

Appendix: Programmatic Success Dashboard Formulas

The tables below are a list of the formulas used to display the charts and metrics on the Programmatic Success Dashboard. The list of fields is directly from the RETAIN *Quarterly Progress Report* Appendix A for Phase 2. Please refer to the Appendix A data dictionary for a complete list of fields, their definitions, and defined field values.

Table 1: Participant Demographics Programmatic Success Dashboard Formulas

Dashboard widget	Type of graphic	QPR data field(s)	Formula ¹
Age of Participants	Chart	RTN03 RTN69	<pre> CASE WHEN RTN03 >= 18 and RTN03 <= 29 THEN "18–29" WHEN RTN03 >= 30 and RTN03 <= 39 THEN "30–39" WHEN RTN03 >= 40 and RTN03 <= 49 THEN "40–49" WHEN RTN03 >= 50 and RTN03 <= 59 THEN "50–59" WHEN RTN03 >= 60 and RTN03 <= 69 THEN "60–69" WHEN RTN03 >= 70 THEN "70+" ELSE "Other" END CASE WHEN STARTS_WITH(RTN69, "1") THEN 1 END CASE WHEN STARTS_WITH(RTN69, "2") THEN 2 END </pre>

¹ All charts use either a COUNT() of number of participants or COUNT() of percentage of participants after the group by statements

Dashboard widget	Type of graphic	QPR data field(s)	Formula ⁱ
Participant Education	Chart	RTN08	<pre> CASE WHEN CONTAINS_TEXT(RTN08, "1") THEN "Less than high school degree" WHEN CONTAINS_TEXT(RTN08, "2") THEN "High school degree or equivalent" WHEN CONTAINS_TEXT(RTN08, "3") THEN "Occupational or 2-year college degree" WHEN CONTAINS_TEXT(RTN08, "4") THEN "4-year college degree (bachelor's)" WHEN CONTAINS_TEXT(RTN08, "4") THEN "4-year college degree (bachelor's)" WHEN CONTAINS_TEXT(RTN08, "5") THEN "Postgraduate degree" END </pre>
Sex and Race of Participants	Chart	RTN05 RTN06 RTN07-1 RTN07-2 RTN07-3 RTN07-4 RTN07-5	<pre> CASE WHEN RTN06 = 1 THEN "Hispanic" When RTN07-1 = 1 THEN "White" When RTN07-2 = 1 THEN "Black" WHEN RTN07-3 = 1 THEN "American Indian or Alaska Native" WHEN RTN07-4 = 1 THEN "Asian" WHEN RTN07-5 = 1 THEN "Hawaiian or Pacific Islander" END CASE WHEN STARTS_WITH(RTN05, 1) THEN "Male" END, </pre>

Dashboard widget	Type of graphic	QPR data field(s)	Formula ⁱ
Sex and Race of Participants (continued)			<pre> CASE WHEN STARTS_WITH(RTN05, 2) THEN "Female" END </pre>
Industry Summary	Chart	RTN28	<pre> CASE WHEN RTN28=1 THEN "Agriculture or mining" WHEN RTN28=2 THEN "Construction or utilities" WHEN RTN28=3 THEN "Manufacturing" WHEN RTN28=4 THEN "Retail trade, wholesale trade, or transportation" WHEN RTN28=5 THEN "Information" WHEN RTN28=6 THEN "Finance or real estate" WHEN RTN28=7 THEN "Professional, management, or administrative services" WHEN RTN28=8 THEN "Education or health care" WHEN RTN28=9 THEN "Accommodation and food services or arts and entertainment" WHEN RTN28=10 THEN "Other services" WHEN RTN28=11 THEN "Public administration" END </pre>
Total Participants	Metric	RTN01	COUNT(RTN01)
Average Age of Participants	Metric	RTN03	AVG(RTN03)

Table 2: Program Metrics Programmatic Success Dashboard Formulas

Dashboard widget	Type of graphic	QPR data field(s)	Formula
Top 10 Illnesses or Injuries	Chart	RTN22	COUNT(RTN22)
Percentage of Participants Enrolled by # of Weeks After Injury or Illness	Chart	RTN20 RTN24	CASE WHEN DATE_DIFF(RTN20, RTN24) > 0 AND DATE_DIFF(RTN20, RTN24) <=14 THEN "2 Weeks" WHEN DATE_DIFF(RTN20, RTN24) > 14 AND DATE_DIFF(RTN20, RTN24) <= 28 THEN "4 Weeks" WHEN DATE_DIFF(RTN20, RTN24) > 28 AND DATE_DIFF(RTN20, RTN24) <= 42 THEN "6 Weeks" WHEN DATE_DIFF(RTN20, RTN24) > 42 AND DATE_DIFF(RTN20, RTN24) <= 56 THEN "8 Weeks" WHEN DATE_DIFF(RTN20, RTN24) > 56 AND DATE_DIFF(RTN20, RTN24) <= 70 THEN "10 Weeks" WHEN DATE_DIFF(RTN20, RTN24) > 70 AND DATE_DIFF(RTN20, RTN24) <=84 THEN "12 Weeks" END
Median Days in RETAIN Program	Metric	RTN70 RTN20	MED(DATE_DIFF(RTN70, RTN20))
Median Days Between Enrollment and RTW Plan	Metric	RTN42 RTN20	MED(DATE_DIFF(RTN42, RTN20))
Median Days Between RTW Plan and Exit	Metric	RTN70 RTN42	MED(DATE_DIFF(RTN70, RTN42))

Dashboard widget	Type of graphic	QPR data field(s)	Formula
Median Number of Employer Touchpoints	Metric	RTN35	MED(RTN35)
Median Number of HCP Touchpoints	Metric	RTN36	MED(RTN36)
Median Number of Coordinator Touchpoints	Metric	RTN34	MED(RTN34)

Table 3: Program Metrics (Part 2) Programmatic Success Dashboard Formulas

Dashboard widget	Type of graphic	QPR data field(s)	Formula
Number of Participants who Interacted with RETAIN Stakeholders	Chart	RTN38 RTN39 RTN40	CASE WHEN RTN38 = 1 THEN "Health care provider" WHEN RTN39 = 1 THEN "Employer" WHEN RTN40 = 1 THEN "Another party" END
Referral Services	Chart	RTN30	CASE WHEN RTN30 = 1 THEN "Community-based organization" WHEN RTN30 = 2 THEN "Employer (RETAIN affiliated)" WHEN RTN30 = 3 THEN "Employer (not RETAIN affiliated)" WHEN RTN30 = 4 THEN "Health care provider (RETAIN affiliated)" WHEN RTN30 = 5 THEN "Health care provider (not RETAIN affiliated)" WHEN RTN30 = 6 THEN "Health care"

Dashboard widget	Type of graphic	QPR data field(s)	Formula
Referral Services (continued)			WHEN RTN30 = 7 THEN "Workforce system" WHEN RTN30 = 8 THEN "Self-referral" WHEN RTN30 = 9 THEN "Social media or press" WHEN RTN30 = 10 THEN "Workforce system professional" WHEN RTN30 = 11 THEN "Vocational rehabilitation provider" WHEN RTN30 = 12 THEN "Other" END
Program Services and Referrals	Chart	RTN54 RTN55 RTN56 RTN57 RTN58 RTN59	CASE WHEN RTN54 = 1 THEN "Job search services" WHEN RTN55 = 1 THEN "Training services" WHEN RTN56 = 1 THEN "Case management services" WHEN RTN57 = 1 THEN "On-site job analysis" WHEN RTN58 = 1 THEN "Ergonomic assessment" WHEN RTN59 = 1 THEN "Transitional work opportunity" END
Number Referred for non-RETAIN Services	Metric	RTN54 RTN55 RTN56 RTN57 RTN58 RTN59	CASE WHEN RTN54 = 2 THEN 1 WHEN RTN55 = 2 THEN 1 WHEN RTN56 = 2 THEN 1 WHEN RTN57 = 2 THEN 1 WHEN RTN58 = 2 THEN 1 WHEN RTN59 = 2 THEN 1 END

Dashboard widget	Type of graphic	QPR data field(s)	Formula
Number with Workplace Accommodations	Metric	RTN48 RTN49 RTN50 RTN51	CASE WHEN RTN48 = 1 THEN 1 WHEN RTN49 = 1 THEN 1 WHEN RTN50 = 1 THEN 1 WHEN RTN51 = 1 THEN 1 END

Table 4: Exited Participants Programmatic Success Dashboard Formulas

Dashboard widget	Type of graphic	QPR data field(s)	Formula
Employment Outcomes at Exit	Chart	RTN48 RTN49 RTN50 RTN51 RTN52 RTN68	CASE WHEN (RTN48 = 1 OR RTN49 = 1 OR RTN50 = 1 OR RTN51 = 1 OR RTN52 = 1) AND (RTN68 >= 1 AND RTN68 <= 3) THEN "Working With Accommodation" WHEN (RTN48 = 0 OR RTN49 = 0 OR RTN50 = 0 OR RTN51 = 0 OR RTN52 = 0) AND (RTN68 >= 1 AND RTN68 <= 3) THEN "Working Without Accommodation" WHEN RTN68 = 0 THEN "Did Not Return To Work" END

Dashboard widget	Type of graphic	QPR data field(s)	Formula
Percentage of Participants Enrolled by # of Weeks after Injury or Illness	Chart	RTN20 RTN24 RTN68	<pre> CASE WHEN DATE_DIFF(RTN20, RTN24) > 0 AND DATE_DIFF(RTN20, RTN24) <=14 THEN "2 Weeks" WHEN DATE_DIFF(RTN20, RTN24) > 14 AND DATE_DIFF(RTN20, RTN24) <= 28 THEN "4 Weeks" WHEN DATE_DIFF(RTN20, RTN24) > 28 AND DATE_DIFF(RTN20, RTN24) <= 42 THEN "6 Weeks" WHEN DATE_DIFF(RTN20, RTN24) > 42 AND DATE_DIFF(RTN20, RTN24) <= 56 THEN "8 Weeks" WHEN DATE_DIFF(RTN20, RTN24) > 56 AND DATE_DIFF(RTN20, RTN24) <= 70 THEN "10 Weeks" WHEN DATE_DIFF(RTN20, RTN24) > 70 AND DATE_DIFF(RTN20, RTN24) <=84 THEN "12 Weeks" END CASE WHEN RTN68 >= 1 AND RTN68 <=3 THEN "RTW" WHEN RTN68 = 0 then "No RTW" END </pre>
Median Days in Retain Program	Metric	RTN20 RTN70 RTN68	<i>Returned to Work Formula</i> DATE_DIFF(RTN70, RTN20), FILTER(RTN69 =2 & (RTN68 >= 1 & RTN68 <=3)
		RTN69	<i>Exited w/o Return to Work Formula</i> DATE_DIFF(RTN70, RTN20), FILTER(RTN69 =2 & RTN68 = 0)

Dashboard widget	Type of graphic	QPR data field(s)	Formula
Median Days Between Enrollment and RTW Plan	Metric	RTN20	<i>Returned to Work Formula</i>
		RTN42 RTN68 RTN69	DATE_DIFF(RTN42, RTN20), FILTER(RTN69 =2 & (RTN68 >= 1 & RTN68 <=3) <i>Exited w/o Return to Work Formula</i> DATE_DIFF(RTN42, RTN20), FILTER(RTN69 =2 & RTN68 = 0)
Median Days Between RTW Plan and Exit	Metric	RTN42	<i>Returned to Work Formula</i>
		RTN68 RTN69 RTN70	DATE_DIFF(RTN70, RTN42), FILTER(RTN69 =2 & (RTN68 >= 1 & RTN68 <=3) <i>Exited w/o Return to Work Formula</i> DATE_DIFF(RTN70, RTN42), FILTER(RTN69 =2 & RTN68 = 0)
Median Number of Employer Touchpoints	Metric	RTN35	<i>Returned to Work Formula</i>
		RTN68 RTN69	MED(RTN35), FILTER(RTN69 =2 & (RTN68 >= 1 & RTN68 <=3) <i>Exited w/o Return to Work Formula</i> MED(RTN35), FILTER(RTN69 =2 & RTN68 = 0)
Median Number of HCP Touchpoints	Metric	RTN36	<i>Returned to Work Formula</i>
		RTN68 RTN69	MED(RTN36), FILTER(RTN69 =2 & (RTN68 >= 1 & RTN68 <=3) <i>Exited w/o Return to Work Formula</i> MED(RTN36), FILTER(RTN69 =2 & RTN68 = 0)
Median Number of Participant Touchpoints	Metric	RTN34	<i>Returned to Work Formula</i>
		RTN68 RTN69	MED(RTN34), FILTER(RTN69 = 2 & (RTN68 >= 1 & RTN68 <=3) <i>Exited w/o Return to Work Formula</i> MED(RTN34), FILTER(RTN69 = 2 & RTN68 = 0)

Dashboard widget	Type of graphic	QPR data field(s)	Formula
Number Referred to Other Programs After RETAIN	Metric	RTN68 RTN69 RTN71	CASE WHEN RTN71 = 1 THEN 1 END FILTER(RTN69 = 2 & RTN68 = 0)
Number Not Referred to Other Programs After RETAIN	Metric	RTN68 RTN69 RTN71	CASE WHEN RTN71 = 2 THEN 1 END FILTER(RTN69 = 2 & RTN68 = 0)