

DataPoint User Guide

**Using Metrics and Dimensions – Proficient
Functionality**

Understanding Metrics and Dimensions and How to Use Them

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Purpose

The purpose of this user guide is to outline:

- metrics and dimensions
- how to add metrics to a summary report
- how to add dimensions to a summary report

Metrics and Dimensions

Summary Reports are dynamic reports that use a predefined template. This template allows you to add and/or refine information as needed. As a reminder, summary reports are found under the **Utilization**, **Financial**, and **Enrollment** dropdowns on your DataPoint home page.

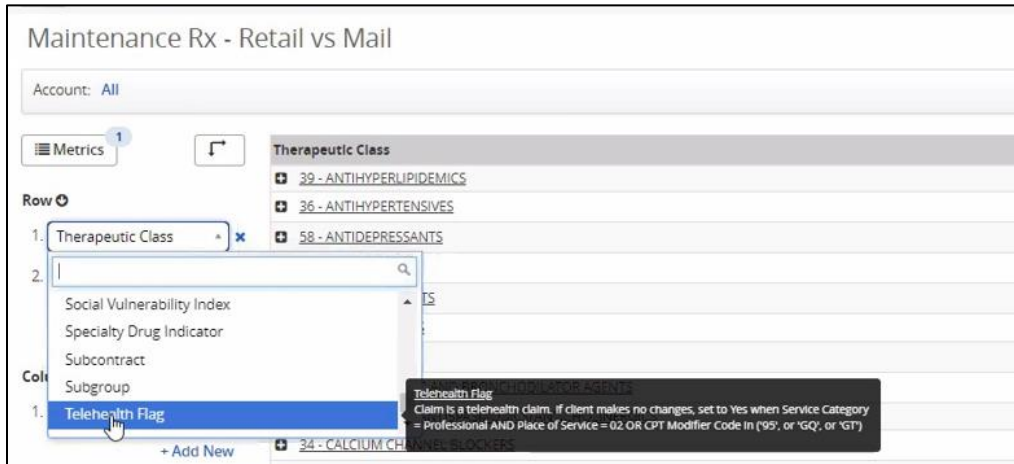
Metrics are units of measurement added to your summary report to make it more impactful. There are different categories of metrics depending on the type of summary report being pulled. Metric examples under each drop-down include:

- **Utilization:** Number of ER Visits, Visits per 1,000
- **Financial:** Total Paid Amounts (\$), Per Member Per Month (PMPM)
- **Enrollment:** Number of Unique Members in a given Demographic

Dimensions are the filters that form the rows and columns of the summary report. Dimensions also allow you to build and refine reports. The dimensions you choose define how the data is categorized and can vary based on the report you are building. There are different categories of dimensions depending on the type of summary report being pulled. Dimension examples under each drop-down include:

- **Utilization:** Therapeutic Class, Drug Source, Service Categories
- **Financial:** Preventive Services, Line Service Type
- **Enrollment:** Member Enrollment Age Band, Chronic Conditions

Tip: You can hover over some metrics or dimensions to view the definition. In the example below, we pulled the Maintenance Rx-Retail vs Mail report. If you add a row and search for Telehealth Flag, when you hover over **Telehealth Flag**, a definition will pop up.



Adding Metrics to a Summary Report

Advanced users may find it helpful to add additional or different metrics to a summary report to extract specific information and identify trends. There are unlimited combinations and reports available.

In the following scenario, we will be taking a closer look at the Medical Paid Lag summary report. We will explain how adding metrics and dimensions allows you to view the same data in three different formats. Each format provides a unique glimpse into the data. The format you choose will be driven by your preference.

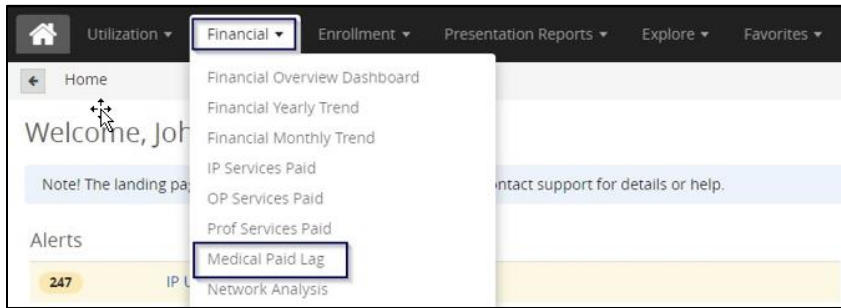
Scenario: you have a self-funded plan and would like to see a lag report inclusive of medical and pharmacy claims by month.

This is not a standard summary report; only medical claims are shown on the standard **Medical Paid Lag Report**. Using this report, we will outline how to build the desired report in 3 different formats:

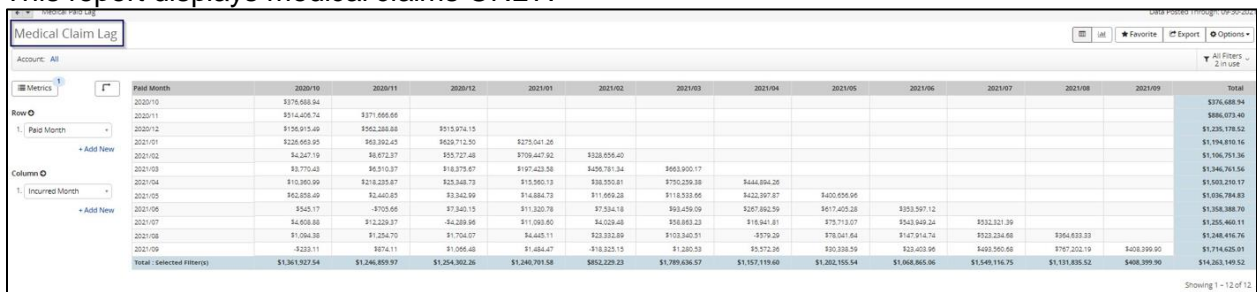
- Format 1: Total Claims Lag by Month
- Format 2: Medical Claims and Pharmacy Claims Lag by Month
- Format 3: Medical Claims Lag by Month and Pharmacy Claims Lag by Month

Format 1: Total Claims Lag by Month

The first way to format the **Medical Paid Lag** report to also include pharmacy claims is by replacing a metric within the summary report. Navigate to the **Medical Paid Lag** report under the **Financial** dropdown.

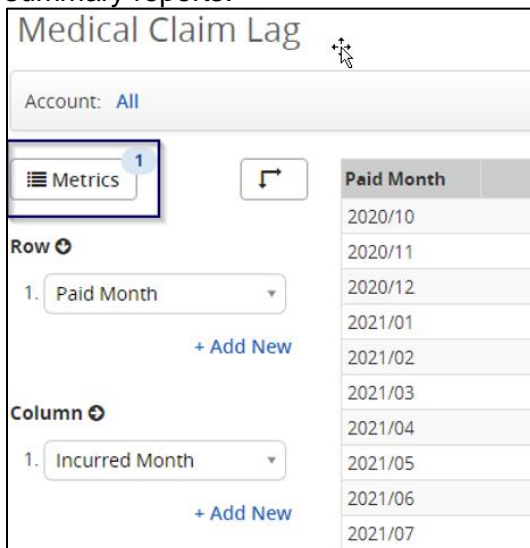


This report displays medical claims ONLY.



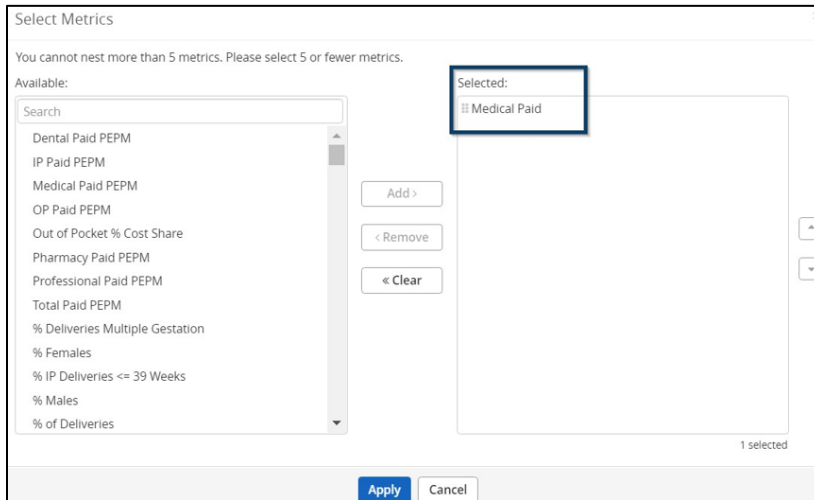
Paid Month	2020/10	2020/11	2020/12	2021/01	2021/02	2021/03	2021/04	2021/05	2021/06	2021/07	2021/08	2021/09	Total
2020/10	\$176,688.54	\$171,666.66											\$348,355.20
2020/11	\$114,456.74	\$171,666.66											\$286,123.40
2020/12	\$156,915.49	\$562,388.08	\$515,974.15										\$1,235,178.52
2021/01	\$226,669.95	\$69,392.45	\$639,712.50	\$279,041.26									\$1,194,816.16
2021/02	\$4,247.19	\$8,672.37	\$55,727.48	\$709,447.92	\$328,656.40								\$1,396,761.36
2021/03	\$3,770.43	\$6,510.37	\$18,379.67	\$197,423.58	\$426,791.34	\$663,950.17							\$1,344,791.56
2021/04	\$19,389.99	\$216,229.87	\$23,348.79	\$13,960.13	\$39,799.81	\$702,229.36	\$444,094.36						\$1,909,210.17
2021/05	\$62,858.49	\$2,440.65	\$3,342.99	\$14,884.79	\$1,959.28	\$119,539.66	\$422,197.87	\$400,656.66					\$1,636,794.83
2021/06	\$543.17	-\$705.66	\$7,340.15	\$11,320.78	\$7,534.18	\$99,459.09	\$267,862.59	\$617,405.28	\$353,597.12				\$1,358,388.70
2021/07	\$4,658.88	\$12,228.37	-\$4,289.96	\$11,089.80	\$4,029.48	\$58,865.23	\$18,841.81	\$75,713.07	\$543,949.24	\$532,321.39			\$1,255,466.11
2021/08	\$1,094.38	\$1,254.70	\$1,704.07	\$4,445.11	\$23,332.89	\$103,340.51	-\$379.29	\$78,041.64	\$147,914.74	\$523,234.69	\$354,633.33		\$1,348,416.76
2021/09	-\$223.11	\$974.11	\$1,066.48	\$1,484.47	-\$18,325.15	\$1,240.53	\$5,572.36	\$90,339.59	\$23,403.99	\$499,500.68	\$797,202.19	\$403,399.90	\$1,714,626.91
Total (Selected Filters)	\$1,361,927.54	\$1,246,859.97	\$1,254,302.26	\$1,248,791.58	\$492,229.23	\$1,789,636.97	\$1,197,119.60	\$1,202,155.54	\$1,068,865.96	\$1,549,116.79	\$1,131,835.52	\$408,399.90	\$14,263,149.52

Click the **Metrics** button on the left-hand side of the report. Tip: This button applies to all summary reports.

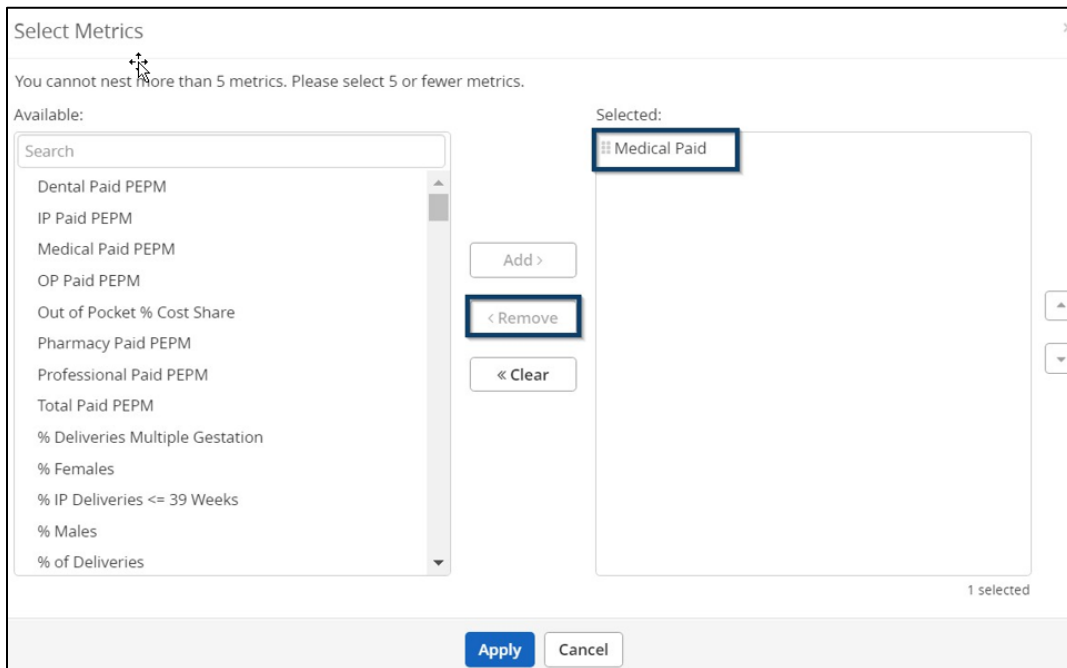


The **Select Metrics** box will display and allows you to populate the report with different metrics or add additional metrics to the current report.

To continue with this example, the **Medical Paid** metric will already be pre-populated under **Selected** on the right-hand side.

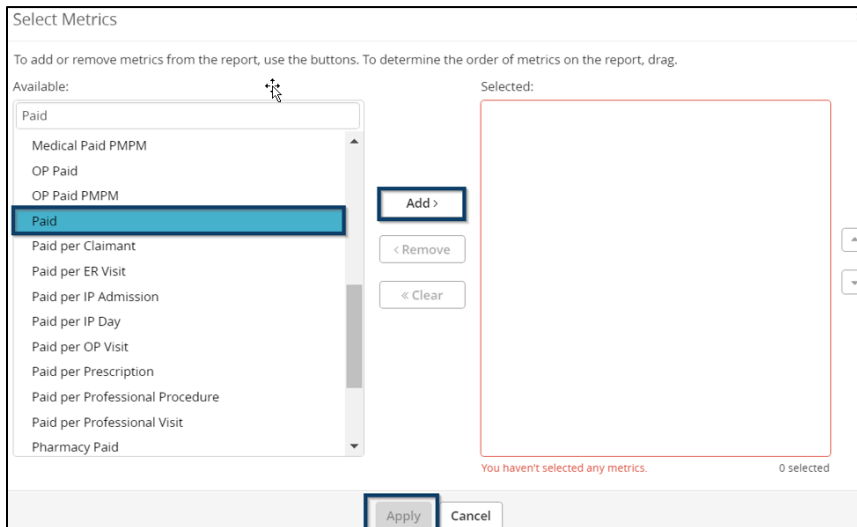


You will remove **Medical Paid** by clicking on **Medical Paid** on the right-hand side and clicking the **Remove** button.



To add **Paid**, on the left-hand menu, search or scroll to **Paid**. Highlight **Paid**, click on the **Add** button, and click **Apply**.

By selecting Paid, the report will include both medical and pharmacy paid claims.



You will now see the **Medical Claim Lag** box. Navigate to the bottom left-hand side of your report and click **Update**.

Medical Claim Lag

Account: All

Metrics

Row 1. Paid Month + Add New

Column 1. Incurred Month + Add New

Update

Paid Month	2020/10	2020/11	2020/12	2021/01	2021/02
2020/10	\$376,688.94				
2020/11	\$514,406.74	\$371,666.66			
2020/12	\$156,915.49	\$562,288.88	\$515,974.15		
2021/01	\$226,663.95	\$63,392.45	\$629,712.50	\$275,041.26	
2021/02	\$4,247.19	\$8,672.37	\$55,727.48	\$709,447.92	\$328,656.40
2021/03	\$3,770.43	\$6,510.37	\$18,375.67	\$197,423.58	\$456,781.34
2021/04	\$10,360.99	\$218,235.87	\$25,348.73	\$15,560.13	\$38,550.81
2021/05	\$62,858.49	\$2,440.85	\$3,342.99	\$14,884.73	\$11,669.28
2021/06	\$545.17	-\$705.66	\$7,340.15	\$11,320.78	\$7,534.18
2021/07	\$4,608.88	\$12,229.37	-\$4,289.96	\$11,093.60	\$4,029.48
2021/08	\$1,094.38	\$1,254.70	\$1,704.07	\$4,445.11	\$23,332.89
2021/09	-\$233.11	\$874.11	\$1,066.48	\$1,484.47	-\$18,325.15
Total : Selected Filter(s)	\$1,361,927.54	\$1,246,859.97	\$1,254,302.26	\$1,240,701.58	\$852,229.23

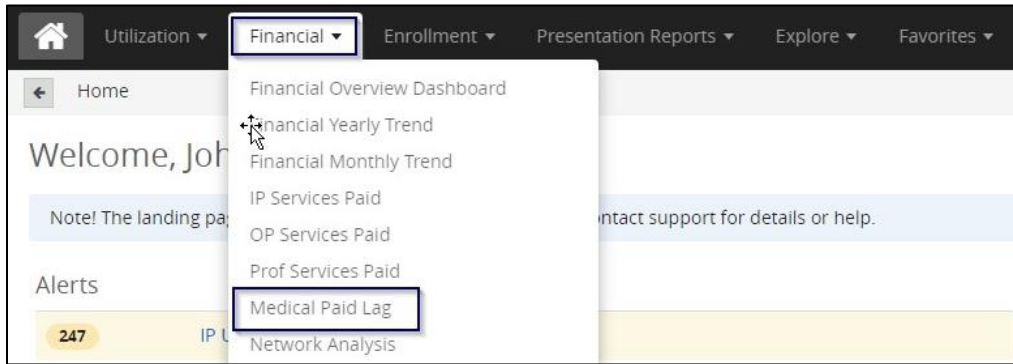
The data in the report will now show your medical and pharmacy claims as one single number by month. As you can see below, the numbers are higher since they encompass both medical and pharmacy claims.

Paid Month	2020/10	2020/11	2020/12	2021/01	2021/02	2021/03	2021/04	2021/05	2021/06	2021/07	2021/08	2021/09	Total
2020/10	\$792,622.53												\$792,622.53
2020/11	\$506,433.03	\$841,050.45											\$1,347,483.48
2020/12	\$156,915.49	\$552,128.98	\$942,553.36										\$1,651,597.83
2021/01	\$226,663.95	\$63,392.45	\$602,287.71	\$657,943.77									\$1,550,287.88
2021/02	\$4,247.19	\$8,672.37	\$55,727.48	\$703,449.64	\$769,612.61								\$1,541,709.29
2021/03	\$3,770.43	\$6,510.37	\$18,375.67	\$197,435.13	\$447,041.53	\$1,088,288.51							\$1,761,421.64
2021/04	\$10,793.61	\$218,918.49	\$25,560.86	\$17,866.85	\$39,975.44	\$744,137.99	\$871,564.82						\$1,928,818.06
2021/05	\$62,858.49	\$2,440.85	\$3,342.99	\$14,884.73	\$11,669.28	\$118,550.60	\$409,237.25	\$773,968.01					\$1,396,952.20
2021/06	\$545.17	-\$705.66	\$7,340.15	\$11,320.78	\$7,534.18	\$93,628.49	\$268,210.37	\$604,394.11	\$847,199.07				\$1,839,466.66
2021/07	\$4,608.88	\$12,229.37	-\$4,289.96	\$11,093.60	\$4,046.42	\$58,880.17	\$16,958.75	\$75,753.07	\$533,191.82	\$943,251.98			\$1,655,724.10
2021/08	\$1,094.38	\$1,254.70	\$1,704.07	\$4,445.11	\$23,332.89	\$103,340.51	-\$522.51	\$78,041.64	\$147,914.74	\$514,667.36	\$759,224.27		\$1,634,497.16
2021/09	-\$233.11	\$874.11	\$1,066.48	\$1,484.47	-\$18,325.15	\$1,297.47	\$5,646.08	\$30,418.59	\$23,603.96	\$493,264.26	\$776,054.05	\$792,192.94	\$2,107,344.15
Total: Selected Filter(s)	\$1,770,320.04	\$1,706,766.48	\$1,653,668.81	\$1,619,924.08	\$1,284,887.20	\$2,208,123.74	\$1,571,094.76	\$1,562,575.42	\$1,551,909.59	\$1,951,183.60	\$1,535,278.32	\$792,192.94	\$19,207,924.98

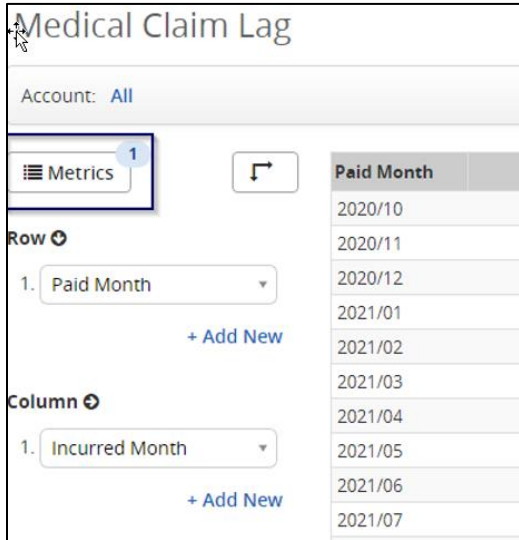
Format 2: Medical Claims and Pharmacy Claims Lag by Month

Alternatively, you can format the **Medical Paid Lag** report to include pharmacy claims by adding a metric. This will separate medical and pharmacy claims.

As stated above, navigate to the **Medical Paid Lag** report under the **Financial** dropdown.



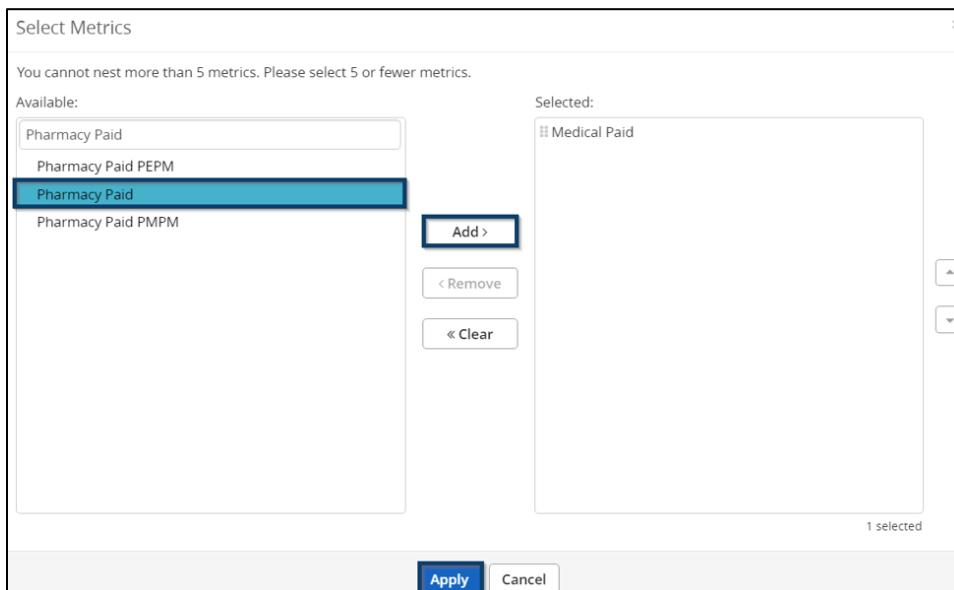
To add a metric, click the **Metrics** button on the left-hand side of the report.



The **Select Metrics** box will display and allows you to populate the report with different metrics or add additional metrics to the current report.

The **Medical Paid** metric will already be pre-populated under **Selected** on the right-hand side. To continue with this example, you will add the **Pharmacy Paid** metric, while keeping the **Medical Paid** metric.

Search or scroll down to **Pharmacy Paid** and select it. Click **Add**, and then click **Apply**.



You will now see the **Medical Claim Lag** box. Navigate to the bottom left-hand side of your report and click **Update**.

Medical Claim Lag

Account: All

Metrics 2

Row

1. Paid Month ▼

+ Add New

Column

1. Incurred Month ▼ ✕

+ Add New

2. Metrics ▼

Update

Paid Month	2020/10
2020/10	\$376,688.94
2020/11	\$514,406.74
2020/12	\$156,915.49
2021/01	\$226,663.95
2021/02	\$4,247.19
2021/03	\$3,770.43
2021/04	\$10,360.99
2021/05	\$62,858.49
2021/06	\$545.17
2021/07	\$4,608.88
2021/08	\$1,094.38
2021/09	-\$233.11
Total :	
Selected	\$1,361,927.54
Filter(s)	

Tip: Make sure you select the correct timeframe by clicking **All Filters** to confirm you are viewing the **Incurred Month** and **Paid Month**. The default filters for the Medical Claim Lag are set to **Trend** for a 12-month period but can be updated for shorter or longer specific month selections (6 months, 24 months, 36 months). Refer to the *Enhanced Filtering User Guide* for additional information on filtering.

Medical Claim Lag

Account: All

Favorite
Export
Options

Type: Basic Advanced

Overview

+ Add Filter
Clear All

Incurring Month ▼ | Trend ▼ | last: 12 | Months ▼ | Select Values

Paid Month ▼ | Trend ▼ | last: 12 | Months ▼ | Select Values

Enable Lag Period ⊞

Enable Lag Period ⊞

Incurred Month trend last 12 Months

Paid Month trend last 12 Months

The data in the report will now show your medical and pharmacy claims as separate columns by month.

Paid Month	2021/05		2021/06		2021/07		2021/08		2021/09		Total		
	Medical Paid	Pharmacy Paid	Medical Paid	Pharmacy Paid	Medical Paid	Pharmacy Paid	Medical Paid	Pharmacy Paid	Medical Paid	Pharmacy Paid	Medical Paid	Pharmacy Paid	
2021/10											\$376,688.94	\$415,933.59	
2021/11											\$886,073.40	\$461,410.08	
2021/12											\$1,235,178.52	\$416,419.31	
2021/01											\$1,194,810.16	\$355,477.72	
2021/02											\$1,106,751.36	\$434,957.93	
2021/03											\$1,346,761.56	\$414,660.08	
2021/04	\$426,670.56										\$1,503,210.17	\$425,607.89	
2021/05	-\$13,160.62	\$400,656.96	\$373,311.05								\$1,036,784.83	\$360,167.37	
2021/06	\$317.78	\$617,405.28	-\$13,011.17	\$353,597.12	\$493,601.95						\$1,358,388.70	\$481,077.96	
2021/07	\$16.94	\$75,713.07	\$40.00	\$543,949.24	-\$10,757.42	\$532,321.39	\$410,930.59				\$1,255,460.11	\$400,283.99	
2021/08	\$56.78	\$78,041.64	\$0.00	\$147,914.74	\$0.00	\$523,234.68	-\$8,567.32	\$364,633.33	\$394,590.94		\$1,248,416.76	\$386,080.40	
2021/09	\$73.72	\$30,338.59	\$80.00	\$23,403.96	\$200.00	\$493,560.68	-\$296.42	\$767,202.19	\$8,851.86	\$408,399.90	\$383,793.04	\$1,714,625.01	
Total:													
Selected Filter(s)	\$413,975.16	\$1,202,155.54	\$360,419.88	\$1,068,865.06	\$483,044.53	\$1,549,116.75	\$402,066.85	\$1,131,835.52	\$403,442.80	\$408,399.90	\$383,793.04	\$14,263,149.52	\$4,944,775.46

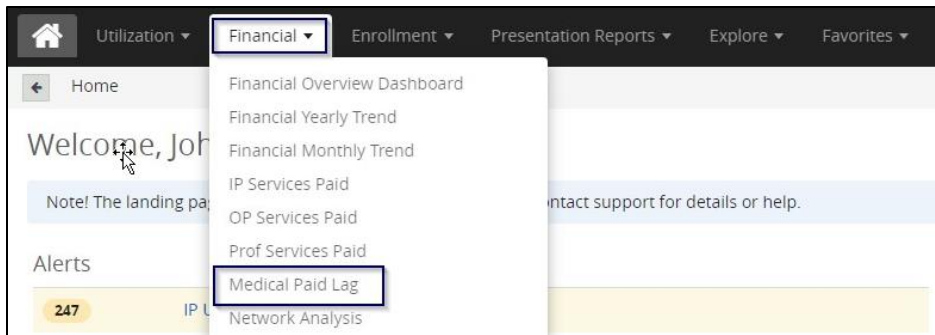
Adding Dimensions to Summary Reports

A variety of dimensions can be added to a summary report. The process of adding additional dimensions is outlined below.

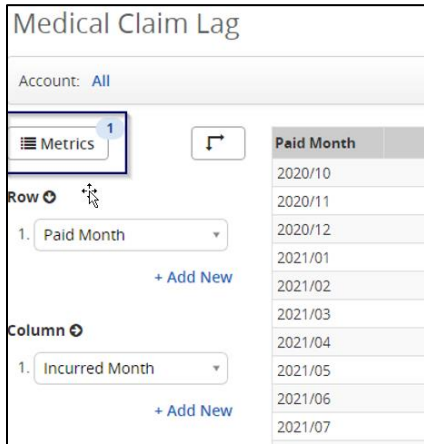
Format 3: Medical Claims Lag by Month and Pharmacy Claims Lag by Month

Building on the Format 1 example above, you can add dimensions, instead of metrics shown in Format 2, to view pharmacy and medical claims separately by month in their own rows.

As stated above, navigate to the **Medical Paid Lag** report under the **Financial** dropdown.



Tip: Make sure the metric is set to **Paid**. To ensure that the metric is set to **Paid**, click **Metrics**.



Medical Claim Lag

Account: All

Metrics 1

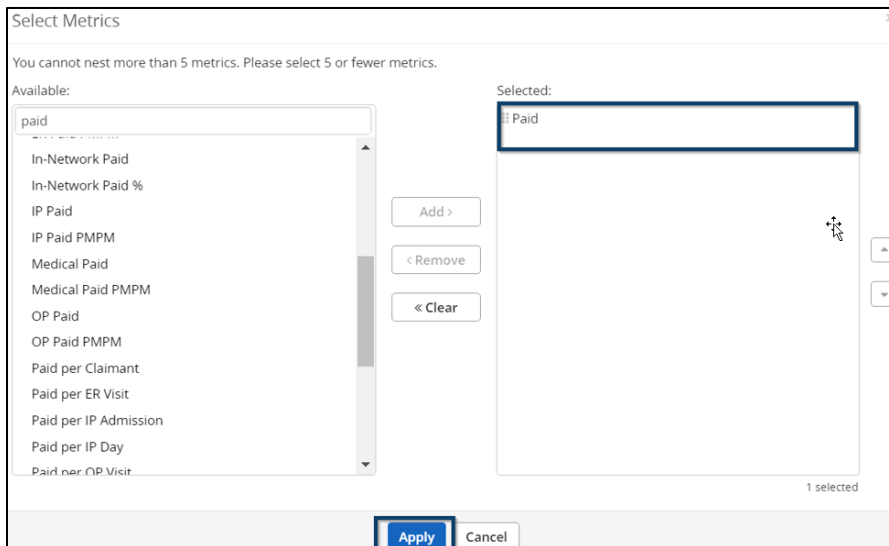
Row 1: Paid Month + Add New

Column 1: Incurred Month + Add New

Paid Month
2020/10
2020/11
2020/12
2021/01
2021/02
2021/03
2021/04
2021/05
2021/06
2021/07

Ensure **Paid** is the only metric under the **Selected** section. If it is not, remove any additional metrics present and add **Paid**. Once you have **Paid** under **Selected**, click **Apply**.

By selecting **Paid**, the report will include both medical and pharmacy paid claims.



Select Metrics

You cannot nest more than 5 metrics. Please select 5 or fewer metrics.

Available:

- paid
- In-Network Paid
- In-Network Paid %
- IP Paid
- IP Paid PMPM
- Medical Paid
- Medical Paid PMPM
- OP Paid
- OP Paid PMPM
- Paid per Claimant
- Paid per ER Visit
- Paid per IP Admission
- Paid per IP Day
- Paid per OP Visit

Selected:

- Paid

1 selected

Apply Cancel

You can then add a new dimension, or update an existing dimension, and have it displayed as a row and/or column on your report. To do this, click **Add New**.

Medical Paid Lag

Medical Claim Lag

Account: All

Metrics 1

Row 1. Paid Month **+ Add New**

Column 1. Incurred Month **+ Add New**

Paid Month	2020/10	2020/11	2020/12
2020/10	\$376,688.94		
2020/11	\$514,406.74	\$371,666.66	
2020/12	\$156,915.49	\$562,288.88	\$515,974.15
2021/01	\$226,663.95	\$63,392.45	\$629,712.50
2021/02	\$4,247.19	\$8,672.37	\$55,727.48
2021/03	\$3,770.43	\$6,510.37	\$18,375.67
2021/04	\$10,360.99	\$218,235.87	\$25,348.73
2021/05	\$62,858.49	\$2,440.85	\$3,342.99
2021/06	\$545.17	-\$705.66	\$7,340.15
2021/07	\$4,608.88	\$12,229.37	-\$4,289.96
2021/08	\$1,094.38	\$1,254.70	\$1,704.07
2021/09	-\$233.11	\$874.11	\$1,066.48
Total :			
Selected	\$1,361,927.54	\$1,246,859.97	\$1,254,302.26
Filter(s)			

After clicking **Add New**, you can type the dimension you want to add, select it, and click **Update**.

Metrics 1

Row 1. Paid Month **x**

2. \$10K Increase Predi... **x**

Incurring Month

Incurring Month

Incurring Month of Year

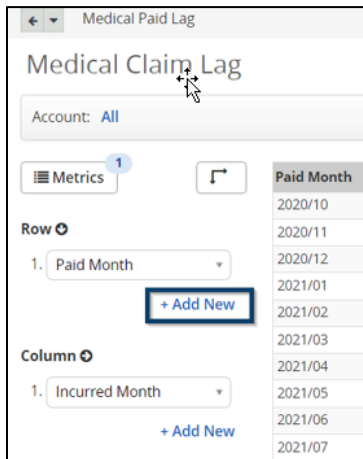
Column 1. Incurred Month

+ Add New

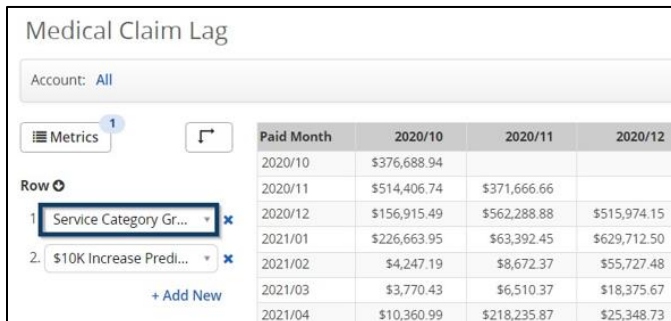
Update

Following our example above, to create report format 3, we need to add a new dimension called **Service Category Group**. To organize the data in a better view, the first dimension under Row will be **Service Category Group** and the second dimension will be **Paid Month**.

Click on **Add New** to populate a second-row dimension option.

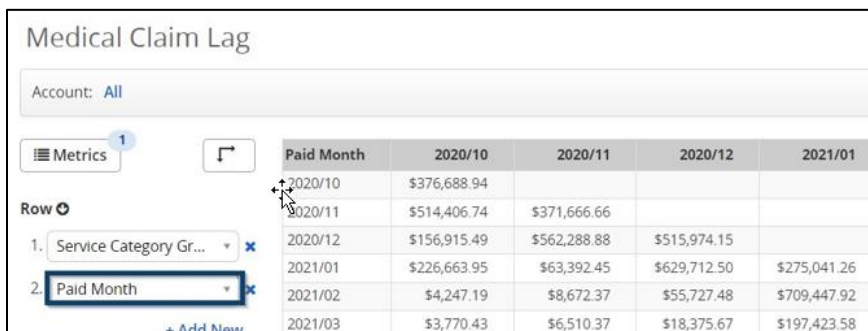


Under Row 1, click on **Paid Month**, search for **Service Category Group**, and select **Service Category Group**. This will form Row 1.



Paid Month	2020/10	2020/11	2020/12
2020/10	\$376,688.94		
2020/11	\$514,406.74	\$371,666.66	
2020/12	\$156,915.49	\$562,288.88	\$515,974.15
2021/01	\$226,663.95	\$63,392.45	\$629,712.50
2021/02	\$4,247.19	\$8,672.37	\$55,727.48
2021/03	\$3,770.43	\$6,510.37	\$18,375.67
2021/04	\$10,360.99	\$218,235.87	\$25,348.73

For Row 2, click on the populated dimensions options, search for **Paid Month** and select **Paid Month**. This will form Row 2.



Paid Month	2020/10	2020/11	2020/12	2021/01
2020/10	\$376,688.94			
2020/11	\$514,406.74	\$371,666.66		
2020/12	\$156,915.49	\$562,288.88	\$515,974.15	
2021/01	\$226,663.95	\$63,392.45	\$629,712.50	\$275,041.26
2021/02	\$4,247.19	\$8,672.37	\$55,727.48	\$709,447.92
2021/03	\$3,770.43	\$6,510.37	\$18,375.67	\$197,423.58

Click **Update**.

Medical Claim Lag						
Account: All						
Metrics ¹		Paid Month	2020/10	2020/11	2020/12	2021/01
Row		2020/10	\$376,688.94			
1. Service Category Gr...		2020/11	\$514,406.74	\$371,666.66		
2. Paid Month		2020/12	\$156,915.49	\$562,288.88	\$515,974.15	
		2021/01	\$226,663.95	\$63,392.45	\$629,712.50	\$275,041.26
		2021/02	\$4,247.19	\$8,672.37	\$55,727.48	\$709,447.92
		2021/03	\$3,770.43	\$6,510.37	\$18,375.67	\$197,423.58
		2021/04	\$10,360.99	\$218,235.87	\$25,348.73	\$15,560.13
		2021/05	\$62,858.49	\$2,440.85	\$3,342.99	\$14,884.73
		2021/06	\$545.17	-\$705.66	\$7,340.15	\$11,320.78
		2021/07	\$4,608.88	\$12,229.37	-\$4,289.96	\$11,093.60
		2021/08	\$1,094.38	\$1,254.70	\$1,704.07	\$4,445.11
		2021/09	-\$233.11	\$874.11	\$1,066.48	\$1,484.47
		Total : Selected	\$1,361,927.54	\$1,246,859.97	\$1,254,302.26	\$1,240,701.58

Your report will now show medical vs. pharmacy broken out by total paid.

Service Category Group	2020/10	2020/11	2020/12	2021/01	2021/02	2021/03	2021/04	2021/05	2021/06	2021/07
Medical	\$1,361,927.54	\$1,246,859.97	\$1,254,302.26	\$1,240,701.58	\$852,229.23	\$1,789,636.57	\$1,157,119.60	\$1,202,155.54	\$1,068,865.06	\$1,549,116.75
Pharmacy										
Total : All	\$1,361,927.54	\$1,246,859.97	\$1,254,302.26	\$1,240,701.58	\$852,229.23	\$1,789,636.57	\$1,157,119.60	\$1,202,155.54	\$1,068,865.06	\$1,549,116.75

Showing 1 - 2 of 2

You can expand the **Medical** and **Pharmacy Service Category Groups** to see the two separate lags, but all the costs rolled up for each month. Below we have expanded the **Medical Service Category Group**.

Service Category Group	2020/10	2020/11	2020/12	2021/01	2021/02	2021/03	2021/04	2021/05	2021/06	2021/07
Medical										
2020/10	\$376,688.94									
2020/11	\$514,406.74	\$371,666.66								
2020/12	\$156,915.49	\$562,288.88	\$515,974.15							
2021/01	\$226,663.95	\$63,392.45	\$629,712.50	\$275,041.26						
2021/02	\$4,247.19	\$8,672.37	\$55,727.48	\$709,447.92	\$328,656.40					
2021/03	\$3,770.43	\$6,510.37	\$18,375.67	\$197,423.58	\$456,781.34	\$663,900.17				
2021/04	\$10,360.99	\$218,235.87	\$25,348.73	\$15,560.13	\$38,550.81	\$750,259.38	\$444,894.26			
2021/05	\$62,858.49	\$2,440.85	\$3,342.99	\$14,884.73	\$11,669.28	\$118,533.66	\$422,397.87	\$400,656.96		
2021/06	\$545.17	-\$705.66	\$7,340.15	\$11,320.78	\$7,534.18	\$93,459.09	\$267,892.59	\$617,405.28	\$353,597.12	
2021/07	\$4,608.88	\$12,229.37	-\$4,289.96	\$11,093.60	\$4,029.48	\$58,863.23	\$16,941.81	\$75,713.07	\$543,949.24	\$532,321.33
2021/08	\$1,094.38	\$1,254.70	\$1,704.07	\$4,445.11	\$23,332.89	\$103,340.51	-\$579.29	\$78,041.64	\$147,914.74	\$523,234.66
2021/09	-\$233.11	\$874.11	\$1,066.48	\$1,484.47	-\$18,325.15	\$1,280.53	\$5,572.36	\$30,338.59	\$23,403.96	\$493,560.66
Total : Medical	\$1,361,927.54	\$1,246,859.97	\$1,254,302.26	\$1,240,701.58	\$852,229.23	\$1,789,636.57	\$1,157,119.60	\$1,202,155.54	\$1,068,865.06	\$1,549,116.75
Pharmacy										
Total : All	\$1,361,927.54	\$1,246,859.97	\$1,254,302.26	\$1,240,701.58	\$852,229.23	\$1,789,636.57	\$1,157,119.60	\$1,202,155.54	\$1,068,865.06	\$1,549,116.75