RETAIN | Retaining Employment and Talent After Injury/Illness Network

RETAIN TA Webinar
Title: Recruitment-to-Enrollment Pipeline Dashboard Tool Overview
Facilitators: Wehmah Jones, PhD, Christina Jones, Keith Watson
Date: Thursday, March 5, 2020 at 11:00 P.M. – 12:00 P.M PT

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<<MODERATOR: Hi, everyone, and welcome to today's webinar, the recruitment-to-enrollment dashboard overview. I am Mona Kilany and I am here to initially walk you through some tips. You can put a message in the Chat box if you have trouble launching Adobe. Please submit comments at any time during the webinar in the Chat box or use your Raise Hand function in the menu. As I said, I am Mona Kilany, welcoming you to today's webinar. Before we get started, a little about RETAIN. Retaining Employment and Talent after Injury is funded by ODEP at the US Department of Labor. Disability employment policy referred to -- I am sorry, referred to as ODEP. Training administration and the Social Security Administration.

Through the cross-sector collaborative work of teams retain focuses on an important aspect of disability employment stay-at-work, return-to-work strategies, about people who become ill or injured during work years to remain in the labor force. Today's presenters will be Dr. Wehmah Jones, Christina Jones and Keith Watson, all from the AIR team. Now I am going to ask Wehmah Jones to get us started.

>> WEHMAH JONES: Welcome, everyone. I am going to go over the agenda for the webinar today. We started with introductions. We are going to provide an overview of the dashboard and the dashboard too many component. Then we will have a live demo for you and show you how to enter and manage data within the tool as well as take you through the filters and the charts which are our second component of the tool. Then we will talk a little about how you can use this tool to support your continuous quality improvement efforts and we will let you know what other resources are available and how you can reuse RETAIN. We will stop periodically to ask if you have any questions. So, feel free to let us know if you have questions. There is also the raise your hand function. If you have questions during the seminar, please feel free to type them in the box.

Let's start with a quick poll question. We have developed some videos. We just wanted to see how many of you have had the opportunity to watch them yet. So, just quickly, if you can indicate whether or not you have seen them, if you have seen one or two or watched all of them. We want to see where people are in terms of their knowledge. Okay. It look is like half of you have seen the modules and many you haven't watched any of them, which is fine also. We will be going over a lot of the information that is presented for you. Let's talk a little about the dashboard. We developed the dashboard because there are a lot of ** on recruitment and enrollment. We thought it would be helpful to have you be able to look at what your data says with respect to who is recruited, who is enrolled in the study and how many people are even come to go that first appoint. Basically the tool is designed to help you. Anybody on your team can use the tool but we recommend it is somebody who is planning, tracking and making decision about your recruitment and enrollment process. It is designed to help you understand what is going on with your recruitment. That way, you can make some decisions and decide what's best in terms of training, what other activities you need to be doing to help improve.

I wanted to mention some quick prerequisites that you need to use the tool. So, there needs to be some system in place for tracking your pre enrollment data. This could be a simple Excel spreadsheet you have or something else you are already using. Then you have to have data records at the individual level because, as you will see later, when you are entering data into the tool it is all based on the individual. The tool that we have is made in Excel's 2013. So, if you have 2013 or later, you should be fine. However, if you are using an earlier version of Excel there might be some small loss of functionality. Then, of course, it would be great if you have someone who knows how to use Excel. Then finally you will just need the ability to transfer the data into the proper format and we will talk a little bit about that. I am going to turn it over to Keith, who is going to introduce the dashboard tool component.

>> KEITH WATSON: Thank you, Wehmah and hi everybody there are two components to the tool, dashboard and a data sheet. The data sheet you are looking at here, contains the data displayed in the dashboard. In this data sheet each row represents a person who is a potentially retained enrollee. The columns in the data sheet are the characteristics of that person and all of the information about what step in the recruitment-to-enrollment process that person's reached. The other component is the dashboard sheet. The dashboard sheet consists of three charts and of filters. On the top left you can see the recruitment-to-enrollment funnel chart. Each person in the process when first identified all the way until they receive their first service.

To the right of that is a chart showing the reason that each person drops; for those who dropped before they received their first service. Then at bottom of the dashboard is the trends chart, which shows how the number of persons at different stages has changed over time. To the right of those charts are filters and those filters control the data that are displayed in the dashboard including up at the top a date filter and down below category filters. Now I am going to pass to Christina Jones who will discuss the process of entering and managing data in the tool.

>> CHRISTINA JONES: Thank you, Keith. Welcome, everybody. In this section we are going to provide some information in how to enter and manage data in the dashboard. Specifically we are going over a quick overview of the data sheet, go through the data sheet columns, describe some methods that you can use, add data to the data sheet as well as some helpful tips and hints. I am going to do a live demonstration using the Excel dashboard. For this demonstration I am going to use some sample data that is available for download. These are not real program data; they were created just to demonstrate how the dashboard works. Give me one moment just to share my screen. So the dashboard contains two worksheets. First is the dashboard that you can see up on my screen right now and the second is the data sheet. If you click on this tab at the bottom this will take you to the data sheet. When you click on the data sheet you can see

the data displayed on the dashboard. Each row is an individual person, like you said before, who had been identified as a potential retained participant. The columns are information about that participant. Additional information about the column fields are located in the appendix of the dashboard users guide, which we are not going to pull up here today. It does include all of the field names, whether or not the fields are required for the dashboard, the format of the data needed, an example of the data and how it is used in the dashboard. If we look at the actual data sheet, column A is the first and unique identifier. This can be any kind of unique identifier. Right here we are using an example of an auto-generated number. Column B is a notes column. It is not required. It is optional for use. It allows you to make notes about that particular identifier. It could be anything from a name or additional information to help associate that identifier with ** if needed. The next 18 columns, C-T is information about that unique person age, race, information about illness or injury U through AJ are all where the person is in the process of enrolling. The next set of fields are the dates that correspond with the recruitment enrollment. For instance, the data identified, the first day that person was contacted, the date they were enrolled.

Lastly, the remaining two columns, AK and AL are automatically calculated from the data in the prior column. So this essentially is used by the data sheets to generate the charts and we highly recommend that you don't copy-and-paste, or write over this because they are automatically calculated. If we take a look at dashboard that doesn't have any sample data you can see that it is blank. The second row here is blue. This indicates that Excel is expecting data to be added to this row and the rows below it. You should not delete this row. If you do delete this row the dashboard will break and not populate the charts. Additionally there is a date already populated in the "Date Identified" field.   This is to ensure that the structure of the date is assigned to it as a date and it is necessary for formatting of the data and populating the dashboard. You can change the date but you have to keep a date in that field.

To add data to the dashboard: There are two -- currently two possible ways. The first is to copy and paste the data from another source. The second is to enter the data manually into the data sheet. To copy-and-paste you will want to have the data structured in the format of the data sheet and then copy-and-paste it by selecting the data you want. I am just going to use the sample data as an example to populate the empty data sheet selecting maybe 10 rows all the way through AJ, right-click Kathy, click to my blank data sheet, right-click copy.   You will want to paste Special Values. This is to ensure that the formatting of the spreadsheet stays the way that it's supposed to be formatted.

When you do that you can flip to the dashboard.   If you will see it has not populated. If it hasn't, go to Data, hit Refresh all and you will see the data that you put into this data sheet.

The second option for entering data is to enter it by hand. To do this, you will want to start the first empty row and enter the data row by row. That concludes the live demonstration about entering data. We will go back to through the slides. All right, a couple of key things to remember when you are entering and managing your data: Do not delete the top blue row on the data sheet. Always copy and paste in row two or at the end, after the last row of data in your data sheet. Do not leave any blank lines in the middle of your data.

Data can be entered manually or copied and pasted. One thing I have not talked about here but I will in the next section: Make sure to use consistent wording for categories of text. It is important to use consistent wording for categories and I will show you why that is important during the next live demonstration. Moving on to the dashboard charts and filters, I am going to go through the key elements of the dashboard, including the funnel chart, the reason dropped chart, the trends chart and then go through using the filters. Now I am going to flip back through my screen.
Like Keith had said earlier, the dashboard consist of three charts and a set of filters of the chart in the upper left is the recruitment-to-enrollment funnel chart. This chart shows the number of people within the recruitment pipeline from potential participant all the way to people who received their first service. One thing to note is these data are only a sample. This is a good opportunity to customize categories as needed for your own program. So these categories could be collapsed or could be disaggregated, depending on what it is your program would like to report on.
To the right of the funnel chart is the Reason Dropped chart.

[See Screen]

This chart shows the reasons why participants have dropped. The filter immediately to it its right over here (indicating) controls that chart. It allows you to filter in order to see different slices of the data. The default is the not contacted. But you could also look at not interested. And the reasons why they might have been not interested.
Or Not enrolled or never dropped, for instance. That is probably less exciting. How about No first service? As with the funnel chart, these categories can be easily modified to fit your own program reporting needs at the bottom of the dashboard is the recruitment-to-enrollment graph.

I am going to scroll down a little bit. This chart shows how the number of people -- the number of people at different stages. Identified, Contacted Edge Enrolled First service received and how that changes over time. In the chart, the bottom axis is the year and the month; and this is the year and the month of when the person was first identified. The side axis shows the number of people. So, for example, if a person was identified in September 2019, they were counted it in September of 2019.
People identified in September 2019 all have increased in numbers -- I have an increased number of being identify; which increased the number of people eligible, enrolled and first service received.

So you know as well that the categories for this chart map to the categories in the recruitment-to-enrollment funnel. Categories that you modify here can also -- will correspond to the categories in the trend chart. The last thing we are going to look at are the filters. I am going to scroll over so we can see the filters. So, at the top of each filter is the data field that it's being filtered on this is filtering own age, industry. This is on industry, et cetera. These filters can be easily modified. What you see on the dashboard are a few we selected that we thought would be flickable to the majority of retained programs.

If we take the age category for example, there are ** no (?) selected. Initially these are selected. You can tell that because they are all blue. So if we want to filter the data, we can click on the filter we want to add. For Age I can click on 18-24. Persons identified between 18 and 24. If want to select multiple columns or categories you can do that. Now we selected participant’s 18-24 and have had a two- to six-week injury. The dashboard changes depending on the filter selected, you can see that. If you want to select multiple items within a category, you select the multi-select button right here. This allows you to select two items in in one category. Now we filtered the data of person’s 18-44 who have been two to six weeks since injury. Then it adjusts the charts and filters the charts with the data filters. If you want to re-set the dashboard box to not selecting any filters, you can do that by either selecting this (indicating) filter button next to each category or you can go up to the right and click on the Reset All Filters which resets it back to the original default position. I am going to do that now. And it's back to where it was before.

The last filter is the date filter. This selects persons who are identified within a certain time period. When the filter is blue it is selecting all time periods. If you want to adjust that, you can either select the month that you want to see. For instance I am go going to select September so it adjusts to show the charts only in September. If I want to do a range of months, all I need to do is click on -- I don't know how well you can see it. But there is a little bar next to the blue line (indicating) that you can use to scroll left and right to adjust the filter. I am going to flip back to the slides. That concludes my live demonstration. Put the slide back up? There we go.

>> Before we move on, we do want to see if people have questions so far, questions about entering the data, manipulating the data in the tool, questions about the dashboard?
(Pause)

>> You can unmute or type your questions in the Chat box. Looks like there aren't any questions right now: Okay. Is the sample information available to play with? Yes. So if you go on the ROCyou will see two files are uploaded, one is a blank file you can use for your own data and then we have a sample file with the data in in there. You can use that to get a sense of how the tool works. Any other questions? I am going to give you a few examples of how you can use the tool and the data in the tools to . . . use the data in the tool. So, I just had some example questions: I was trying to pull up my screen but I saw my Excel file had frozen up so I don't want to waste time dealing with that. So, we will just walk through some of these examples. The first is which provider has the most ineligible referrals. If your project is getting refers from a number of different providers or provider groups, you might want to determine which ones are giving me participants who are actually enrolled in the study; and so, using the dashboard, when you have that data, you can then determine what your next steps would be. And you don't only need to look at who's giving the most ineligible; you can also look the at providers who have the most eligible referrals. There might be something that group is doing that is really working that you can apply to some of your other providers or it could be that providers who don't have a lot of eligible referrals need more training. Maybe they need a little more clarity about the eligibility criteria. That's something that could be an easy fix where once they have the knowledge, hopefully you can see things change a little bit. You can use the dashboard to determine what type it is of injury or medical conditions have lower conversion rates. So, the chart right now has work-related and nonwork

related. You might want to determine folks who are injured on the job are more likely to enroll and retain. If you find out that they are not, using the reasons dropped chart, you have that information there and you can see why they are not. A common thing might be something going on with their employer, afraid their employer knowing they are injured. Once you have that kind of information, you then know how to attack it and what approach you want to take. It could be employer training is necessary; it could be that you need to take a look at your scrips where you are talking about confidentiality and clear that up a bit, see what is confidential and what their employers really will not know so you can help calm their fears down a little bit.

You might also use the dashboard just to take a look at the reasons why people are not interested in enrolling. The important piece to remember there is that's data that you enter. So that means you have to collect that data from people. So it might be that you call someone, they say they are not interested. If they at the in you why, you can insert that reason into the dashboard. That way, you start getting more data on different reasons and concerns that folks have and you can use that to once again look at your plan and see what are some of the reasons that people can adjust directly. There are things you have no control over, but some things you might be able to control or improve upon.

Then finally, you can use the dashboard to drill down a little bit into the data. So, for example, if you see that people with injuries are enrolling more than other injuries and you want to get more information about that, the filters can help you do that. You can filter by age; see is it the younger group, the older group that is more likely to enroll. If it is the older group, maybe you want to put more resources into industries or providers who target older workers. Or if you find that younger folks are not enrolling as much you could take a look at your recruitment materials and change them to appeal to a younger group. Those are questions you can think about. There are different questions you can answer once you start getting more data to put into the dashboard.

I am going to pause to see if people have questions. I see a question about getting the slides via email. This will be posted on the rock. Just a little about the resources we have for the dashboard. As you may know already we created a series of videos to tell you a little more about the dashboard. There are four videos. One is an introduction video. One talks about getting your data into the dashboard. The other describes the dashboard itself with the filters in the chart. Then, finally, the last one talks about CQI. We also have a user guide on the rock. And that walks you through some of the same information that is in the videos. And, as I noted before, there is the sample dashboard which is also located on the rock and you can use that to look at the data, see how the dashboard works, think about how you can use it and what kinds of information you can start gathering to make the dashboard work four. And finally, this webinar, which we are doing right now, will also be posted on the ROC. Now we are going to talk a little about customizing the tool and technical assistance that is available. Christina?

>> CHRISTINA JONES: Thank you, Wehmah. For technical assistance, we do have a few resources available that Wehmah went through. The user's guide, the webinar. But we are also available to do one-on-one support, especially if you have any issues or have any problem with using your own specific data. The last thing that's available is we can do some minor customization of the dashboard, including adding/removing some

of the filters. Perhaps thinking through different ways of bringing the data into the dashboard; as well as thinking through how to use the dashboard as a prototype for building additional resources on top of your existing resources. Tool customization -- I think I went through some of these. Specifically for tool customization we had specific ideas such as:

- Modifying the recruitment-to-enrollment funnel.
- Adding additional filters, it can be problematic to set it up the first time.

There is help relative to target. That would be a good idea. Helpful how you would modify the dashboard to include target and then whether or not that would be included in the charts that are already existing or if it would be a modified chart that is not quite like what we already have. Lastly, we could help set up the data sheet for data import. This is acknowledging the fact that I am fairly confident that your data systems aren't going to be able to output the data exactly like what we have set up in the sample dashboard. Some data modification will need to happen. If any of the teams need help with modification of the data, we are prepared to help with that.

>> Provide info on this modification . . . I would be happy to talk more one-on-one. I am not certain I am prepared to prepare information on this at this moment. Are there any additional questions about the available technical assistance or tool modifications?
(Pause)

>> Okay. Doesn't look like there is more coming through the Chat. So I am going to turn it over to Wehmah to talk about next steps.

>> WEHMAH JONES: Okay. As far as next steps, if you haven't done so already, definitely go to the rock (phonetic) and download the dashboard. Make sure that everything's working properly and if not, you certainly can reach out to us and we will help to troubleshoot there. Once you get it downloaded you can play with it a little bit and you can see how you can get your data into the dashboard. Of course, as Christina said: We are here to help in terms of troubleshooting, in terms of customizing. I think the idea of having enrollment relative to targets is a great idea; we just need to think about how that will look. But that could give you a very quick way to see if you are meeting your target.

But you certainly can reach out to your TA liaison and they can reach out to our IT team and we will give you some one-on-one support in terms of using the dashboard tool. Now that you have kind of gotten the lay of the land, are there any questions or any other potential modifications people think they might need? We probably won't be able to get into the how to done this call but it would be great to know ahead of time if people are thinking about certain ways that they want to use the dashboard or want to modify the dashboard and that will help us start planning in terms of TA.
(Pause)

>> Someone is asking if it's possible to have a regional map associated. We will definitely –

>> That is a question for me, right? I think it is possible. It depends on the kind of data you are able to extract from your system. If we have that information, it should be possible.

>> WEHMAH JONES: And right now I believe the dashboard does have filters. You can add a filter for a region but it does not show you a map. We would have to think about if and how we actually can have a map associated. But in the meantime, you still can filter according to geographic regions.
Any other questions?

>> WEHMAH JONES: Okay. Oh, wait. Is somebody typing in a question?

>> PARTICIPANT: Wehmah or Christina: Is there a limit on the number of filters that can be added to the dashboard?

>> CHRISTINA JONES: I don't think so but from a user experience kind of perspective you wouldn't want to put soap that the dashboard would become hard to use. I would think you would want to think about what filters you would want to have and keep that simple. Technically speaking, there is not a real limit to that. It could be that you want to replace some of the ones that are already there with other filters that you find more useful. It could be a swap-out so you don't have too many cluttering up the dashboard.

>> PARTICIPANT: Great. Thank you.

>> PARTICIPANT: Christina, could you talk a little about if you are using Excel 2010, you mentioned that there might be some loss of functionality. Can you say a little bit more about what that might be?

>> CHRISTINA JONES: Keith, do you want to take this one?

>> KEITH WATSON: Sure. For Excel 2010, the date filtered as Christina displayed and as it currently exists, apparently does not work. So we would be able to talk to you about replaced if you are in Excel 2010, about replacing that date filter with a simpler version that has maybe like a month and year dropdown. But that would be a customization to do that.

>> PARTICIPANT: All right. Thanks.

>> Any other final thoughts or questions?

>> PARTICIPANT: Can you talk a little bit about, Keith, deleting columns from the data tab that you don't need? Would that affect anything at this point?

>> KEITH WATSON: Well . . . okay, for -- definitely a word of caution about it: I mean, it should be possible and we have done a little bit of looking at a this: If there are columns that you don't need that are participant characteristics. That would be anything

between column A and column T which is primary contact type. All of those are optional. They are participant characteristics. And, if you were to delete those, entirely remove those columns, then the filters would go away. The rest of the dashboard would still work. One caution is that they will be extremely hard to bring back again. So, if you were to decide, you know, we just never are going to need age category, probably I would just suggest leave it blank. But if you really feel like it's important for your data processing to eliminate that entirely, you could delete it. Again, you would want to test it. We haven't fully tested what that looks like. Theoretically and with some basic testing that would work. We would be happy to talk to you if you feel you want to delete, remove some columns; just walk you through what that looks like.

And with any changes you are making, ever and even if you are not making changes or adding new data we always advise: Copy the file, save it under a new name, increment it, increment the version number or increment the date in the name of the file just so you always have something backed up. That way, if something goes wrong, you just refer back to your prior file.

>> PARTICIPANT: One last question: The funnel chart. Right now, we have it organized according to identified/contacted/eligible/expressed interest/then enrolled. What if a state wants to change the order of that a little and revise it? Is that possible?

>> CHRISTINA JONES: We actually went through that because we changed our categories as we were developing the tool and it's a fair amount of work. It's not trivial of the categories in the funnel chart are the structure of that is built into the data path itself. So, if you are changing the categories in the funnel chart, that requires changing the columns. It requires changing one of the formulas that calculates some information; it requires changing the charts. So it's doable and we've actually done it inside the AIR team. You may decide it is worth it; it is worth the effort because we need data that actually match our particular program. Just to let you know, that is a significant customization.

>> PARTICIPANT: Thanks.

>> WEHMAH JONES: So I will just open it up: Are there any other questions? We have a minute or so. Does anybody have any other thoughts about the dashboard? Someone is typing in the Chat box. Thank you, Jamie. We think it's a cool tool also. So, great. It looks like there aren't anymore questions. Of course, once you have the opportunity to import either your own data or play around with the sample dashboard, please reach out to your TA liaison if you have any questions; if any other thoughts come up about how you might want to customize the dashboard in order to get some additional information. Again, reach our to your TA liaison and we can certainly connect with you to help get that done. So, finally, we do want your feedback. If you could take a couple of minutes to complete the survey, we will appreciate that.
And the link is in the Chat box. All right. Thanks, everyone. We definitely appreciate your time and again, just a reminder, all of the resources that we mentioned are posted on the rock (phonetic) and then this webinar will be posted in a few days.

Thank you.

>> PARTICIPANT: Thank you.
>> PARTICIPANT: Thank you.
(Disconnecting)