

# Recruitment-to- Enrollment Pipeline Dashboard Tool Overview

March 5, 2020



**RETAIN** | Retaining Employment and Talent  
After Injury/Illness Network



# Webinar Quick Tips

- **If you are having any trouble with Adobe Connect, email [RETAINTA@air.org](mailto:RETAINTA@air.org) or use the chat box.**
- **Submit questions at any time during the webinar in the chat box—or use the “Raise Your Hand” function in the top menu.**



# Welcome

**RETAIN** | Retaining Employment and Talent After  
Injury/Illness Network

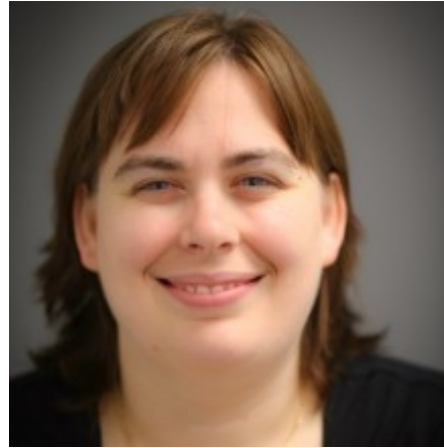
# About RETAIN

- Retaining Employment and Talent After Injury/Illness Network (RETAIN)
- Joint initiative led by the U.S. Department of Labor (DOL) and the Office of Disability Employment Policy (ODEP), and funded by ODEP, DOL's Employment and Training Administration, and the Social Security Administration
- RETAIN technical assistance (TA) funded by ODEP and housed at the American Institutes for Research (AIR)
- Focused on building state capacity in stay-at-work/return-to-work strategies across eight states
- Explores ways to help people who become ill or injured during their working years remain in the labor force

# Today's Presenters



Wehmah Jones, PhD  
Senior Researcher  
AIR



Christina Jones  
Senior Data Scientist  
AIR



Keith Watson  
Principal Client Technology  
Development Manager  
AIR

# Agenda

- Welcome and introduction of presenters
- Overview of the Recruitment-to-Enrollment Dashboard
- Dashboard tool components
- Entering and managing data with live demo
- Dashboard charts and filters with live demo
- Using the tool to support continuous quality improvement (CQI) efforts
- Dashboard resources
- Tool customization and other TA options
- Q&A

# Poll Question

- How many of the Recruitment-to-Enrollment Pipeline Dashboard modules have you watched?
  - I haven't watched any of them.
  - One or two modules.
  - I watched all the modules.

# The Recruitment-to-Enrollment Pipeline Dashboard Tool

**RETAIN**

Retaining Employment and Talent After  
Injury/Illness Network



# Recruitment-to-Enrollment Pipeline Dashboard Tool

- What is the dashboard tool?
- Who should use the tool?
- Why use this tool?

# Prerequisites

- State system to track pre-enrollment data
- Data records at the individual level
- Excel 2013 or later (or 2010 with small loss of functionality) and staff who can use it
- Ability to transform data into proper format

# Dashboard Tool Components

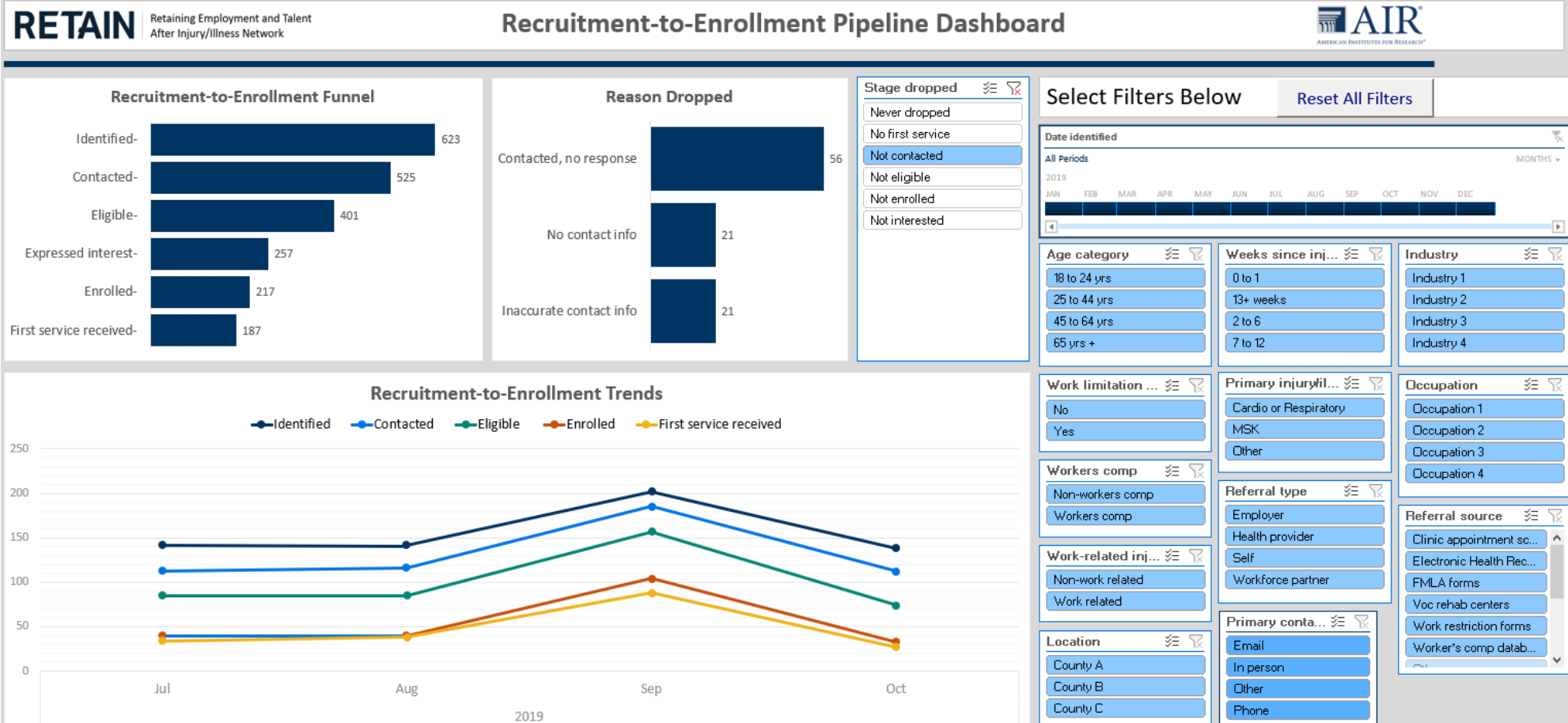
# Tool Component–Data Spreadsheet

Unique Person ID	Notes	Age_cat	Sex	Hispanic	Race	Primary injury/illness	Work-related injury	Referral type	Referral source	Reason dropped
1025		18 to 24 yrs	F	Non-Hispanic	White	Cardio or Respiratory	Work related	Employer	Electronic Health Records	Inaccurate contact info
1026		45 to 64 yrs	M	Non-Hispanic	White	MSK	Non-work related	Employer	Electronic Health Records	Inaccurate contact info
1027		25 to 44 yrs	M	Non-Hispanic	White	MSK	Work related	Health provider	Clinic appointment sched	Inaccurate contact info
1028		45 to 64 yrs	M	Hispanic/Lat	White	MSK	Non-work related	Employer	Electronic Health Records	Inaccurate contact info
1029		45 to 64 yrs	F	Non-Hispanic	White	MSK	Non-work related	Self	Electronic Health Records	Inaccurate contact info
1030		25 to 44 yrs	M	Hispanic/Lat	White	Other	Work related	Workforce partner	Electronic Health Records	Inaccurate contact info
1031		25 to 44 yrs	M	Hispanic/Lat	White	MSK	Work related	Health provider	Worker's comp database	No contact info
1032		18 to 24 yrs	F	Non-Hispanic	Asian	MSK	Work related	Health provider	Voc rehab centers	No contact info
1033		25 to 44 yrs	M	Non-Hispanic	Black or A	Other	Non-work related	Employer	Electronic Health Records	No contact info
1034		18 to 24 yrs	M	Non-Hispanic	Black or A	MSK	Non-work related	Health provider	Clinic appointment sched	No contact info
1035		18 to 24 yrs	M	Hispanic/Lat	White	MSK	Work related	Health provider	Worker's comp database	No contact info
1036		45 to 64 yrs	M	Non-Hispanic	White	Other	Non-work related	Workforce partner	Electronic Health Records	No contact info
1037		25 to 44 yrs	M	Non-Hispanic	Black or A	MSK	Non-work related	Workforce partner	Electronic Health Records	No contact info
1038		25 to 44 yrs	F	Non-Hispanic	White	MSK	Work related	Health provider	Clinic appointment sched	No contact info
1039		45 to 64 yrs	F	Non-Hispanic	White	Other	Non-work related	Workforce partner	Electronic Health Records	No contact info
1040		65 yrs +	F	Non-Hispanic	White	MSK	Non-work related	Employer	Electronic Health Records	No contact info
1041		25 to 44 yrs	F	Hispanic/Lat	White	MSK	Non-work related	Workforce partner	Electronic Health Records	No contact info
1042		25 to 44 yrs	F	Non-Hispanic	White	MSK	Non-work related	Health provider	Work restriction forms	No contact info
1043		25 to 44 yrs	M	Non-Hispanic	White	MSK	Non-work related	Health provider	Clinic appointment sched	Contacted, no response
1044		25 to 44 yrs	F	Non-Hispanic	White	Other	Work related	Health provider	Worker's comp database	Contacted, no response
1045		25 to 44 yrs	M	Non-Hispanic	White	MSK	Non-work related	Health provider	Worker's comp database	Contacted, no response
1046		25 to 44 yrs	M	Non-Hispanic	White	MSK	Non-work related	Workforce partner	Electronic Health Records	Contacted, no response
1047		25 to 44 yrs	F	Non-Hispanic	White	MSK	Work related	Workforce partner	Electronic Health Records	Contacted, no response
1048		25 to 44 yrs	F	Non-Hispanic	Other or 2	Other	Work related	Health provider	Clinic appointment sched	Contacted, no response
1049		45 to 64 yrs	M	Non-Hispanic	Black or A	MSK	Work related	Health provider	FMLA forms	Contacted. no response



Retaining Employment and Talent After Injury/Illness Network

# Tool Component–Dashboard Spreadsheet



# Entering and Managing Data in the Tool

**RETAIN**

Retaining Employment and Talent After  
Injury/Illness Network

# Entering and Managing Data

- Overview of the data sheet
- Data sheet columns and their usage
- Methods for adding data to the data sheet
- Helpful data tips

# Live Demonstration

**RETAIN**

Retaining Employment and Talent After  
Injury/Illness Network



# Entering and Managing Data–Key Items to Remember

- Do not delete the top blue row (row 2).
- Do enter or copy and paste into row 2.
- Enter data manually or copy and paste into the data sheet.
- Use consistent wording for categories of text.

# Dashboard Charts and Filters

# Using Dashboard Charts and Filters

- Recruitment-to-Enrollment Funnel chart
- Reason Dropped chart
- Recruitment-to-Enrollment Trends chart
- Using the filters

# Live Demonstration

**RETAIN**

Retaining Employment and Talent After  
Injury/Illness Network

# Questions?

# Using the Tool to Support Continuous Quality Improvement Efforts

# Dashboard Data in Practice

- Example 1: Which provider has the most ineligible referrals?
- Example 2: What types of injury or medical condition (work-related or nonwork-related) have lower conversion rates?
- Example 3: What are the most common reasons participants are not interested in enrolling?
- Example 4: For persons with a musculoskeletal diagnosis, does age makes a difference in enrollment?

# Questions?



# Dashboard Resources

# Dashboard Resources

1. Dashboard video training modules

2. User's Guide

3. Sample dashboard

4. Webinar

# Tool Customization and Technical Assistance

# Technical Assistance

- Dashboard User's Guide
- Webinar
- One-on-one support
- Dashboard customization

# Tool Customization and Technical Assistance

- Modify the Recruitment-to-Enrollment Funnel.
- Add filters.
- Help import data.
- Help set up data spreadsheet for data import or data entry.

# Questions?

# Next Steps

# Next Steps

- Download dashboard.
- Import data into the dashboard tool.
- Contact your RETAIN TA liaison for additional support or dashboard customization.



Your feedback is important!

Please take 2 minutes to complete the following survey:

[https://www.surveymonkey.com/r/RETAINTA\\_03\\_05\\_2020](https://www.surveymonkey.com/r/RETAINTA_03_05_2020)

# *Thank you!*

**RETAIN**

Retaining Employment and Talent After  
Injury/Illness Network

This document was prepared for the U.S. Department of Labor (DOL) Office of Disability Employment Policy and Retaining Employment and Talent After Injury/Illness Network (RETAIN) state grantees, by the American Institutes for Research under DOL Contract Number 1605DC-18-F-00429. The views expressed are those of the authors and should not be attributed to DOL, nor does mention of trade names, commercial products, or organizations imply endorsement of same by the U.S. Government.