

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.

M	aintenance Rx - Re	etail vs Mail		
Ac	count: All			
	Metrics	Therapeutic Class		
2		39 - ANTIHYPERLIPI	DEMICS	
Row	0	36 - ANTIHYPERTEN	SIVES	
1.[Therapeutic Class • 🗙	58 - ANTIDEPRESSA	NTS	
2	1	Q		
- En-	Social Vulnerability Index		15	
	Specialty Drug Indicator			
	Subcontract			
Colu	Subgroup		A AUTOR PONICHODILATOR AGENTS	
1.	Telehenith Flag		Jaim is a telehealth claim. If client makes no changes, set to Yes when Service Category	
	+ Add New	B 34 - CALCIUM CHA	Professional AND Place of Service = 02 OR CPT Modifier Code in (95', or 'GQ', or 'GT') NEL BLOCK FRS	

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.

• • Medical Paid Lag	1												Data Pol	cea inrough: 09-30-202
Medical Claim Lag												(III) (M	* Favorite	Export Options •
Account: All														▼ All Fiters ∪ 2 in use
■ Metrics	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	\$376,688.94												\$376,688.94
RowO	2020/11	\$514,406.74	\$371,666.66											\$886,073.40
1. Paid Month +	2020/12	\$156,915.49	\$562,288.88	\$515,974.15										\$1,235,178.52
	2021/01	\$226,663.95	\$63,392,45	\$629,712.50	\$275,041.26									\$1,194,810.16
+ ADD NEW	2021/02	\$4,247.19	\$8,672.37	\$55,727.48	\$709,447.92	\$328,656.40								\$1,106,751.36
Column O	2021/03	\$3,770.43	\$6,510.37	\$18,375.67	\$197,423.58	\$455,781.34	\$663.900.17							\$1,346,761.56
	2021/04	\$10,360.99	\$218,235,87	\$25,348.73	\$15,560.13	\$38,550,81	\$750,259,38	\$444,894,25						\$1,503,210.17
1. Incurred Month +	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					\$1,036,784.83
+ Add New	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				\$1,358,388.70
	2021/07	\$4,608.88	\$12,229,37	-\$4,289.96	\$11,093.60	\$4,029.48	\$56,863,23	\$16,941,81	\$75,713.07	\$543,949,24	\$532,321.39			\$1,255,460.11
	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	\$523,234.68	\$364,633.33		\$1,248,416.76
	2021/09	-\$233.11	\$874.11	\$1,056.48	\$1,484,47	-\$18,325.15	\$1,280.53	\$5,572.36	\$30,338.59	\$23,403.96	\$493,560.68	\$767,202.19	\$408,399.90	\$1,714,625.01
	Total : Selected Filter(s)	\$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	\$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.

Medical Claim Lag	* *
Account: All	
∎ Metrics	Paid Month
	2020/10
Row O	2020/11
1. Paid Month	2020/12
	2021/01
+ Add New	2021/02
	2021/03
Column O	2021/04
1. Incurred Month 🔹	2021/05
+ Add New	2021/06
+ Add New	2021/07



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.

ou cannot nest more than 5 metrics. Please sele	ect 5 or fewer r	netrics.		-	
vailable:			Selected:		
Search			II Medical Paid	1	
Dental Paid PEPM				-	
IP Paid PEPM					
Medical Paid PEPM		Add			
OP Paid PEPM		Pidd 7			
Out of Pocket % Cost Share		< Remove			
Pharmacy Paid PEPM					
Professional Paid PEPM		« Clear			
Total Paid PEPM					
% Deliveries Multiple Gestation					
% Females					
% IP Deliveries <= 39 Weeks					
% Males					
% of Deliveries	-				
					1 selected

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

Available:		Selected:	
Search		III Medical Paid	
Dental Paid PEPM			
IP Paid PEPM			
Medical Paid PEPM	Add>		
OP Paid PEPM			_
Out of Pocket % Cost Share	< Remove	e	
Pharmacy Paid PEPM			
Professional Paid PEPM	« Clear		
Total Paid PEPM			
% Deliveries Multiple Gestation			
% Females			
% IP Deliveries <= 39 Weeks			
% Males			
% of Deliveries	-		
			1 selected



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.

Select Metrics				
To add or remove metrics from the report, use the	e buttons. To	o determine the o	order of metrics on the report, drag.	
Available:			Selected:	
Paid				
Medical Paid PMPM				
OP Paid				
OP Paid PMPM		Add >		
Paid		Addr		_
Paid per Claimant		< Remove		
Paid per ER Visit				
Paid per IP Admission		« Clear		
Paid per IP Day				
Paid per OP Visit				
Paid per Prescription				
Paid per Professional Procedure				
Paid per Professional Visit				
Pharmacy Paid	•			
			You haven't selected any metrics.	0 selected
	[Apply Car	ncel	

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

n Lag						
[L.	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	
+ Add New		\$4,247.19	\$8,672.37	\$55,727.48	\$709,447.92	\$328,656.40
		\$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
alal Name	2021/06	\$545.17	-\$705.66	\$7,340.15	\$11,320.78	\$7,534.18
ad New	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
Update	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
	n Lag r dd New dd New Update	Paid Month 2020/10 2020/11 2020/12 2020/12 2021/01 2021/02 2021/03 2021/04 2021/05 2021/05 2021/06 2021/07 2021/08 2021/09 Total : Selected Filter(s)	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 : \$51,361,927.54 Filter(s) \$1,361,927.54	Paid Month 2020/10 2020/11 2020/10 \$376,688.94 2020/11 2020/11 \$514,406.74 \$371,666.66 2020/12 \$156,915.49 \$562,288.88 2021/01 \$226,663.95 \$63,392.45 2021/02 \$4,247.19 \$8,672.37 2021/03 \$3,770.43 \$6,510.37 2021/04 \$10,360.99 \$218,235.87 2021/05 \$62,858.49 \$2,2440.85 2021/05 \$62,858.49 \$2,2440.85 2021/05 \$62,858.49 \$2,2440.85 2021/05 \$62,858.49 \$2,2440.85 2021/05 \$62,858.49 \$2,2440.85 2021/05 \$62,858.49 \$2,2440.85 2021/06 \$545.17 -\$705.66 2021/07 \$4,608.88 \$1,224.03 2021/08 \$1,094.38 \$1,254.70 2021/09 -\$233.11 \$874.11 Total : \$545.1927.54 \$1,246,859.97 Filter(s) \$1,361,927.54 \$1,246,859.97	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 2020/10 \$226,663,95 \$63,392,45 \$629,712,50 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 2021/05 \$62,858,49 \$2,440,85 \$3,342.99 2021/05 \$62,858,49 \$2,440,85 \$3,342.99 2021/05 \$62,858,49 \$2,440,85 \$3,342.99 2021/07 \$4,608,88 \$12,229,37 \$4,289,96 2021/07 \$4,608,88 \$12,229,37 \$4,289,96 2021/08 \$1,094,38 \$1,254,70 \$1,704,07 2021/09	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 \$663,392.45 \$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 2021/05 \$62,858.49 \$2,440.85 \$3,342.99 \$14,884.73 2021/06 \$545.17 .5705.66 \$7,340.15 \$11,320.78 2021/07 \$4,608.88 \$12,229.37 .54,289.96 \$11,093.60 2021/08 \$1,094.38 \$1,254.70 \$1,704.07 \$4,445.11 2021/09 .5233.11 \$874.11



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.

Utilization 🔻	Financial 🔻	Enrollment 🔻	Presentation Reports 🔻	Explore 🔻	Favorites 🔻
← Home	Financial Ove	erview Dashboard			
Welcome, Joh	• Financial Yea	rly Trend nthly Trend			
Note! The landing pa	IP Services P OP Services I	aid Paid	intact support for	details or help.	
Alerts	Prof Services	Paid			
Aici to	Medical Paid	Lag			
247 IP (Network Ana	lysis			



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

Medical Claim Lag	
Account: All	
I≣ Metrics	Paid Month
	2020/10
Row O	2020/11
1. Paid Month	2020/12
	2021/01
+ Add New	2021/02
	2021/03
Column O	2021/04
1. Incurred Month	2021/05
+ Add New	2021/06
+ Add New	2021/07

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.

Select Metrics			
You cannot nest more than 5 metrics. Please select 5 or fe	wer metrics.		
Available:		Selected:	
Pharmacy Paid		III Medical Paid	
Pharmacy Paid PEPM			
Pharmacy Paid			
Pharmacy Paid PMPM	Add >		
	< Remove		
	« Clear		
			1 selected
	Apply Can	cel	



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			
2 ↓	Paid Month	2020/10	
	2020/10	\$376,688.94	
Row 🕑	2020/11	\$514,406.74	
1. Paid Month	2020/12	\$156,915.49	
	2021/01	\$226,663.95	
+ Add New	2021/02	\$4,247.19	
	2021/03	\$3,770.43	
Column	2021/04	\$10,360.99	
1. Incurred Month 🔹 🗙	2021/05	\$62,858.49	
+ Add New	2021/06	\$545.17	
· Aud New	2021/07	\$4,608.88	
2. Metrics 🔹	2021/08	\$1,094.38	
	2021/09	-\$233.11	
Update	Total : Selected Filter(s)	\$1,361,927.54	Ş

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		🔳 🕍 🕈 Favorite 🛛 🕫 Export 🗳 Option
Account: All		▼ All Fitter 2 in use
Type: Basic Advanced		Overview
		Add Filter Dear All Incurred Month trend last 12 Months Paid Month trend last 12 Months
Incurred Month	Trend v last 12 Months v Select Values	Enable Lag Period
Paid Month +	Trend Iast 12 Months Select Values	Enable Lag Period



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

34		20	2021/05		21/06	2	2021/07		2021/08		2021/09		lotal
Paid Month	narmacy Paid	Medical Paid	Pharmacy Paid	Medical Paid	Pharmacy Paid	Medical Paid	Pharmacy Paid						
2020/10												\$376,688.94	\$415,933.59
2020/11												\$886,073.40	\$461,410.08
2020/12												\$1,235,178.52	\$416,419.31
2021/01												\$1,194,810.16	\$355,477.72
2021/02		12										\$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	\$400,263.99
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	\$392,719.14
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
4													1

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.

Utilization 🗸	Financial 🔻	Enrollment 👻	Presentation Reports 👻	Explore 🕶	Favorites 🕶				
← Home	Financial Ove	rview Dashboard							
Welcome, Joh	Financial Yea Financial Moi	rly Trend nthly Trend							
Note! The landing pa	IP Services Pa OP Services P	aid Paid	intact support for o	details or help.					
Alerts	Prof Services								
AICTO	Medical Paid	Medical Paid Lag							
247 IP U	Network Ana	lysis							

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	
I≣ Metrics	Paid Month
	2020/10
Row O th	2020/11
1. Paid Month	2020/12
	2021/01
+ Add New	2021/02
	2021/03
column O	2021/04
1. Incurred Month 🔹	2021/05
+ Add New	2021/06
+ Add New	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. Plea	se select 5 or fewer metrics.	
Available:	Selected:	
paid	# Paid	
In-Network Paid	▲	
In-Network Paid %		
IP Paid	Add >	+1+
IP Paid PMPM		18
Medical Paid	< Remove	
Medical Paid PMPM		~
OP Paid	« Clear	
OP Paid PMPM		
Paid per Claimant		
Paid per ER Visit		
Paid per IP Admission		
Paid per IP Day		
Paid ner OP Visit	•	
		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 La	g				
Medical Claim	Lag				
	0				
Account: All					
1					
I Metrics	\ ↓	Paid Month	2020/10	2020/11	2020/12
		2020/10	\$376,688.94		
Row O		2020/11	\$514,406.74	\$371,666.66	
1. Paid Month	*	2020/12	\$156,915.49	\$562,288.88	\$515,974.15
	-	2021/01	\$226,663.95	\$63,392.45	\$629,712.50
+ A0	dd New	2021/02	\$4,247.19	\$8,672.37	\$55,727.48
		2021/03	\$3,770.43	\$6,510.37	\$18,375.67
Column O		2021/04	\$10,360.99	\$218,235.87	\$25,348.73
1. Incurred Month	*	2021/05	\$62,858.49	\$2,440.85	\$3,342.99
4.0	Id Now	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 Filter(s)	\$1,361,927.54	\$1,246,859.97	\$1,254,302.26

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

← ▼ Medical Paid Lag	
Medical Claim Lag	
Account: All	
	Daid Manth
	Paid Month
	2020/10
Row 😋	2020/11
1. Paid Month *	2020/12
	2021/01
+ Add New	2021/02
	2021/03
Column O	2021/04
1. Incurred Month *	2021/05
+ Add New	2021/06
+ Add New	2021/07

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

Medical Clai	im Lag				
Account: All					
I≣ Metrics	[I]	Paid Month	2020/10	2020/11	2020/12
		2020/10	\$376,688.94		
Row O		2020/11	\$514,406.74	\$371,666.66	
1 Service Category	Gr • ×	2020/12	\$156,915.49	\$562,288.88	\$515,974.15
	_	2021/01	\$226,663.95	\$63,392.45	\$629,712.50
2. \$10K Increase Pr	edi 🔹 🗙	2021/02	\$4,247.19	\$8,672.37	\$55,727.48
+	Add New	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.

Medical Claim Lag	5				
Account: All					
I≣ Metrics	Paid Month	2020/10	2020/11	2020/12	2021/01
	+12020/10	\$376,688.94			
Row O	12020/11	\$514,406.74	\$371,666.66		
1. Service Category Gr *	2020/12	\$156,915.49	\$562,288.88	\$515,974.15	
. Service category or	2021/01	\$226,663.95	\$63,392.45	\$629,712.50	\$275,041.26
2. Paid Month *	2021/02	\$4,247.19	\$8,672.37	\$55,727.48	\$709,447.92
+ Add New	2021/03	\$3,770.43	\$6,510.37	\$18,375.67	\$197,423.58



Click Update.

Medical Claim Lag	5					
Account: All						
I≣ Metrics	Ĩ	Paid Month	2020/10	2020/11	2020/12	2021/01
		2020/10	\$376,688.94			
Row O		2020/11	\$514,406.74	\$371,666.66		
1. Service Category Gr *	×	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
2. Paid Month	×	2021/02	\$4,247.19	\$8,672.37	\$55,727.48	\$709,447.92
+ Add New		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
Column		2021/06	\$545.17	-\$705.66	\$7,340.15	\$11,320.78
1. Incurred Month *		2021/07	\$4,608.88	\$12,229.37	-\$4,289.96	\$11,093.60
+ Add New		2021/08	\$1,094.38	\$1,254.70	\$1,704.07	\$4,445.11
+ Add New		2021/09	-\$233.11	\$874.11	\$1,066.48	\$1,484.47
Update		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.

2020/10	2020/11	2020/12	2021/01	2021/02	2021/03	2021/04	2021/05	2021/06	2021/07	
\$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	-
\$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	-
	-12- 								•	
									Showing 1 - 2 o	f2
	2020/10 \$1,361,927.54 \$1,361,927.54	2020/10 2020/11 \$1,361,927.54 \$1,246,859.97 \$1,361,927.54 \$1,246,859.97	2020/10 2020/11 2020/12 \$1,361,927.54 \$1,246,859.97 \$1,254,302.26 \$1,361,927.54 \$1,246,859.97 \$1,254,302.26	2020/10 2020/11 2020/12 2021/01 \$1,361,927.54 \$1,246,859.97 \$1,254,302.26 \$1,240,701.58 \$1,361,927.54 \$1,246,859.97 \$1,254,302.26 \$1,240,701.58 \$1,361,927.54 \$1,246,859.97 \$1,254,302.26 \$1,240,701.58	2020/10 2020/11 2020/12 2021/01 2021/02 \$1,361,927.54 \$1,246,859.97 \$1,254,302.26 \$1,240,701.58 \$852,229.23 \$1,361,927.54 \$1,246,859.97 \$1,254,302.26 \$1,240,701.58 \$852,229.23	2020/10 2020/11 2020/12 2021/01 2021/02 2021/03 \$1,361,927.54 \$1,246,859.97 \$1,254,302.26 \$1,240,701.58 \$852,229.23 \$1,789,636.57 \$1,361,927.54 \$1,246,859.97 \$1,254,302.26 \$1,240,701.58 \$852,229.23 \$1,789,636.57 \$1,361,927.54 \$1,246,859.97 \$1,254,302.26 \$1,240,701.58 \$852,229.23 \$1,789,636.57	2020/10 2020/11 2020/22 2021/01 2021/02 2021/03 2021/04 \$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 \$1,361,927.54 \$1,246,859.97 \$1,254,302.26 \$1,240,701.58 \$852,229.23 \$1,789,636.57 \$1,157,119.60	2020/10 2020/11 2020/12 2021/01 2021/02 2021/03 2021/04 2021/05 \$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 \$1,361,927.54 \$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	2020/10 2020/11 2020/12 2021/01 2021/02 2021/03 2021/04 2021/05 2021/06 \$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 \$1,361,927.54 \$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	2020/10 2020/11 2020/12 2021/01 2021/02 2021/03 2021/04 2021/05 2021/06 2021/07 \$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 \$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 \$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

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	\$532,321.3
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	\$523,234.6
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	\$493,560.6
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	\$1,549,116.7
<u>Pharmacy</u>										
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	\$1,549,116.7