

# SHERLOCK EXPENSE EVALUATION REPORT

## Medicare Edition - 2016

### *Volume II: Operational Metrics*



SHERLOCK COMPANY

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November 2016

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## Tab 2

### Summary of Operational Metrics

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Tab 4

**Provider Network Management and Services**

Provider Network Management & Services responds to inquiries from providers, contracts with providers for care delivered to members, is the liaison for provider appeals (whose coordinating responsibility resets with customer services), credentials providers for eligibility for contracts, issues report cards to provider and audits and validates provider activity.

Metric	Page	Definition	Calculation
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*Provider Relations Service Metrics:*

This sub-function responds to inquiries from providers.

**Provider Relations Services Cost Summary**

Per Member

Manual Inquiries

	Manual Inquiries per Member.....	95
x	Members per FTE.....	95
=	Manual Inquiries per FTE per Year.....	95
x	Provider Relations Services Cost per Manual Inquiry.....	95
=	Provider Relations Services Cost per FTE.....	95
x	FTEs per 10,000 Members.....	95
=	Provider Relations Services Costs PMPM.....	95

Total Inquiries

	Total Inquiries per Member.....	95
x	Members per FTE.....	95
=	Total Inquiries per FTE per Year.....	95
x	Provider Relations Services Cost per Total Inquiry.....	95
=	Provider Relations Services Cost per FTE.....	95
x	FTEs per 10,000 Members.....	95
=	Provider Relations Services Costs PMPM.....	95

Per Provider

Manual Inquiries

	Manual Inquiries per Provider.....	96
x	Providers per FTE.....	96
=	Manual Inquiries per FTE per Year.....	96
x	Provider Relations Services Cost per Manual Inquiry.....	96
=	Provider Relations Services Cost per FTE.....	96
x	FTEs per 10,000 Providers.....	96
=	Provider Relations Services Costs per Provider per Year.....	96

Total Inquiries

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Total Provider Inquiries .....	<a href="#">101</a>		

**Provider Network Management and Services**

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*Provider Contracting Metrics:*

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Tab 5

**Enrollment / Membership / Billing**

Enrollment / Membership / Billing processes group and membership transactions, processes invoices and maintains population demographics.

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=		Costs per FTE.....	<a href="#">121</a>
x		FTEs per 10,000 Members.....	<a href="#">121</a>
=		Costs per Member per Month.....	<a href="#">121</a>
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x		Members per FTE.....	<a href="#">121</a>
=		Total Transactions per FTE per Year.....	<a href="#">121</a>
x		Enrollment Cost per Total Transaction.....	<a href="#">121</a>
=		Costs per FTE.....	<a href="#">121</a>
x		FTEs per 10,000 Members.....	<a href="#">121</a>
=		Costs per Member per Month.....	<a href="#">121</a>
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+		Enrollment Total Staffing Costs per Total FTE.....	<a href="#">121</a>
=		Enrollment Total Costs per Total FTE.....	<a href="#">121</a>
x		Enrollment Total FTEs per 10,000 Members.....	<a href="#">121</a>
=		Enrollment Cost per Member per Month.....	<a href="#">121</a>
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**Enrollment / Membership / Billing**

<b>Metric</b>	<b>Page</b>	<b>Definition</b>	<b>Calculation</b>
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Electronic Transactions Requiring Manual Intervention.....	<a href="#">127</a>		
All Other Manual.....	<a href="#">127</a>		
Total Manual Transactions.....	<a href="#">128</a>		
Automated			
Direct to System.....	<a href="#">128</a>		
Other.....	<a href="#">129</a>		
Total Automated Electronic.....	<a href="#">129</a>		
Total Member Transactions.....	<a href="#">130</a>		
Note: Total Enrollment Transactions per Member per Year.....	<a href="#">130</a>		
<u>Composition of Total Member Transactions</u>			
Manual			
Electronic Transactions Requiring Manual Intervention.....	<a href="#">131</a>		
All Other Manual.....	<a href="#">131</a>		
Total Manual Transactions.....	<a href="#">132</a>		
Automated			
Direct to System.....	<a href="#">132</a>		
Other.....	<a href="#">133</a>		
Total Automated Electronic.....	<a href="#">133</a>		
Total Member Transactions.....	<a href="#">134</a>		
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**Enrollment / Membership / Billing**

<b>Metric</b>	<b>Page</b>	<b>Definition</b>	<b>Calculation</b>
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40 - 44.....	<a href="#">140</a>		
< 45 (sum of above).....	<a href="#">140</a>		
45 - 49.....	<a href="#">140</a>		
50 - 54.....	<a href="#">140</a>		
55 - 59.....	<a href="#">140</a>		
60 - 65.....	<a href="#">140</a>		
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## Tab 6

### Customer Services

The Customer Services function responds to customer inquiries and coordinates appeals.

---

Metric	Page	Definition	Calculation
<b>Customer Services Cost Summary</b>			
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x Customer Service Cost per Manual Inquiry.....	<a href="#">149</a>		
= Costs per FTE.....	<a href="#">149</a>		
x FTEs per 10,000 Members.....	<a href="#">149</a>		
= Costs per Member per Month.....	<a href="#">149</a>		
<u>Staffing vs. Non-Labor</u>			
Customer Services Total Non-Labor Cost per Total FTE.....	<a href="#">149</a>		
+ Customer Services Total Staffing Costs per Total FTE.....	<a href="#">149</a>		
= Customer Services Total Costs per Total FTE.....	<a href="#">149</a>		
x Customer Services Total FTEs per 10,000 Members.....	<a href="#">149</a>		
= Customer Services Cost per Member per Month.....	<a href="#">149</a>		
Percent of Customer Services Costs that are Staffing.....	<a href="#">149</a>		
Percent of Customer Services Costs that are Non-Labor.....	<a href="#">149</a>		
Percent of Customer Services Costs that are Outsourced.....	<a href="#">149</a>		
Percent of Customer Services Staffing that is Outsourced.....	<a href="#">149</a>		
<b>Inquiries</b>			
<u>Inquiries per Member per Year, by Mode and Product</u>			
Manual			
Manual Calls.....	<a href="#">150</a>		
Paper/Written Inquiries.....	<a href="#">150</a>		
Manual Electronic Inquiries.....	<a href="#">151</a>		
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**Customer Services**

<b>Metric</b>	<b>Page</b>	<b>Definition</b>	<b>Calculation</b>
<b>Inquiries (continued)</b>			
<u>Percent of Total Inquiries, by Mode and Product</u>			
Manual			
Manual Calls.....	<a href="#">154</a>		
Paper/Written Inquiries .....	<a href="#">154</a>		
Manual Electronic Inquiries.....	<a href="#">155</a>		
Total Manual Inquiries.....	<a href="#">155</a>		
Automated Calls.....	<a href="#">156</a>		
Total Member Inquiries .....	<a href="#">156</a>		
Percent of Total Calls Received that are Manual.....	<a href="#">157</a>		
<u>Product Mix of Inquiries</u>			
Manual			
Manual Calls.....	<a href="#">158</a>		
Paper/Written Inquiries .....	<a href="#">158</a>		
Manual Electronic Inquiries.....	<a href="#">159</a>		
Total Manual Inquiries.....	<a href="#">159</a>		
Automated Calls.....	<a href="#">160</a>		
Total Member Inquiries .....	<a href="#">160</a>		
<u>Reasons for Inquiries Per Member Per Year, by Product</u>			
Benefit Lookup.....	<a href="#">161</a>		
Eligibility.....	<a href="#">161</a>		
Claims Status.....	<a href="#">162</a>		
Provider Check.....	<a href="#">162</a>		
Billing.....	<a href="#">163</a>		
Other.....	<a href="#">163</a>		
Total Inquiries.....	<a href="#">164</a>		
<u>Reasons for Inquiries as a Percent of Total Inquiries</u>			
Benefit Lookup.....	<a href="#">165</a>		
Eligibility.....	<a href="#">165</a>		
Claims Status.....	<a href="#">166</a>		
Provider Check.....	<a href="#">166</a>		
Billing.....	<a href="#">167</a>		
Other.....	<a href="#">167</a>		
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**Customer Services**

<b>Metric</b>	<b>Page</b>	<b>Definition</b>	<b>Calculation</b>
<b>Member Portal</b>			
Name and Vendor of Portal Used.....	<a href="#">169</a>		
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Percent of Members with Registered Accounts.....	<a href="#">169</a>		
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Percent Transfer.....	<a href="#">171</a>		
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<b>Timeliness of Customer Services Response</b>			
Days to Resolve Inquiries.....	<a href="#">173</a>		
First Call Resolution Rate.....	<a href="#">173</a>		
<b>Member Appeals</b>			
Percent of Appeals Overturned.....	<a href="#">174</a>		
Percent of Appeals Upheld.....	<a href="#">174</a>		
Appeals per 10,000 Members.....	<a href="#">175</a>		

Tab 7

Claim and Encounter Capture and Adjudication

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Suspended Claims per Member.....	181		
x Members per FTE.....	181		
= Suspended Claims Processed per FTE per Year.....	181		
x Cost per Suspended Claim.....	181		
= Costs per FTE.....	181		
x FTEs Per 10,000 Members.....	181		
= Costs per Member Per Month.....	181		
<u>Total Claims</u>			
x Claims Processed Per Member.....	181		
= Members Per FTE.....	181		
x Claims Processed Per FTE Per Year.....	181		
= Cost per Claims Processed.....	181		
x Costs Per FTE.....	181		
= FTEs Per 10,000 Members.....	181		
Costs Per Member Per Month.....	181		
<u>Staffing vs. Non-Labor</u>			
Claims Processing Total Non-Labor Cost per Total FTE.....	181		
+ Claims Processing Staffing Costs per Total FTE.....	181		
= Claims Processing Total Costs per Total FTE.....	181		
x Claims Processing Total FTEs per 10,000 Members.....	181		
= Claims Processing Cost per Member per Month.....	181		
Percent of Claims Processing Costs that are Staffing.....	181		
Percent of Claims Processing Costs that are Non-Labor.....	181		
Percent of Claims Processing Costs that are Outsourced.....	181		
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<b>Volume of Claims</b>			
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Paper Receipts as a Percent of Total Receipts.....	182		
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Total Receipts Per Member Per Year.....	184		

## Claim and Encounter Capture and Adjudication

Metric	Page	Definition	Calculation
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Total Receipts Rejected Per Member Per Year.....	<a href="#">187</a>		
Total Rejected Receipts as a Percent of Total Receipts.....	<a href="#">187</a>		
<u>Processed Claims</u>			
Paper Claims Processed Per Member Per Year.....	<a href="#">188</a>		
Paper Claims Processed as a Percent of Total Claims.....	<a href="#">188</a>		
Paper Claims Processed as a Percent of Paper Receipts.....	<a href="#">189</a>		
Electronic Claims Processed Per Member Per Year.....	<a href="#">190</a>		
Electronic Claims Processed as a Percent of Total Claims.....	<a href="#">190</a>		
Electronic Claims Processed as a Percent of Electronic Receipts.....	<a href="#">191</a>		
Total Claims Processed Per Member Per Year.....	<a href="#">192</a>		
Total Claims Processed as a Percent of Total Receipts.....	<a href="#">192</a>		
Cost per Processed Claim.....	<a href="#">193</a>		
<u>Autoadjudicated Claims</u>			
Paper Claims Autoadjudicated Per Member Per Year.....	<a href="#">194</a>		
Paper Auto-Adjudication Rate.....	<a href="#">194</a>		
Paper Claims Autoadjudicated as Percent of Total Claims Autoadjudicated.....	<a href="#">195</a>		
Electronic Claims Autoadjudicated Per Member Per Year.....	<a href="#">196</a>		
Electronic Autoadjudication Rate.....	<a href="#">196</a>		
Electronic Claims Autoadjudicated as Percent of Total Claims Autoadjudicated.....	<a href="#">197</a>		
Total Claims Autoadjudicated Per Member Per Year.....	<a href="#">198</a>		
Total Claims Auto-Adjudication Rate.....	<a href="#">198</a>		
<u>Suspended Claims (Claims Requiring Manual Intervention)</u>			
Paper Claims Suspended Per Member Per Year.....	<a href="#">199</a>		
Paper Suspension Rate.....	<a href="#">199</a>		
Electronic Claims Suspended Per Member Per Year.....	<a href="#">200</a>		
Electronic Suspension Rate.....	<a href="#">200</a>		
Total Claims Suspended Per Member Per Year.....	<a href="#">201</a>		
Total Suspension Rate.....	<a href="#">201</a>		
Cost per Suspended Claim.....	<a href="#">202</a>		

**Claim and Encounter Capture and Adjudication**

<b>Metric</b>	<b>Page</b>	<b>Definition</b>	<b>Calculation</b>
<b>Volume of Claims (continued)</b>			
<u>Adjusted Claims</u>			
Total Claims Adjusted Per Member Per Year.....	<a href="#">203</a>		
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Encounters Paid via Capitation Per Member Per Year.....	<a href="#">206</a>		
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15 - 30 days.....	<a href="#">209</a>		
31 - 60 days.....	<a href="#">210</a>		
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Tab 8  
Information Systems

Metric	Page	Definition	Calculation
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x IS Costs per Total FTE.....	<a href="#">223</a>		
= IS Costs per IS FTE.....	<a href="#">223</a>		
x IS FTEs per 10,000 Members.....	<a href="#">223</a>		
= Cost per Member per Month.....	<a href="#">223</a>		
<b>Effect of IS Allocated by Supported Functional Area</b>			
IS After Allocation as a Percent of Total IS.....	<a href="#">223</a>		
x Total IS PMPM.....	<a href="#">223</a>		
= IS Costs PMPM, After Allocation.....	<a href="#">223</a>		
x Non-IS Costs PMPM, After Allocation.....	<a href="#">223</a>		
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<b>Internal vs. Outsourced FTE Costs</b>			
Internal IS Expenses per Internal FTE.....	<a href="#">223</a>		
Outsourced IS Expenses per Outsourced FTE.....	<a href="#">223</a>		
<b>Staffing vs. Non-Labor</b>			
Information Systems Total Non-Labor Cost per Total FTE.....	<a href="#">224</a>		
+ Information Systems Total Staffing Costs per Total FTE.....	<a href="#">224</a>		
= Information Systems Total Costs per Total FTE.....	<a href="#">224</a>		
x Information Systems Total FTEs per 10,000 Members.....	<a href="#">224</a>		
= Information Systems Cost per Member per Month.....	<a href="#">224</a>		
Percent of Information Systems Costs that are Non-Labor.....	<a href="#">224</a>		
Percent of Information Systems Costs that are Staffing.....	<a href="#">224</a>		
Percent of Information Systems Costs that are Outsourced.....	<a href="#">224</a>		
Percent of Information Systems Staffing that is Outsourced.....	<a href="#">224</a>		
<b>Total Information Systems Costs, Natural Accounting Categories</b>			
<u>Per Member Per Month</u>			
(a) Internal Personnel, Including Travel and Training.....	<a href="#">225</a>		
(b) Consultants / Contractors.....	<a href="#">225</a>		
(c) Hardware Depreciation and Maintenance.....	<a href="#">225</a>		
(d) Software Amortization and Maintenance.....	<a href="#">225</a>		
(e) All Other, Including Office Supplies.....	<a href="#">225</a>		
Total Information Systems Expenses.....	<a href="#">225</a>		
<u>Percent of Premium Equivalents</u>			
(a) Internal Personnel, Including Travel and Training.....	<a href="#">225</a>		
(b) Consultants / Contractors.....	<a href="#">225</a>		
(c) Hardware Depreciation and Maintenance.....	<a href="#">225</a>		
(d) Software Amortization and Maintenance.....	<a href="#">225</a>		
(e) All Other, Including Office Supplies.....	<a href="#">225</a>		
Total Information Systems Expenses.....	<a href="#">225</a>		



**Information Systems**

Metric	Page	Definition	Calculation
<b>Total Information Systems Costs, Natural Accounting Categories (continued)</b>			
<u>Percent of Total Information Systems Costs</u>			
(a) Internal Personnel, Including Travel and Training.....	<a href="#">225</a>		
(b) Consultants / Contractors.....	<a href="#">225</a>		
(c) Hardware Depreciation and Maintenance.....	<a href="#">225</a>		
(d) Software Amortization and Maintenance.....	<a href="#">225</a>		
(e) All Other, Including Office Supplies.....	<a href="#">225</a>		
Total Information Systems Expenses.....	<a href="#">225</a>		
<b>Total Information Systems Costs, Functional Areas</b>			
<u>Per Member Per Month</u>			
11 (a) Operations and Support.....	<a href="#">226</a>		
(1) Voice and Data Network.....	<a href="#">226</a>		
(2) Data Center.....	<a href="#">226</a>		
(3) Engineering.....	<a href="#">226</a>		
(4) Desktop Services.....	<a href="#">226</a>		
(5) Help Desk.....	<a href="#">226</a>		
(6) Storage and Capacity Management.....	<a href="#">226</a>		
(7) Business Continuity Planning (BCP) and Disaster Recovery (DR).....	<a href="#">226</a>		
(8) Other.....	<a href="#">226</a>		
11 (b) Applications Maintenance.....	<a href="#">226</a>		
11 (c) Applications Acquisition and Development.....	<a href="#">226</a>		
(1) Project Management Office and Support (PMO).....	<a href="#">226</a>		
(2) Other.....	<a href="#">226</a>		
11 (d) Security Administration and Enforcement.....	<a href="#">226</a>		
Total Information Systems Expenses.....	<a href="#">226</a>		
<u>Percent of Premium Equivalents</u>			
11 (a) Operations and Support.....	<a href="#">226</a>		
(1) Voice and Data Network.....	<a href="#">226</a>		
(2) Data Center.....	<a href="#">226</a>		
(3) Engineering.....	<a href="#">226</a>		
(4) Desktop Services.....	<a href="#">226</a>		
(5) Help Desk.....	<a href="#">226</a>		
(6) Storage and Capacity Management.....	<a href="#">226</a>		
(7) Business Continuity Planning (BCP) and Disaster Recovery (DR).....	<a href="#">226</a>		
(8) Other.....	<a href="#">226</a>		
11 (b) Applications Maintenance.....	<a href="#">226</a>		
11 (c) Applications Acquisition and Development.....	<a href="#">226</a>		
(1) Project Management Office and Support (PMO).....	<a href="#">226</a>		
(2) Other.....	<a href="#">226</a>		
11 (d) Security Administration and Enforcement.....	<a href="#">226</a>		
Total Information Systems Expenses.....	<a href="#">226</a>		

## Information Systems

Metric	Page	Definition	Calculation
<b>Total Information Systems Costs, Functional Areas (continued)</b>			
<u>Percent of Total Information Systems Costs</u>			
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(1) Voice and Data Network.....	<a href="#">227</a>		
(2) Data Center.....	<a href="#">227</a>		
(3) Engineering.....	<a href="#">227</a>		
(4) Desktop Services.....	<a href="#">227</a>		
(5) Help Desk.....	<a href="#">227</a>		
(6) Storage and Capacity Management.....	<a href="#">227</a>		
(7) Business Continuity Planning (BCP) and Disaster Recovery (DR).....	<a href="#">227</a>		
(8) Other.....	<a href="#">227</a>		
11 (b) Applications Maintenance.....	<a href="#">227</a>		
11 (c) Applications Acquisition and Development.....	<a href="#">227</a>		
(1) Project Management Office and Support (PMO).....	<a href="#">227</a>		
(2) Other.....	<a href="#">227</a>		
11 (d) Security Administration and Enforcement.....	<a href="#">227</a>		
Total Information Systems Expenses.....	<a href="#">227</a>		
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<u>Utilization</u>			
Average Utilization for Processors, 24/7 Capacity.....	<a href="#">227</a>		
Average Utilization for Processors, Prime Shift.....	<a href="#">227</a>		
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<u>Data Center Storage Capacity</u>			
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<b>Internal Help Desk</b>			
Average Speed to Answer, Seconds.....	<a href="#">228</a>		
Call Abandonment Rate.....	<a href="#">228</a>		
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Satisfaction, Scale of 1 to 10.....	<a href="#">228</a>		
Number of Calls per Helpdesk FTE per Year.....	<a href="#">228</a>		
Number of Calls per Total FTE per Year.....	<a href="#">228</a>		
Number of Calls as a Percent of All Inquiries (Calls plus Online).....	<a href="#">228</a>		
Total FTEs per Helpdesk FTE.....	<a href="#">228</a>		
Number of Tickets Opened Online per Helpdesk FTE per Year.....	<a href="#">228</a>		
Number of Tickets Opened Online per Total FTE per Year.....	<a href="#">228</a>		
Number of Tickets Opened Online as a Percent of All Inquiries (Calls plus Online).....	<a href="#">228</a>		
Desktop Management Software and Vendors.....	<a href="#">228</a>		

**Information Systems**

Metric	Page	Definition	Calculation
<b>Core Systems</b>			
<u>Availability</u>			
System Availability - 24 / 7 Average.....	<a href="#">229</a>		
Time to Resolve Critical Outage, Hours.....	<a href="#">229</a>		
Production Job Cost Summary			
Production Jobs per 1,000 Members.....	<a href="#">230</a>		
x Members per IS FTE.....	<a href="#">230</a>		
= Daily Production Jobs per IS FTE.....	<a href="#">230</a>		
x IS Cost per Production Job.....	<a href="#">230</a>		
= IS Cost per IS FTE.....	<a href="#">230</a>		
x IS FTEs per 10,000 Members.....	<a href="#">230</a>		
= IS Costs per Member per Month.....	<a href="#">230</a>		
<u>Production and Test Jobs</u>			
Daily Production Jobs per 10,000 Members.....	<a href="#">231</a>		
Yearly Claims Processed per Daily Production Job.....	<a href="#">231</a>		
Yearly Enrollment Transactions Processed per Daily Production Job.....	<a href="#">231</a>		
Yearly Member and Provider Inquiries Processed per Daily Production Job.....	<a href="#">231</a>		
Percent of Total Production Jobs Run Daily.....	<a href="#">232</a>		
Production Jobs as a Percent of Total Jobs.....	<a href="#">232</a>		
Daily Test Jobs per 10,000 members.....	<a href="#">233</a>		
Percent of Total Test Jobs Run Daily.....	<a href="#">233</a>		
Test Jobs as a Percent of Total Jobs.....	<a href="#">234</a>		
<b>Projects</b>			
Percent of Number of Total Projects.....	<a href="#">235</a>		
Percent of Total Project Dollars Spent.....	<a href="#">235</a>		
Percent of Total Project Hours.....	<a href="#">236</a>		
Projects per FTE.....	<a href="#">236</a>		
Spend per Project.....	<a href="#">237</a>		
Spend per FTE.....	<a href="#">237</a>		
FTEs per 10,000 Members.....	<a href="#">238</a>		
Spend PMPM.....	<a href="#">238</a>		
<i>Each of the above metrics are provided for the following types of projects.</i>			
Strategic Projects			
Infrastructure Projects			
Process Improvement Projects			
Support Projects			
Other Projects			
Total			

Tab 9

**Corporate Services Cluster**

The Corporate Services Cluster is comprised of the functions of Finance and Accounting, Actuarial, Corporate Executive and Governance and the Corporate Services function. The Corporate Services function includes subfunctions like Facilities, Legal and Human Resources. This tab includes metrics of those subfunctions.

Metric	Page	Definition	Calculation
<b>Corporate Services Function</b>			
<u>Corporate Services Function Cost Summary</u>			
	<a href="#">243</a>		
x	<a href="#">243</a>		
=	<a href="#">243</a>		
x	<a href="#">243</a>		
=	<a href="#">243</a>		
<u>Staffing vs. Non-Labor</u>			
	<a href="#">243</a>		
+	<a href="#">243</a>		
=	<a href="#">243</a>		
x	<a href="#">243</a>		
=	<a href="#">243</a>		
	<a href="#">243</a>		
	<a href="#">243</a>		
	<a href="#">243</a>		
	<a href="#">243</a>		

**Corporate Services Cluster**

Metric	Page	Definition	Calculation
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=			<a href="#">246</a>
x			<a href="#">246</a>
=			<a href="#">246</a>
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x			<a href="#">246</a>
=			<a href="#">246</a>
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