaces** and select the appropriate tab, such as Dashboard, Shared, or Personal.
2. From the Looks area of the list, select the appropriate Look.

   The selected Look will open.



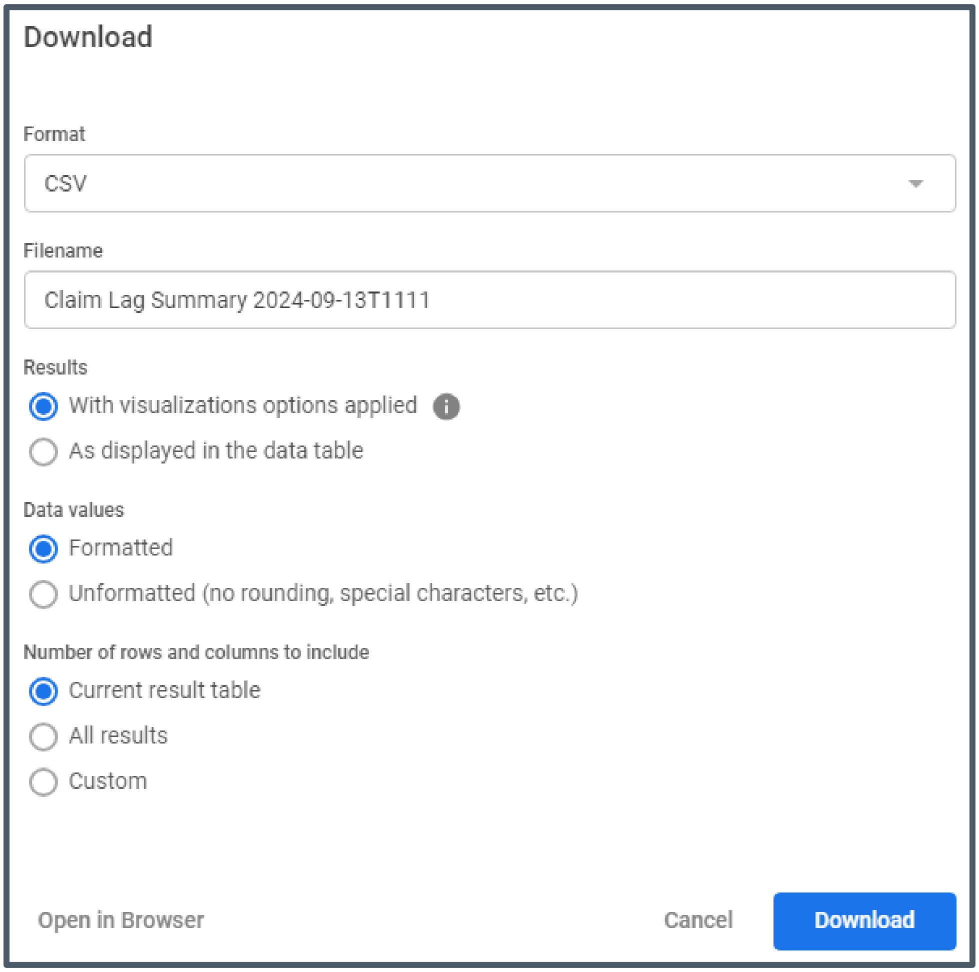
	Account	Average Waystar Lag Days	Average Payer Lag Days	Average Charge Lag Days	Average Life Cycle Days
1	America Healthcare Inc (729)	∅	∅	∅	∅
2	Waystar Training Account (5076)	∅	∅	∅	∅
3	America Healthcare Hospital (4520)	0.25	12.54	22.76	23.01
4	America Healthcare Primary Care (188)	0.19	9.92	22.81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



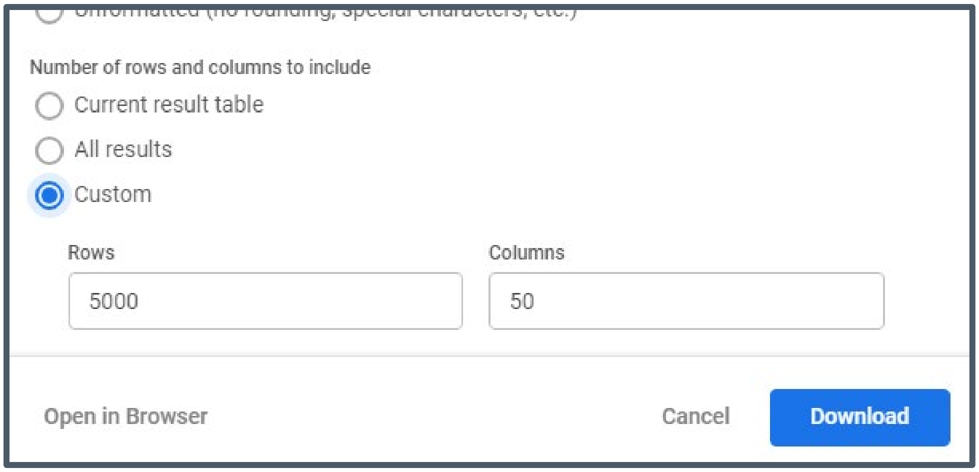
The Download screen will open.

5. Configure the download using the following options.



- **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.

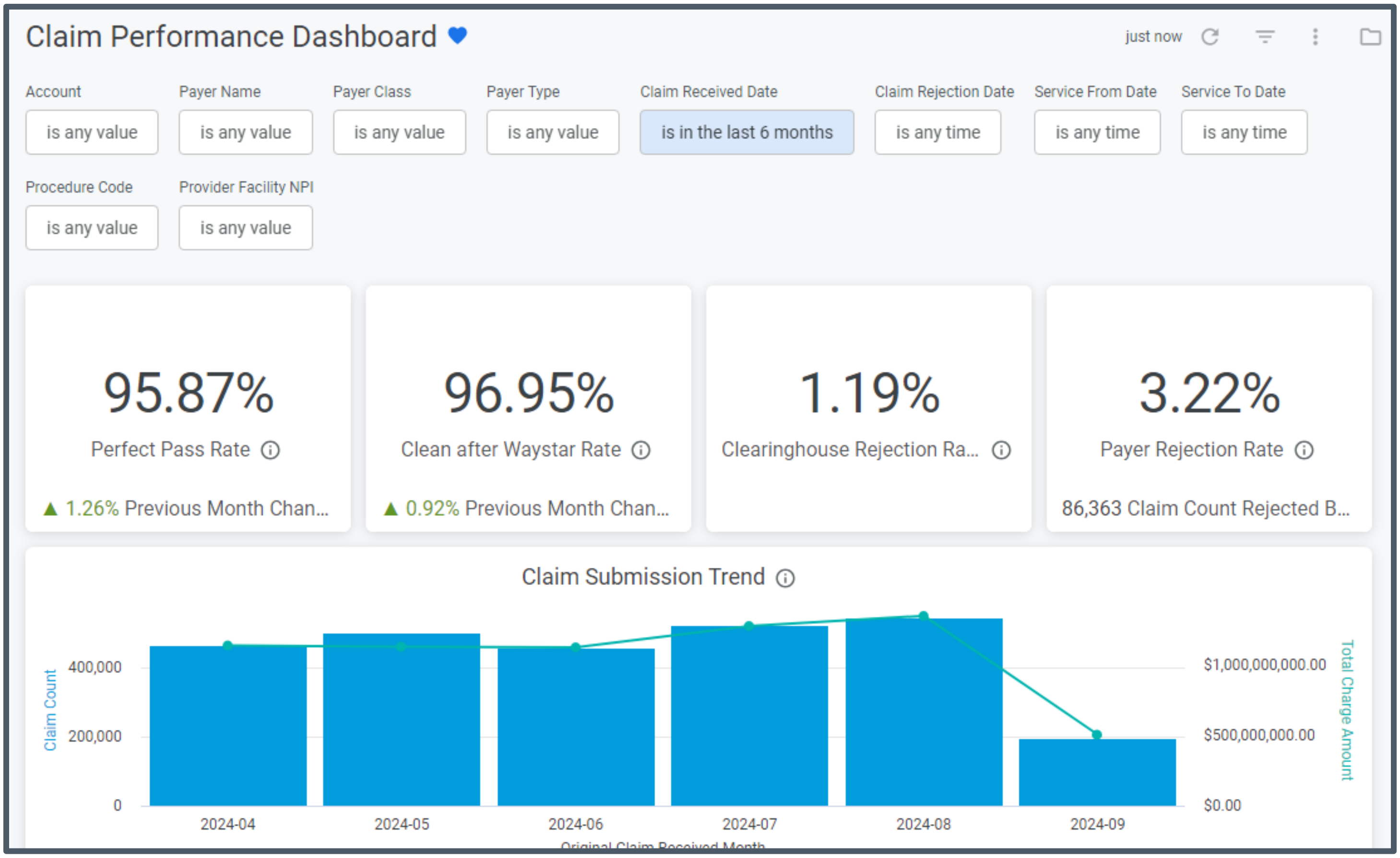
Downloading Look data within a dashboard

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

To download Look data within a dashboard:

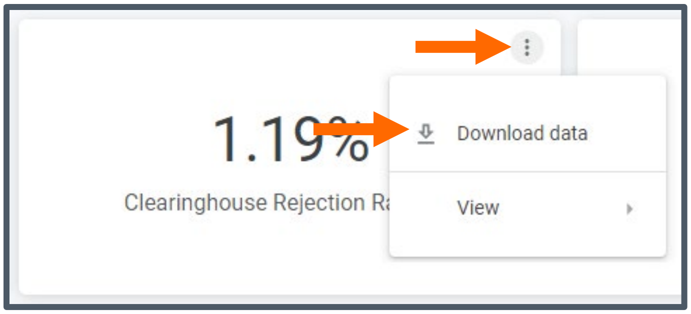
1. Go to **ANALYTICS** > **Analytics** > **Work Spaces** and select the appropriate tab, such as Dashboard, Shared, or Personal.
2. From the Dashboards area of the list, select the appropriate dashboard.

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

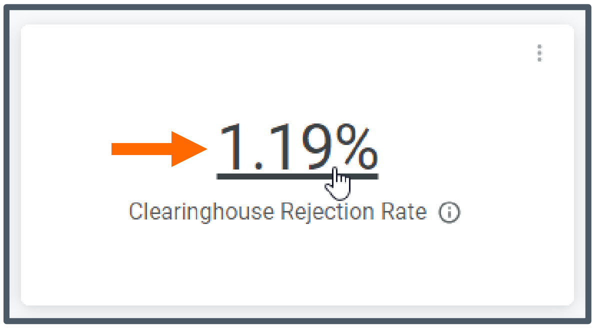


3. From the appropriate tile, begin the download process using either of the following two methods:

- **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**.

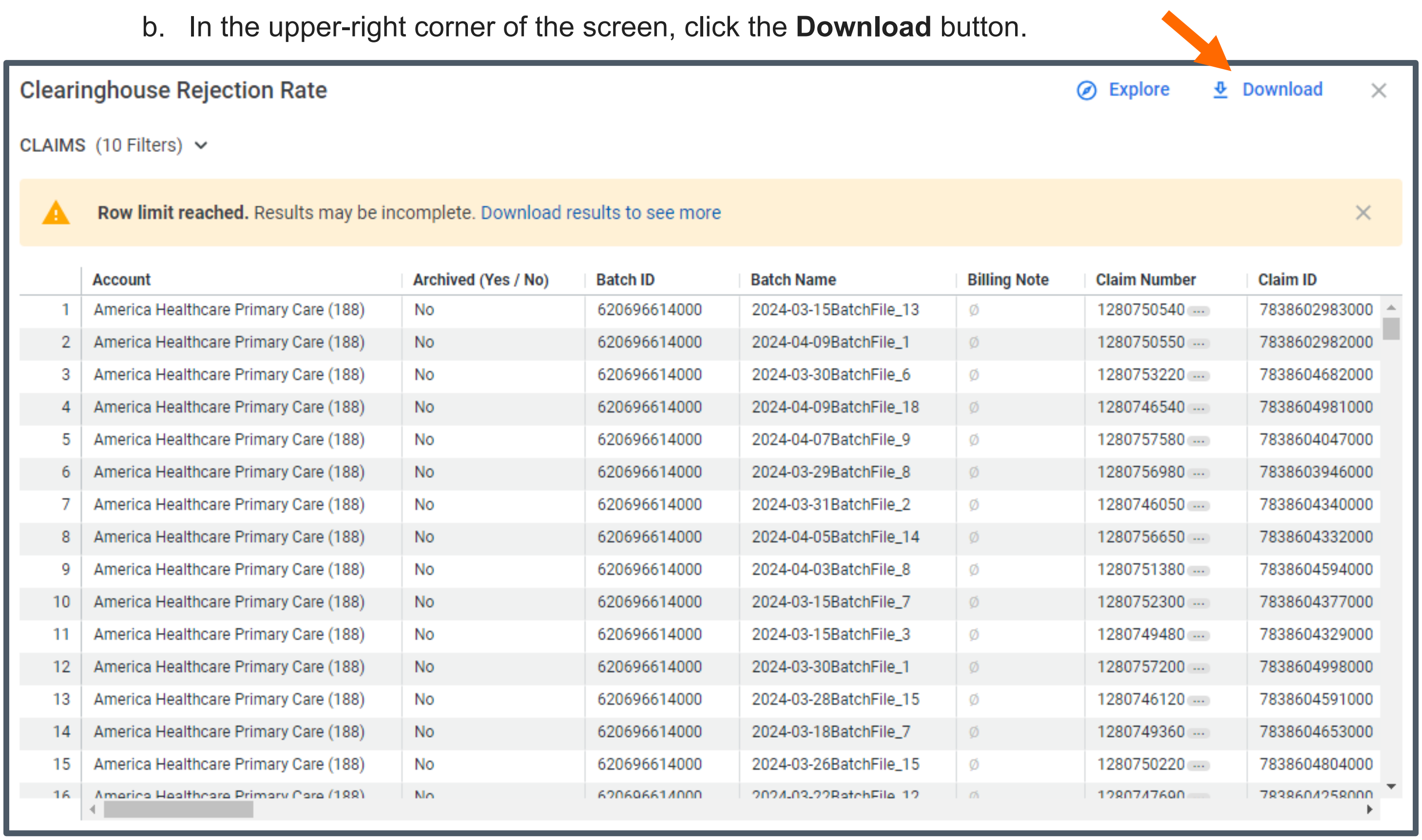


- **From the tile chart**:
  a. Click a numerical link or a drilldown link in an interactive chart item, such as a bar chart or a point on a line chart.



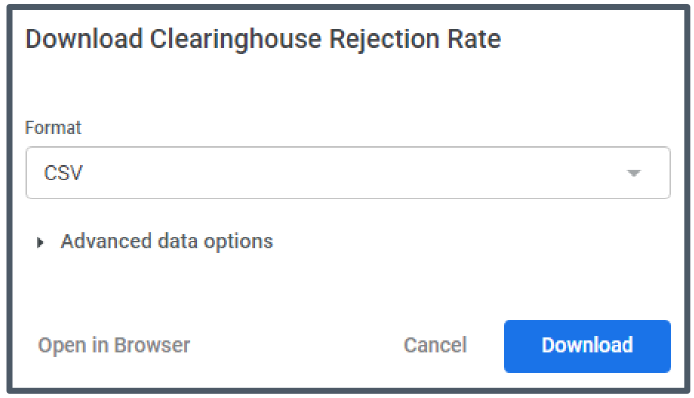
  The tile details table chart will open with a display preview of the associated data.

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



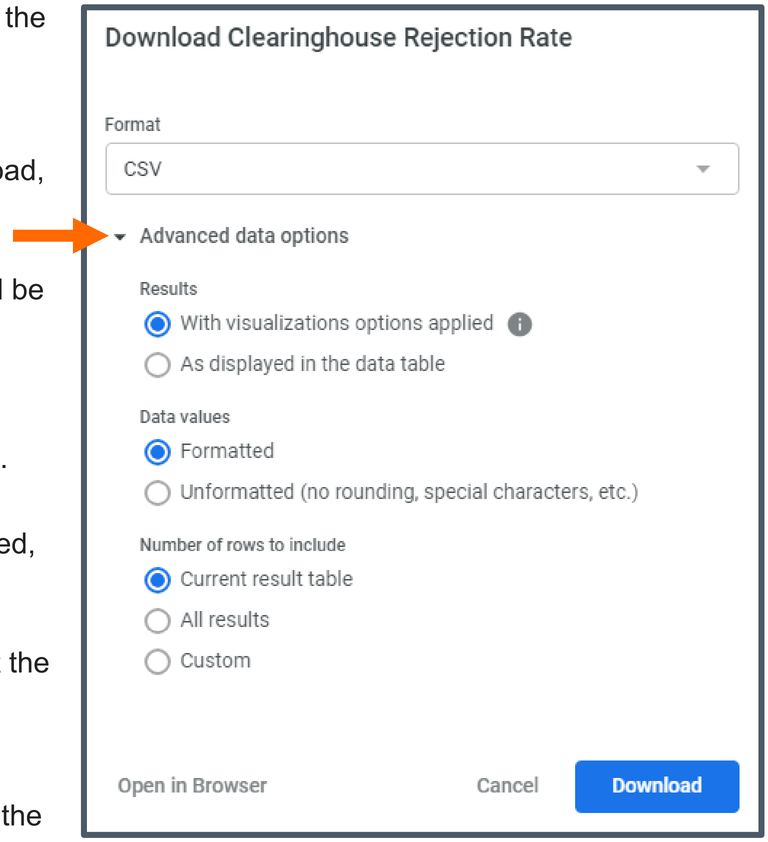
Using either of the previous methods, the Download [tile name] screen will open.

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



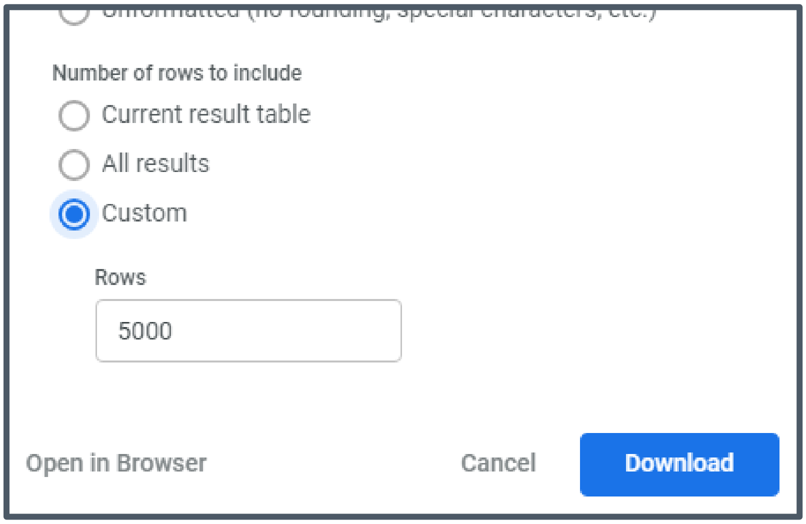
   – TXT (tab-separated values)
   – Excel Spreadsheet (Excel 2007 or later)
   – CSV
   – JSON
   – HTML
   – Markdown
   – PNG (Image of Visualization)

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.

- **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

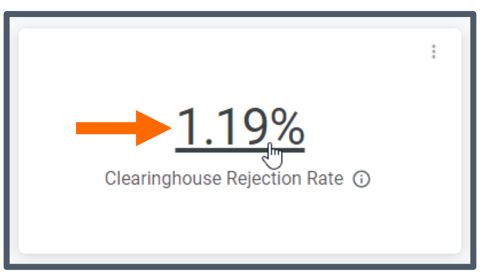
This section explains how to view a Look table chart from either the Look itself or through a dashboard tile.

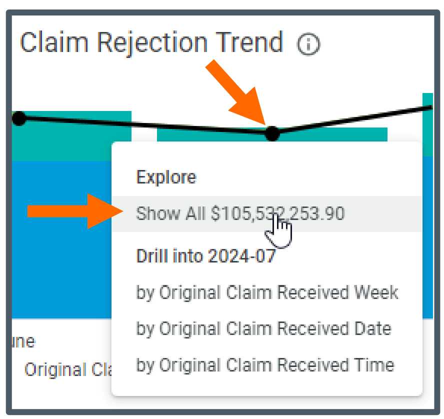
To view a Look table chart:

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.

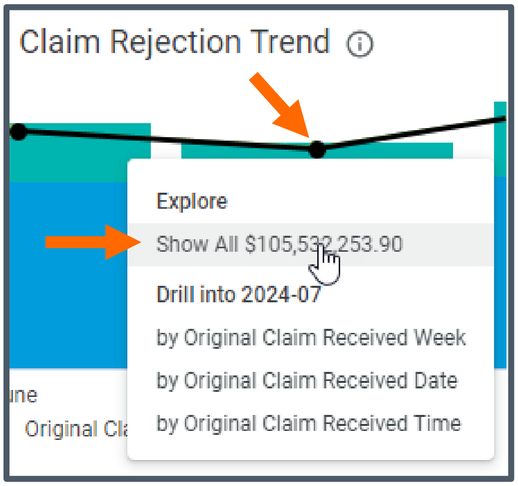
       The following shows examples of clickable links in a tile/Look.





- **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.



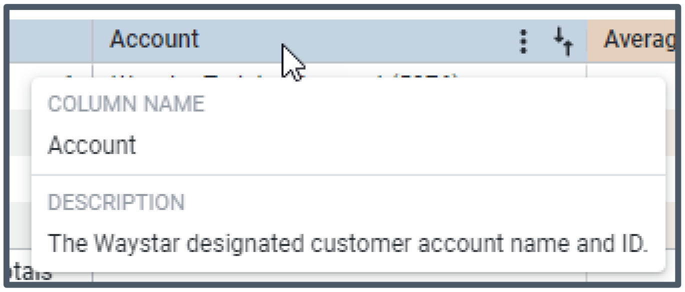
Viewing a column header description of a Look table chart

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.

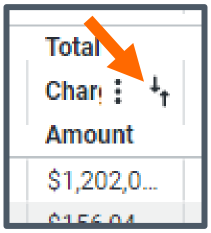


Sorting by column for a Look table chart

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.



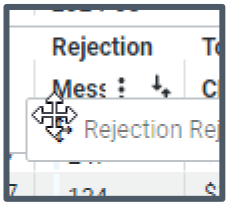
Moving columns of a Look table chart

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.



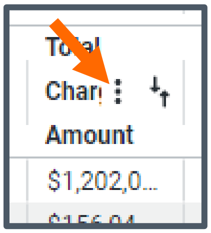
4. Release the mouse button to place the column.

Freezing a column of a Look table chart

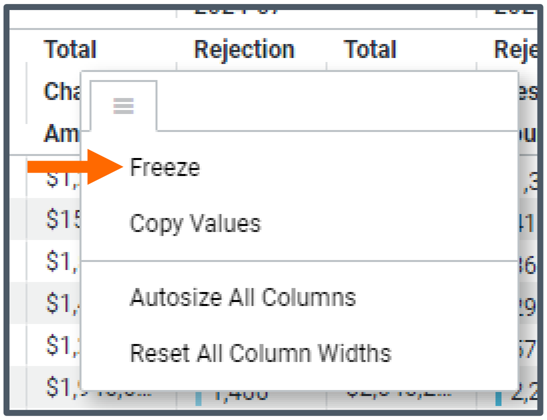
This section explains how to freeze a table column to the left side of the chart. The frozen column remains visible on the left side if you scroll horizontally. You can freeze more than one column.

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.

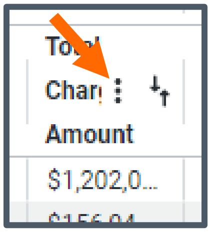
5. To unfreeze a column, click the **Column Options** (three dot) icon again, and select **Unfreeze**.

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**:

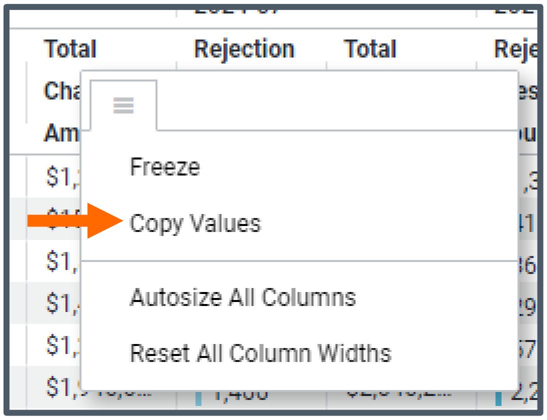


     a. Hover over a column header.

     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**:
    1. 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.
    2. 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**:
    1. Click a cell (be careful not to click on a link within the cell because the detail screen for that link will open).
    2. Hold down the [**Shift**] key and click in another cell.

       All connected cells will display a gray box around them.
    3. Copy the cells using the keyboard shortcuts **Ctrl+c** (Windows) or **Command-c** (Mac).

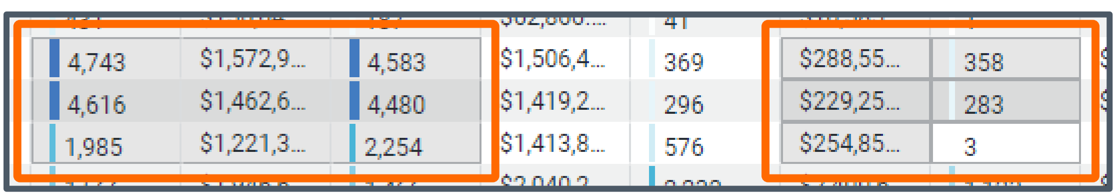
       The cell values are now copied to your computer's clipboard.
  - **[Ctrl] key**:
    1. Click a cell (be careful not to click on a link within the cell because the detail screen for that link will open).
    2. Hold down the [**Ctrl**] key and click in another cell.

       Those two cells will display gray boxes round them.
    3. Click as many cells as desired.
    4. 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]**:
    1. 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.
    2. Click as many cells as desired.
    3. 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.



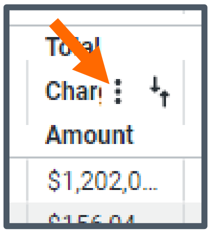
3. Paste the copied value(s) into a spreadsheet, text file, or Looker filter.

Autosizing column widths of a Look table chart

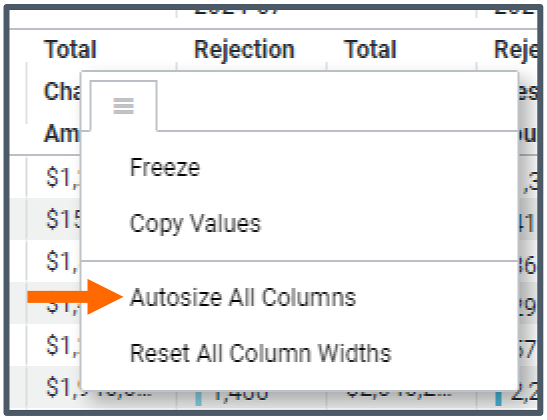
This section explains how to autosize column widths of a Look table chart to fit its column heading name or its longest data value, whichever is wider.

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**.



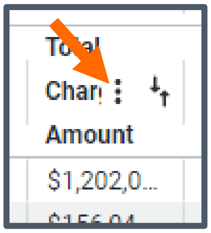
Column widths will fit their column heading name or their longest data value, whichever is wider.

Resetting column widths of a Look table chart

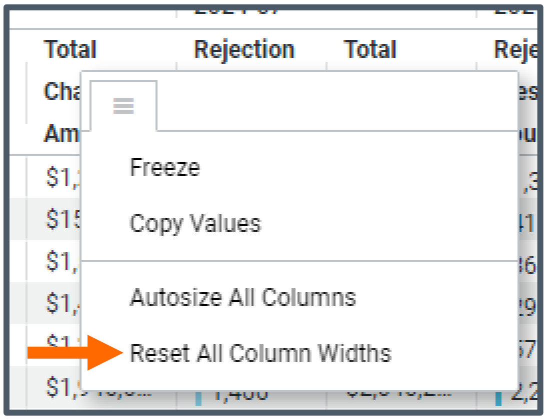
This section explains how to reset column widths of a Look table chart to its default setting.

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.

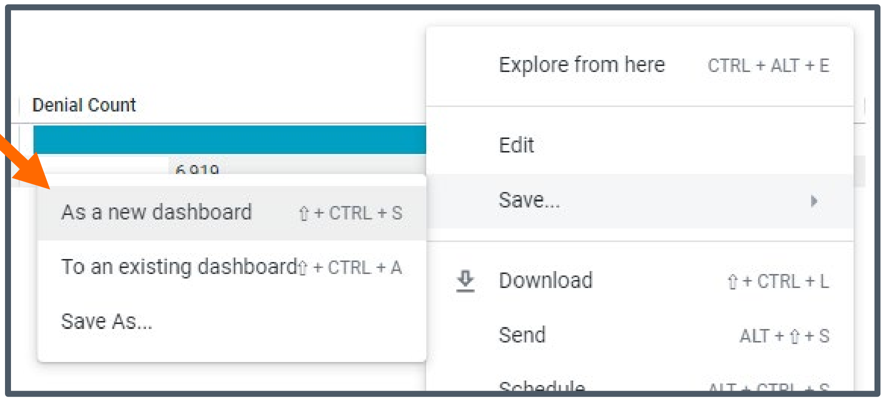
To add a custom dashboard:

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.

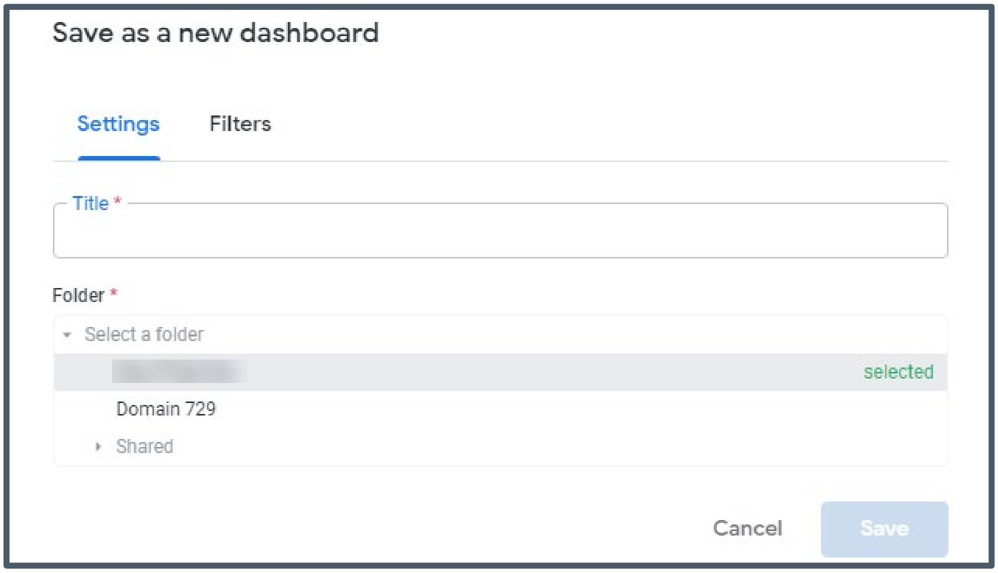
At this point, you can add a new dashboard from either the Look you selected or from the Explore that was used to create the Look.

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.



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

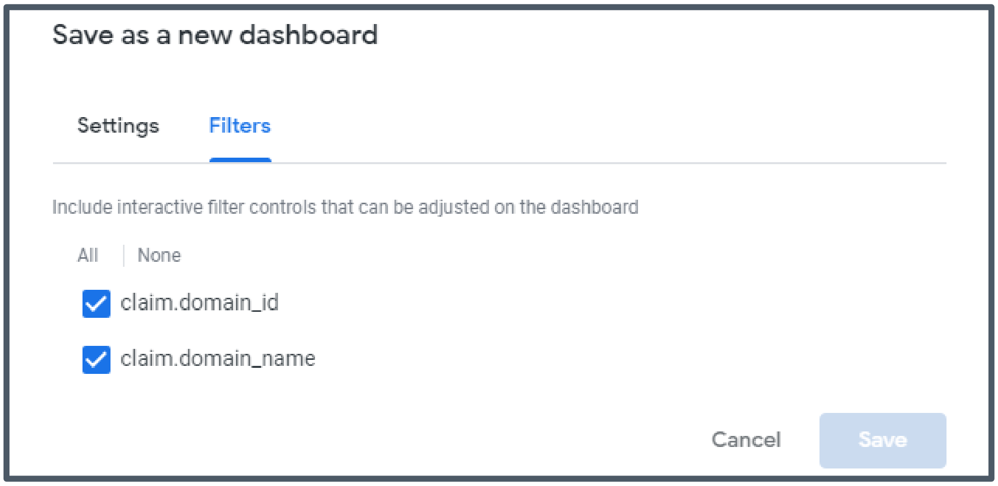
   The name that you enter applies to both the tile (the selected Look or Explore) and the dashboard. To change the tile name, see the Renaming a tile section.

8. Select the folder where you want to save your dashboard.

9. 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.



10. 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.

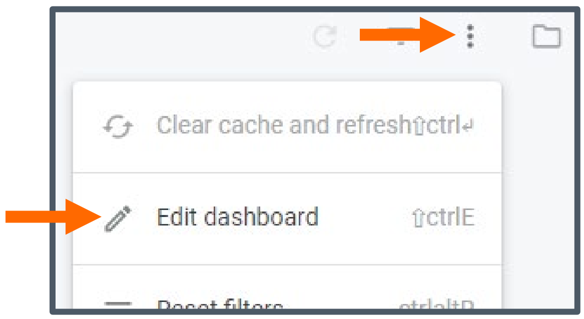
Accessing the edit menu for a custom dashboard

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:

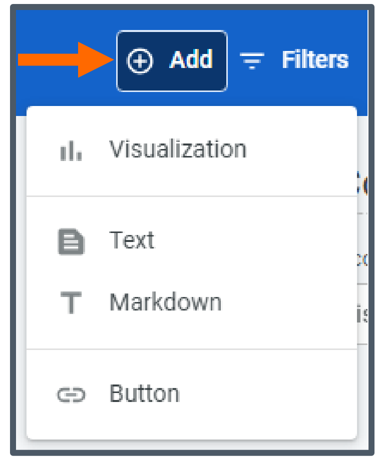
   - Adding a tile
   - Adding a filter
   - Updating settings

Adding a tile

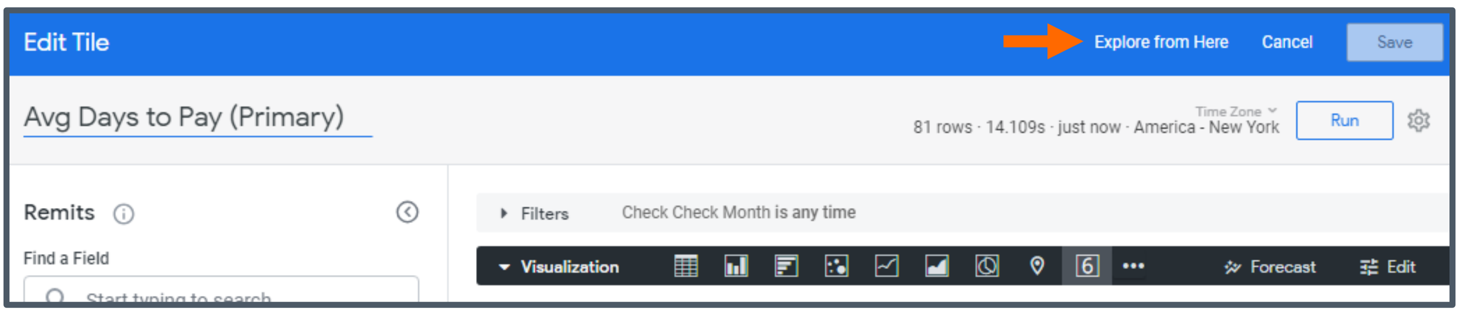
To add a tile to a custom dashboard:

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.



   - **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).

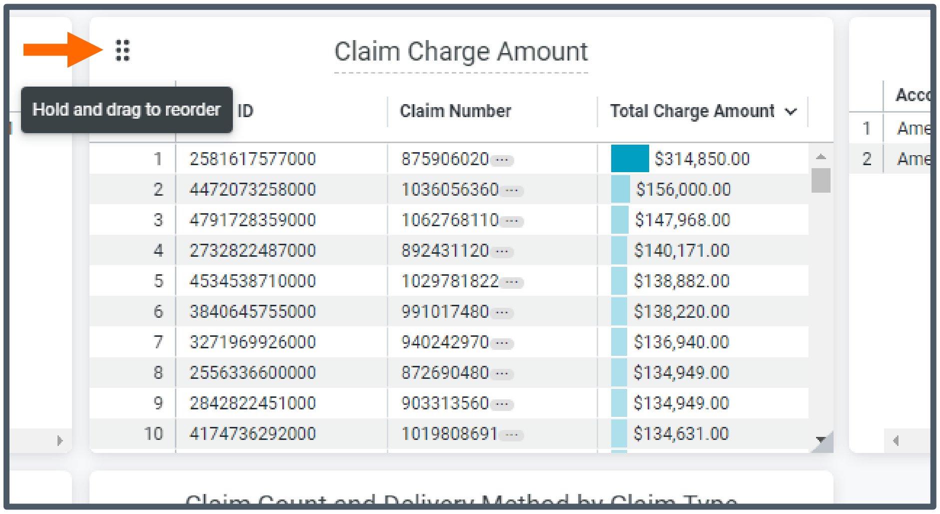
To rename a tile in a dashboard:

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.

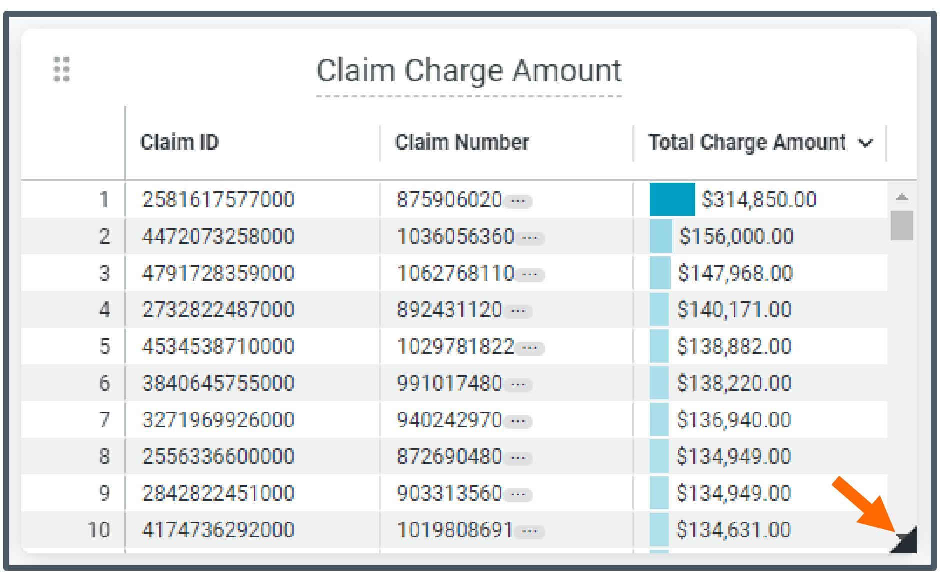


3. Move it to the desired position in the dashboard.
4. Click the **Save** button on the right side of the blue edit menu toolbar above the dashboard.

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:



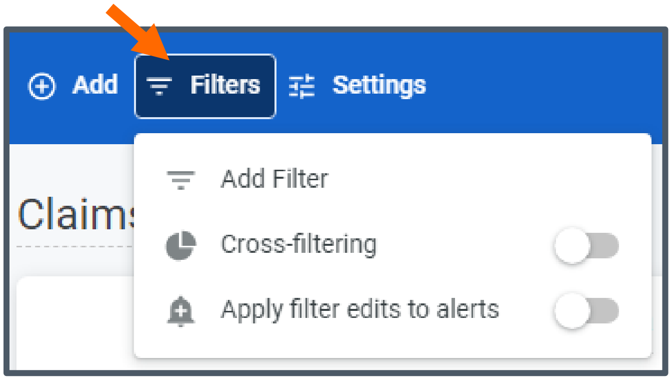
4. Click the **Save** button on the right side of the blue edit menu toolbar above the dashboard.

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.

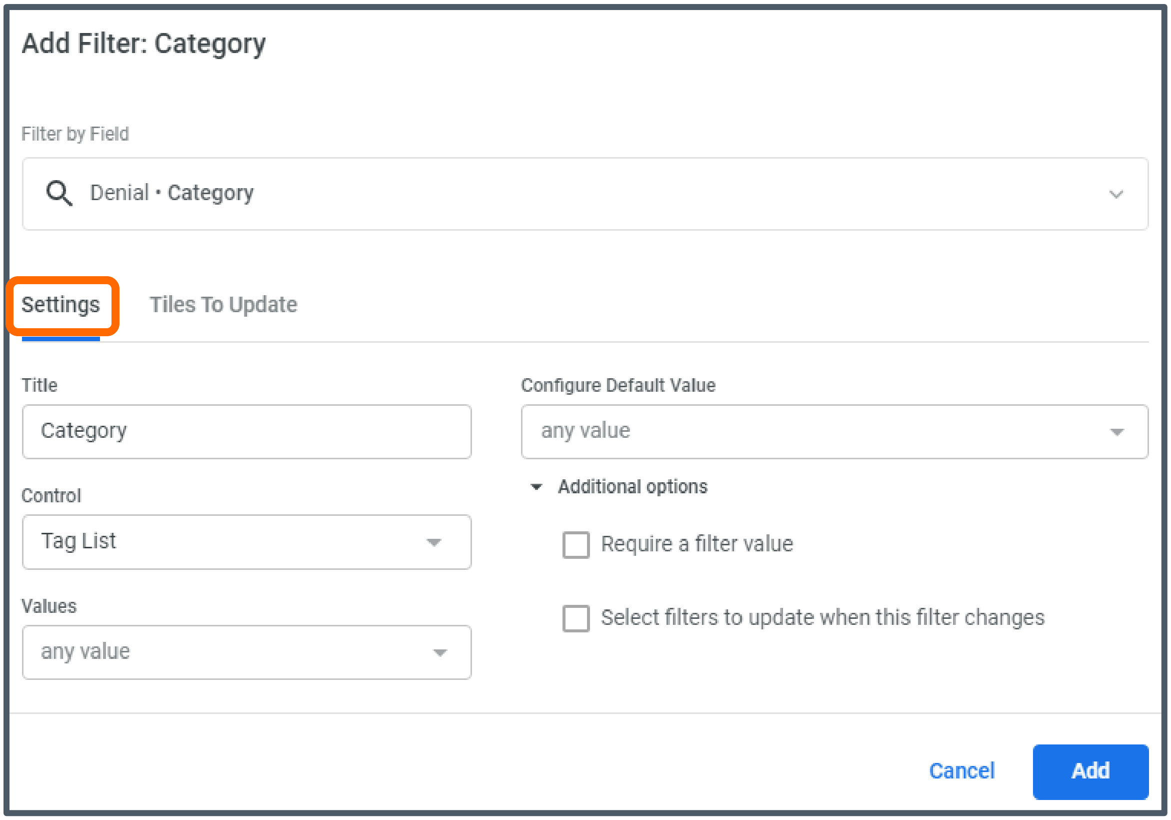
   The Add Filter screen will open, populated with fields (dimensions or measures) from any Explores that were used in the creation of this dashboard's tiles, such as Claims, Denials, and Remits shown in the following example.

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).

6. From an expanded Explore, click the appropriate field. For example, Claims > Claim > Payer > Payer Name (Account).
7. Click the **Add** button.

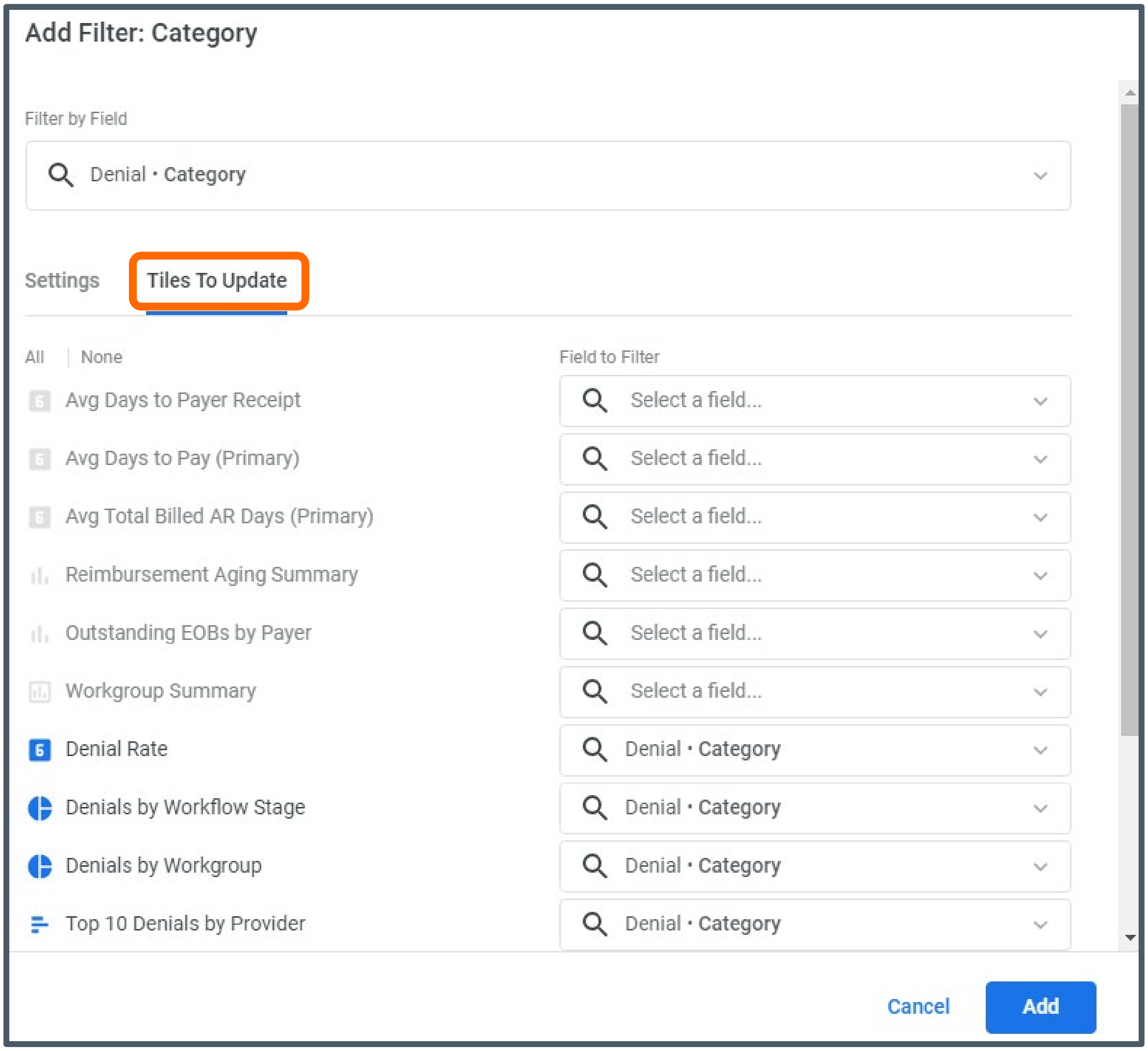
   The selected field name will appear as the **Filter by Field** and the **Settings** and **Tile To Update** tabs will appear on the Add Filter screen.
8. From the **Settings** tab, you can do the following:



- **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.

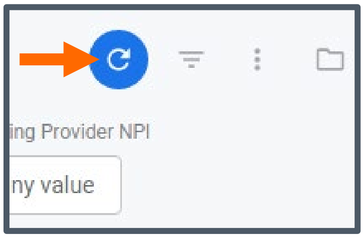
9. From the **Tiles To Update** tab, you can do the following:

   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.



   - **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.



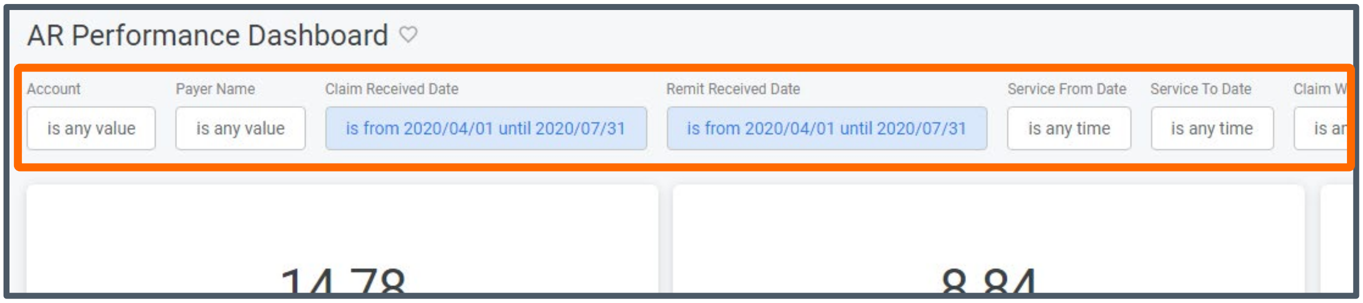
Updating dashboard filters

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.

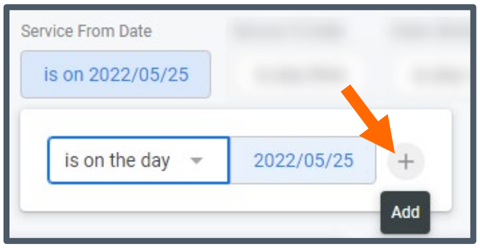
   The dashboard will load. If the dashboard has any applied filters, they will display as filter fields above the dashboard.

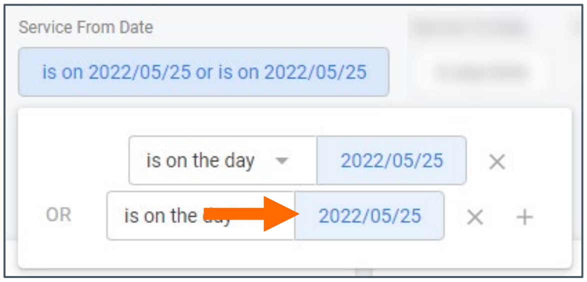


3. **To update existing filters**:
   a. Click any filter value field.

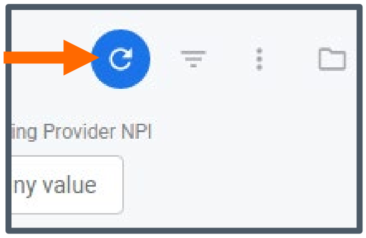
      Dropdown fields will appear below the value field.

   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.





   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.



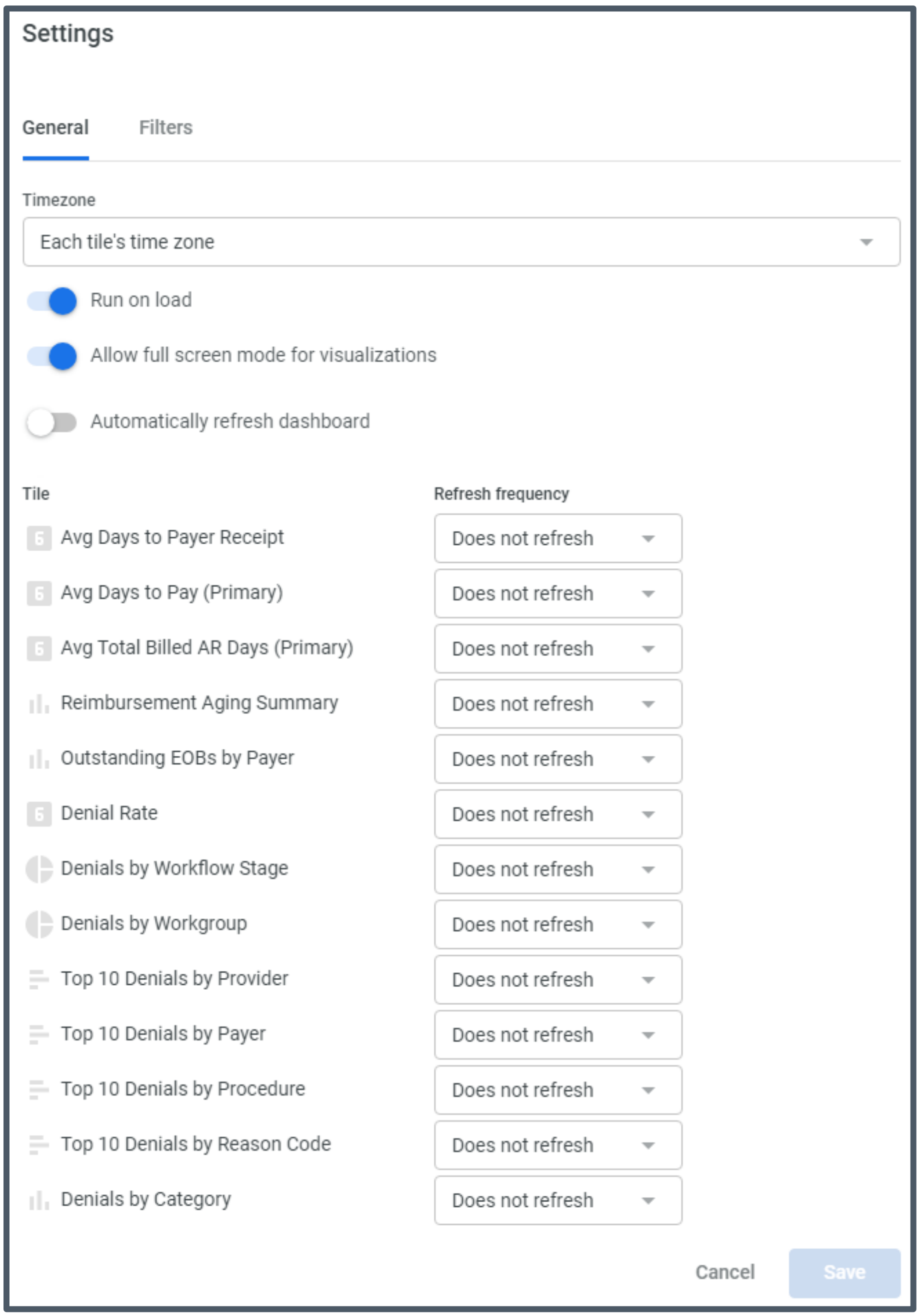
Updating settings

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.

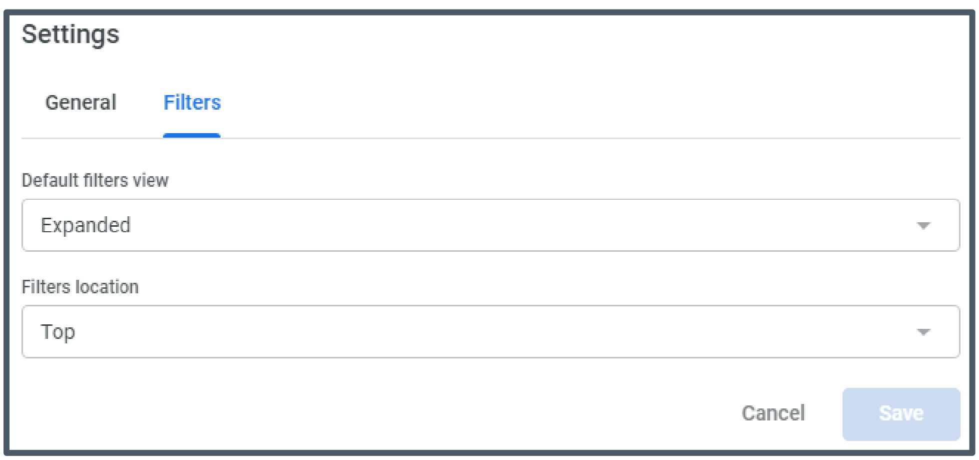
The Settings screen will open.

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



- **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

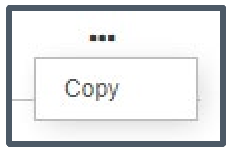
You can perform the actions defined in this section on dashboards that appear in the list on the Work Spaces screen.

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.

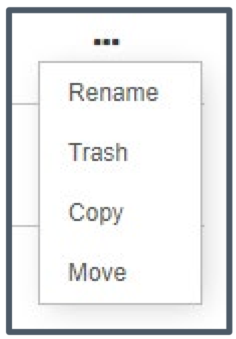
To manage a dashboard from the Work Spaces list:

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.

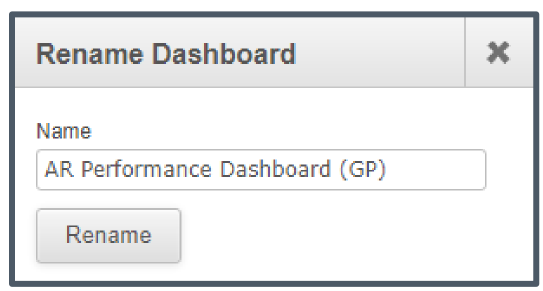
   

   Custom dashboards allow you to perform more actions. Keep in mind that after you make a copy of a “Created by Waystar” dashboard, that dashboard becomes custom, and you would then see this menu.

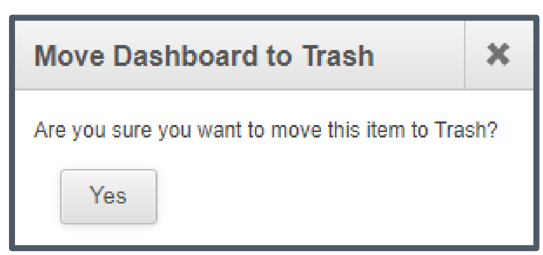
   

3. From the menu, select the appropriate action:
   - **Rename**: Opens the Rename Dashboard screen.
     a. In the **Name** field, enter an appropriate name for the dashboard
     b. Click the **Rename** button.

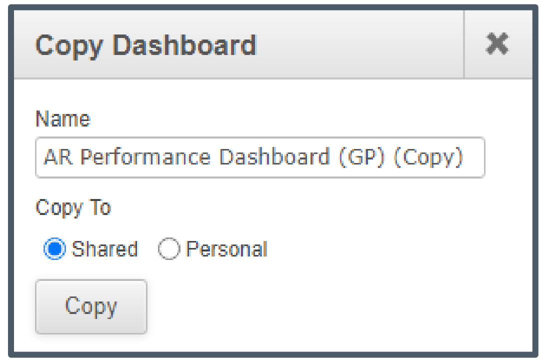
        The dashboard will now appear in the list under the new name.

   - **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.

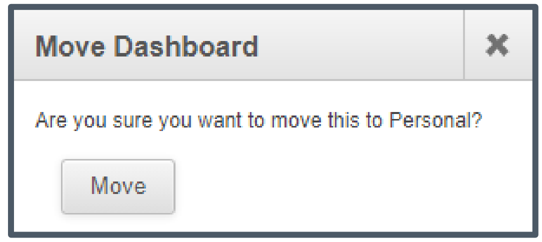
- **Copy**: Opens the Copy Dashboard screen. This action allows you to copy custom or "Created by Waystar" dashboards.

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

- **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.

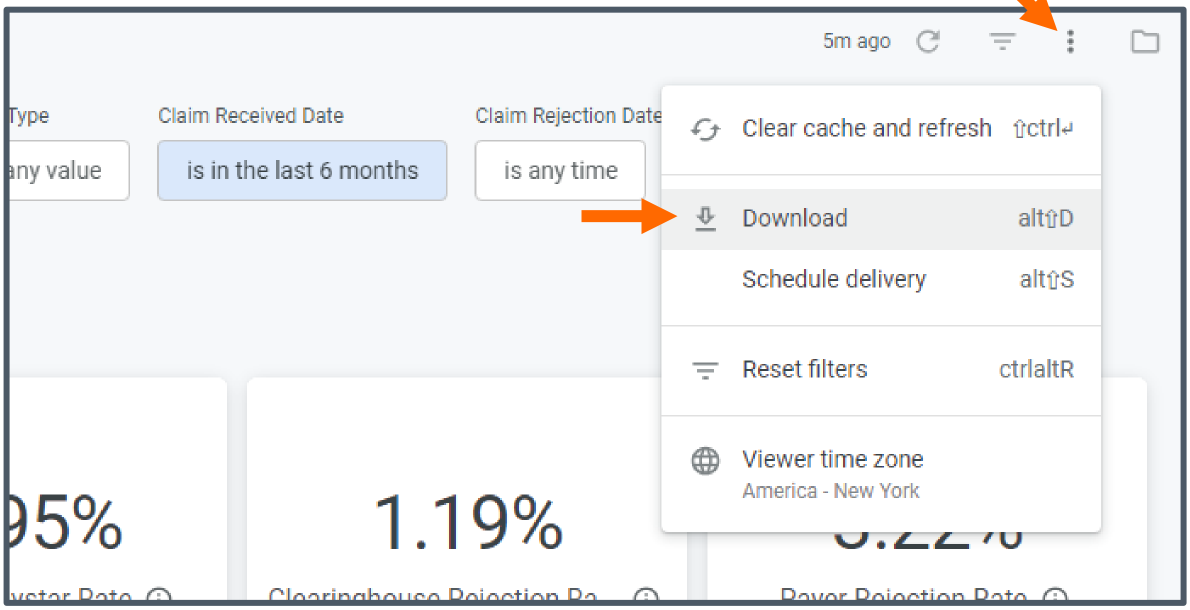
  

Downloading data for the entire dashboard

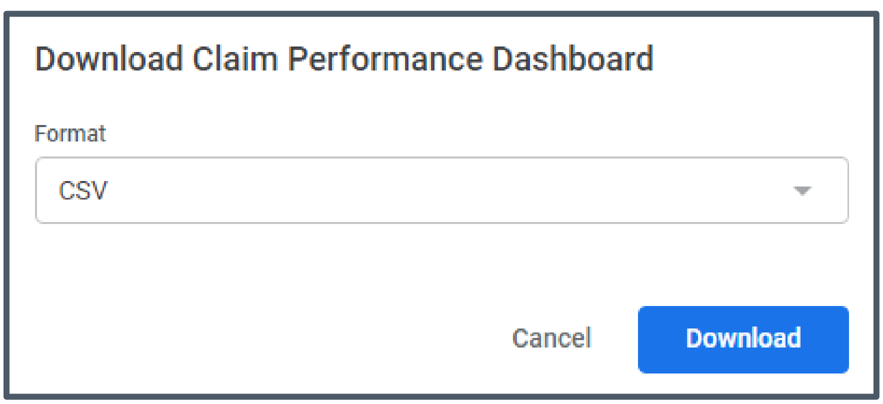
This section explains how to download dashboard data as CSV files or a PDF.

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**.

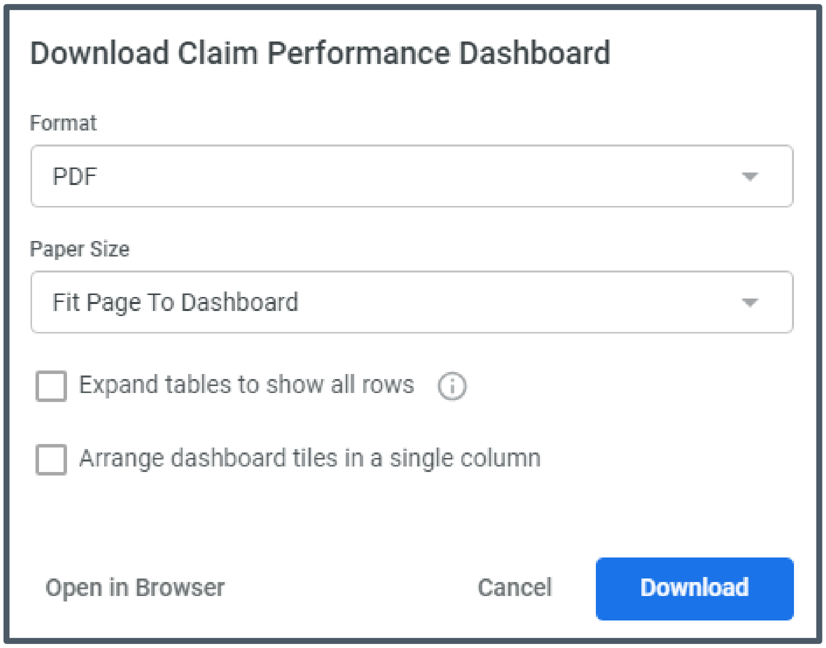


5. Continue with the instructions for downloading CSV files or a PDF:
   - **Download as CSV files**:
     a. From the Download [dashboard name] screen that will open, select **CSV** from the dropdown.
     b. Click the **Download** button.
     A zipped collection will download with each dashboard tile rendered in a separate CSV file.



- **Download as a PDF:**

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



– **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.

b. 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.

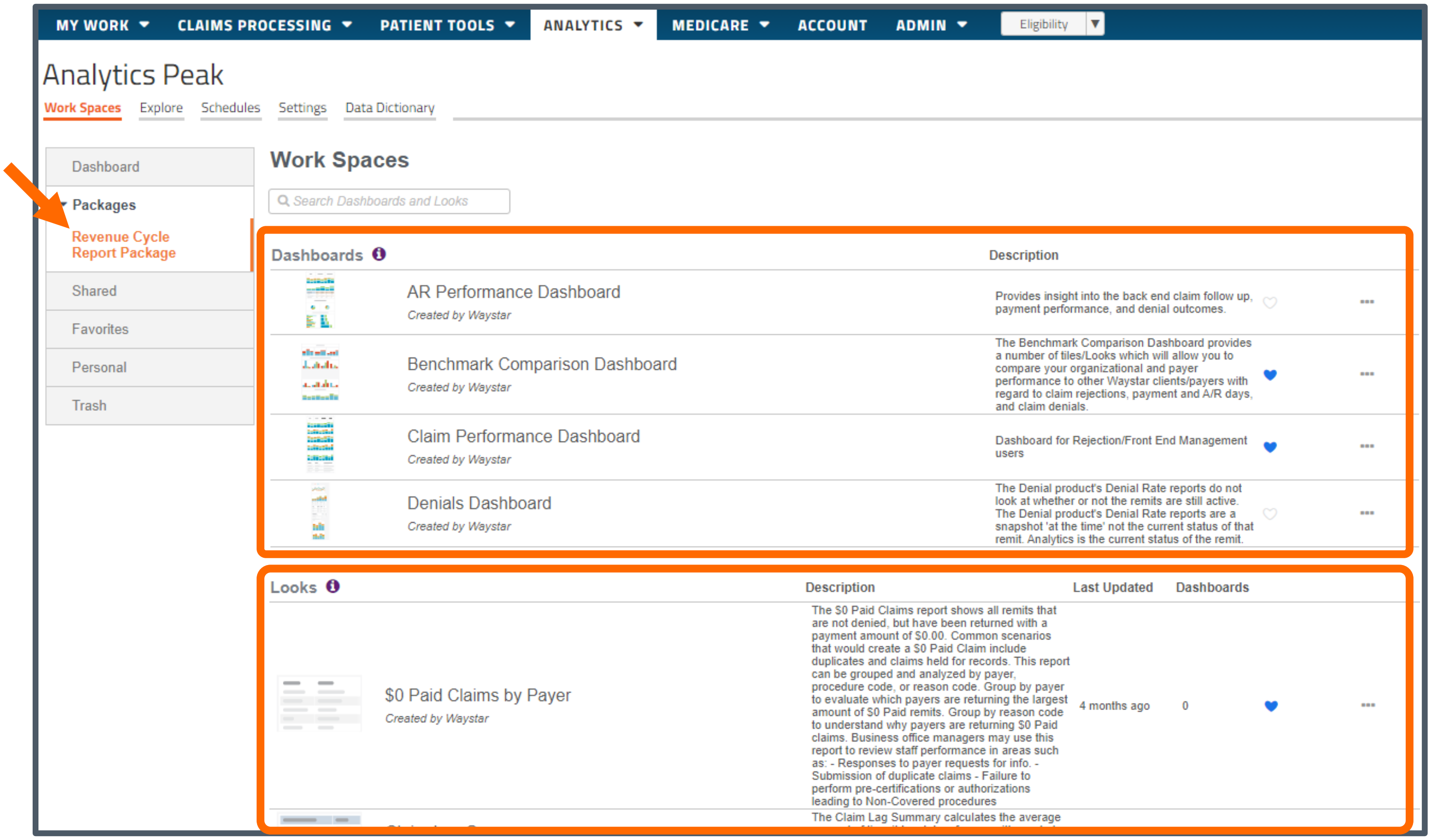
Packaged reporting

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.

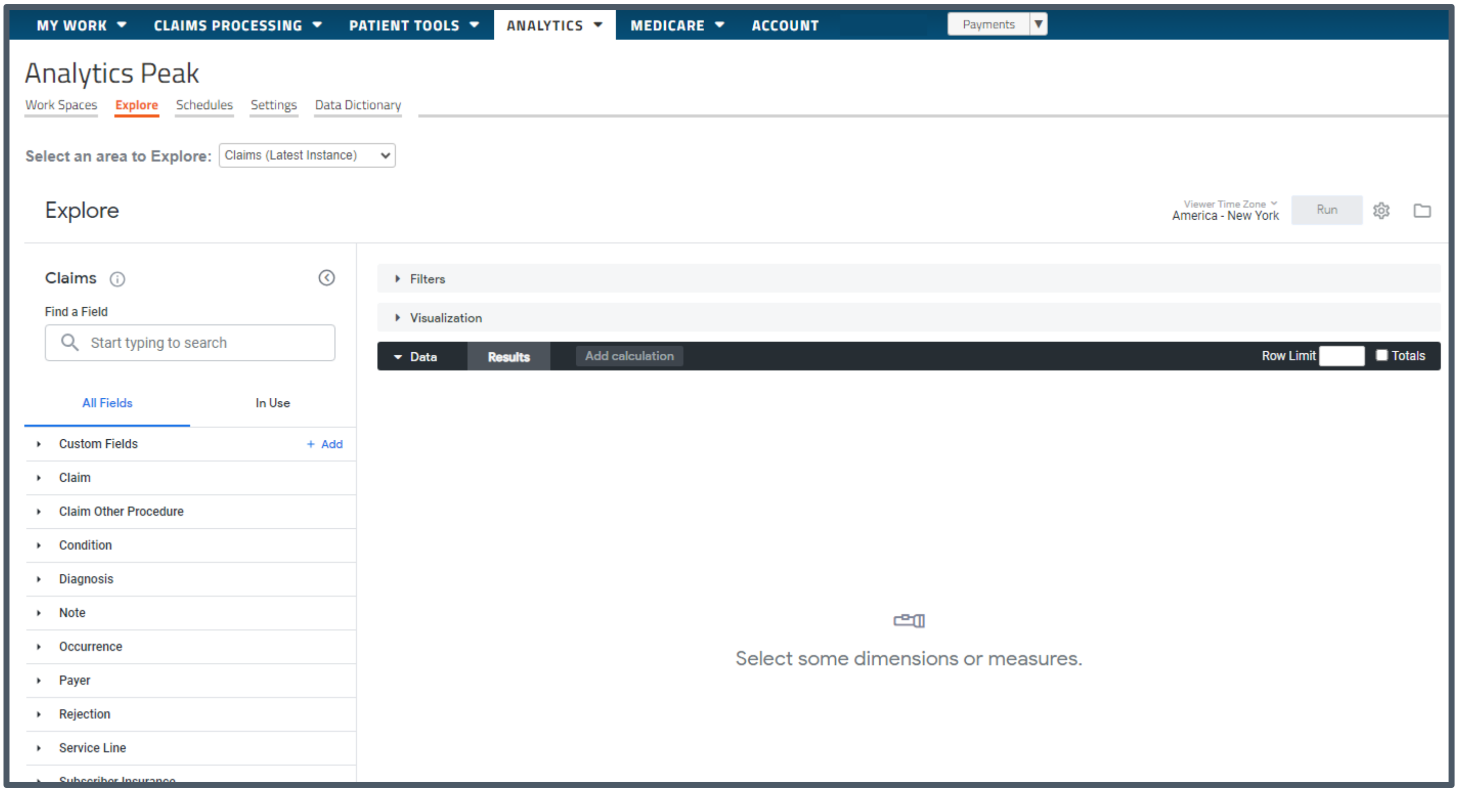
To access these dashboards and Looks:

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.



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.



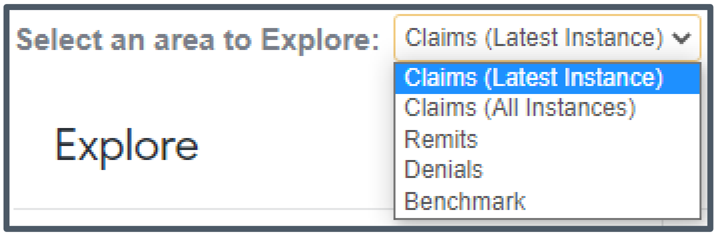
Building a new Look

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.

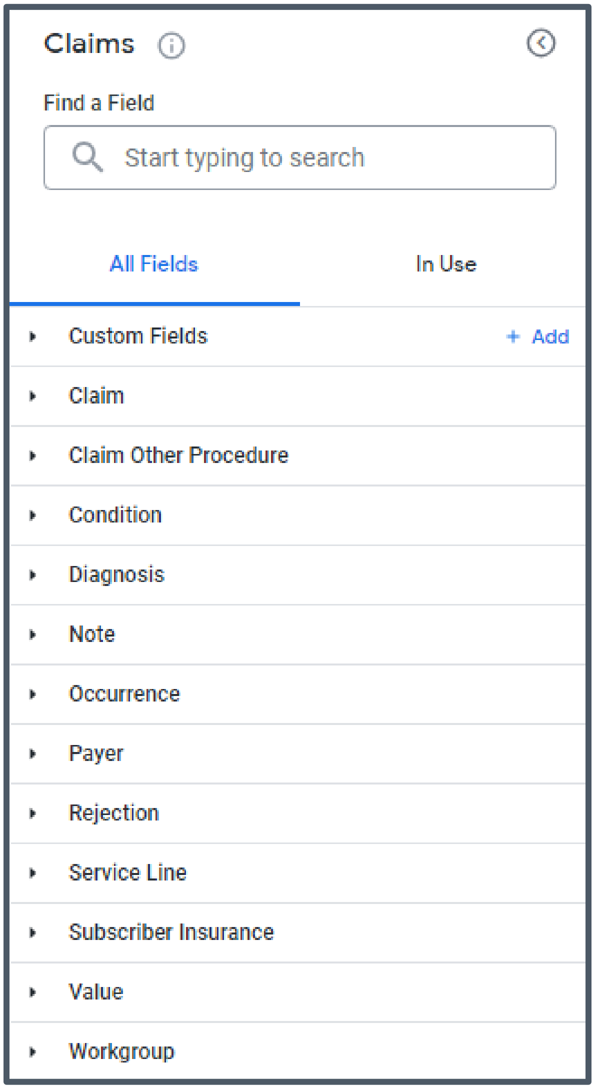
   Additional information – Data analysis process

   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**.



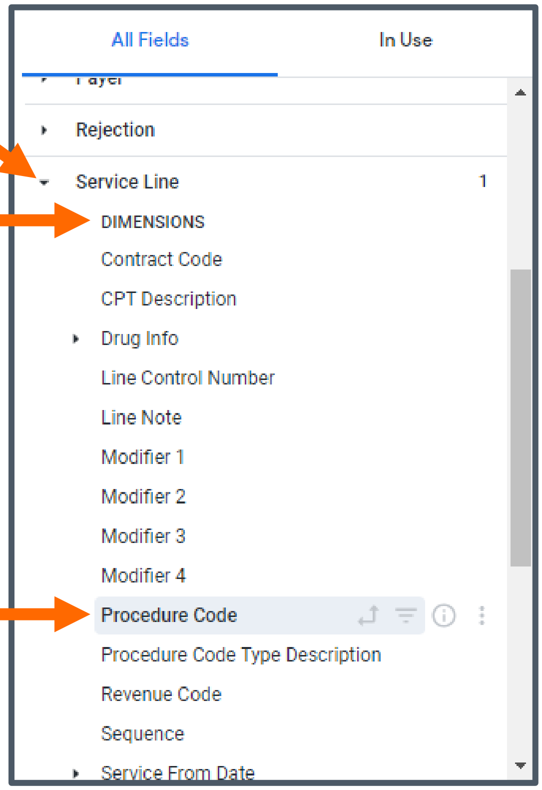
Note: Use the Data Dictionary to find descriptions of the full list of Explore reporting attributes.

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.

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.



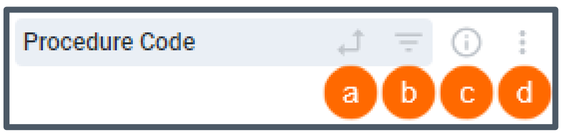
If desired, click the dimension a second time to remove it from the data table.

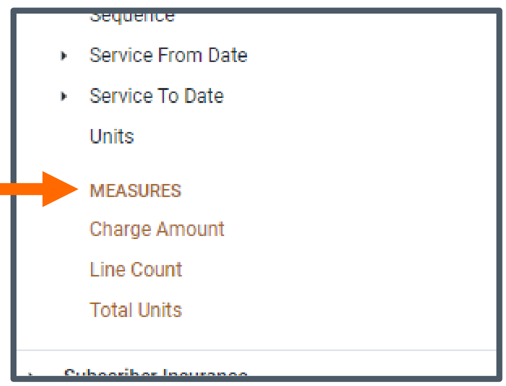
Example scenario

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:





a. **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

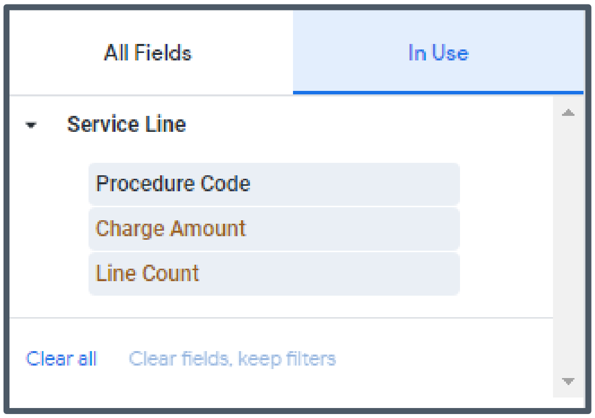
   Pivoting data only changes how the data is presented in the generated Look data table. Additionally, only dimensions can be pivoted to view the associated data horizontally. Pivoting may be beneficial if you are adding multiple dimensions, and you want to view the associated data horizontally. Pivoting 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.

b. **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.

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**.

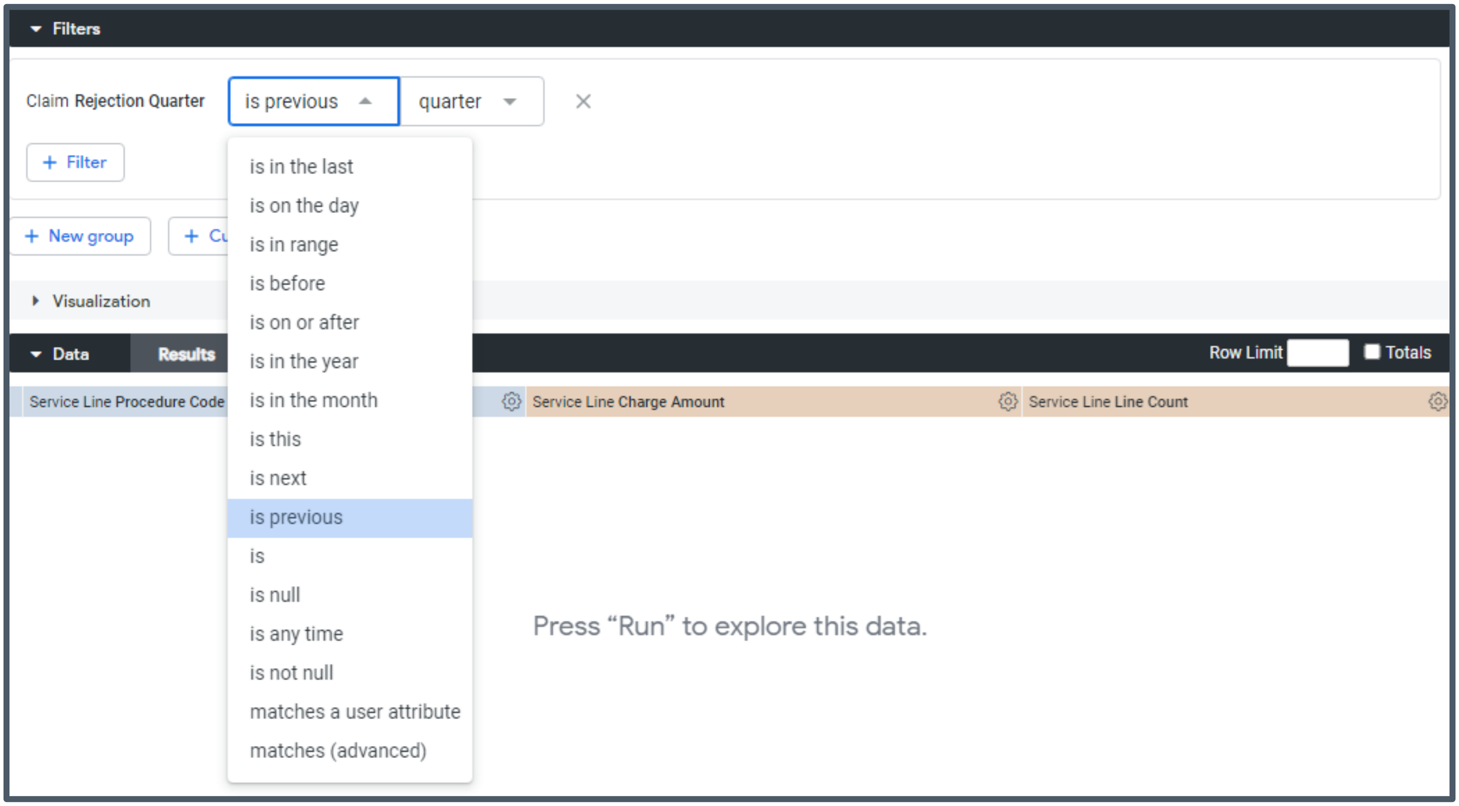
5. To review all values added to your Look, click the **In Use** column in the field-picker area.



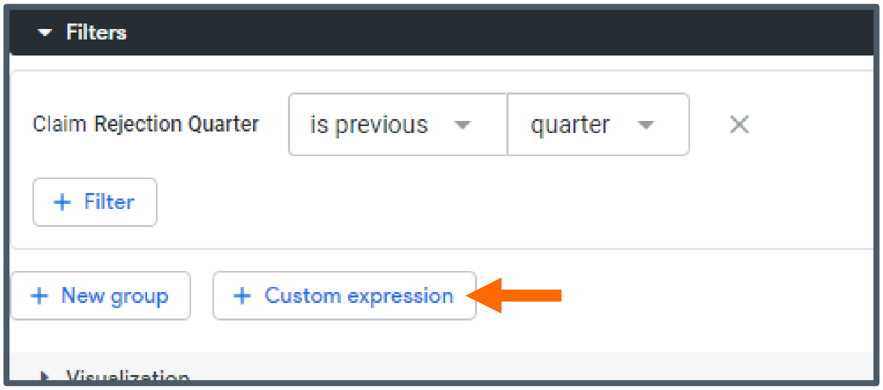
6. *Optional*. Perform the following, optional steps to further customize your Look filters and data table:

   a. Apply a secondary field qualifier from the first field dropdown in the **Filters** section.

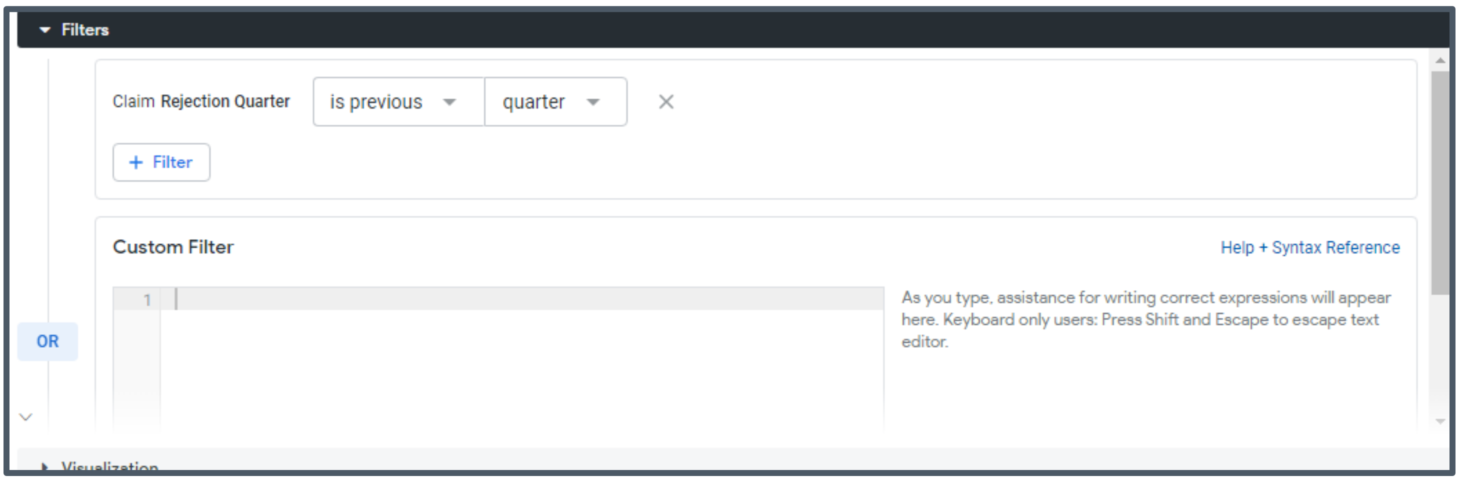
   b. Apply/reassign tertiary, quaternary, etc. field qualifiers as necessary:



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



The Custom Filter menu will open.

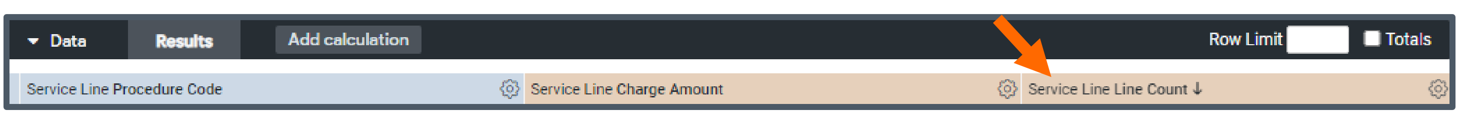


d. You can manually build custom filters for your Look using the following functions and operators:

- **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.

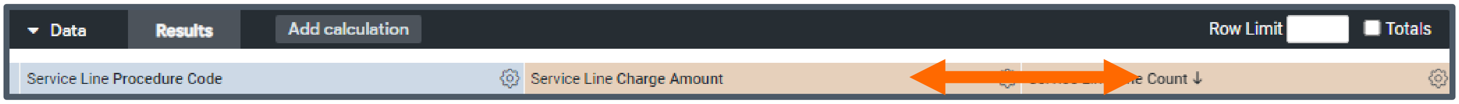
- **Totals**: If this checkbox is clicked, a row will be added at the bottom of the data table displaying numerical measure value totals.

  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

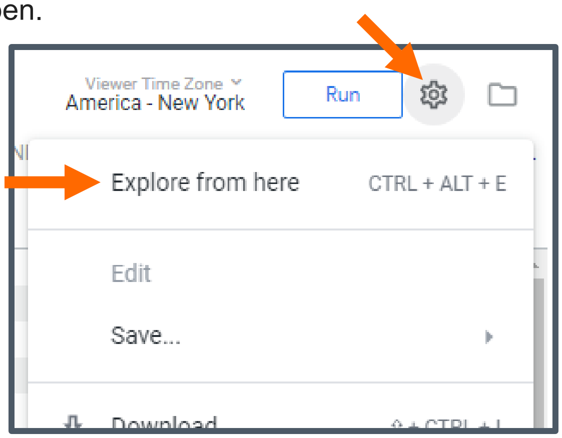
To open a Look from Work Spaces:

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.

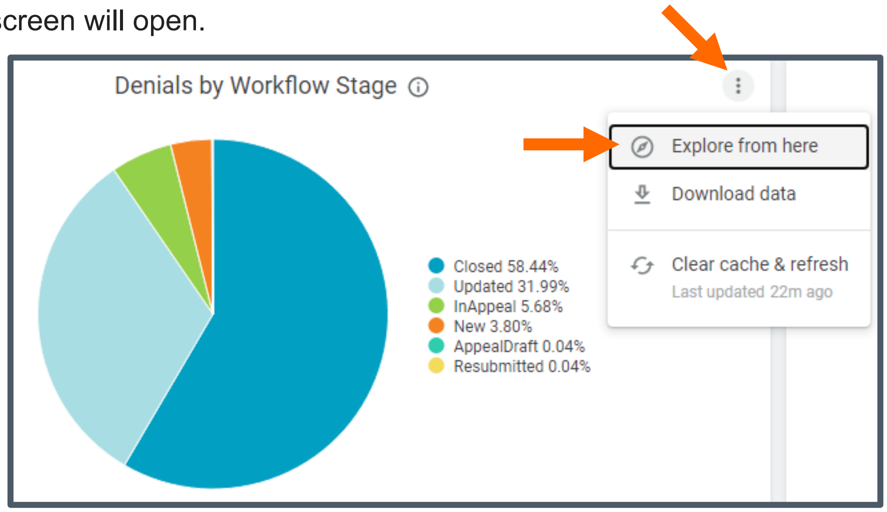
Opening a Look from a dashboard

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.

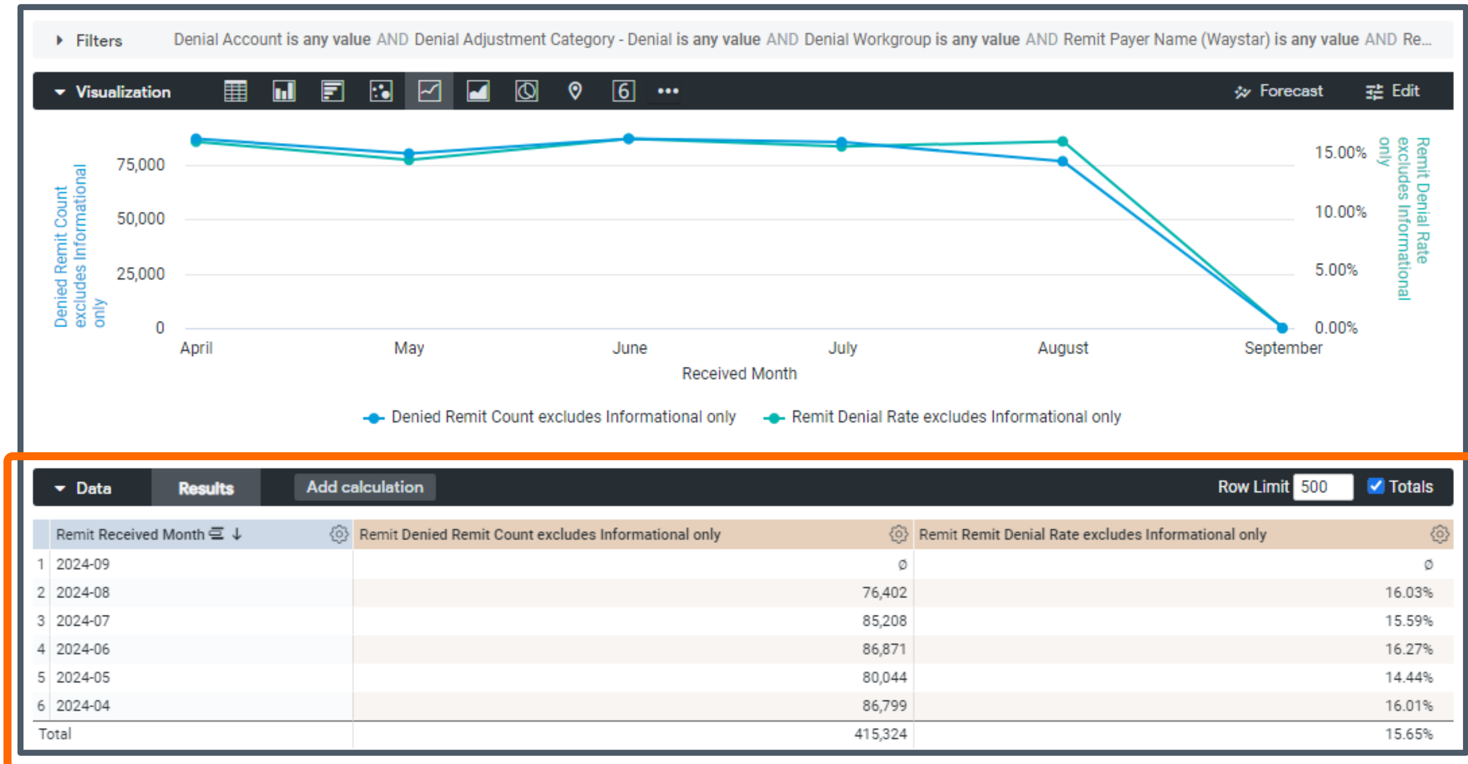
Managing Looks in Explore

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).

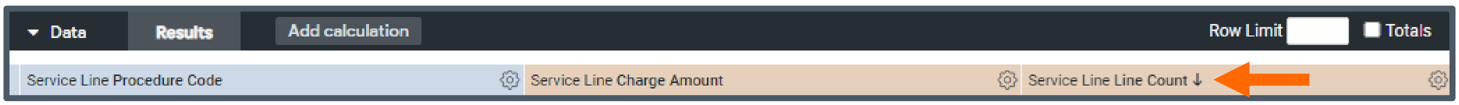
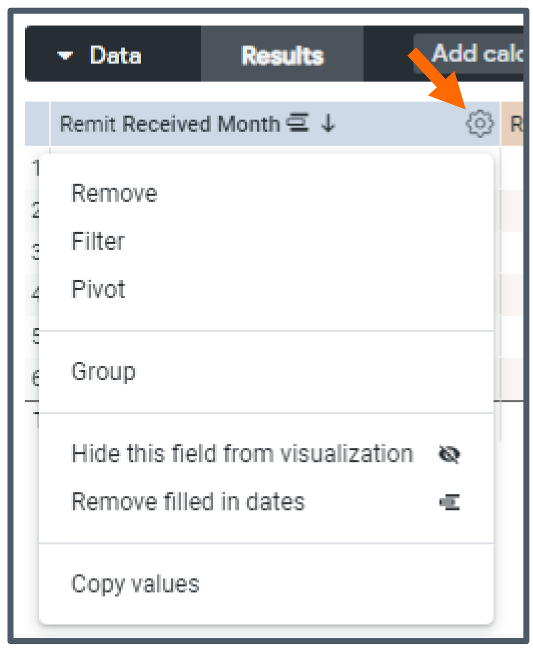


Chart (data table) actions

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.

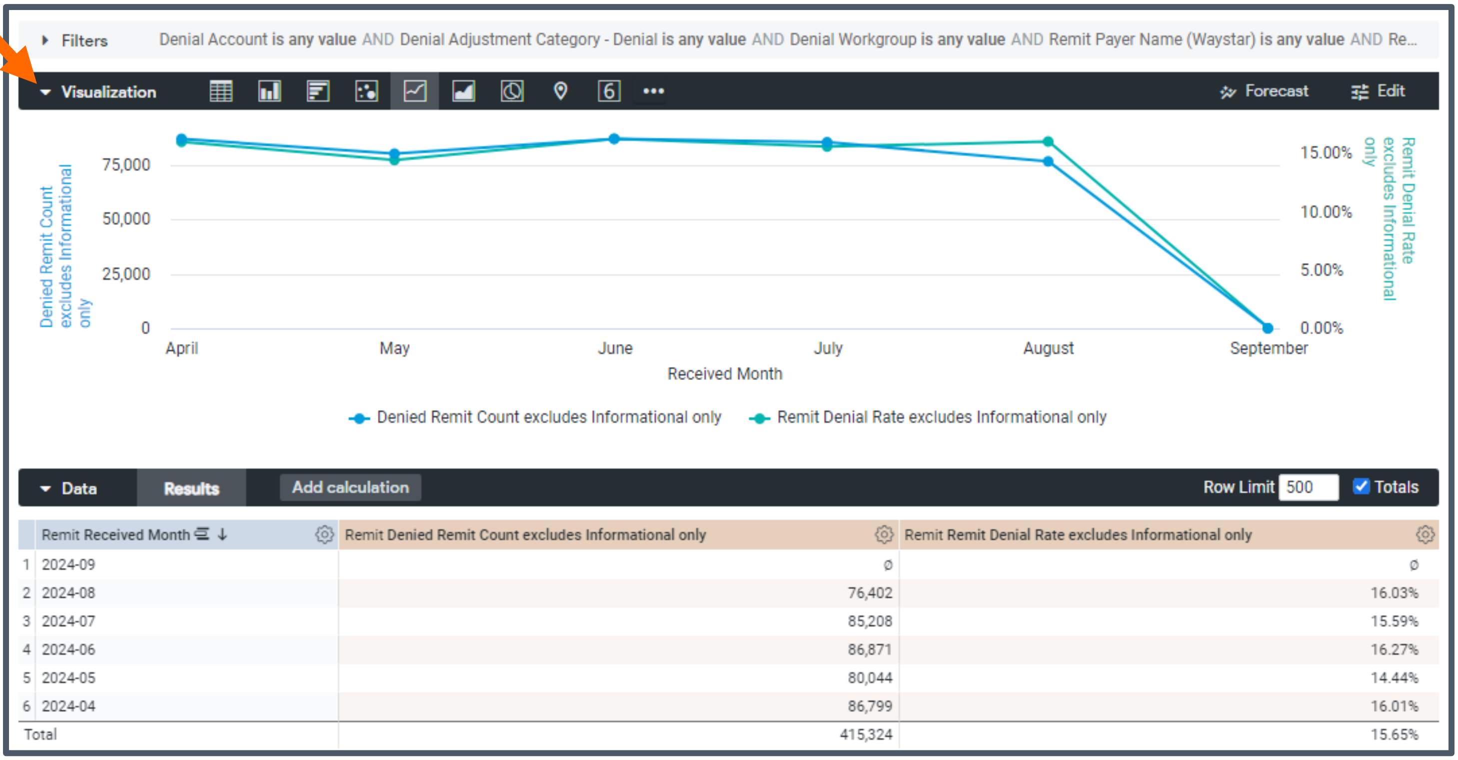


- **Remove**: Remove the attribute from the Look grid.
- **Filter**: Add the attribute to the Look filter list.
- **Pivot**: Transpose the reported data horizontally in your table. For more information on the Pivot action, see the Building a new Look section.
- **Group**: Create a group by field.
- **Hide 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.

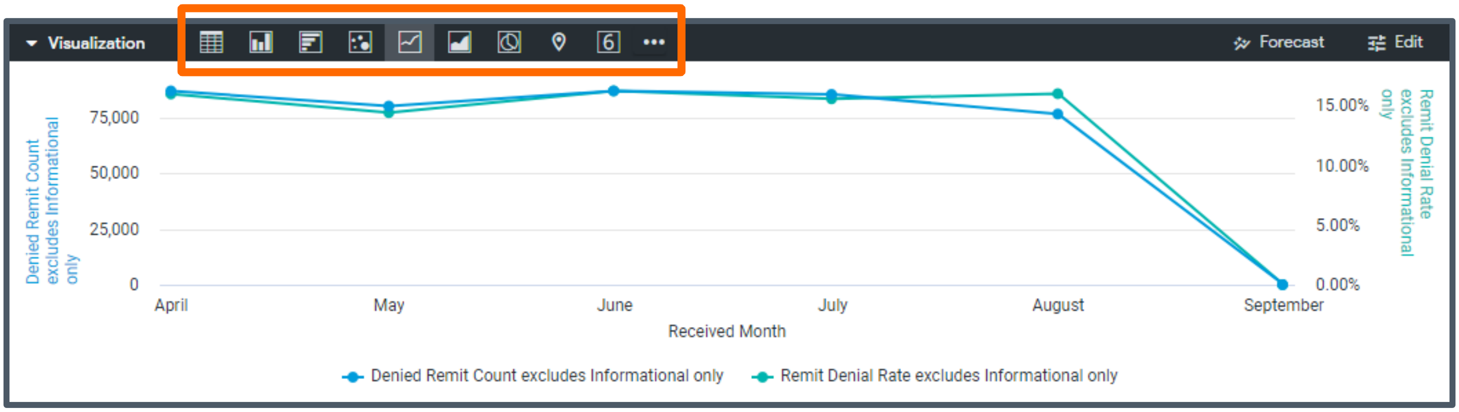


	Remit Received Month	Remit Denied Remit Count excludes Informational only	Remit Remit Denial Rate excludes Informational only
1	2024-09	∅	∅
2	2024-08	76,402	16.03%
3	2024-07	85,208	15.59%
4	2024-06	86,871	16.27%
5	2024-05	80,044	14.44%
6	2024-04	86,799	16.01%
Total		415,324	15.65%

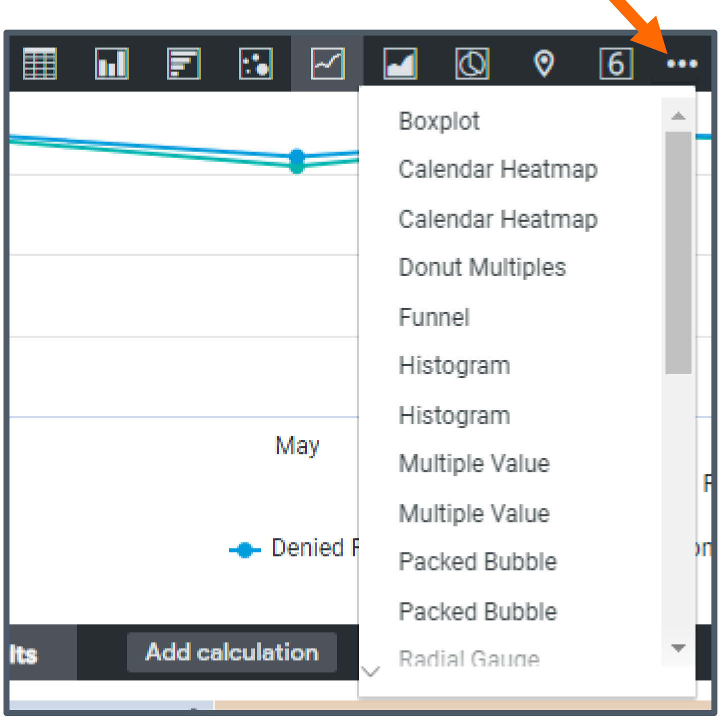
Choosing a Look visualization type

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.

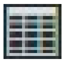
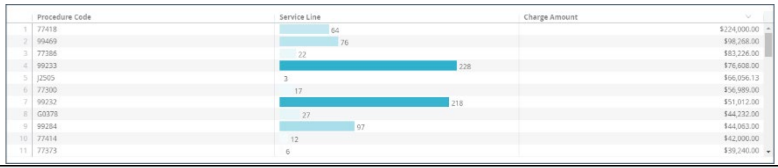
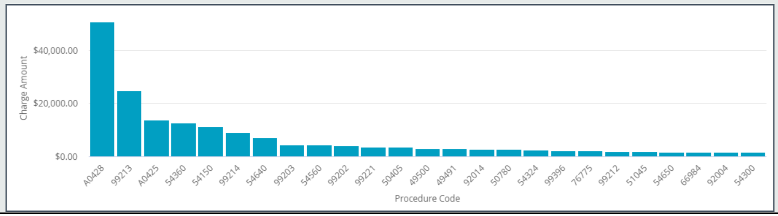
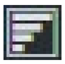
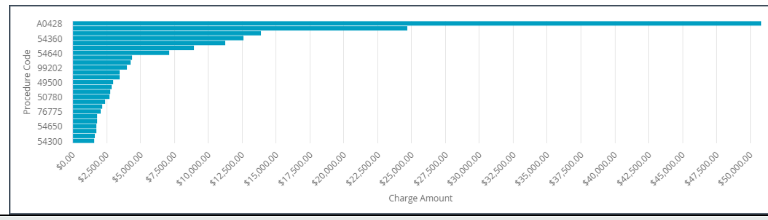
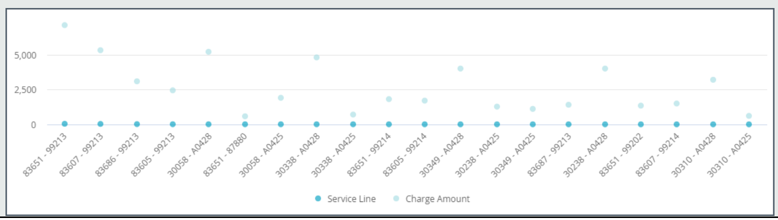
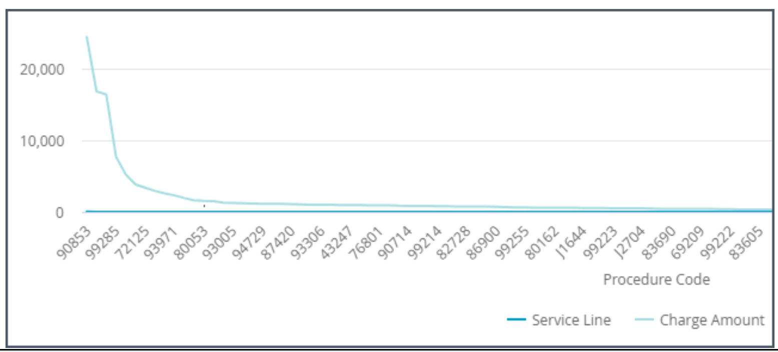
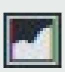
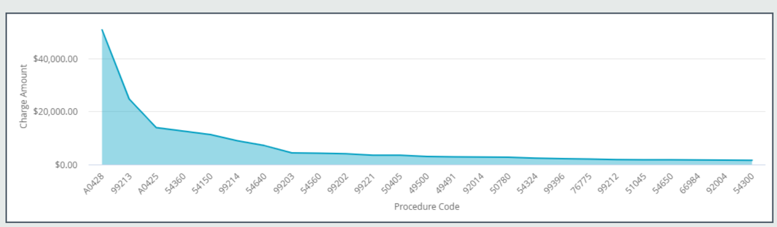
To change the visualization type, simply click any of the options in the Visualization toolbar.

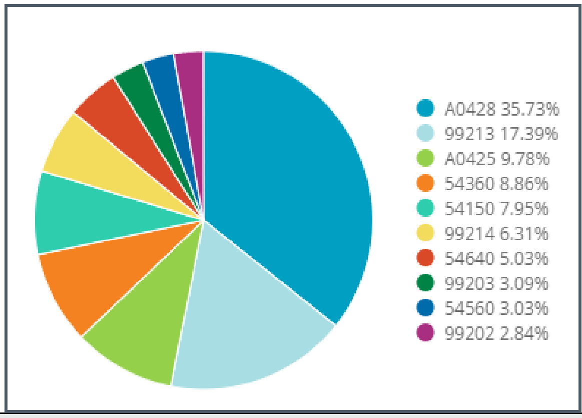
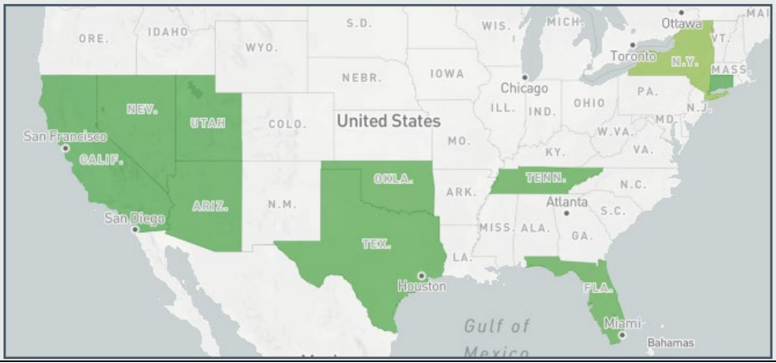
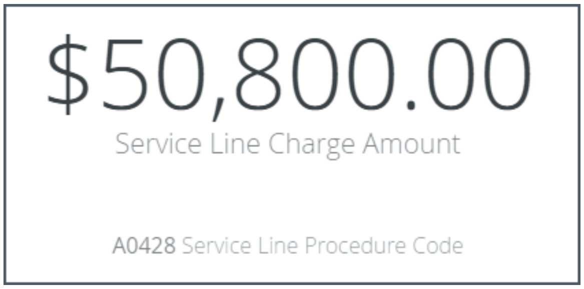


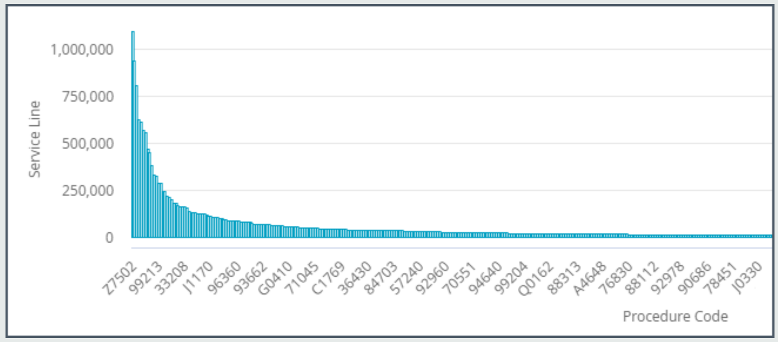
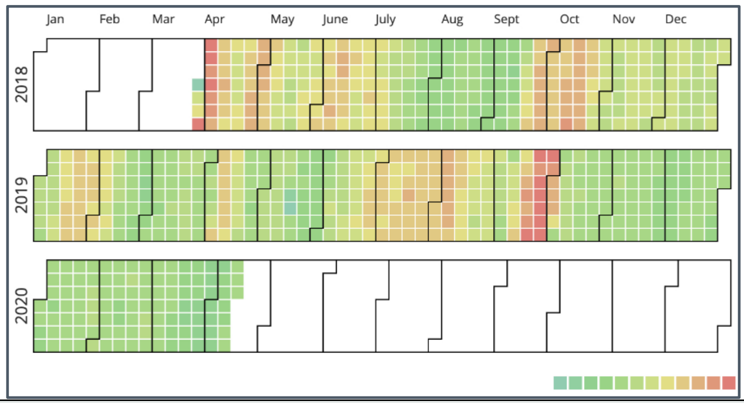
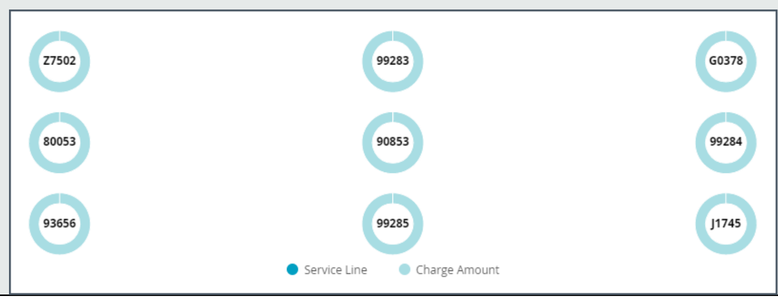
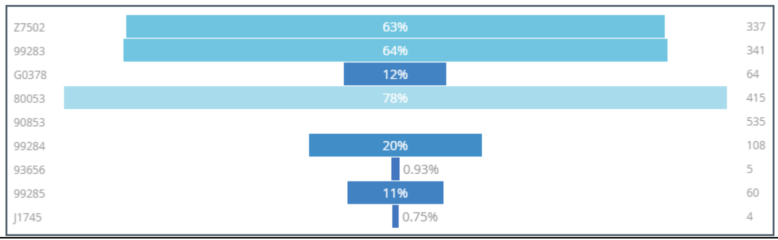
To access additional visualizations, click the three-dot icon to the right of the visualization icons.

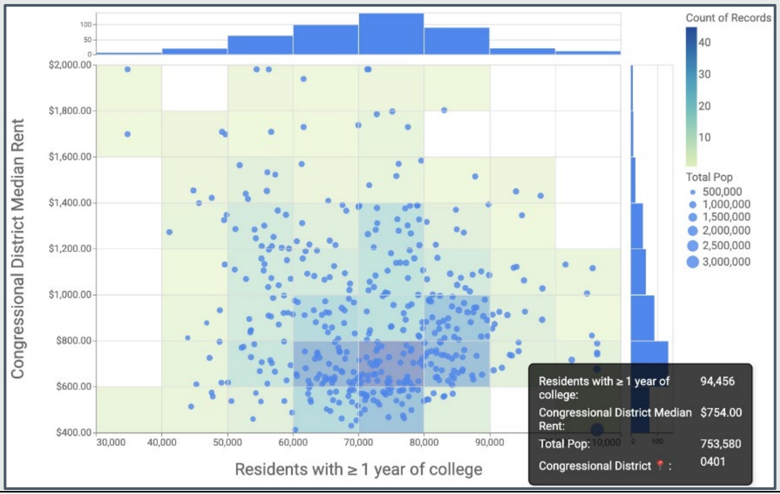
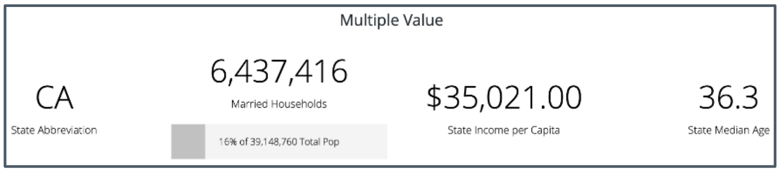
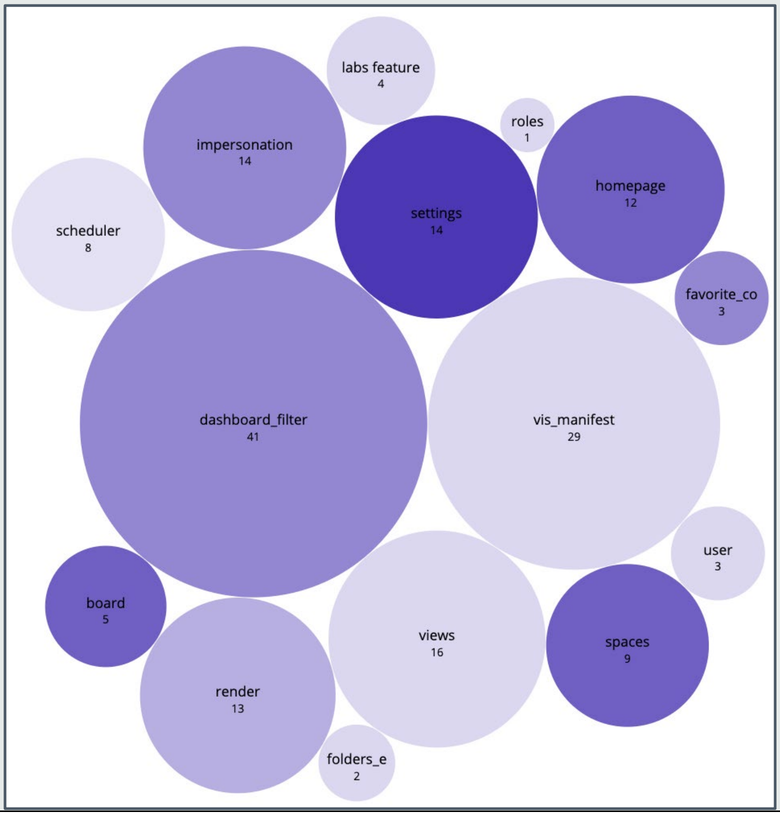


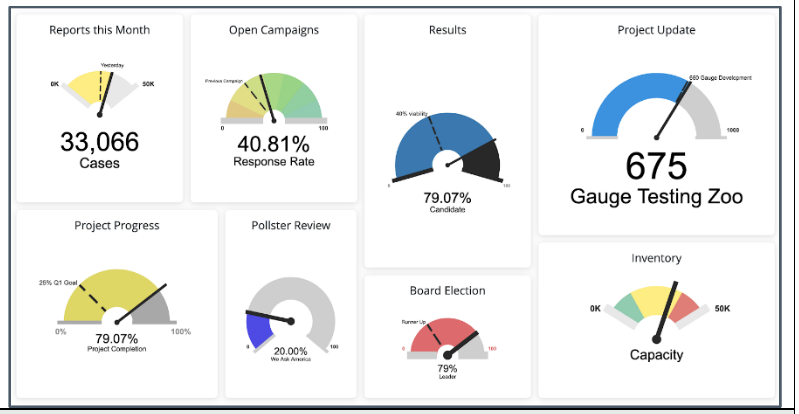
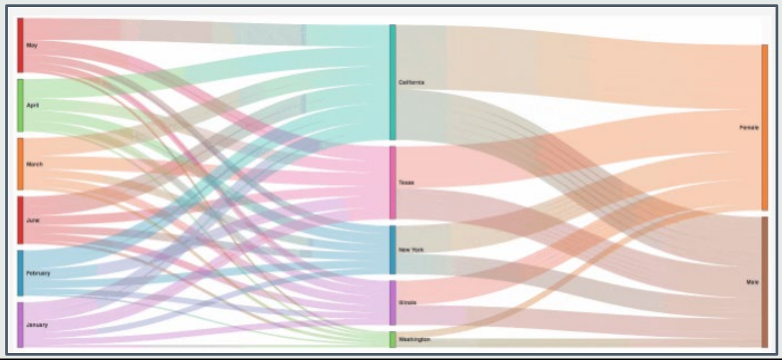
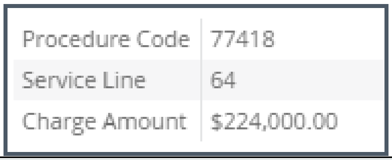
The following table provides descriptions and screenshot examples of each type of visualization:

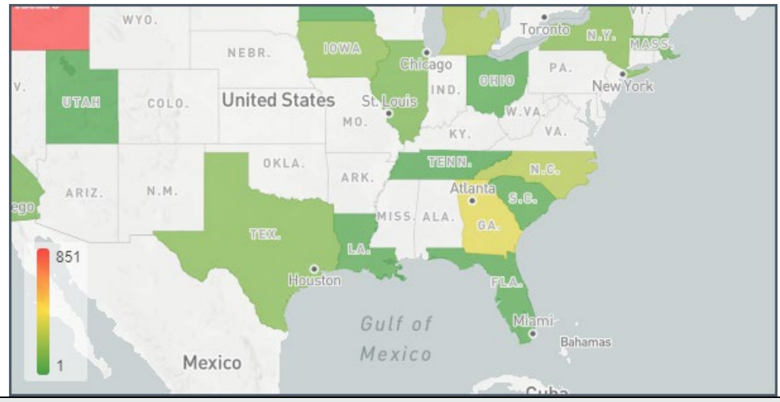
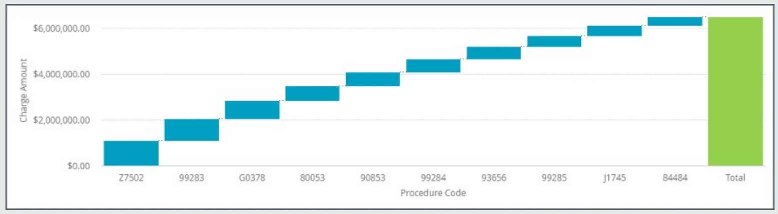
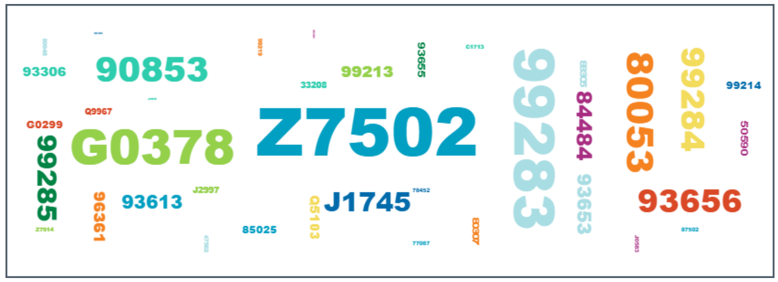
Visualization Type	Toolbar Button	**Description**	**Visualization Example**
Table		The Table chart displays a combination of the data values displayed in your data table and a bar chart representing the measure in your left-most column.	
Column		Column and Bar charts are useful for showing comparisons 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.	

<table>
<tr><th>Visualization Type</th><th>Toolbar Button</th><th>Description</th><th>Visualization Example</th></tr>
<tr><td>Pie</td><td></td><td>Pie charts are useful for illustrating the proportions that several components contribute to a whole.
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.</td><td>
</td></tr>
<tr><td>Google Maps</td><td></td><td>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.
Requirement:
To load a Google Maps chart visualization, you must add at least one location-based dimension.</td><td>
</td></tr>
<tr><td>Single Value</td><td></td><td>Single Value visualizations are helpful when you are looking to provide a snapshot/overview of a data set using a single value.
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).
Quick Tip
Save the associated Look to a dashboard to purpose the Single Value visualization as a dashboard label.</td><td>
</td></tr>
</table>

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

Visualization Type	Toolbar Button	Description	Visualization Example
Histogram	Dropdown Option	Histogram charts are useful for quickly binning measures within 5,000 rows.	
Multiple Value	Dropdown Option	Multiple Value charts are an effective layout for grouping similar types of content or related metrics. **Requirement**: To load the Multiple Value chart, you need one to ten measures including those used for comparisons.	
Packed Bubble	Dropdown Option	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. **Requirement**: To load the Packed Bubble chart, you need one dimension and two measures.	

Visualization Type	Toolbar Button	**Description**	**Visualization Example**
Radial Gauge	Dropdown Option	Radial Gauge charts display a single value that measures progress toward a goal. **Requirement**: To load the Radial Gauge chart, use up to one dimension and up to two measures.	
Sankey	Dropdown Option	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. **Requirement**: To load the Sankey chart, you need at least two dimensions and one measure.	
Single Record	Dropdown Option	The Single Record chart displays the data point in the top row of your data table with the associated attributes.	 Procedure Code 77418 Service Line 64 Charge Amount $224,000.00
Static Map (Points)	Dropdown Option	Static Map (Points) charts are useful for plotting data represented by points on a map. **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.	

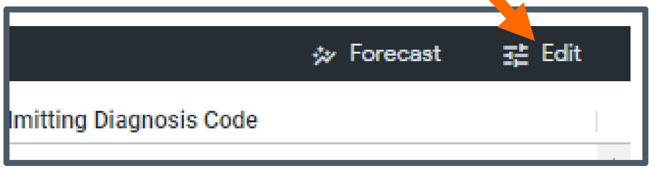
<table>
<tr><th>Visualization Type</th><th>Toolbar Button</th><th>Description</th><th>Visualization Example</th></tr>
<tr><td>Static Map (Regions)</td><td>Dropdown Option</td><td>Static Map (Regions) charts are useful for plotting data regionally.
Requirement:
To load the Static Map (Points) chart, you 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.</td><td>
</td></tr>
<tr><td>Table (Legacy)</td><td>Dropdown Option</td><td>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.</td><td>
<table>
<tr><th>Orders Created Month Num</th><th>1</th><th>2</th><th>3</th><th>4</th><th>5</th><th>6</th><th>7</th><th>8</th><th>9</th><th>10</th><th>11</th><th>12</th></tr>
<tr><td>Orders Created Year</td><td>Orders Order Count</td><td>Orders Order Count</td><td>Orders Order Count</td><td>Orders Order Count</td><td>Orders Order Count</td><td>Orders Order Count</td><td>Orders Order Count</td><td>Orders Order Count</td><td>Orders Order Count</td><td>Orders Order Count</td><td>Orders Order Count</td><td>Orders Order Count</td></tr>
<tr><td>1 2017</td><td>8,976</td><td>8,550</td><td>4,866</td><td>∅</td><td>∅</td><td>∅</td><td>∅</td><td>∅</td><td>∅</td><td>∅</td><td>∅</td><td>∅</td></tr>
<tr><td>2 2016</td><td>6,157</td><td>6,125</td><td>6,536</td><td>6,527</td><td>6,773</td><td>6,627</td><td>6,833</td><td>7,120</td><td>7,399</td><td>7,971</td><td>8,437</td><td>8,934</td></tr>
<tr><td>3 2015</td><td>4,291</td><td>3,935</td><td>4,525</td><td>4,518</td><td>4,629</td><td>4,567</td><td>4,703</td><td>4,881</td><td>5,176</td><td>5,445</td><td>5,849</td><td>6,267</td></tr>
<tr><td>4 2014</td><td>2,691</td><td>2,494</td><td>2,794</td><td>2,985</td><td>3,092</td><td>3,005</td><td>3,154</td><td>3,340</td><td>3,520</td><td>3,747</td><td>3,801</td><td>4,228</td></tr>
<tr><td>5 2013</td><td>477</td><td>650</td><td>856</td><td>1,050</td><td>1,189</td><td>1,257</td><td>1,451</td><td>1,541</td><td>1,767</td><td>2,078</td><td>2,210</td><td>2,580</td></tr>
<tr><td>Total</td><td>22,592</td><td>21,754</td><td>19,577</td><td>15,080</td><td>15,683</td><td>15,456</td><td>16,141</td><td>16,882</td><td>17,862</td><td>19,241</td><td>20,297</td><td>22,009</td></tr>
</table></td></tr>
<tr><td>Timeline</td><td>Dropdown Option</td><td>Timeline charts help you visualize the relationship between groups of events so you can compare the timespans over which these events took place.</td><td>
</td></tr>
<tr><td>Waterfall</td><td>Dropdown Option</td><td>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.</td><td>
</td></tr>
<tr><td>Word Cloud</td><td>Dropdown Option</td><td>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.
Requirement:
To load the Word Cloud chart, you must add only one dimension and one measure.</td><td>
</td></tr>
</table>

Modifying visualization settings

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

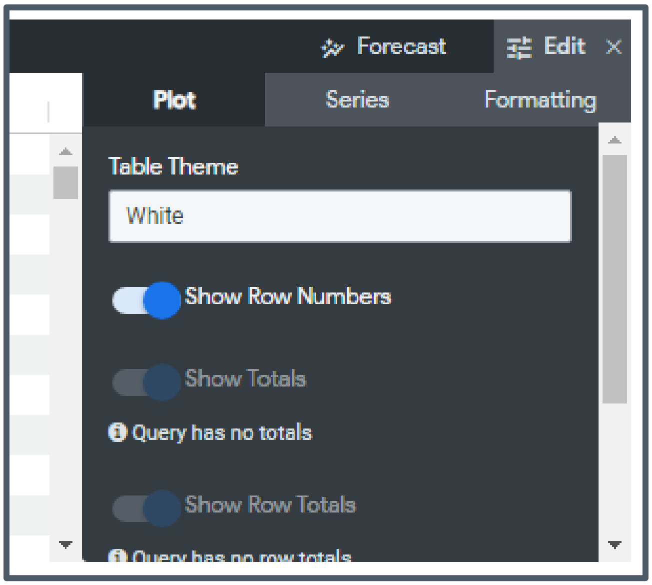
To modify your visualization settings:

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.

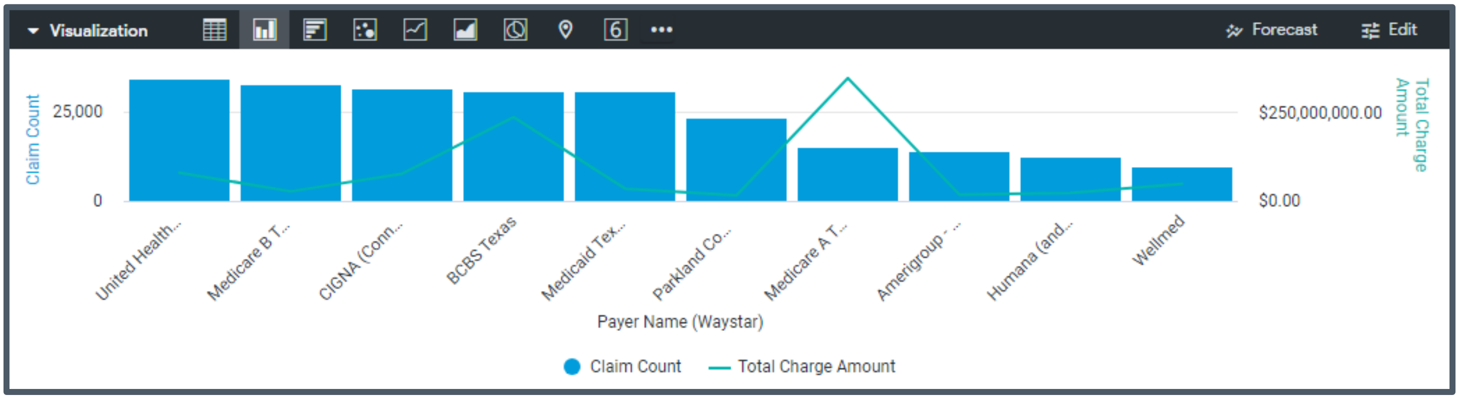
4. For more information on the available settings for each visualization type, click **HERE** for Looker documentation.



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.

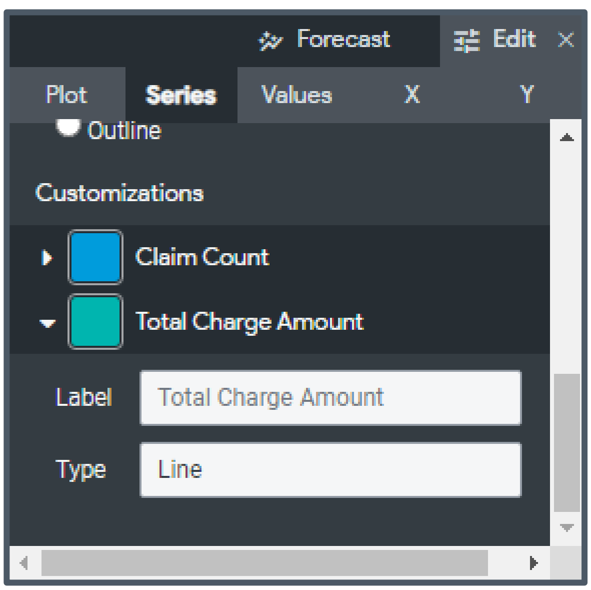
- The Column area of the chart indicates the claim count.
- The Line represents the corresponding total charge amount.



The following visualization settings were applied to build this chart:

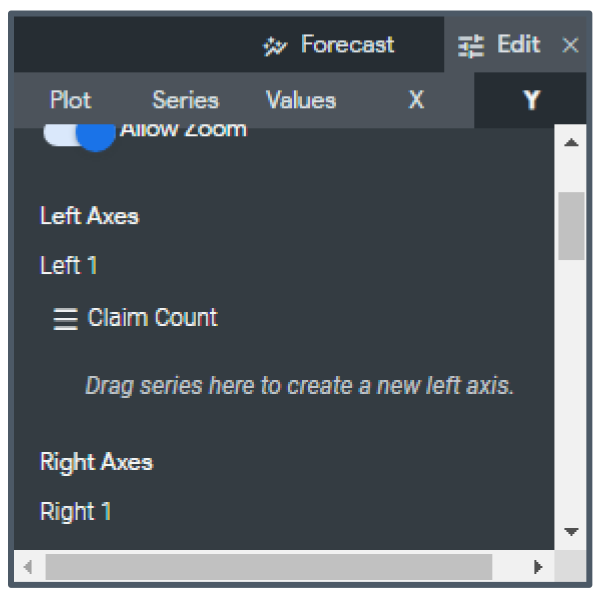
Series tab:

- 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.

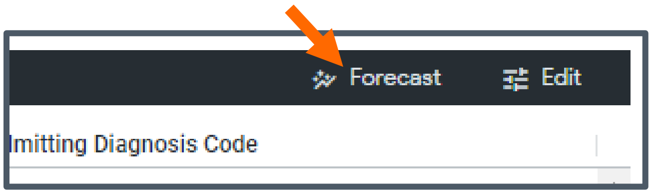


Forecasting visualizations

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.

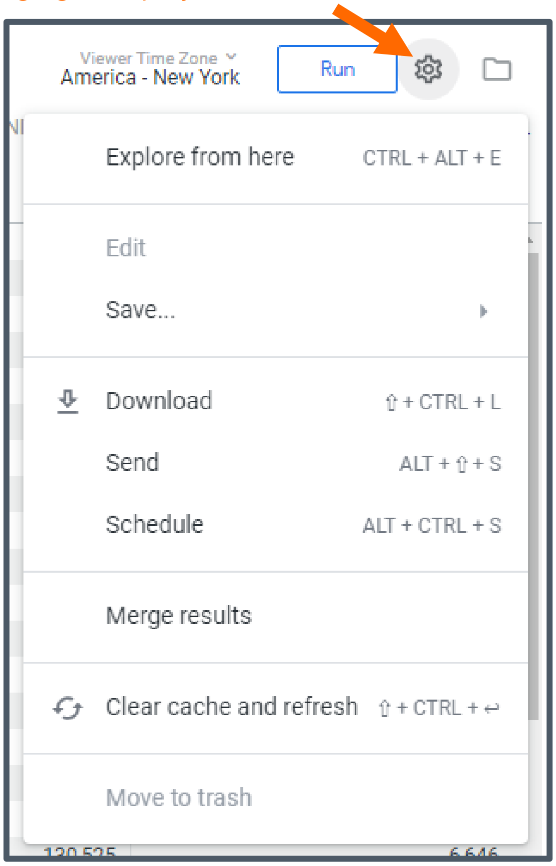
For complete details, see the Analytics Peak Forecasting Guide.



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

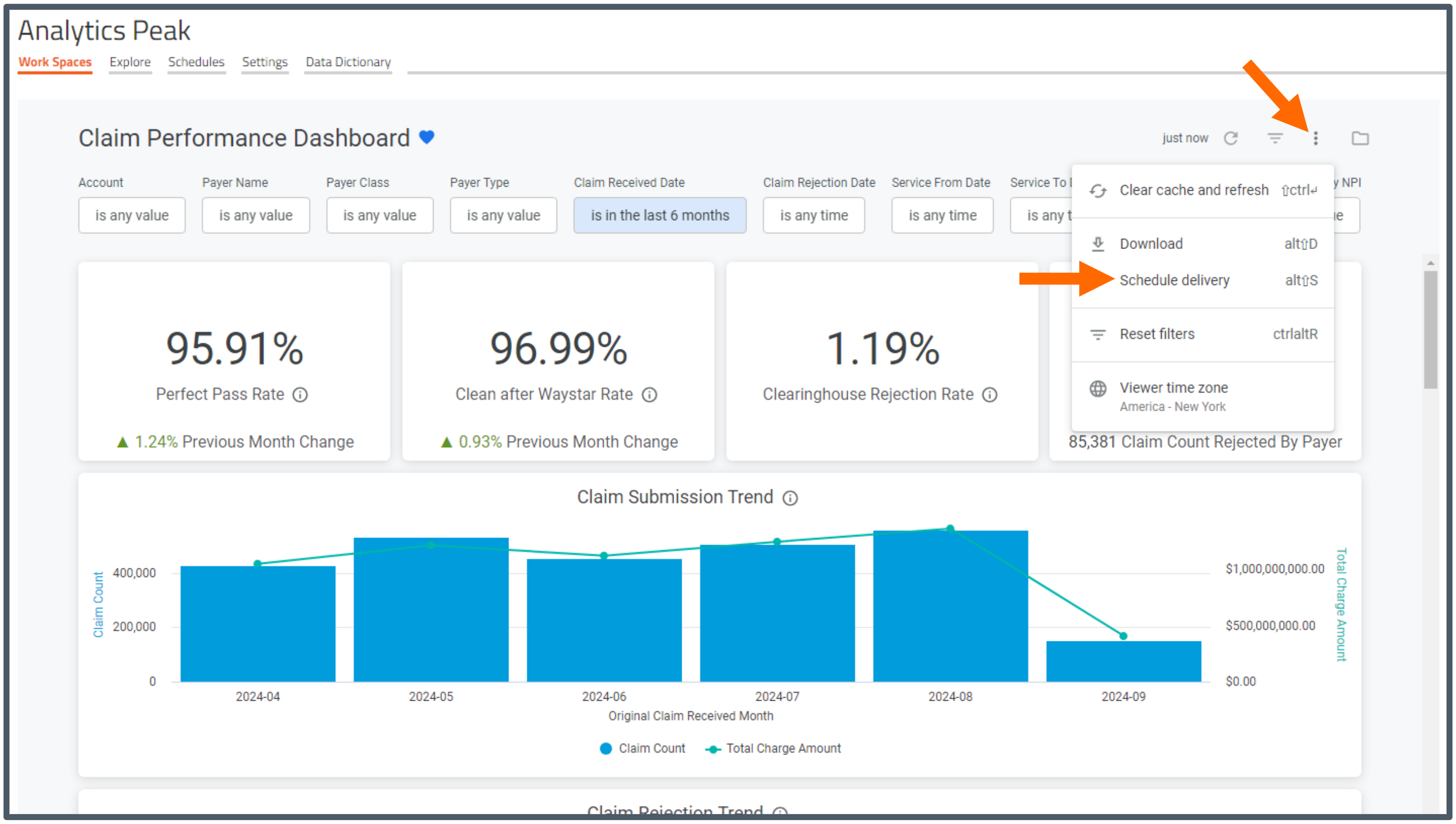
This section explains how to create a recurring schedule for the Analytics application to auto-generate and distribute a dashboard and an individual Look.

Creating a new dashboard schedule

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

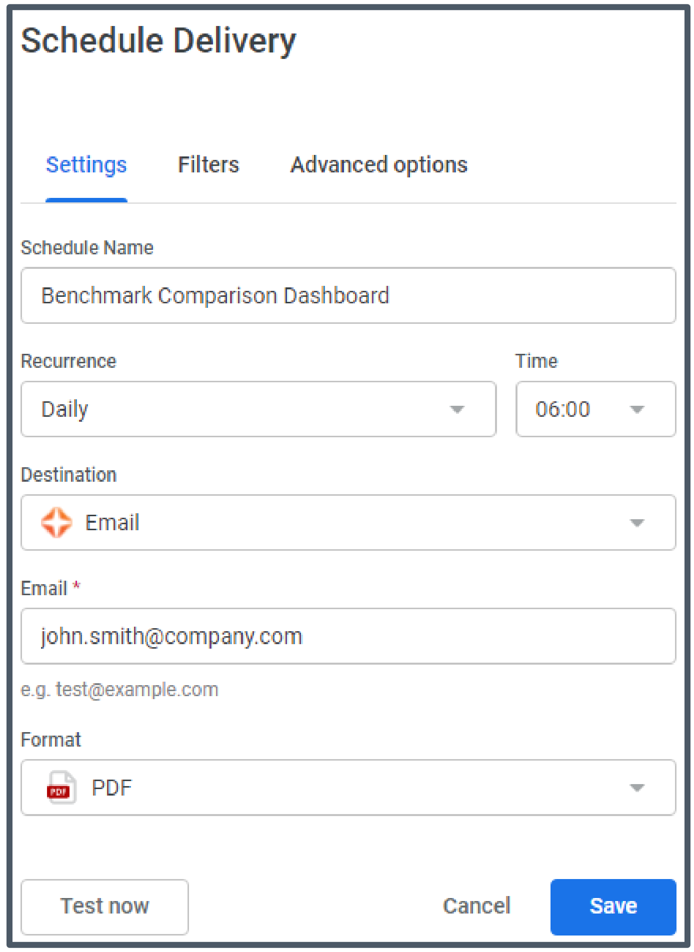
1. Go to **ANALYTICS** > **Analytics** > **Work Spaces** and select the appropriate tab, such as Dashboard, Shared, or Personal.
2. Locate and click the dashboard you would like to create the schedule for.

   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**.



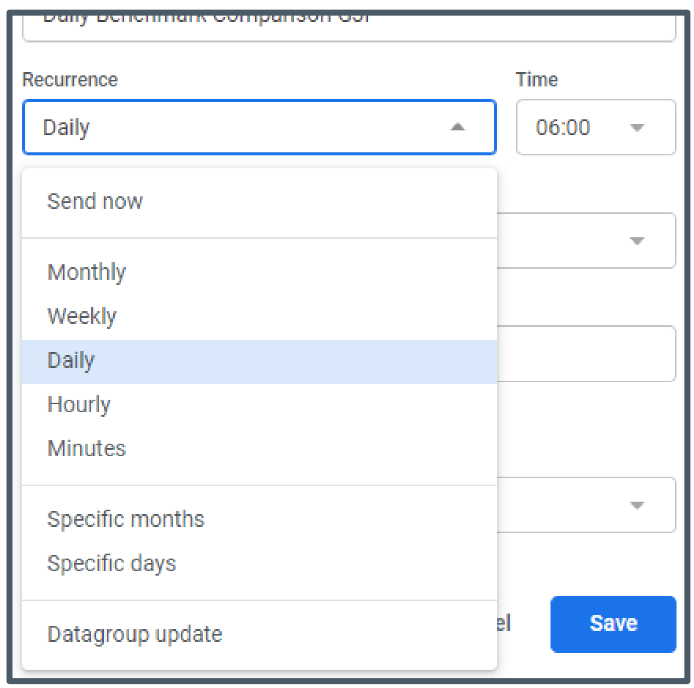
The Schedule Delivery screen will open.

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



6. 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.



7. In the **Destination** dropdown, select from the following:

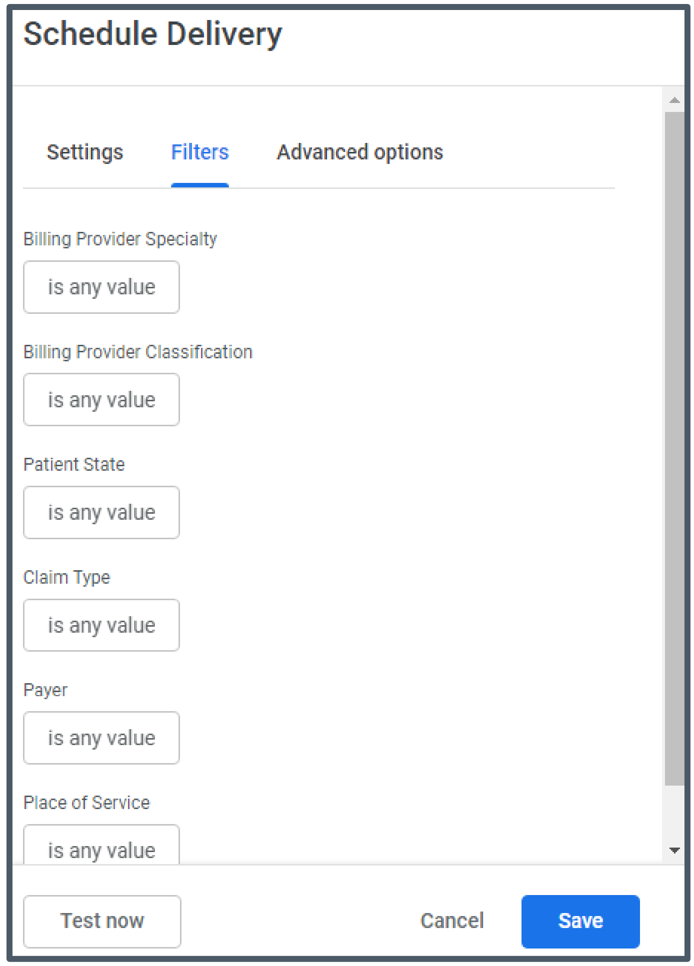
   - **Email** sends an email with a link to the scheduled report on the **ANALYITCS** > **Analytics** > **Schedules** > **Exports** screen.
   - **FTP** appears only if the FTP feature is enabled at the domain or child-account level. It saves the scheduled report in your organization’s default domain FTP 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 **ANALYITCS** > **Analytics** > **Schedules** > **Exports** screen.

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.

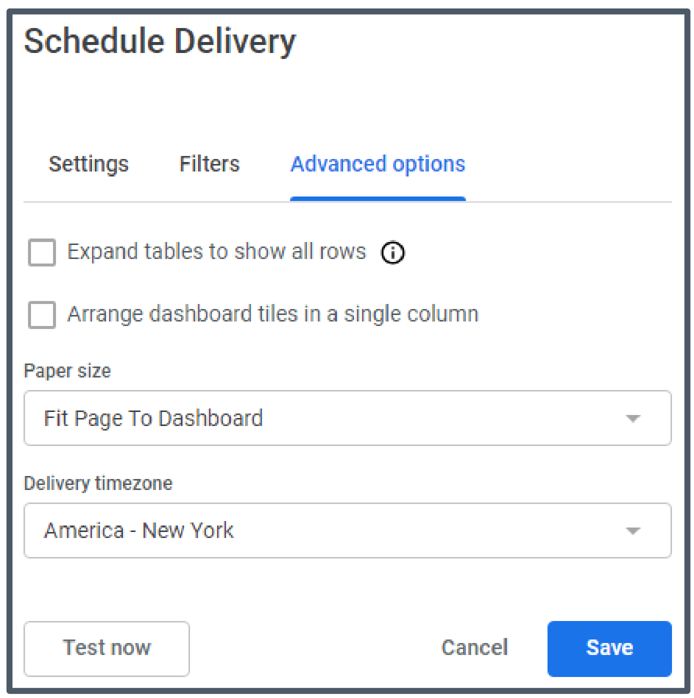
9. From the **Format** dropdown, select one of the following:
   - **CSV zip file**: When the reporting is auto-generated:
     - The emailed link will direct you to the **ANALYTICS** > **Analytics** > **Schedules** > **Exports** screen. After clicking the link in the email (you must be logged into Waystar 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 **ANALYITCS** > **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 **ANALYITCS** > **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.



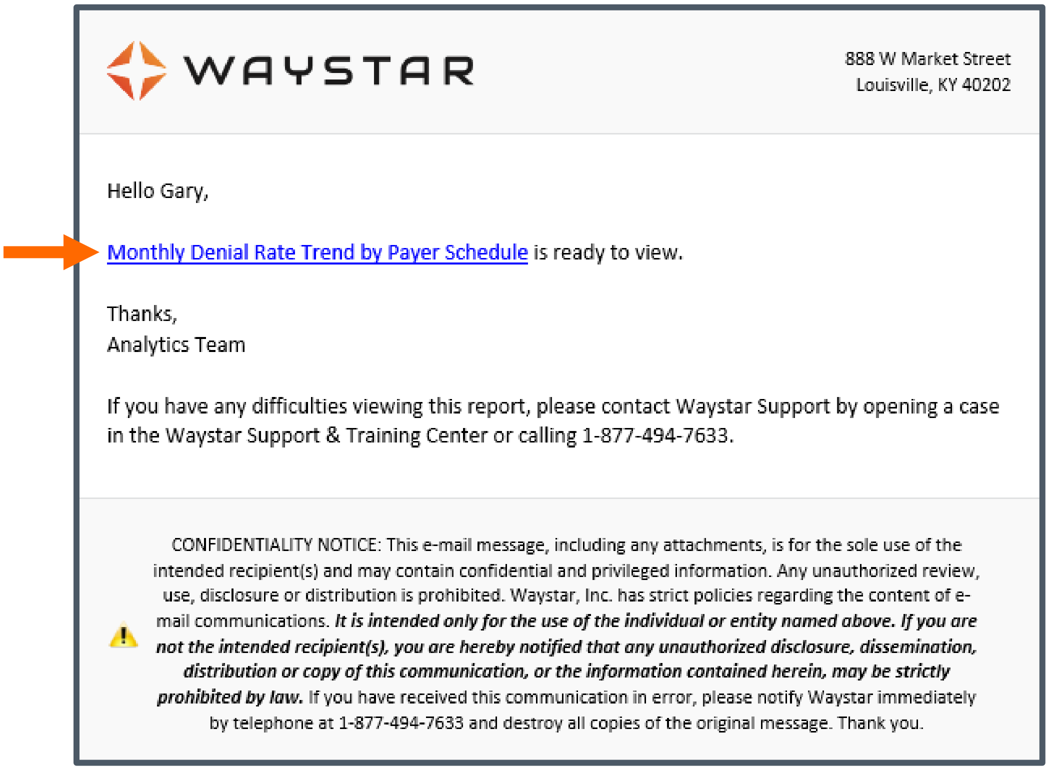
11. If necessary, go to the **Advanced options** tab to define additional customizations for your schedule. The options available in this menu depend on the selected format of your delivery.
12. If desired, click the **Test now** button to send a test version of the dashboard to the specified email address; 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.



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.



888 W Market Street
Louisville, KY 40202

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.

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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.

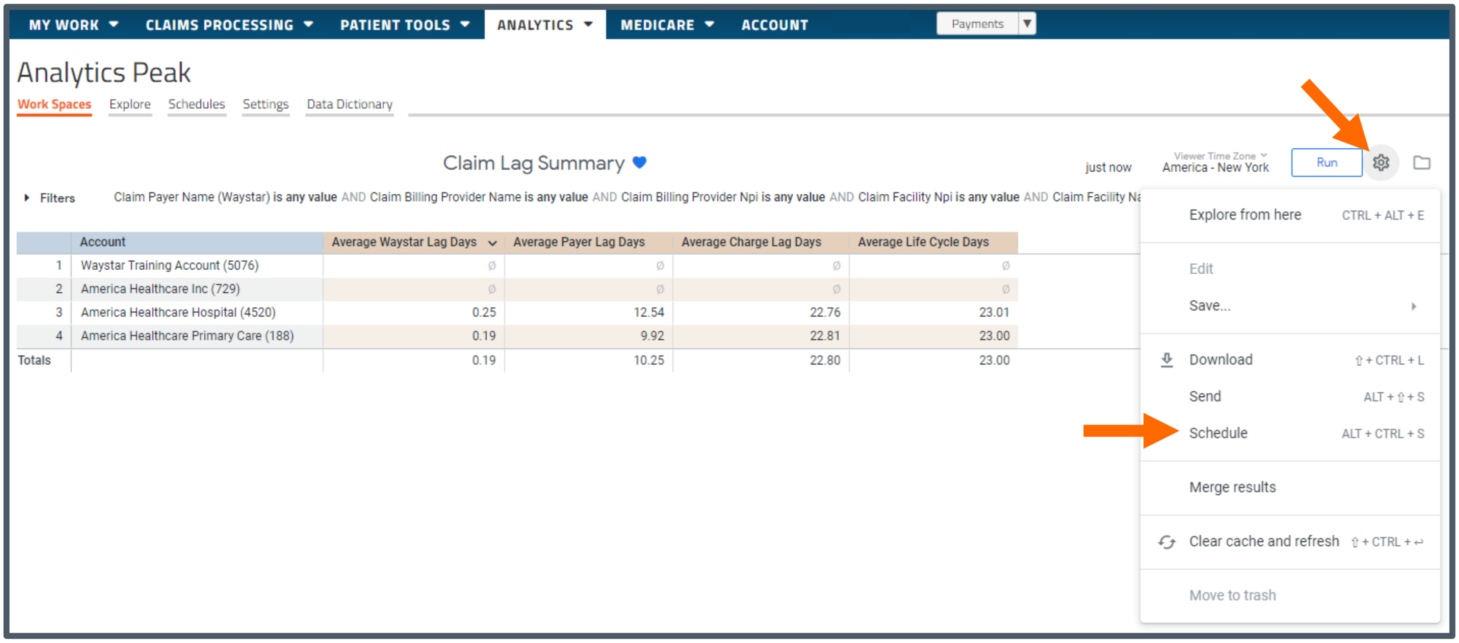
Creating a new Look schedule

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

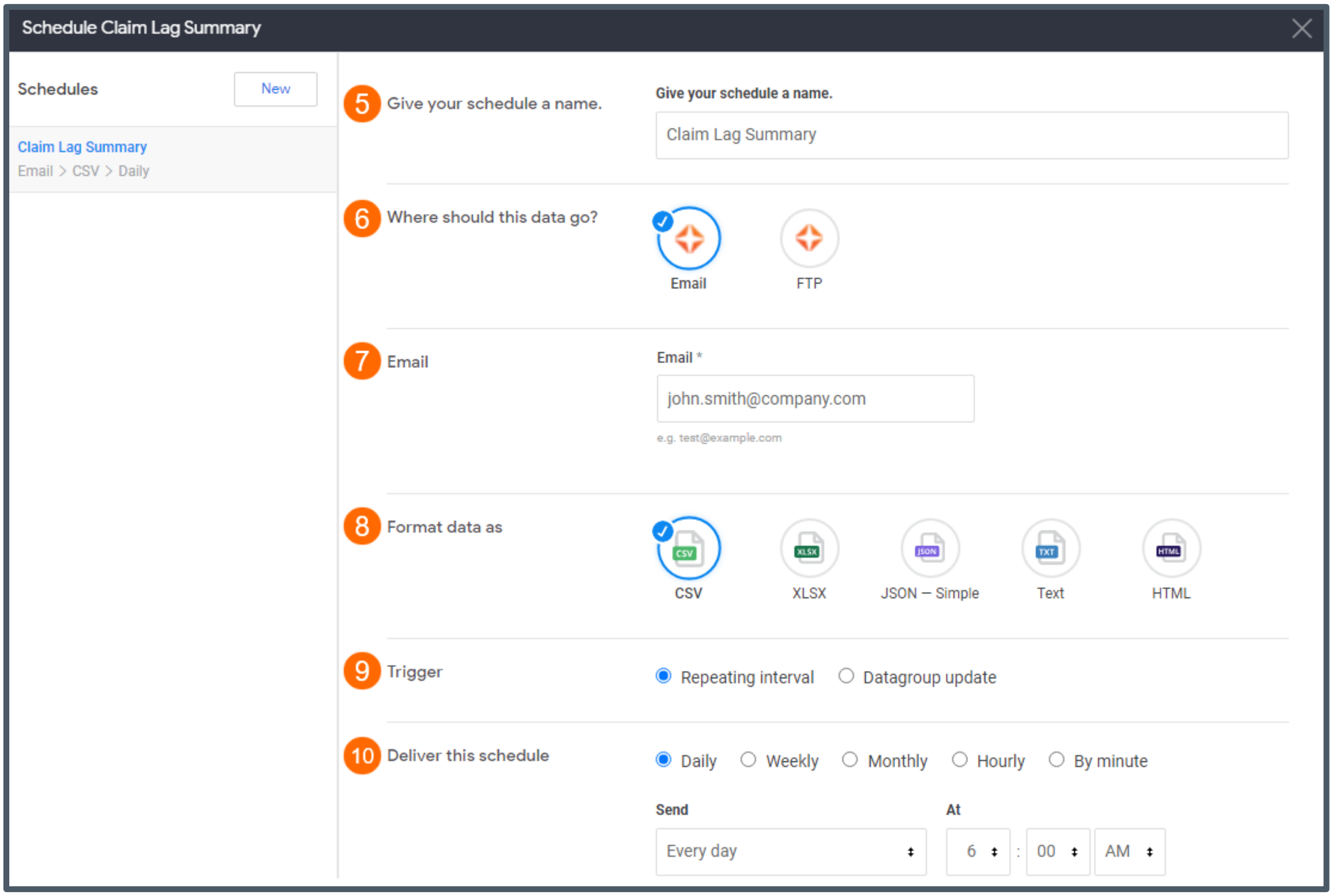
To create a new Look schedule:

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



5. 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.

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

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

7. 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 **ANALYITCS** > **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 **ANALYITCS** > **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 **ANALYITCS** > **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 **ANALYITCS** > **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 **ANALYITCS** > **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.

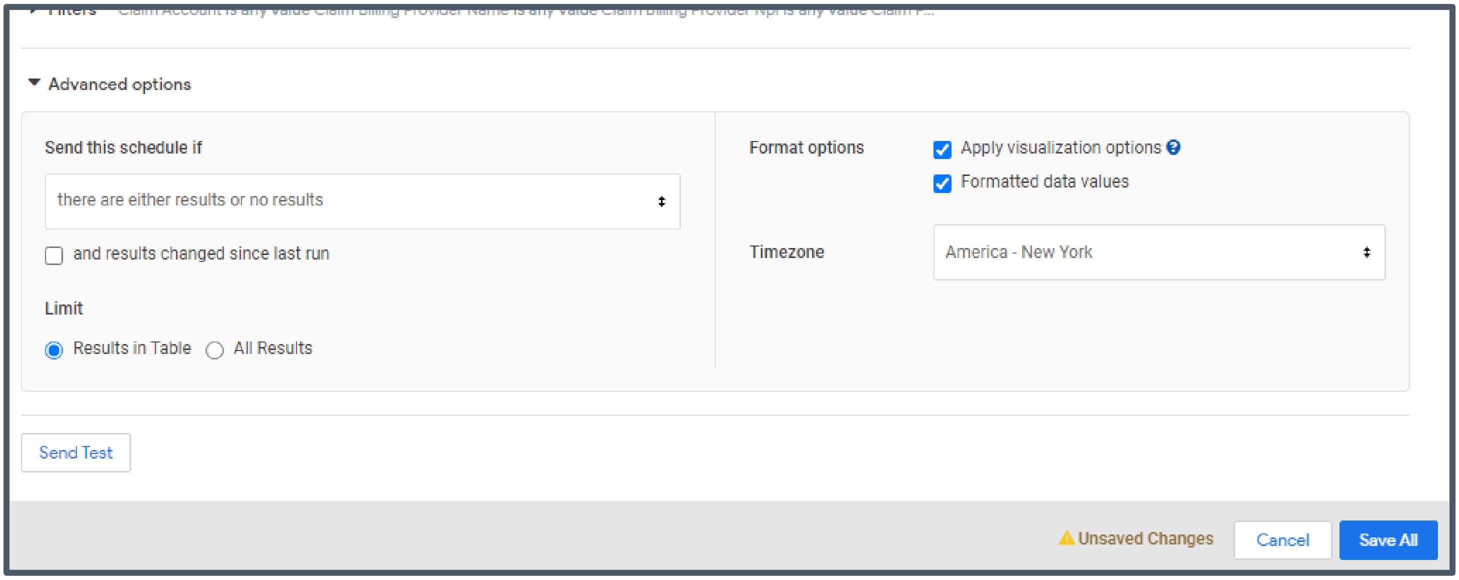
10. Select one of the following date range values from the **Deliver this schedule** section to define the interval at which the automated reporting will be delivered to you:

    - 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.

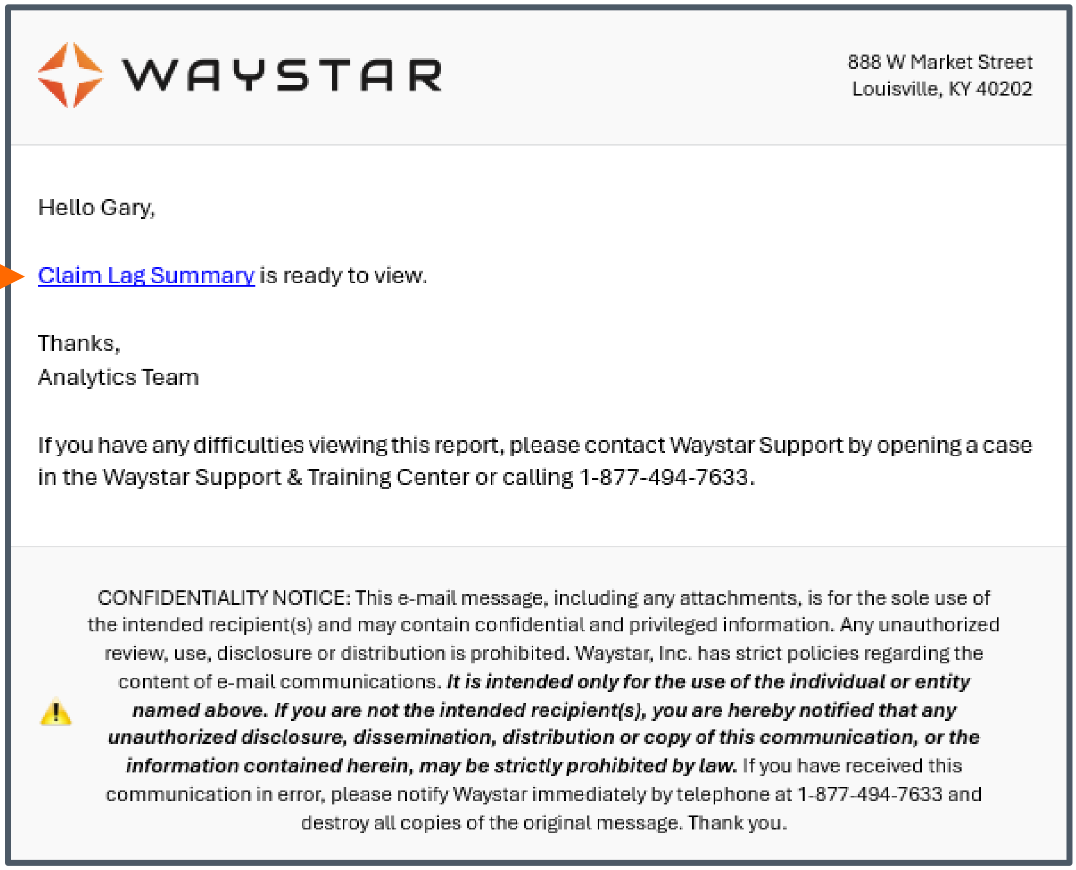
    IMPORTANT: By default, scheduled Looks will include only the first 500 generated results. Please be sure to select **All Results** from the **Limit** section under **Advanced options** to have ***all*** generated results included in the scheduled delivery.



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.



888 W Market Street
Louisville, KY 40202

Hello Gary,

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.

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Click this link to be directed to the **ANALYITCS** > **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 **ANALYITCS** > **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

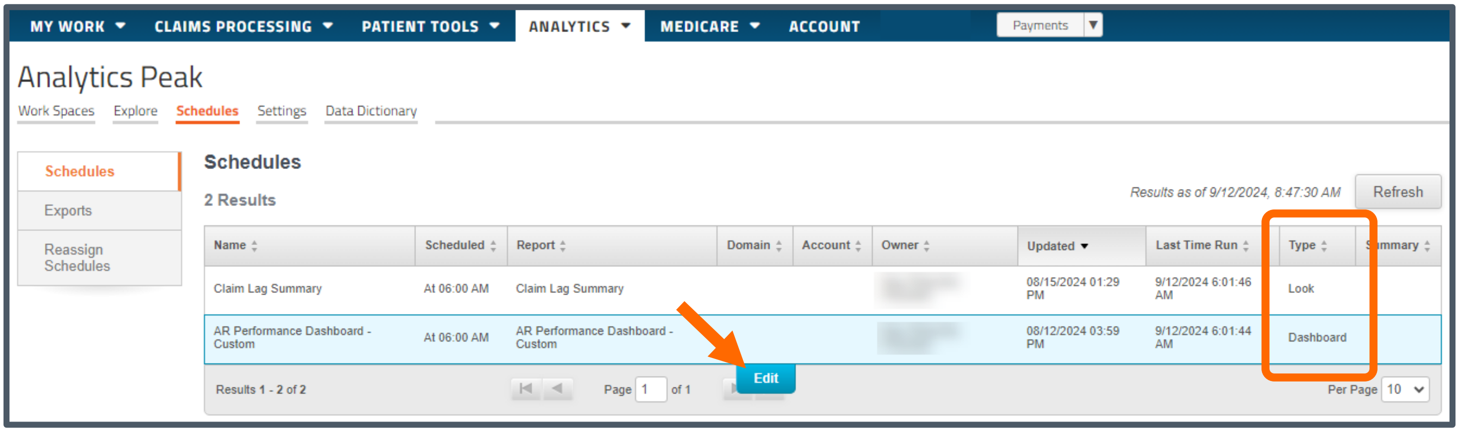
This section explains how to edit an existing schedule.

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 associated dashboard/Look will open.

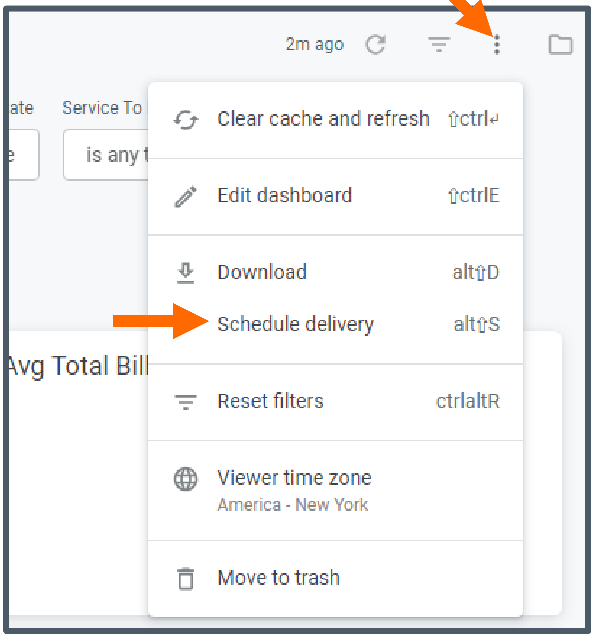
3. Do one of the following based on whether you selected a dashboard or Look:

- **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.

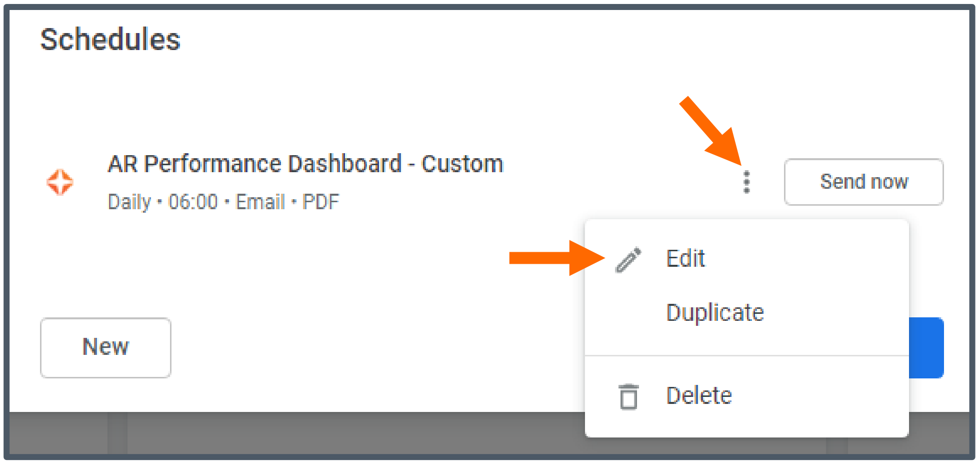
  b. From the dropdown menu that will open, select **Schedule Delivery**.



  The Schedules screen will open.

  c. Click the **More options** (three-dot) icon.

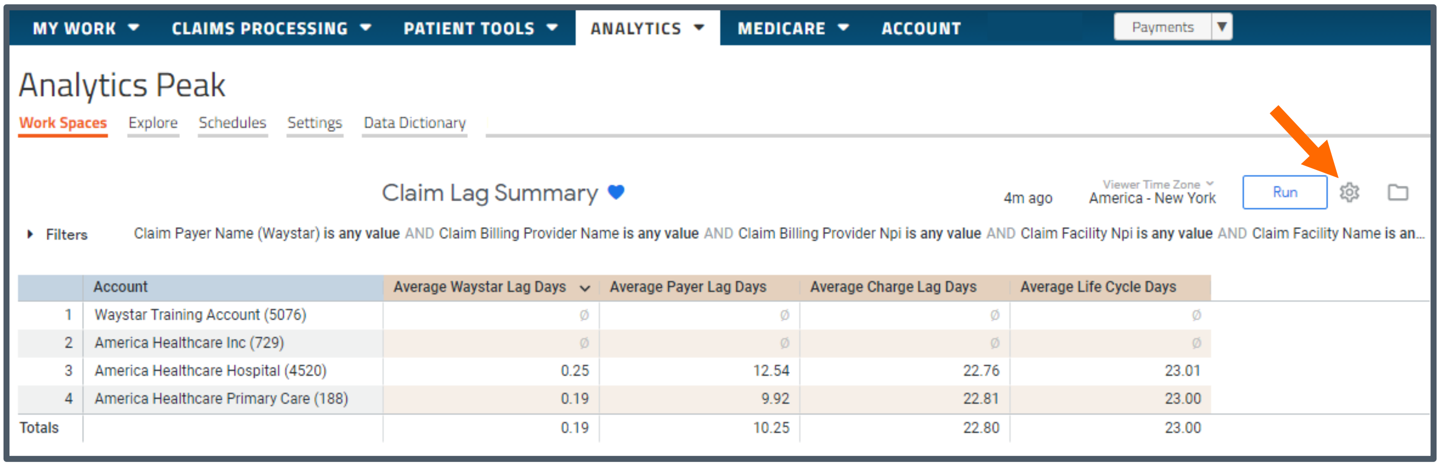
  d. From the dropdown menu that will open, select **Edit**.



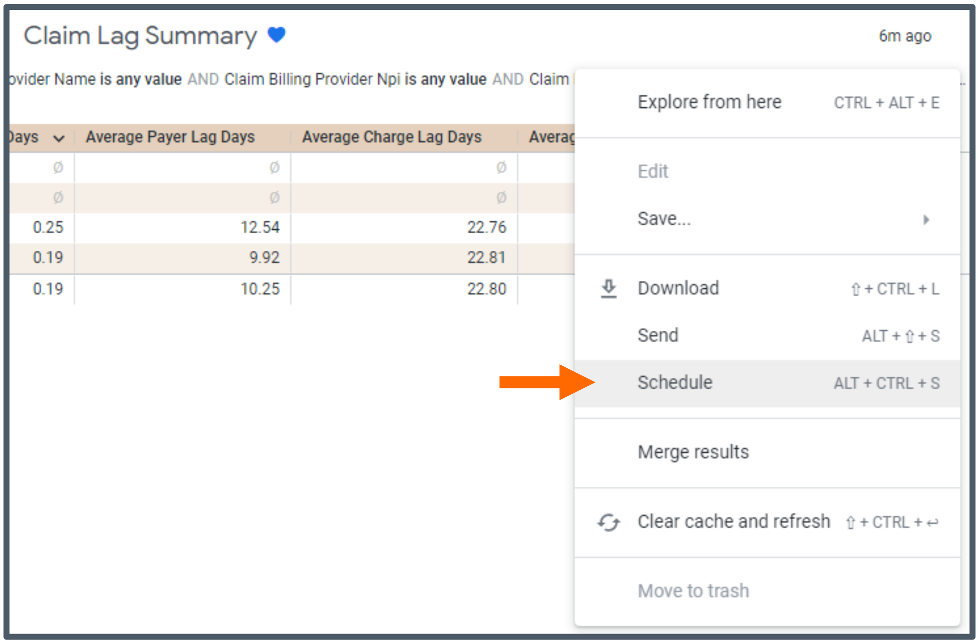
  The Schedule screen will open.

  e. To edit the schedule, see the instructions in the Creating a new dashboard schedule section.

- **Look**:
  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 that will open, select **Schedule**.



  The Schedule [name of Look] screen will open.

  c. To edit the schedule, see the instructions in the Creating a new Look schedule section.

Creating a new schedule for a selected dashboard/Look

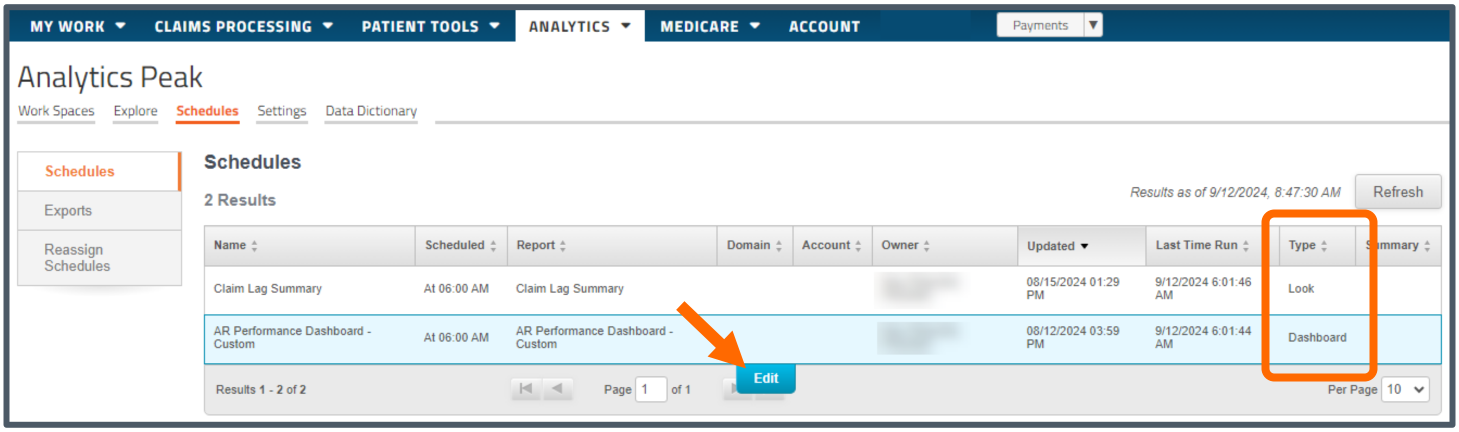
While editing an existing dashboard/Look schedule you can also create a schedule. The schedule will be for that selected dashboard/Look. You can also create schedules from scratch using the instructions in the Creating a new reporting schedule section.

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:



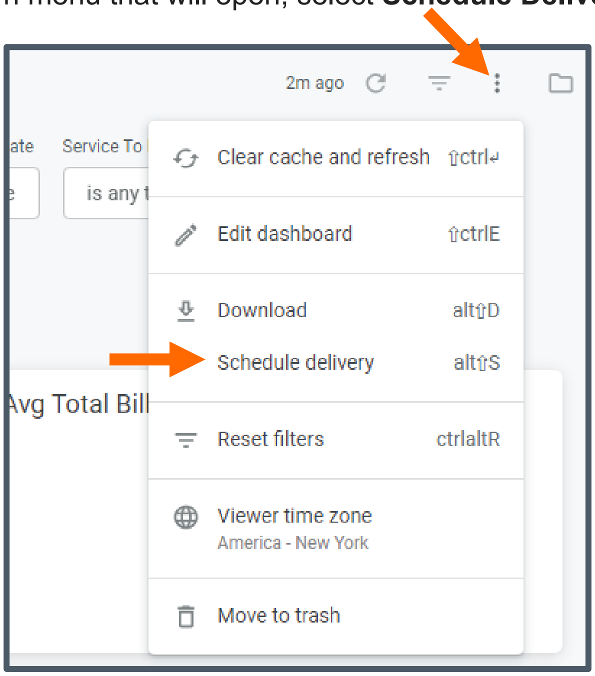
   The associated dashboard/Look will open.

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

- **Dashboard**:

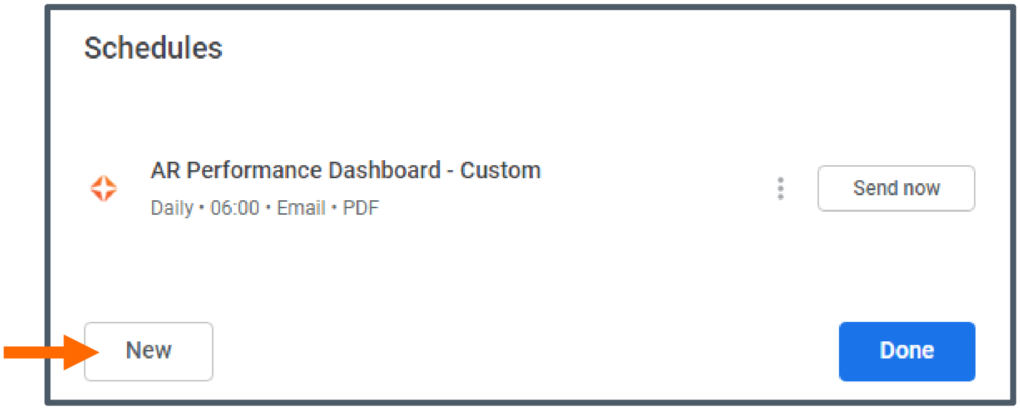
  a. From the dashboard, click the **Dashboard actions** (three-dot) icon in the upper-right corner of the screen.

  b. From the dropdown menu that will open, select **Schedule Delivery**.



  The Schedules screen will open.

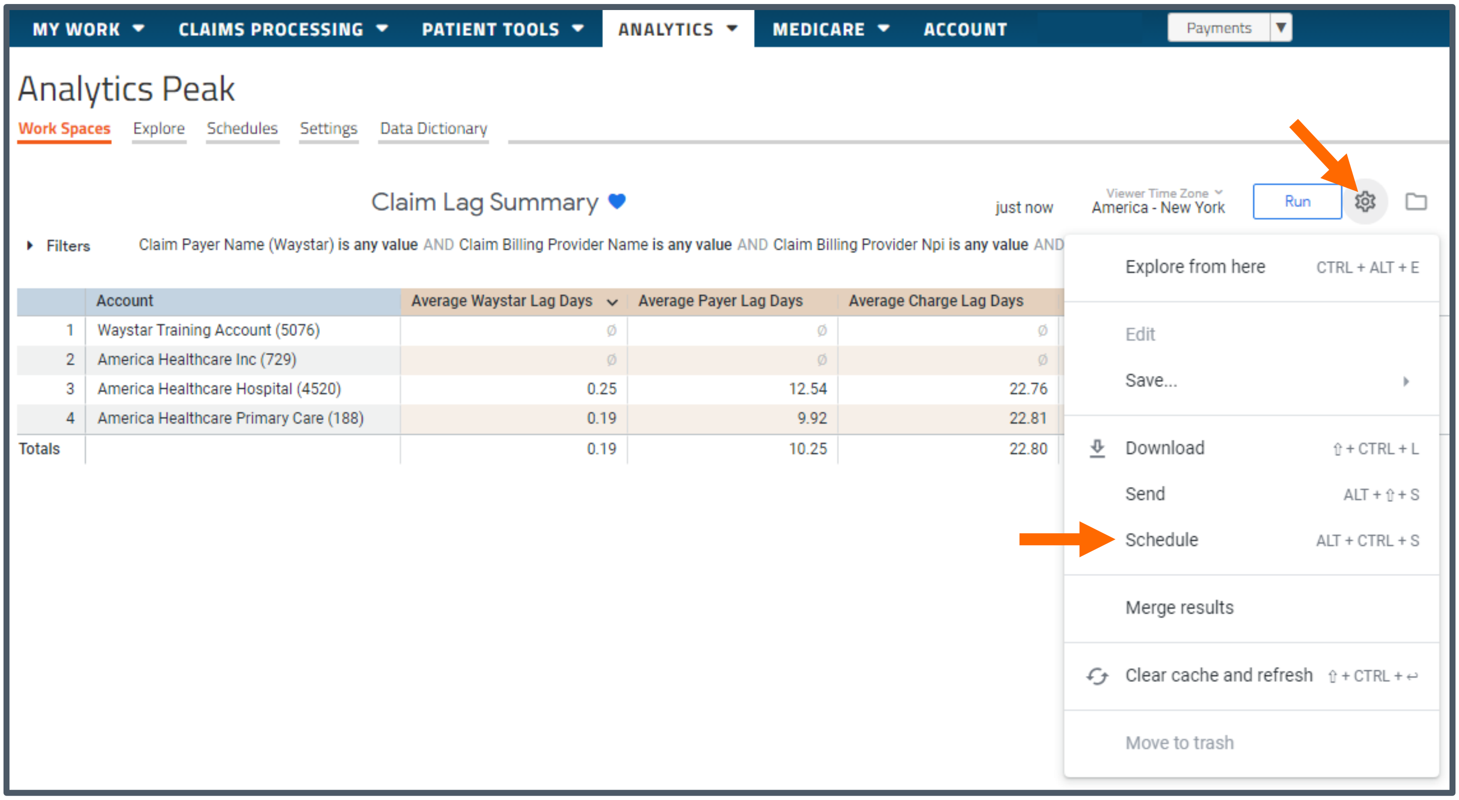
  c. Click the **New** button.



  The Schedule screen will open.

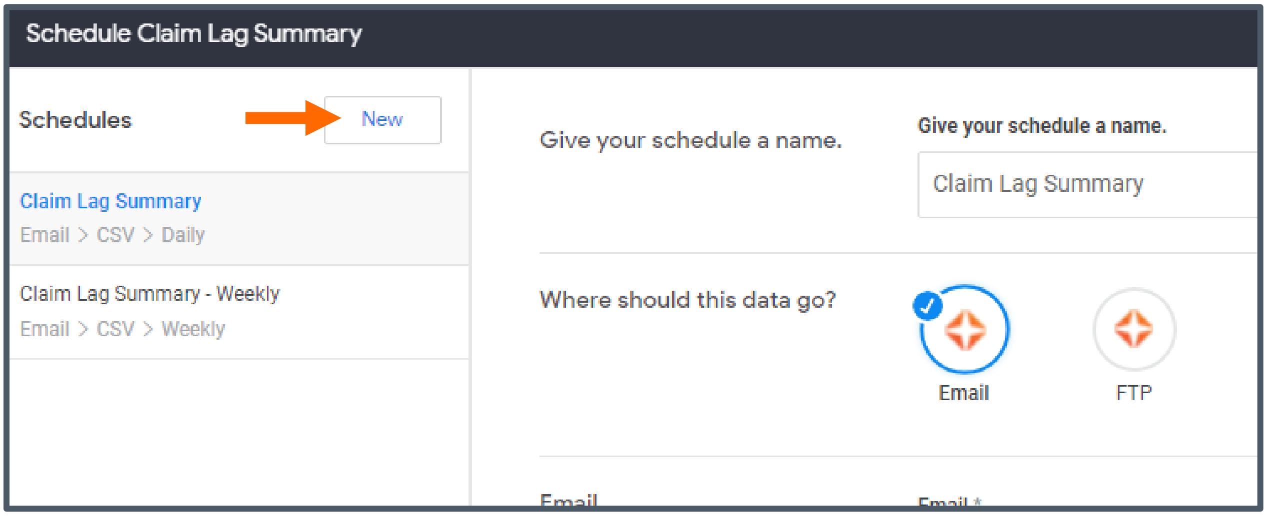
  d. To edit the schedule, see the instructions in the [Creating a new dashboard schedule] section.

- **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**.



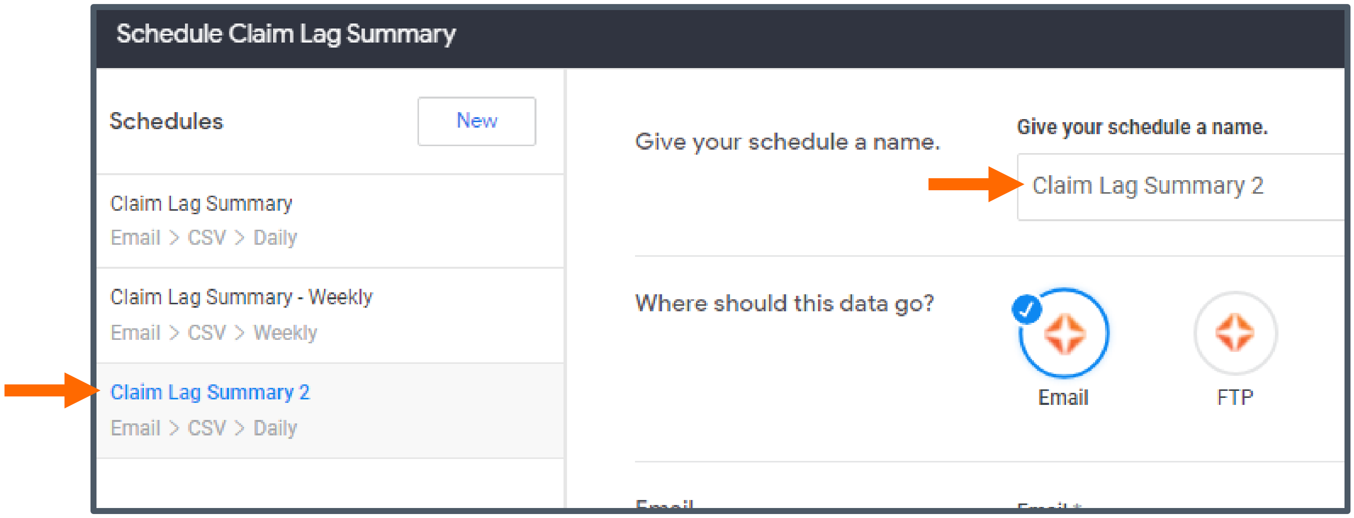
The Schedule [name of Look] screen will open.

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



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

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



e. To complete the schedule, see the instructions in the Creating a new Look schedule section.

Duplicating a schedule

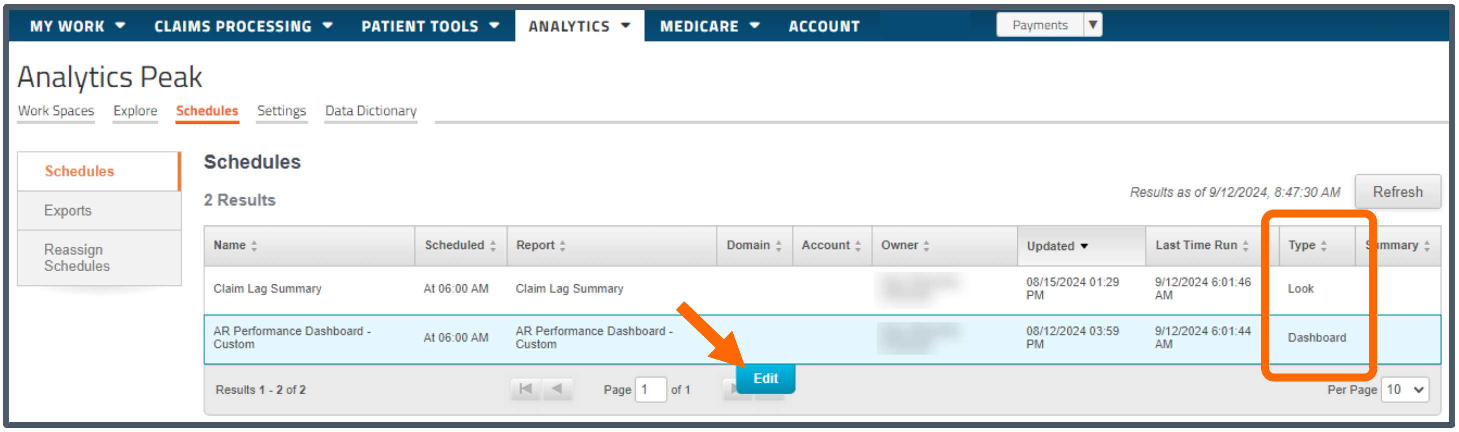
Duplicating a schedule can be beneficial if, for example, you have an existing schedule but want a different delivery cadence.

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:



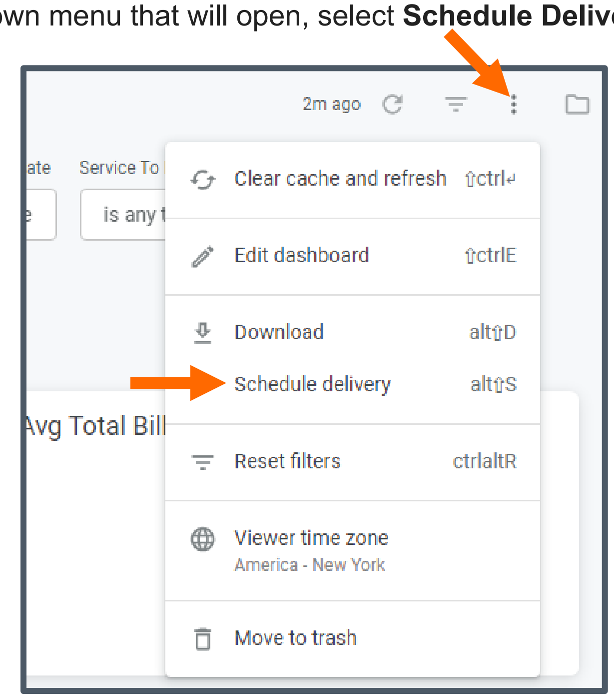
   The associated dashboard/Look will open.

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.

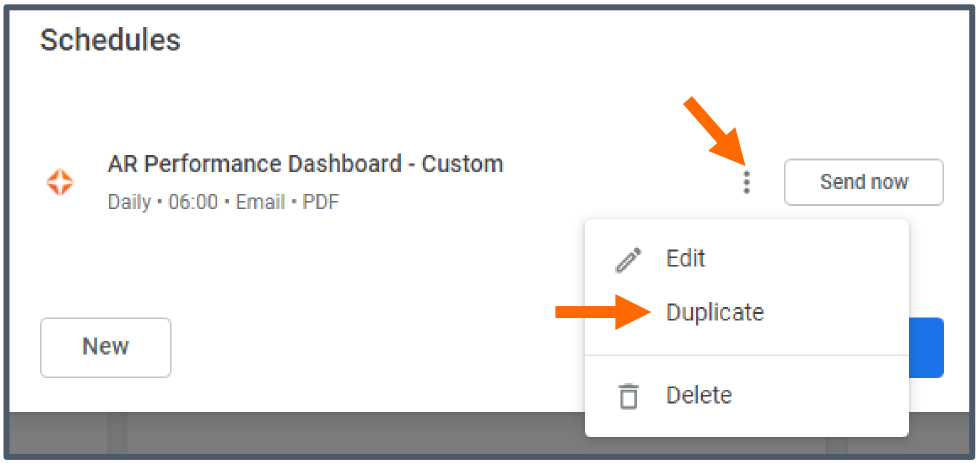
     b. From the dropdown menu that will open, select **Schedule Delivery**.



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.

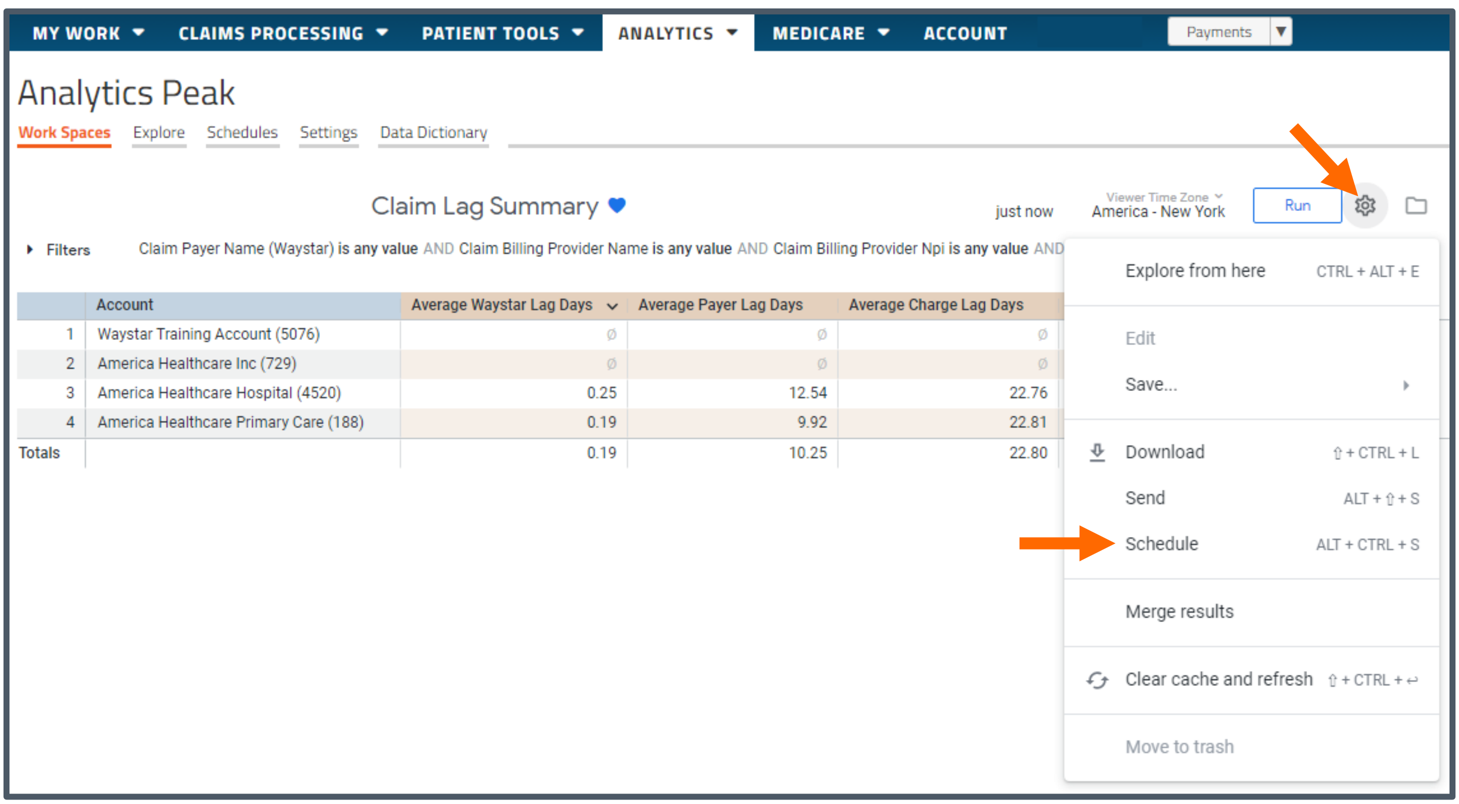
e. Update the schedule name to differentiate it from the existing schedule.

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.

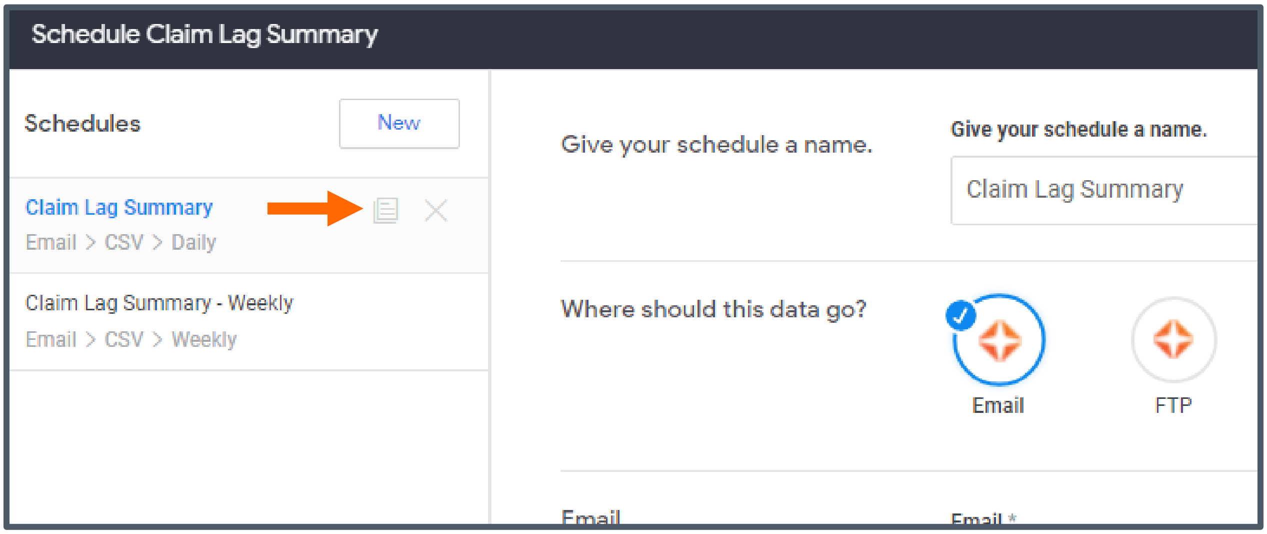
b. From the dropdown menu that will open, select **Schedule**.



The Schedule [name of Look] screen will open.

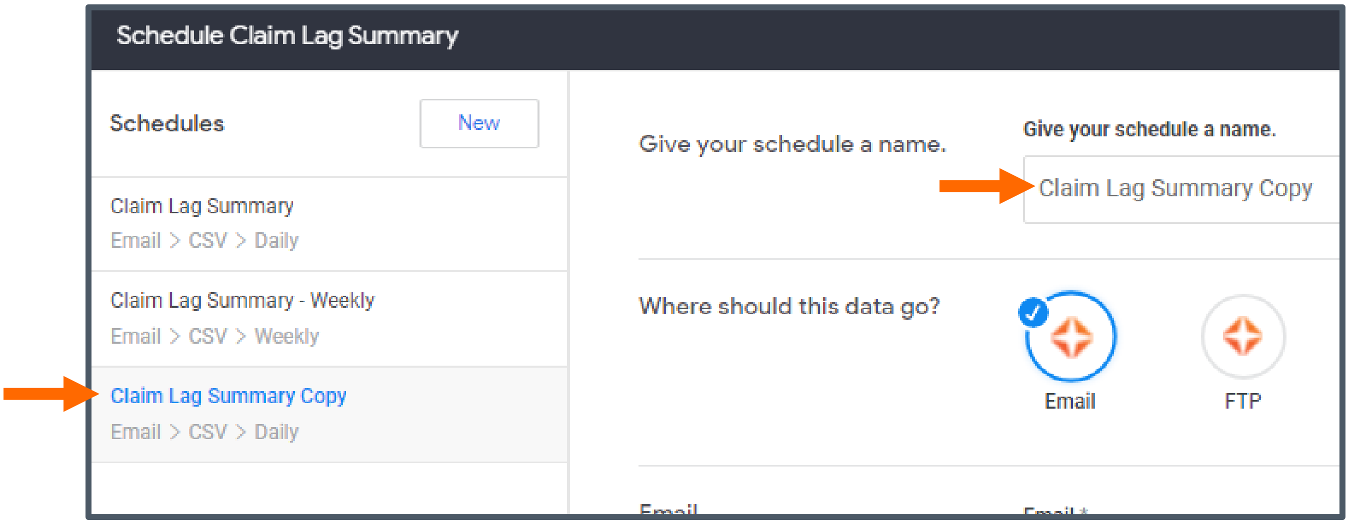
c. From the left pane, hover over the schedule you want to duplicate.

d. Click the **Duplicate** icon to the right of the schedule name.



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.



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.

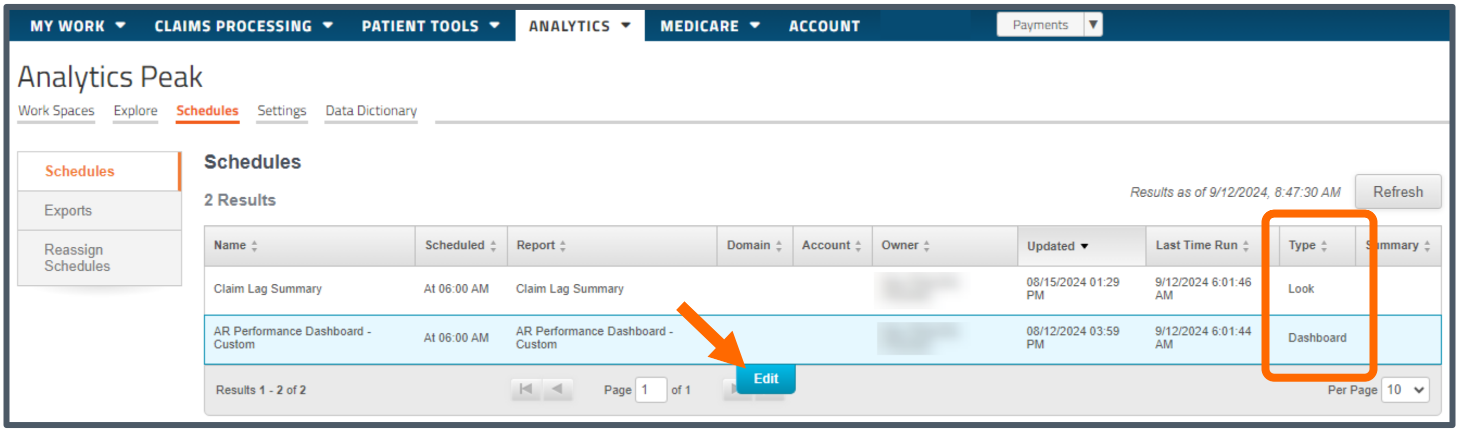
Note: Your domain administrator (DA) or your Waystar representative can also delete schedules.

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:



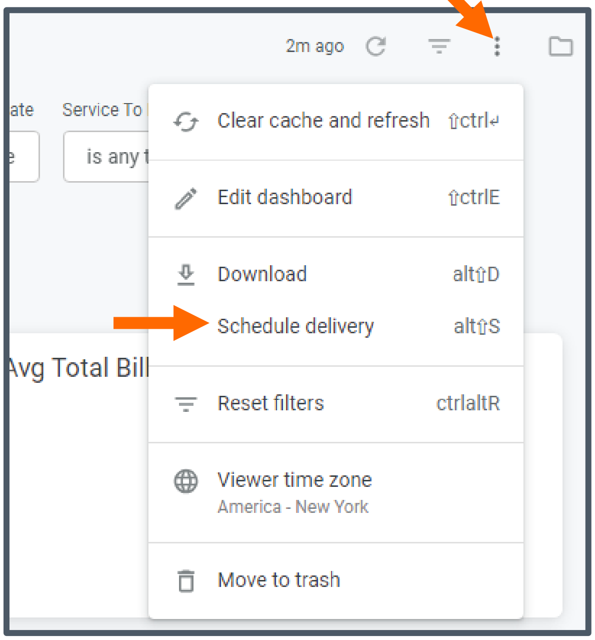
   The associated dashboard/Look will open.

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.

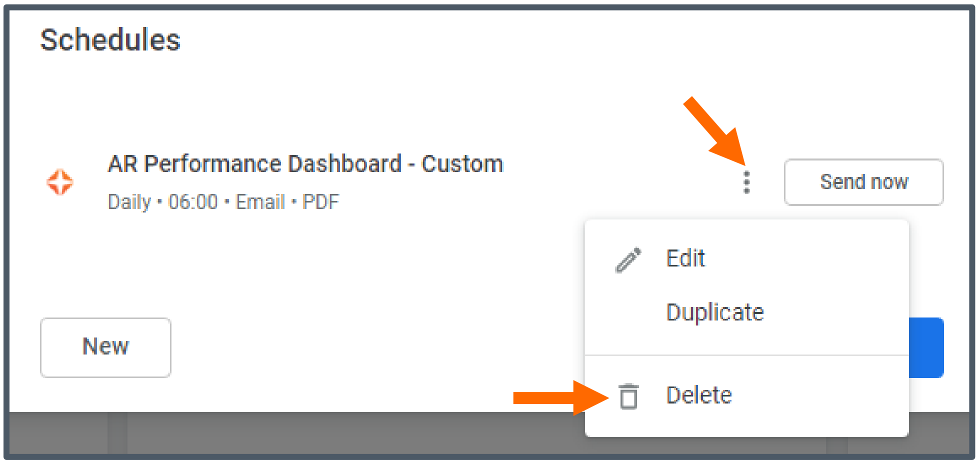
     b. From the dropdown menu that will open, select **Schedule Delivery**.



The Schedules screen will open.

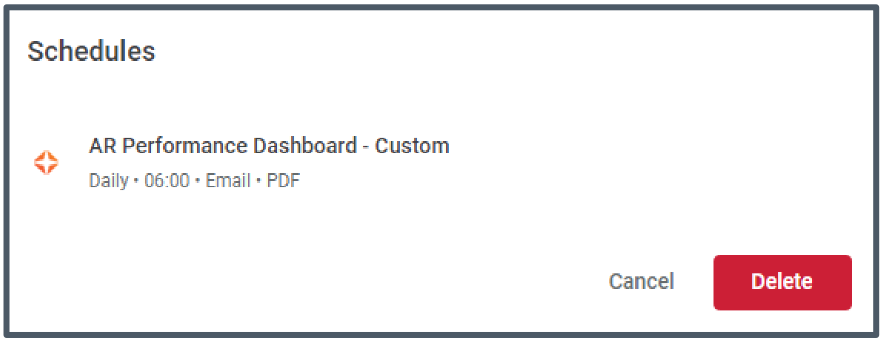
c. Click the **More options** (three-dot) icon.

d. From the dropdown, select **Delete**.

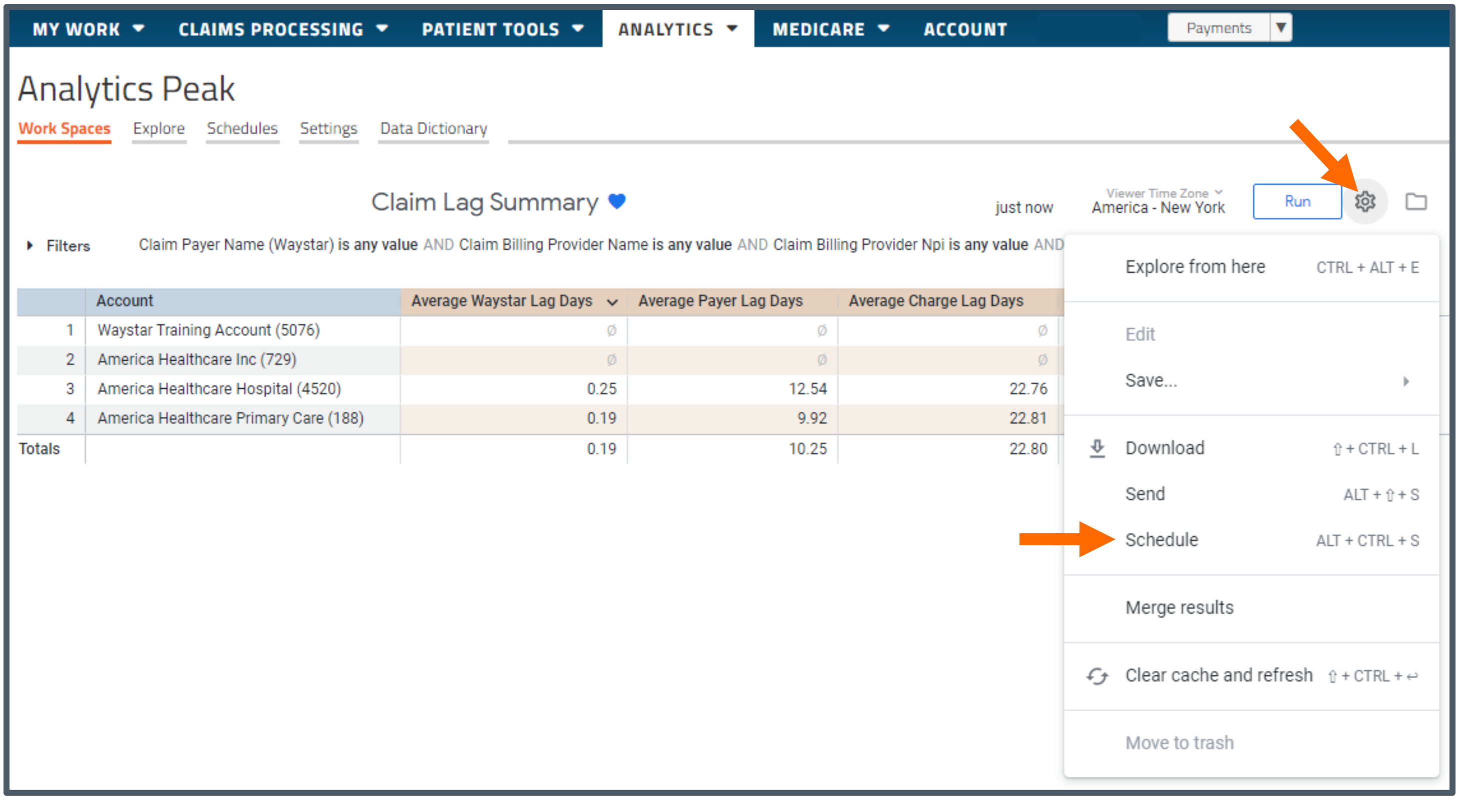


The Schedules confirmation screen will open.

e. Click the **Delete** button.

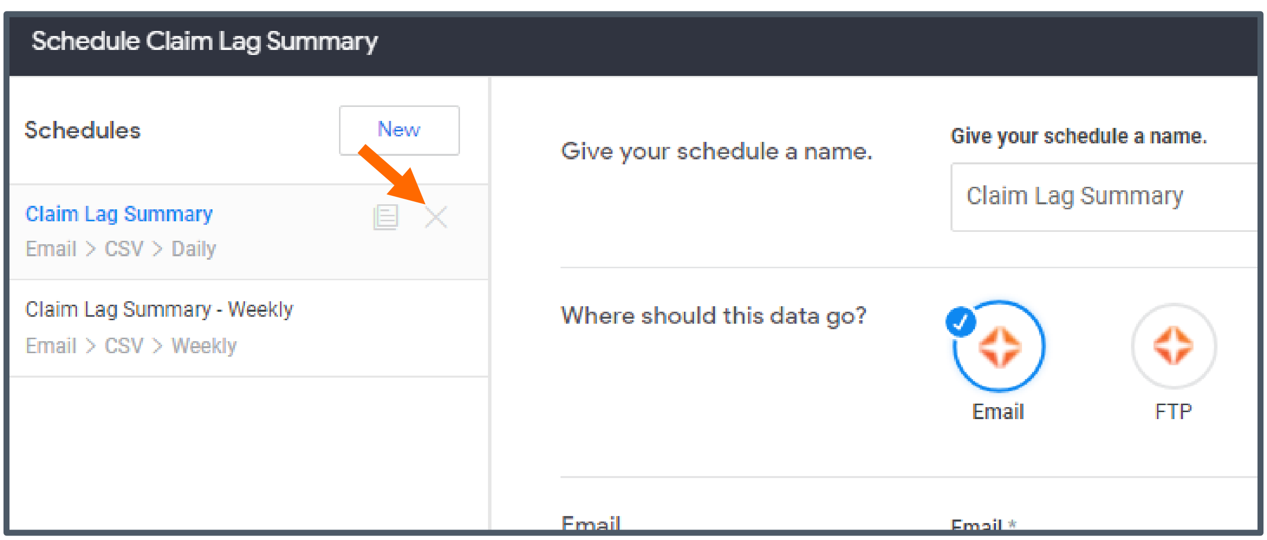


- **Look**:
  a. From the opened Look, hover over the top-right corner of the screen, and then click the **Explore actions** icon that will appear.
  b. From the dropdown menu that will open, select **Schedule**.



The Schedule [name of Look] screen will open.

  c. From the left pane, hover over the appropriate Look schedule, and then click the delete **X** icon.
  d. 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.



Downloading exported/generated reports

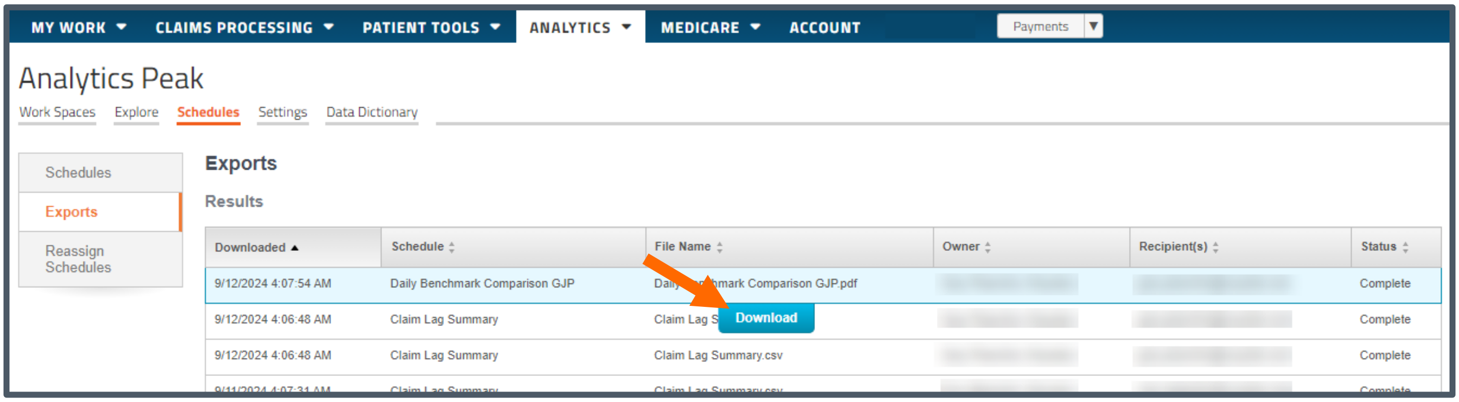
When a scheduled dashboard/Look report is delivered to you via email, the link in the email will direct you to the **ANALYTICS** > **Analytics** >**Schedules** > **Exports** screen (explained in this section) where the reporting will automatically download to your system with the user-defined specifications/settings/formatting.

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 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.

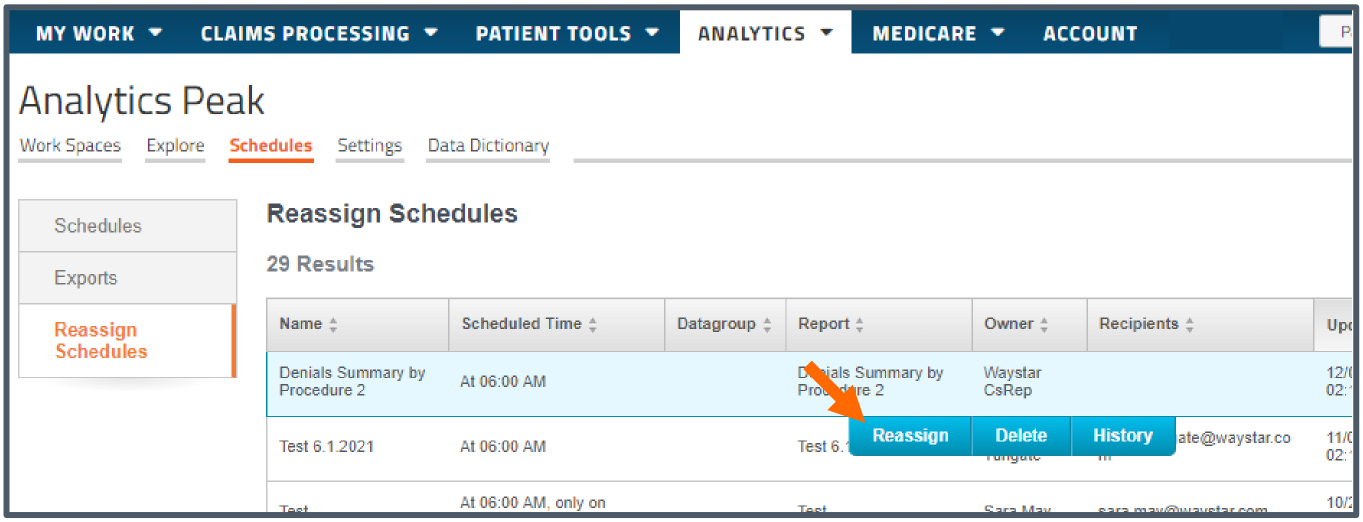
Reassigning schedules

Reassigning a schedule

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

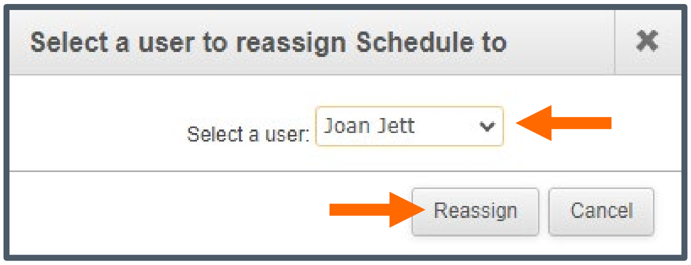
To reassign a schedule:

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 “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.

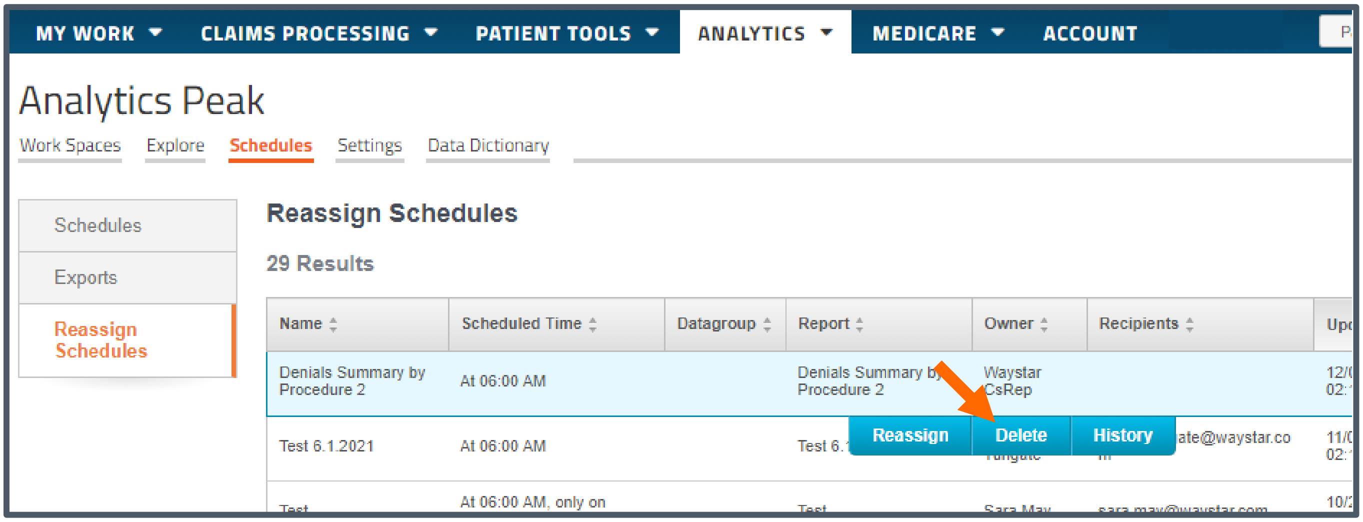
To edit a schedule, see the Editing a schedule section.

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.

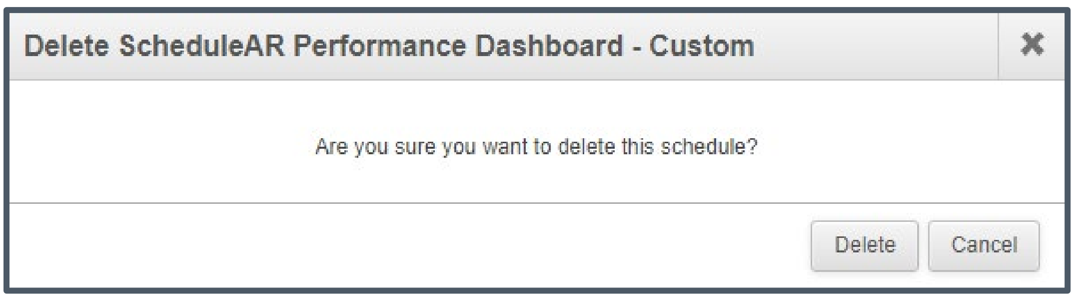
To delete a reassigned schedule:

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 Delete screen will open.

3. Click the **Delete** button.

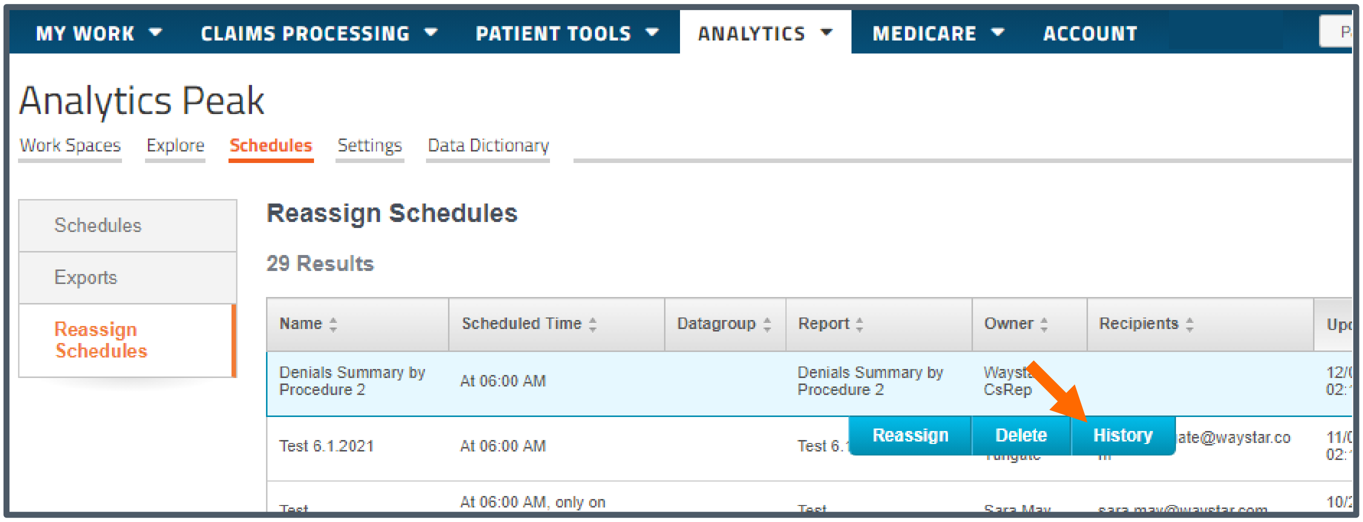


Viewing reassigned schedule history

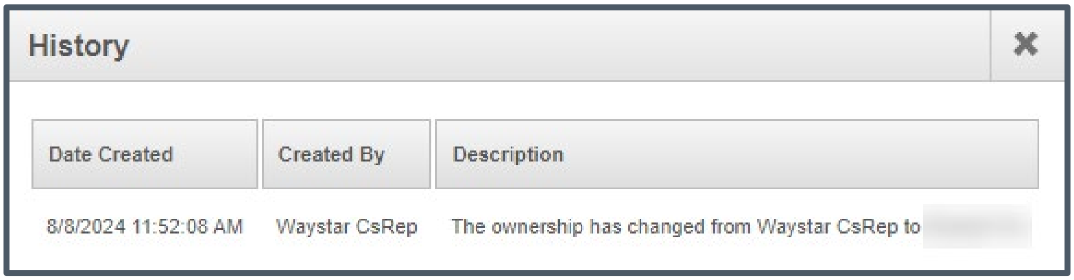
This section explains how to view the history of the reassigned schedule, which will display the reassignment actions taken against the schedule.

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 History screen will open.



- **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:

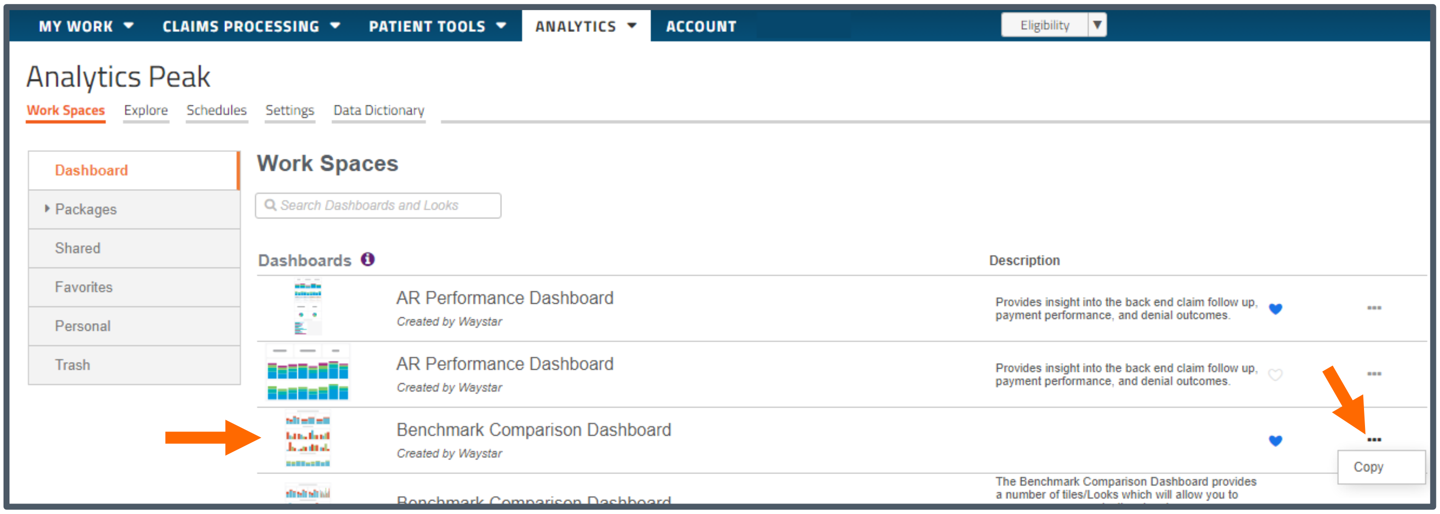
1. Create a copy of the Benchmark Comparison Dashboard

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.

a. Go to **ANALYTICS** > **Analytics** > **Work Spaces** > **Dashboard**.

b. Locate the **Benchmark Comparison Dashboard**.

c. Click the three-dot icon to the right of the dashboard, and from the dropdown menu that will open, select **Copy**.



The Copy Dashboard screen will open.

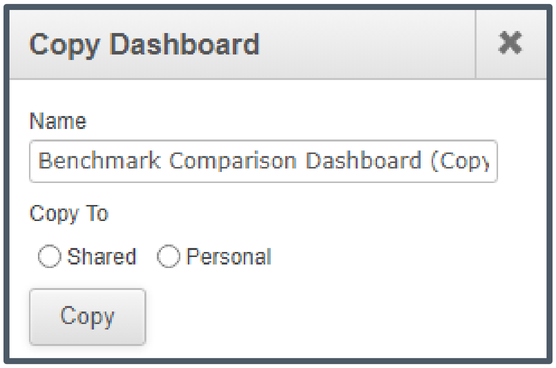
d. In the **Name** field, enter an appropriate name for the copied dashboard. You will use this name to locate the copied dashboard.

e. Under **Copy To**, select the **Shared** or **Personal** radio button.

For more information on the **Shared** and **Personal** tabs, see the Work Spaces section.

f. Click the **Copy** button.

The dashboard copy will be added to the selected tab.



g. 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.

h. Locate and click your dashboard copy in the **Dashboards** section.

Your dashboard copy will appear.

i. To modify the dashboard, continue with the next step.

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:

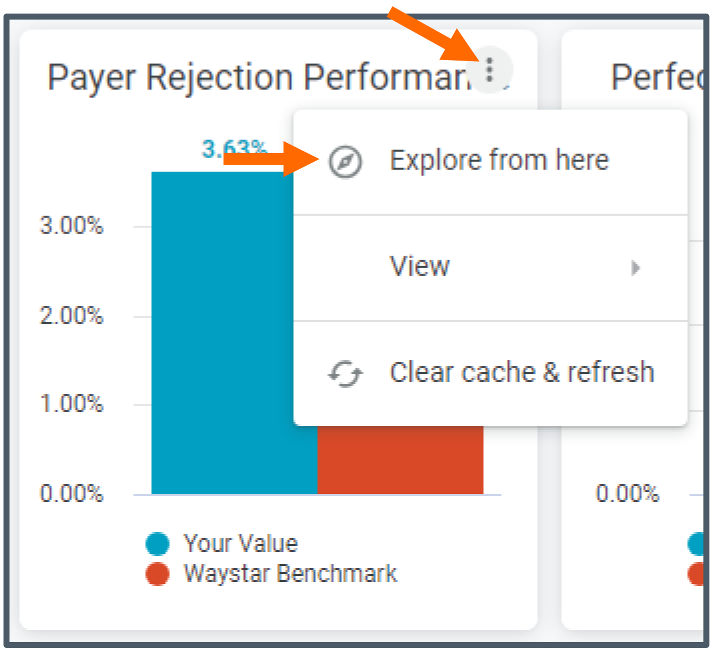
a. Create a copy of the dashboard.

b. Open the copied benchmark dashboard.

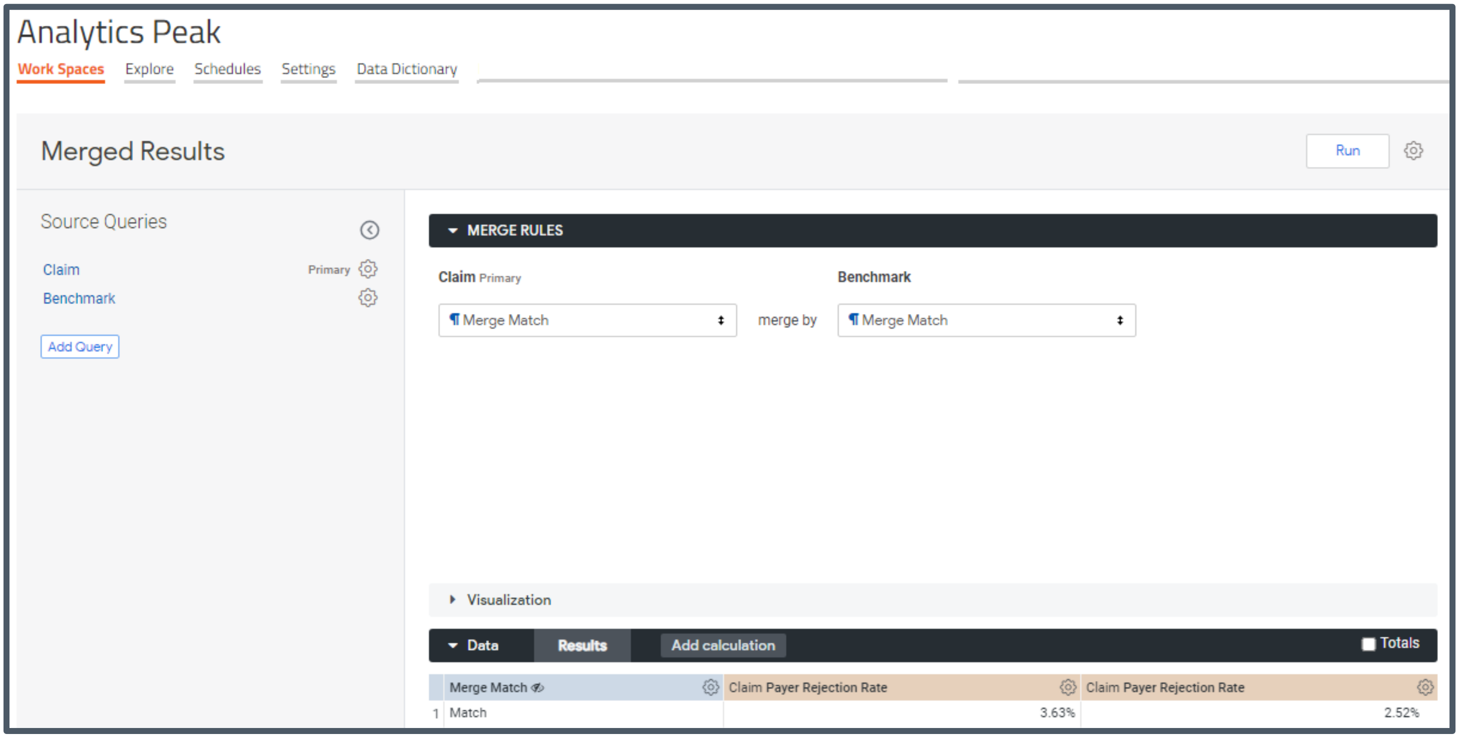
c. Hover over the dashboard tile/Look you would like to use for additional benchmarking analysis and click the **Tile actions** (three-dot) icon in the top-right corner.

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.

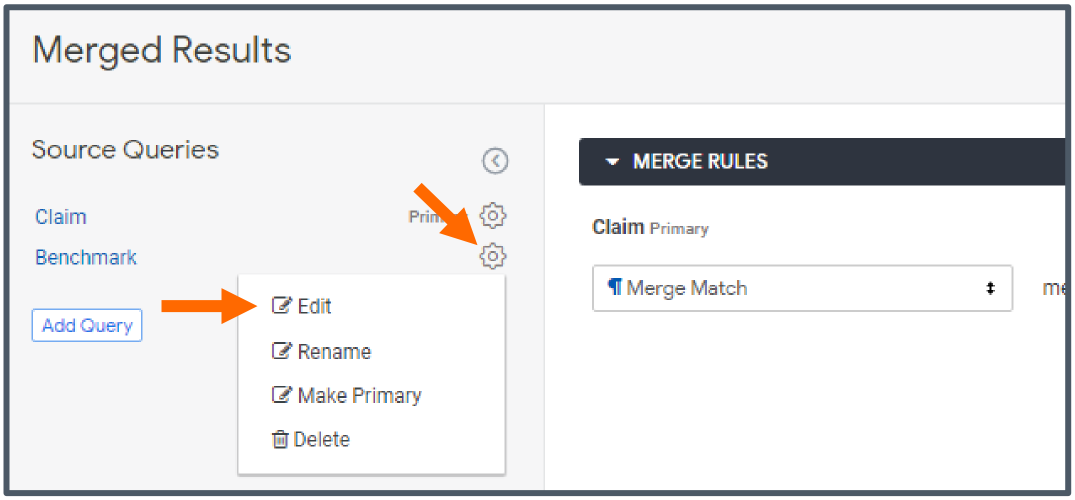


- **MERGE RULES**: Indicates which Explore data set (Claim, Remit, or Denial) was merged with the benchmarking values.
- **Visualization**: Click the Visualization toolbar to open it. It will display a chart-based visualization of the reported data and benchmarking values. The visualization key/legend 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.

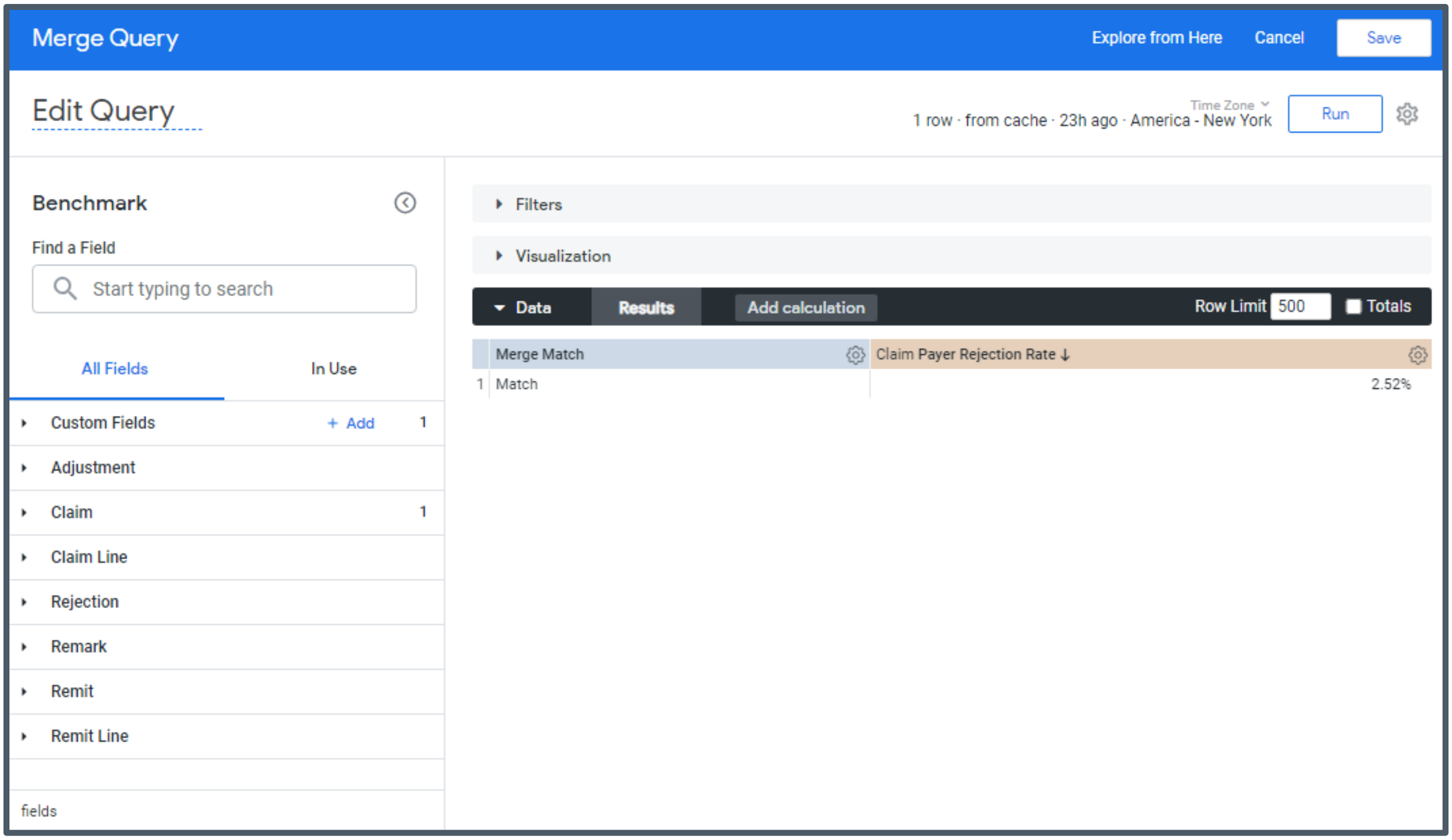
Note: Use the Data Dictionary to find descriptions of the available benchmarking values that can be applied to a Look.

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:
   a. 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**.
   b. From the dropdown menu that will open, select **Edit**.



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



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.

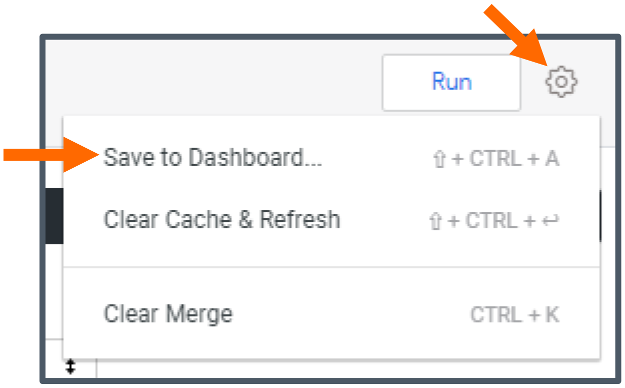
   The benchmarking query results will display.

f. Click the **Save** button in the upper-right corner of the screen.

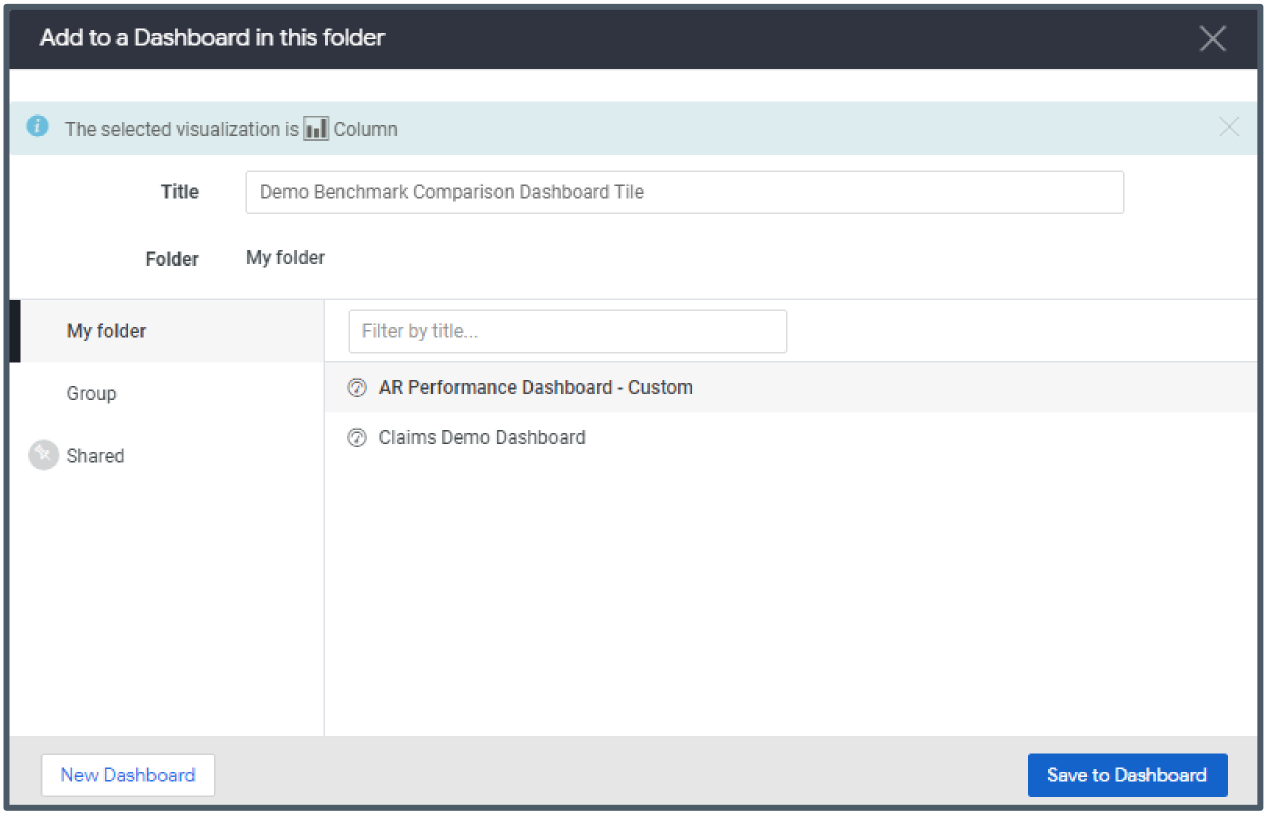
   The Merged Results screen will reopen.

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.

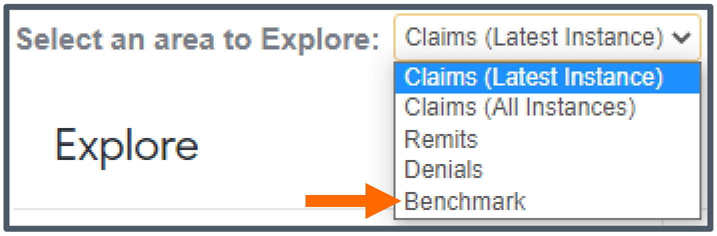
Custom benchmarking analysis with a net-new Look

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**.



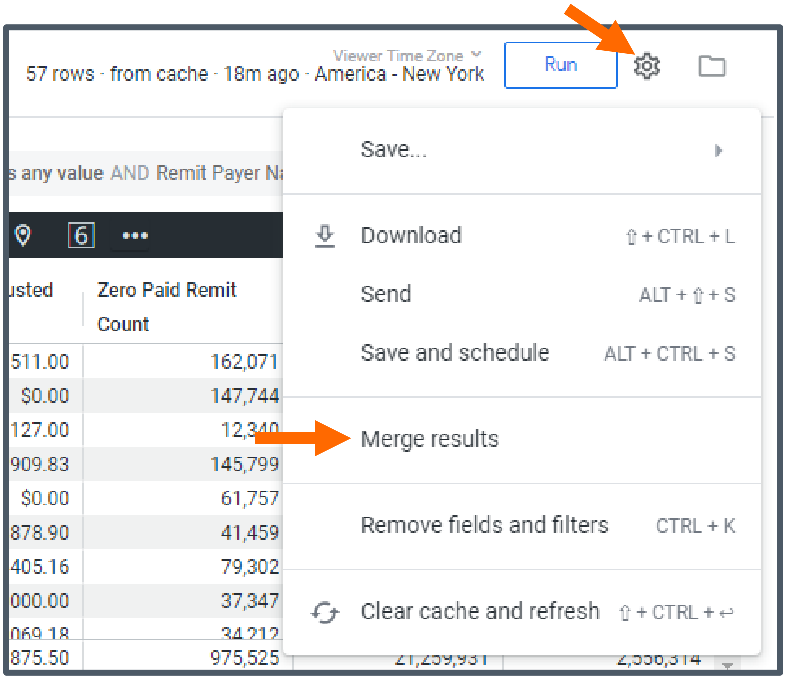
3. To build the benchmarking scenario that you would like merged with the new Look, use the principles and attribute definitions documented in the Explore section.

   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.

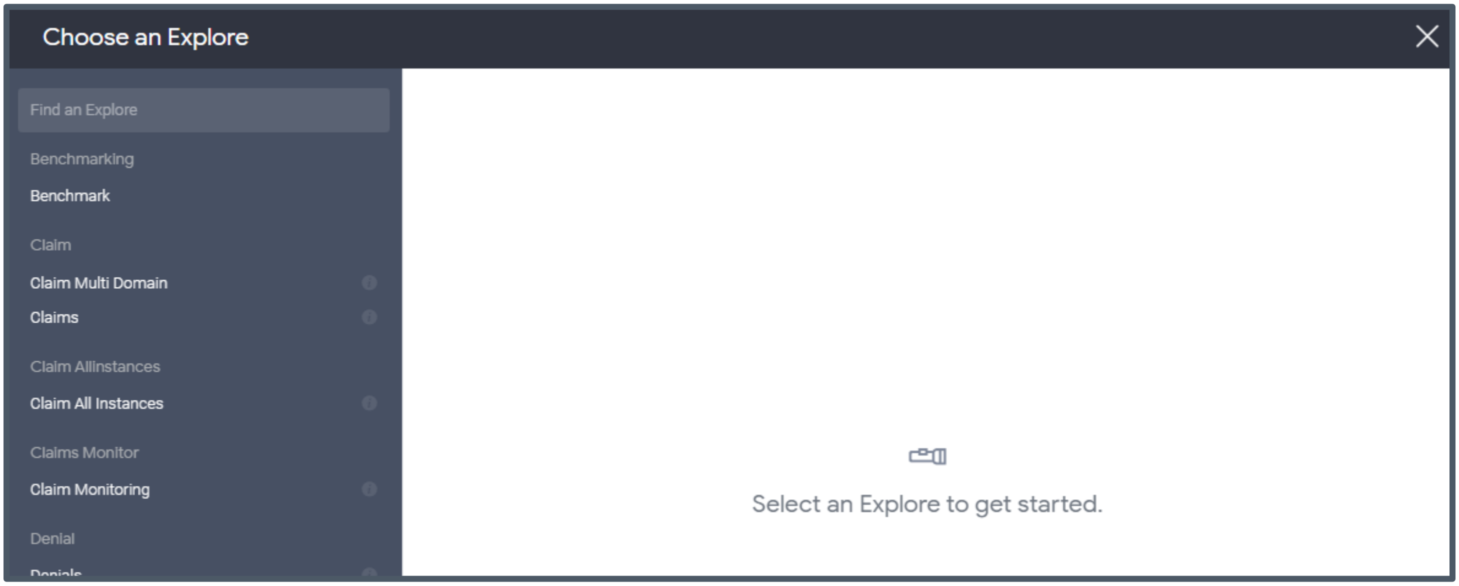
4. Once you are satisfied with your dimension, measure, and filter selections, click the **Run** button at the top of the screen or press the [**Enter**] key on your keyboard.

   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**.



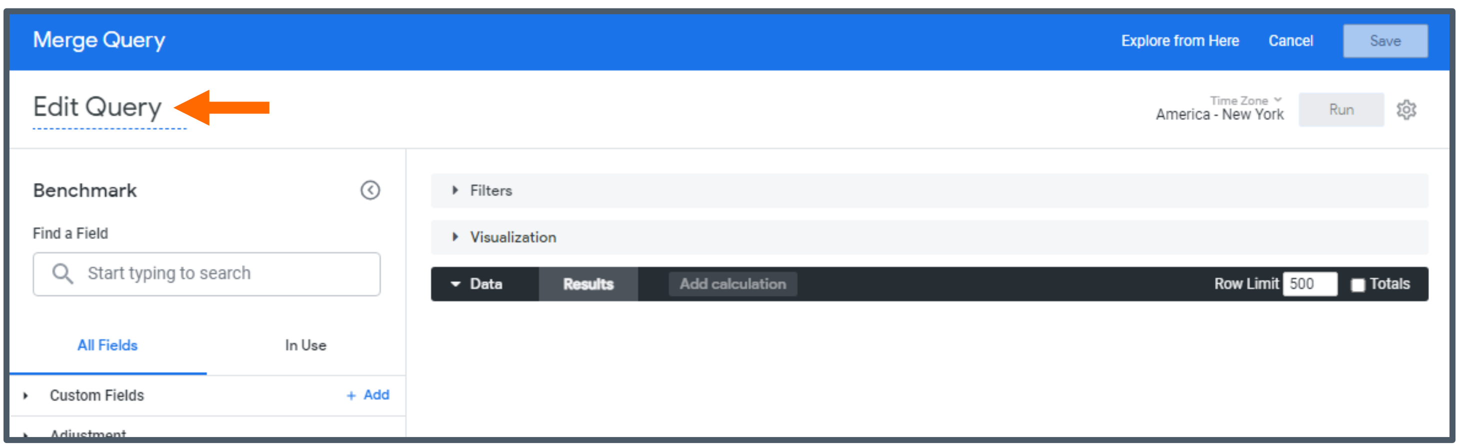
The Choose an Explore screen will open.



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.

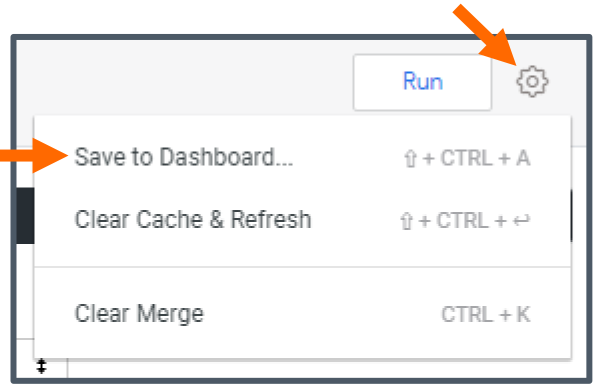
    The Look query results will display.

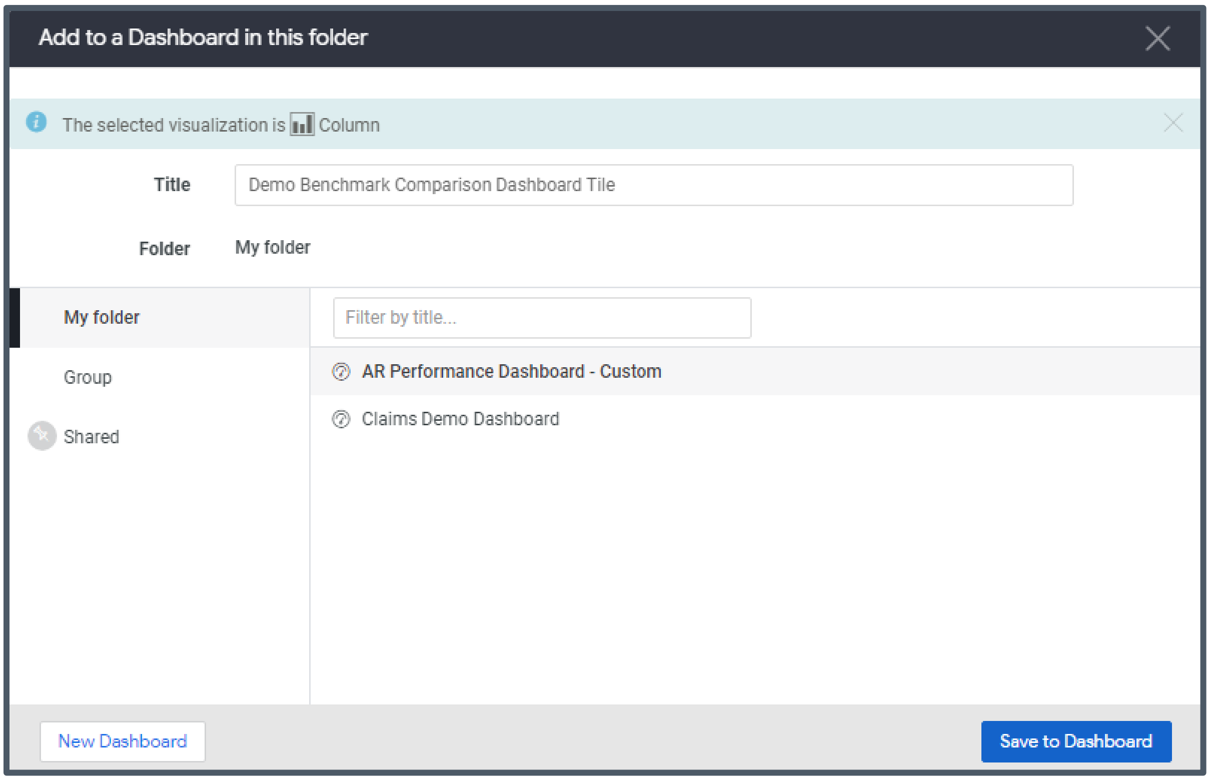
11. Click the **Save** button.

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

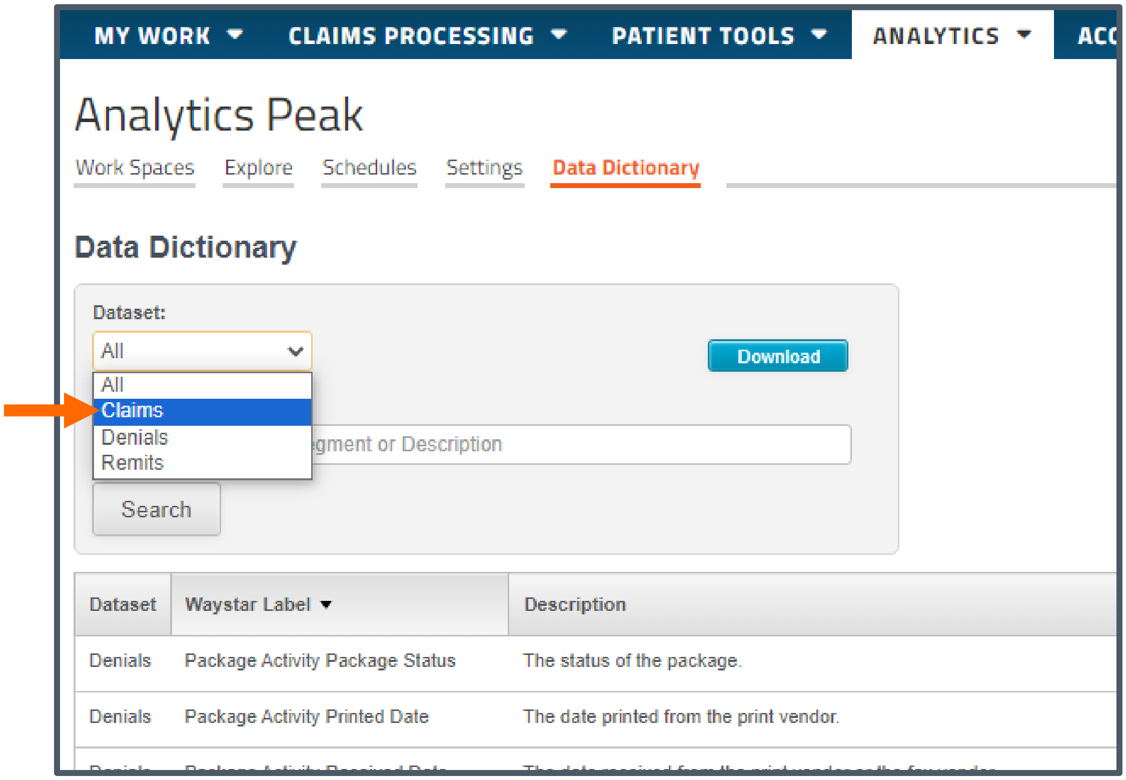
The **ANALYITCS** > **Analytics** > **Data Dictionary** screen provides descriptions and a crosswalk for the 835 and 837 loops and segments of claim submissions and remits and how they correspond to the column headers in Analytics reports.

Selecting a dataset

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

To select a dataset:

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

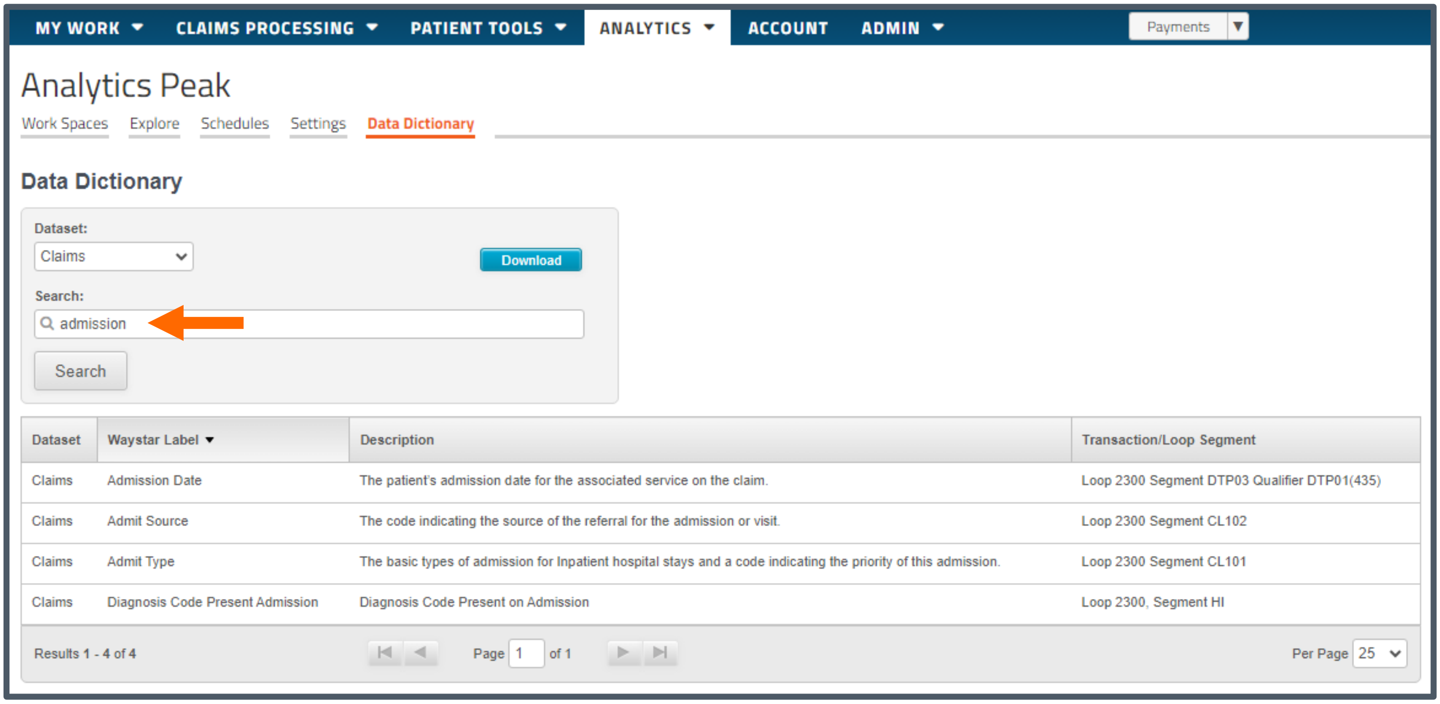


Searching for a description

To search for a description:

1. Go to **ANALYITCS** > **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.



Sorting and navigating the data dictionary

To sort and navigate the list of descriptions:

1. Go to **ANALYITCS** > **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.

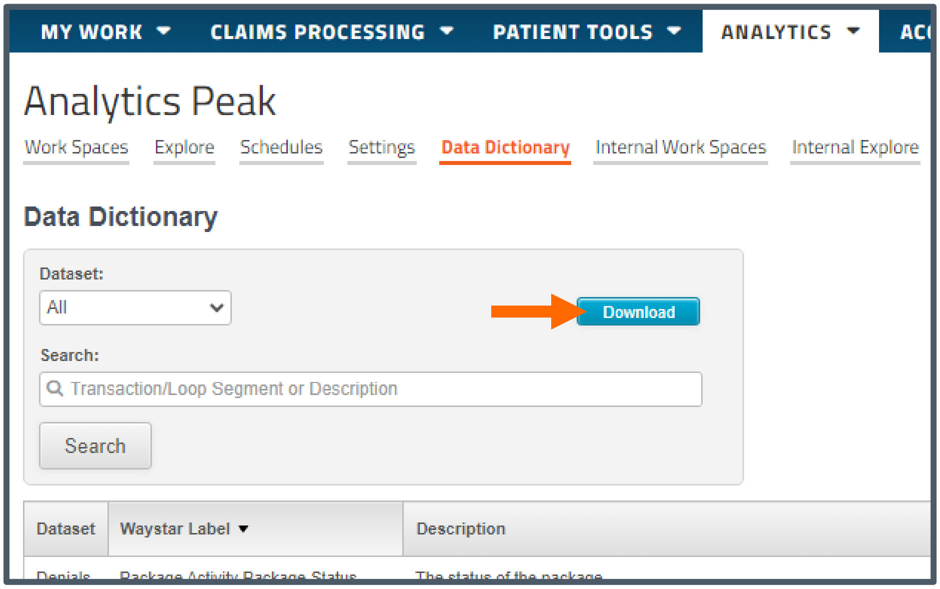
Downloading data dictionary datasets

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 **ANALYITCS** > **Analytics** > **Data Dictionary**.
2. Click the **Download** button.



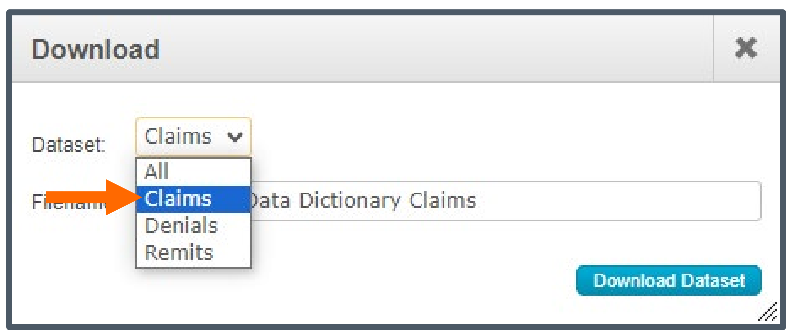
   The Download screen will open.

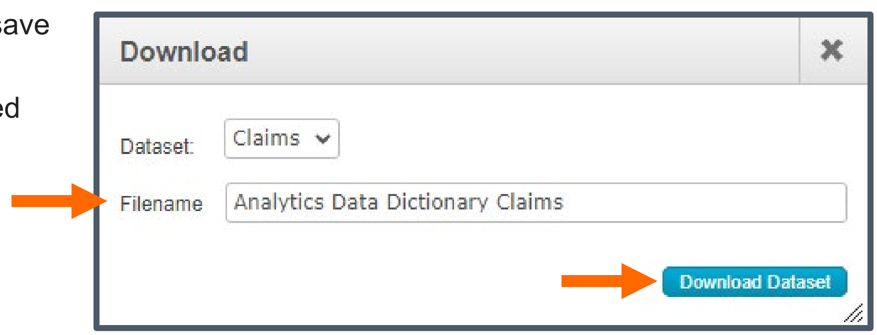
3. From the **Dataset** dropdown, select a dataset (All, Claims, Denials, or Remits).
4. From the **Filename** field, review and update as appropriate the filename you want to use for the CSV file.
5. Click the **Download Dataset** button.

   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.

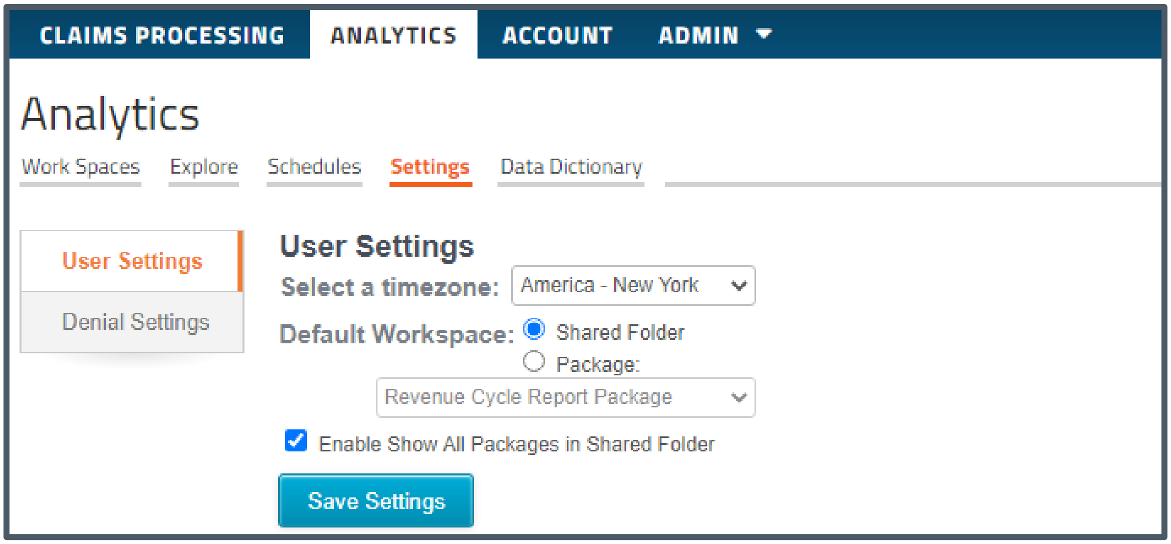




Settings

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:

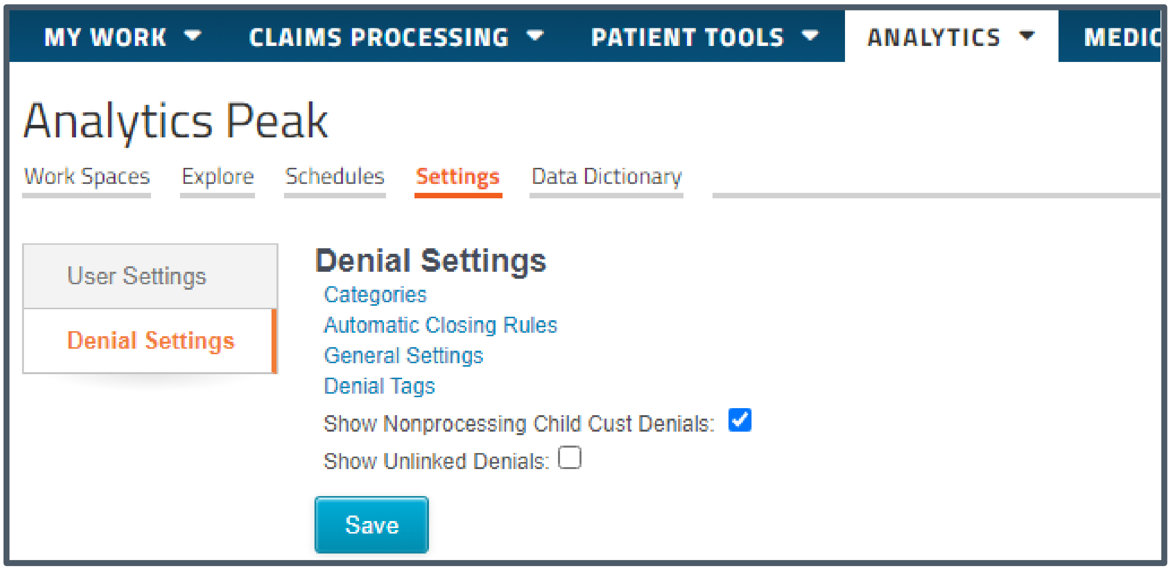


  - **Select a timezone**: Set the default time zone applied to all Looks and dashboards throughout the Analytics solution.
  - **Default Workspace**: Set your default Work Spaces tab that will open when you go to ANALYTICS > Analytics > Work Spaces. Either select your Shared analytics to open or for a 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.



  – **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 Unliked Denials**: Select the checkbox to have your analytics include denials that are not linked to a claim.

Revision log

Date	Description	Version
October 2024	• Added the "Opening Looks in Explore" section • Updated the "Managing Looks in Explore" section	13
October 2024	• Added the "Using column options for Look table charts" section • Updated map visualizations to Google Maps • Added additional Looker information for AND/OR filter options • Added how to download Data Dictionary datasets • Provided a note for "Deleting schedules" that your DA or Waystar representative can also delete schedules • Added the "Reassigning schedules" section	12
May 2024	Added "AND" filter to the "Updating Look filters" section	11
September 2023	• Added the "Opening a dashboard/Look from a Look" section • Added visualizations to the Look visualization section: Calendar Heatmap, Histogram, Multiple Value, Packed Bubble, Radial Gauge, Sankey • Moved the visualization appendix information to the Look visualization section • Updated the Analytics scheduling with new screenshots and processes where appropriate • Updated the Analytics Benchmarking section with new screenshots and processes where appropriate • Removed the Dimensions and Measures Glossary section • Added the Data Dictionary section	10