

DataPoint User Guide

**Adding Variance Report Feature to Summary
Reports and Interpreting Metrics – Expert
Functionality**

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Purpose

The purpose of this user guide is to outline the following:

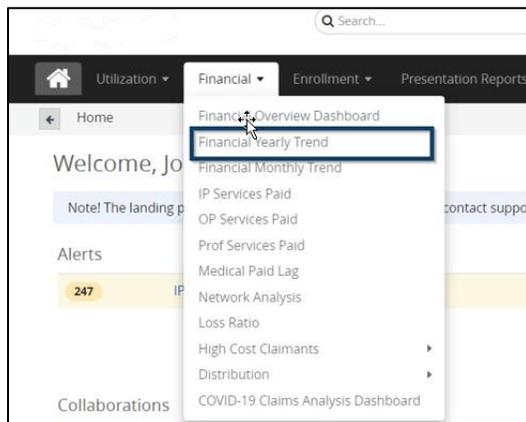
- adding the variance report feature
- customizing filters with variances
- interpreting metrics and drilling further into data

Overview

For advanced DataPoint users, it will be beneficial to understand variances in data over time (multiple quarters and/or years). Within the system, there are various summary reports that allow a user to drill down further into the data. The tool has a feature known as **Variance Reports** which will illustrate data trends over time once you select the filters, metrics, and dimensions desired. These trends may help the user understand the cost and frequency of utilization impacting your group plan and assist in making data-driven decisions. We will walk through a few examples in this user guide. If you need additional assistance, please contact datapoint@sentara.com.

Adding the Variance Report Feature to a Summary Report

Navigate to the Financial drop down and click on **Financial Yearly Trend**.



When you pull the standard **Financial Yearly Trend** report, you will see total claims year over year but will not see a variance.

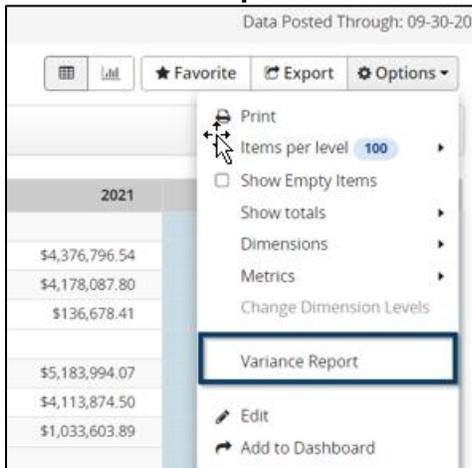


Service Category	2019	2020	2021	Total
Facility Inpatient				
Allowed	\$6,064,398.46	\$4,634,387.87	\$4,376,796.54	\$15,075,582.87
Paid	\$5,745,673.24	\$4,376,594.80	\$4,178,087.80	\$14,300,355.84
Out of Pocket	\$213,251.61	\$199,530.68	\$136,678.41	\$549,460.70
Facility Outpatient				
Allowed	\$7,004,418.99	\$5,975,298.76	\$5,183,994.07	\$18,163,711.82
Paid	\$5,398,750.81	\$4,721,697.06	\$4,113,874.50	\$14,234,322.37
Out of Pocket	\$1,466,529.96	\$1,209,834.16	\$1,033,603.89	\$3,709,968.01
Pharmacy				
Allowed	\$4,906,825.31	\$5,347,556.97	\$4,132,629.40	\$14,387,011.68
Paid	\$4,257,094.89	\$4,664,464.00	\$3,652,291.04	\$12,573,849.93
Out of Pocket	\$649,730.42	\$683,092.97	\$480,338.36	\$1,813,161.75
Professional				
Allowed	\$7,302,441.20	\$6,230,574.24	\$4,945,481.56	\$18,478,497.00
Paid	\$5,431,610.01	\$4,629,828.33	\$3,665,712.68	\$13,727,151.02
Out of Pocket	\$1,682,859.38	\$1,427,199.35	\$1,166,531.33	\$4,276,590.06
Total : Allowed	\$25,278,083.96	\$22,187,817.84	\$18,638,901.57	\$66,104,803.37
Total : Paid	\$20,833,128.95	\$18,392,584.19	\$15,609,966.02	\$54,835,679.16

To understand the variance year over year, click **Options** on the right-hand side of the report.



Click **Variance Report**.



You can then choose your **Report Format**, **Variance Type**, and **Display Preferences**.

Tip: It is recommended to leave the **Report Format** and **Variance Type** options as is. It is also recommended that you change **Display Preferences** to **Show Percent (%) Variance**. This will illustrate the relative changes over time vs. absolute value of the change.

Click **Create Report**.

Create Variance Report

Report Format: Horizontal (Left to Right) Vertical (Top to Bottom)

Variance Type: Rolling Variance Variance to Average Variance to Target

Display Preferences: Show Absolute (#) Variance Show Percent (%) Variance Show Both

Category	April	May	May %Var
A	123	26	-79%
B	5	8	+60%
C	36	118	+231%
D	93	56	-40%
E	40	13	-68%
F	66	52	-14%
G	68	32	-54%
H	353	301	-15%
I	97	115	+19%
J	52	25	-40%
K	2	3	+50%
Total	926	755	-18%

By creating a variance report for the **Financial Yearly Trend** report, you can see the percent (%) variance year-over-year.

Service Category	2019	2020	2020 % Var	2021	2021 % Var
Facility Inpatient					
Allowed	\$6,064,398.46	\$4,634,387.87	↓ -23.58%	\$4,376,796.54	↓ -5.56%
Paid	\$5,745,673.24	\$4,376,594.80	↓ -23.83%	\$4,178,087.80	↓ -4.54%
Out of Pocket	\$213,251.61	\$199,530.68	↓ -6.43%	\$136,678.41	↓ -31.50%
Facility Outpatient					
Allowed	\$7,004,418.99	\$5,975,298.76	↓ -14.69%	\$5,183,994.07	↓ -13.24%
Paid	\$5,398,750.81	\$4,721,697.06	↓ -12.54%	\$4,113,874.50	↓ -12.87%
Out of Pocket	\$1,466,529.96	\$1,209,834.16	↓ -17.50%	\$1,033,603.89	↓ -14.57%
Pharmacy					
Allowed	\$4,906,825.31	\$5,347,556.97	↑ +8.98%	\$4,132,629.40	↓ -22.72%
Paid	\$4,257,094.89	\$4,664,464.00	↑ +9.57%	\$3,652,291.04	↓ -21.70%
Out of Pocket	\$649,730.42	\$683,092.97	↑ +5.13%	\$480,338.36	↓ -29.68%
Professional					
Allowed	\$7,302,441.20	\$6,230,574.24	↓ -14.68%	\$4,945,481.56	↓ -20.63%
Paid	\$5,431,610.01	\$4,629,828.33	↓ -14.76%	\$3,665,712.68	↓ -20.82%
Out of Pocket	\$1,682,859.38	\$1,427,199.35	↓ -15.19%	\$1,166,531.33	↓ -18.26%
Total : Allowed	\$25,278,083.96	\$22,187,817.84	↓ -12.23%	\$18,638,901.57	↓ -15.99%
Total : Paid	\$20,833,128.95	\$18,392,584.19	↓ -11.71%	\$15,609,966.02	↓ -15.13%

Customizing Filters with Variances

You have the option to change the paid years filter to a paid quarter filter to see a quarter over quarter comparison.

To do this, click on **All Filters** and change **Paid Year** to **Paid Quarter** by searching for **Paid Quarter**. Choose **Trend** and **4 Quarters** to give the most recent four quarters' information.

Before you click update, ensure you have updated your Column to **Paid Quarter** as well.

Click **Update**.

Financial Yearly Trend

Account: All

Type: Basic Advanced

Overview

+ Add Filter Clear All Paid Quarter trend last 4 Quarters

Paid Quarter Trend last 4 Quarters

Select Values Enable Lag Period

Update Cancel

Service Category	2020Q4	2021Q1	2021Q1 % Var	2021Q2	2021Q2 % Var	2021Q3	2021Q3 % Var
Facility, Inpatient							
Allowed	\$1,618,425.63	\$1,470,965.80	-9.11%	\$1,406,747.27	-4.37%	\$1,499,083.47	+6.56%
Paid	\$1,551,914.05	\$1,410,172.20	-9.13%	\$1,358,865.91	-3.64%	\$1,409,049.69	+3.69%
Out of Pocket	\$22,473.19	\$59,175.60	+163.32%	\$39,303.05	-33.58%	\$38,199.76	-2.81%
Facility, Outpatient							
Allowed	\$1,476,411.49	\$1,572,471.19	+6.51%	\$1,779,861.09	+13.19%	\$1,831,661.79	+2.91%
Paid	\$1,151,971.01	\$1,160,757.63	+0.76%	\$1,468,340.32	+26.50%	\$1,484,776.55	+1.12%
Out of Pocket	\$312,719.21	\$391,060.90	+25.05%	\$304,226.24	-22.20%	\$338,316.75	+11.21%
Pharmacy							
Allowed	\$1,388,059.80	\$1,405,505.02	+1.26%	\$1,414,116.37	+0.61%	\$1,313,008.01	-7.15%

Your report will now show a quarter over quarter comparison.

Financial Yearly Trend

Account: All

Metrics

Service Category

2020Q4 2021Q1 2021Q1 % Var 2021Q2 2021Q2 % Var 2021Q3 2021Q3 % Var

Service Category	2020Q4	2021Q1	2021Q1 % Var	2021Q2	2021Q2 % Var	2021Q3	2021Q3 % Var
Facility, Inpatient							
Allowed	\$1,618,425.63	\$1,470,965.80	-9.11%	\$1,406,747.27	-4.37%	\$1,499,083.47	+6.56%
Paid	\$1,551,914.05	\$1,410,172.20	-9.13%	\$1,358,865.91	-3.64%	\$1,409,049.69	+3.69%
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Out of Pocket	\$312,719.21	\$391,060.90	+25.05%	\$304,226.24	-22.20%	\$338,316.75	+11.21%
Pharmacy							
Allowed	\$1,388,059.80	\$1,405,505.02	+1.26%	\$1,414,116.37	+0.61%	\$1,313,008.01	-7.15%
Paid	\$1,260,242.04	\$1,206,120.95	-4.29%	\$1,267,106.56	+5.06%	\$1,179,063.53	-6.95%
Out of Pocket	\$127,817.76	\$199,384.07	+55.99%	\$147,009.81	-26.27%	\$133,944.48	-8.89%
Professional							
Allowed	\$1,608,489.35	\$1,680,208.14	+4.46%	\$1,475,353.10	-12.19%	\$1,789,920.32	+21.32%
Paid	\$1,240,530.17	\$1,202,132.83	-3.10%	\$1,095,851.35	-8.84%	\$1,367,728.50	+24.81%
Out of Pocket	\$315,201.22	\$421,918.45	+33.86%	\$344,656.03	-18.31%	\$399,956.85	+16.05%
Total : Allowed	\$6,091,386.27	\$6,129,150.15	+0.62%	\$6,076,077.83	-0.87%	\$6,433,073.59	+5.89%
Total : Paid	\$5,204,657.27	\$4,979,183.61	-4.33%	\$5,190,164.14	+4.24%	\$5,440,618.27	+4.83%

Identifying Trends

After you have created your report, you can then drill down into certain data points to begin an impact analysis.

Click on **Facility Inpatient** to begin a deeper dive into utilization impacting the financial change of the applicable service category (e.g., Facility Inpatient).

Financial Yearly Trend

Account: All

Metrics 3

Row 1. Service Category x 2. Metrics x + Add New

Column 1. Paid Quarter

Service Category	2020Q4	2021Q1	2021Q1 % Var	2021Q2	2021Q2 % Var
Facility Inpatient					
Allowed	\$1,618,425.63	\$1,470,965.80	-9.11%	\$1,406,747.27	-4.37%
Paid	\$1,551,914.05	\$1,410,172.20	-9.13%	\$1,358,865.91	-3.64%
Out of Pocket	\$22,473.19	\$59,175.60	+163.32%	\$39,303.05	-33.58%
Facility Outpatient					
Allowed	\$1,476,411.49	\$1,572,471.19	+6.51%	\$1,779,861.09	+13.19%
Paid	\$1,151,971.01	\$1,160,757.63	+0.76%	\$1,468,340.32	+26.50%
Out of Pocket	\$312,719.21	\$391,060.90	+25.05%	\$304,226.24	-22.20%
Pharmacy					
Allowed	\$1,388,059.80	\$1,405,505.02	+1.26%	\$1,414,116.37	+0.61%

By selecting **Facility Inpatient**, a service category filter auto populates to include only **Facility Inpatient**. To see this, click on **All Filters** at the top right of the screen.

Financial Yearly Trend

Account: All

Type: Basic Advanced

Overview

+ Add Filter Clear All

Paid Quarter trend last 4 Quarters Service Category includes [Facility Inpatient]

Paid Quarter Trend last 4 Quarters

Service Category Includes (Facility Inpatient x)

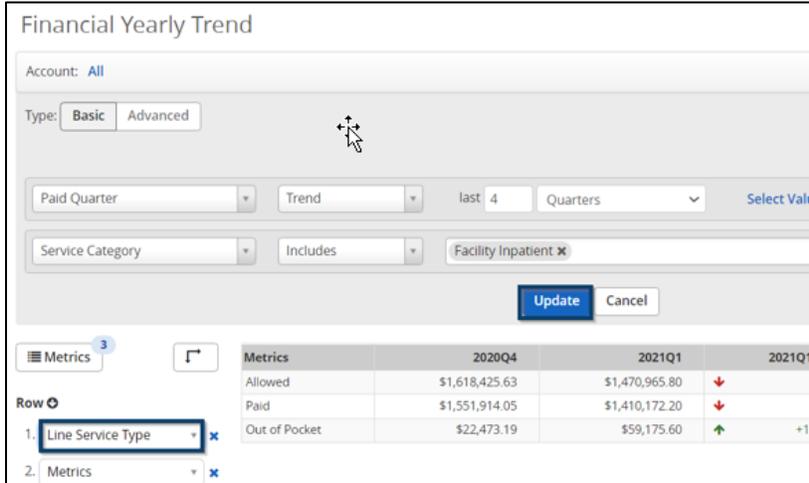
Update Cancel

Metrics 3

Row 1. Service Category x

Metrics	2020Q4	2021Q1	2021Q1 % Var	2021Q2	2021Q2 % Var	2021Q3	2021Q3 % Var
Allowed	\$1,618,425.63	\$1,470,965.80	-9.11%	\$1,406,747.27	-4.37%	\$1,499,083.47	+6.56%
Paid	\$1,551,914.05	\$1,410,172.20	-9.13%	\$1,358,865.91	-3.64%	\$1,409,049.69	+3.69%
Out of Pocket	\$22,473.19	\$59,175.60	+163.32%	\$39,303.05	-33.58%	\$38,199.76	-2.81%

To drill down further into the data, you can also update your **Row** and **Column** information. Building on this example, search for **Line Service Type** under your Row option 1. Click **Update**.



Financial Yearly Trend

Account: All

Type: Basic Advanced

Paid Quarter Trend last 4 Quarters Select Value

Service Category Includes Facility Inpatient x

Update Cancel

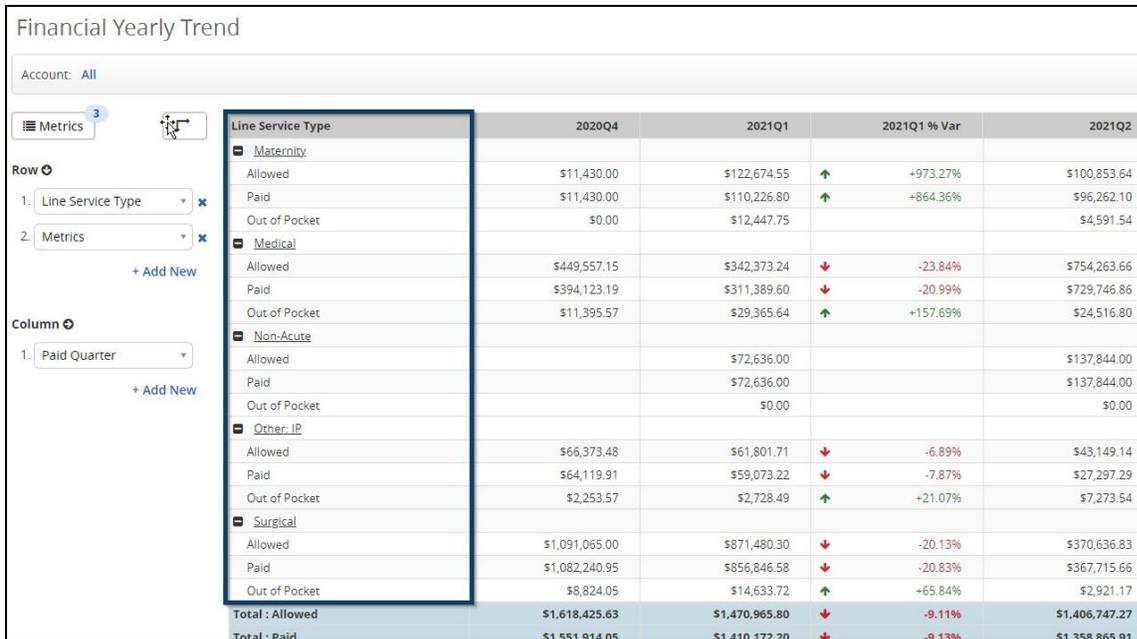
Metrics 3

Metrics	2020Q4	2021Q1	2021Q1
Allowed	\$1,618,425.63	\$1,470,965.80	↓
Paid	\$1,551,914.05	\$1,410,172.20	↓
Out of Pocket	\$22,473.19	\$59,175.60	↑ +16

Row 1. Line Service Type x

2. Metrics x

Your report will now show more detailed information on facility inpatient costs.



Financial Yearly Trend

Account: All

Metrics 3

Row 1. Line Service Type x

2. Metrics x

+ Add New

Column 1. Paid Quarter x

+ Add New

Line Service Type	2020Q4	2021Q1	2021Q1 % Var	2021Q2
Maternity				
Allowed	\$11,430.00	\$122,674.55	↑ +973.27%	\$100,853.64
Paid	\$11,430.00	\$110,226.80	↑ +864.36%	\$96,262.10
Out of Pocket	\$0.00	\$12,447.75		\$4,591.54
Medical				
Allowed	\$449,557.15	\$342,373.24	↓ -23.84%	\$754,263.66
Paid	\$394,123.19	\$311,389.60	↓ -20.99%	\$729,746.86
Out of Pocket	\$11,395.57	\$29,365.64	↑ +157.69%	\$24,516.80
Non-Acute				
Allowed		\$72,636.00		\$137,844.00
Paid		\$72,636.00		\$137,844.00
Out of Pocket		\$0.00		\$0.00
Other-IP				
Allowed	\$66,373.48	\$61,801.71	↓ -6.89%	\$43,149.14
Paid	\$64,119.91	\$59,073.22	↓ -7.87%	\$27,297.29
Out of Pocket	\$2,253.57	\$2,728.49	↑ +21.07%	\$7,273.54
Surgical				
Allowed	\$1,091,065.00	\$871,480.30	↓ -20.13%	\$370,636.83
Paid	\$1,082,240.95	\$856,846.58	↓ -20.83%	\$367,715.66
Out of Pocket	\$8,824.05	\$14,633.72	↑ +65.84%	\$2,921.17
Total : Allowed	\$1,618,425.63	\$1,470,965.80	↓ -9.11%	\$1,406,747.27
Total : Paid	\$1,551,914.05	\$1,410,172.20	↓ -9.13%	\$1,358,865.91

Tip: Once you have created a variance report, you can set an alert for certain metrics and save the report as a **Favorite**. Please reference the *Alerts User Guide* and the *Overall Basic Functionality User Guide* on steps for creating alerts and/or saving reports as a **Favorite**.

Interpreting Metrics

Once you have added the variance feature to your **Summary Report**, you can begin interpreting what the data is telling you. As stated previously, it is best to have a large enough period of review to really interpret metrics to be able to make data-driven decisions. Below are two examples that provide insights into interpreting the metrics in these summary reports.

Financial Yearly Trend (Quarterly View with Variance Report)

Continuing with the above example, looking at just the **Surgical** rows under **Line Service Type**, you will notice changes quarter-over-quarter. In the below example we see the trend in **Surgical** going down each quarter in plan-paid dollars (shown in the **Paid** row). We also notice trends in member **Out of Pocket** costs. You can see **Out of Pocket** costs increased from Q4 2020 to Q1 2021. This could be a result of deductibles resetting for a new plan year. However, moving into Q2 vs. Q1, we see a decrease in member **Out of Pocket** costs.

Drill down to the absolute dollars to help put percentages in context.

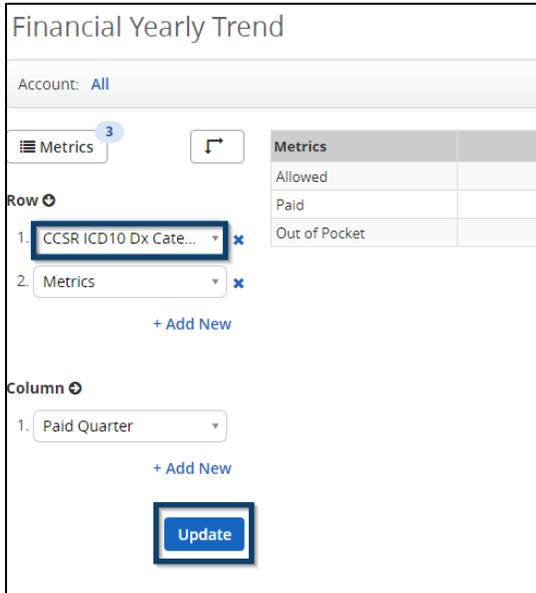
Line Service Type	2020Q4	2021Q1	2021Q1 % Var	2021Q2	2021Q2 % Var	2021Q3	2021Q3 % Var
Surgical							
Allowed	\$1,091,065.00	\$871,480.30	↓ -20.13%	\$370,636.83	↓ -57.47%	\$225,399.35	↓ -39.19%
Paid	\$1,082,240.95	\$856,846.58	↓ -20.83%	\$367,715.66	↓ -57.09%	\$196,955.85	↓ -46.44%
Out of Pocket	\$8,824.05	\$14,633.72	↑ +65.84%	\$2,921.17	↓ -80.04%	\$3,794.50	↑ +29.90%

How to Drill Down into Data

To dig deeper into the **Surgical** data to understand drivers, click on **Surgical**.

Surgical							
Allowed	\$1,091,065.00	\$871,480.30	↓ -20.13%	\$370,636.83	↓ -57.47%	\$225,399.35	↓ -39.19%
Paid	\$1,082,240.95	\$856,846.58	↓ -20.83%	\$367,715.66	↓ -57.09%	\$196,955.85	↓ -46.44%
Out of Pocket	\$8,824.05	\$14,633.72	↑ +65.84%	\$2,921.17	↓ -80.04%	\$3,794.50	↑ +29.90%

Update Row 1 to **CCSR ICD10 Dx Category** and click **Update**.



Financial Yearly Trend

Account: All

Metrics

Row

1. CCSR ICD10 Dx Cate... x

2. Metrics x

+ Add New

Column

1. Paid Quarter

+ Add New

Update

Metrics	
Allowed	
Paid	
Out of Pocket	

Your report will now populate with a quarter-over-quarter view of the CCSR ICD10 Dx Categories within the **Inpatient Surgical Service Type**. Several conclusions can be made. Some examples are outlined below:

1. **Diseases of the Circulatory System** – there is little change in absolute **Allowed** and **Paid** dollars from Q4 to Q1 in this Dx category. However, there is a decrease in absolute **Allowed** and **Paid** dollars from Q2 to Q1 indicating less inpatient surgical costs on the Circulatory System.
2. **Diseases of the Digestive System** – there is a significant decrease in absolute **Allowed** and **Paid** dollars from Q4 to Q1 in this Dx category. This Dx category impacted the net variance for the **Surgical Service Type**.
3. **Diseases of the Musculoskeletal System and Connective Tissue** – there is a significant increase in the absolute **Allowed** and **Paid** costs from Q4 to Q1. Additionally, this category is a driver for the **Inpatient Surgical Out of Pocket** costs from Q4 to Q1.

Financial Yearly Trend

Account: All

Metrics: 3

Column: 1. Paid Quarter

CCSR ICD10 Dx Category	2020Q4	2021Q1	2021Q1 % Var	2021Q2	2021Q2 % Var	2021Q3	2021Q3 % Var
Congenital Malformations, Deformations and Chromosomal Abnormalities							
Allowed				\$91,834.36			↓ -100.00%
Paid				\$91,834.36			↓ -100.00%
Out of Pocket				\$0.00			
Diseases of the Blood and Blood Forming Organs and Certain Disorders Involving the Immune Mechanism							
Allowed		\$156,875.69		-\$1,334.19	↓ -100.85%		↑ +100.00%
Paid		\$156,875.69		-\$1,334.19	↓ -100.85%		↑ +100.00%
Out of Pocket		\$0.00		\$0.00			
Diseases of the Circulatory System							
Allowed	\$299,609.92	\$300,000.48	↑ +0.13%	\$192,149.65	↓ -35.95%		↓ -100.00%
Paid	\$294,489.86	\$295,951.65	↑ +0.50%	\$191,246.23	↓ -35.38%		↓ -100.00%
Out of Pocket	\$5,120.06	\$4,048.83	↓ -20.92%	\$903.42	↓ -77.69%		↓ -100.00%
Diseases of the Digestive System							
Allowed	\$569,687.86	\$60,098.00	↓ -89.46%		↓ -100.00%	\$137,275.19	
Paid	\$569,687.86	\$57,180.90	↓ -89.96%		↓ -100.00%	\$135,525.79	
Out of Pocket	\$0.00	\$2,877.10			↓ -100.00%	\$1,749.40	
Diseases of the Musculoskeletal System and Connective Tissue							
Allowed	\$75,832.00	\$146,751.88	↑ +93.52%		↓ -100.00%		
Paid	\$74,974.71	\$144,212.34	↑ +92.35%		↓ -100.00%		
Out of Pocket	\$857.29	\$2,539.54	↑ +196.23%		↓ -100.00%		

Tip: The Utilization Metrics (PMPMs, PEPMs, Metrics per 1,000) can also be used to identify trends for drivers in these categories. As always, users may contact datapoint@sentara.com for additional guidance.