

Retaining Employment and Talent After Injury/Illness Network

Technical Assistance Resource: Programmatic Success Dashboard: User's Guide

Overview

This User's Guide will support Retaining Employment and Talent After Injury/Illness Network (RETAIN) states' use of the RETAIN Programmatic Success Dashboard—a continuous quality improvement (CQI) resource designed to help states understand the effectiveness of their program implementation. The dashboard uses the RETAIN *Quarterly Progress Report (QPR)* Appendix A data structure to display information about the RETAIN participant demographics, RETAIN program implementation metrics, and a comparison of participants who exited and returned to work with participants who exited after six months and did not return to work.

The dashboard provides RETAIN states with a framework for data-driven continuous monitoring of program implementation and may be used as a starting point for identifying underlying problems, potential areas for improvement, and to help teams reach a shared understanding of them.

Specifically, the dashboard is meant for use by all state RETAIN project staff involved with program implementation efforts. It can identify strengths and gaps in

- *Participant success.* What are the demographic profiles of RETAIN participants who return to work? What is their age, race, and ethnicity? What industry do they work in? What level of education do they have?
- *Program implementation.* How long do participants stay in the program before returning to work? Is the length of time between injury and enrollment associated with RETAIN participants' successful return to work? Is the length of time between other program markers (for example, approval of return-to-work plan) an indicator of future success?
- *Other program metrics.* Does the number of accommodations or interactions between the RETAIN participants and their employers or health care providers affect whether the RETAIN participants are likely to return to work? How do individual risk factors, receiving workers' compensation, or geographic location affect success?

What You Need to Use This Tool

The RETAIN technical assistance (TA) team developed this dashboard with the assumption that the state RETAIN teams have the following:

- **Staff:** Ability to access Google Data Studios and at least one state team member with basic proficiency in Google Sheets¹ and/or Google Data Studios.
- **Appendix A data:** The QPR Appendix A data structure is the back-end infrastructure. This is the same data structure submitted to the U.S. Department of Labor on a quarterly basis. It requires no additional data collection.
- **Google Sheets:** Appendix A data as a comma-separated values (CSV) file in Google Sheets. RETAIN states can connect other data sources to Google Data Studios, if necessary. For more information on supported data sources, see Google Connectors.²
- **Google Data Studios:** Access to Google Data Studios, a free, open-source data visualization platform hosted by Google. For states that cannot use Google products or have their own dashboards, the User's Guide appendix includes all formulas for developing the dashboard widgets. This appendix is posted separately on the RETAIN Online Community.

Where do I get the data?

The Programmatic Success Dashboard uses the RETAIN QPR Appendix A de-identified format.

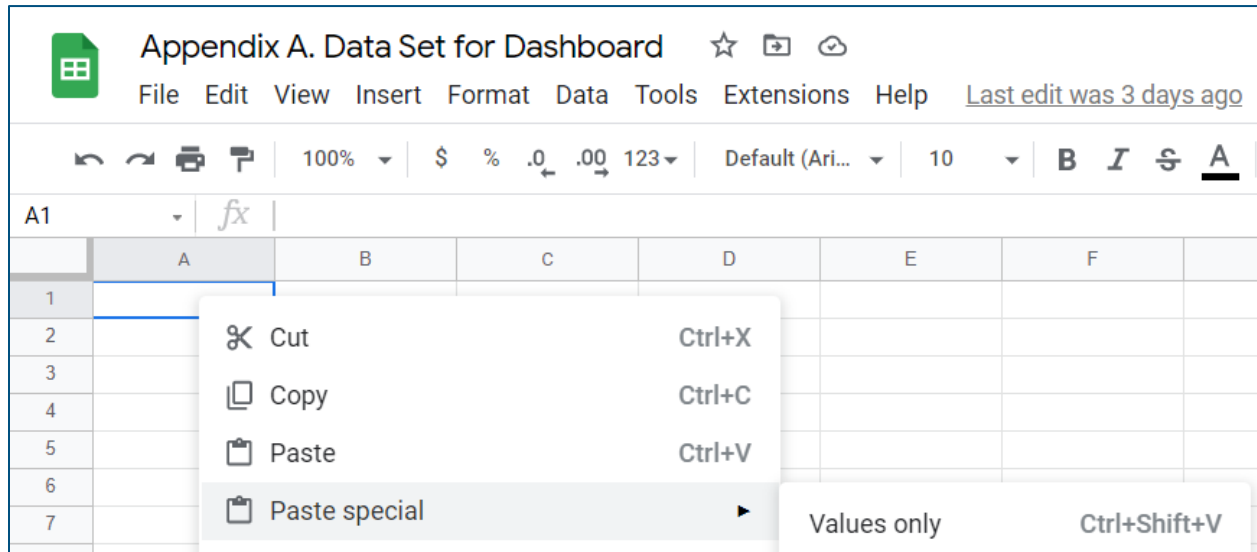
Preparing the Data for the Dashboard

Begin by locating a copy of the Appendix A data. Copy and paste the Appendix A data into a new Google Sheet.

- When copying the data, note the following:
 - Format the data as a table with rows and columns. Each column should contain only single cells; merged cells may cause your data to appear incorrectly. Each row should represent a person (i.e., a RETAIN participant), and each column should align to the data fields in the format and order as described in the QPR Appendix A for Phase 2.
 - Copy the data into the first row and the leftmost column (Row 1 and Column A).
 - When pasting the data into a Google Sheet, use “Paste special” > “Values only” so that you don't accidentally overwrite the formatting of cells in the Google Sheet. (See Figure 1 for a visual display of this action.)

¹ Google. (n.d.) Make data-driven decisions, in Google Sheets. <https://www.google.com/sheets/about/>

² Google. (n.d.) Google Data Studio. <https://datastudio.google.com/u/0/datasources/create>

Figure 1. Visual Depiction of the “Paste Special” Copy-and-Paste Action

- Once you paste the data into a Google Sheet, the data are now ready to be connected to the Google Data Studios platform.

Creating Your Dashboard and Connecting Your Data

You can access the prototype dashboard [here](#).

When you create your own copy of the dashboard, your copy will inherit from the original the following elements:

- pages
- charts
- data range controls
- data and style settings
- shapes and images
- filters

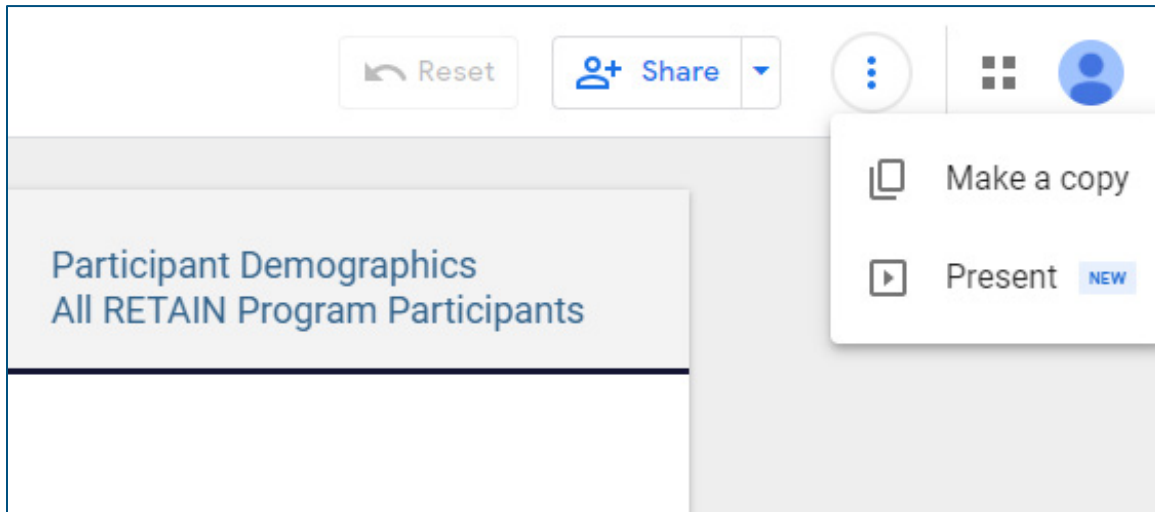
Note: Creating a copy of the dashboard does *not* create a copy of the data source(s). For this dashboard, the data source is the Google Sheet where you loaded the Appendix A data. You must select the data source(s) to use for the copy of the dashboard.

For RETAIN states that want to use the dashboard in Google Data Studios, please follow the directions below.

1. [View the dashboard](#).

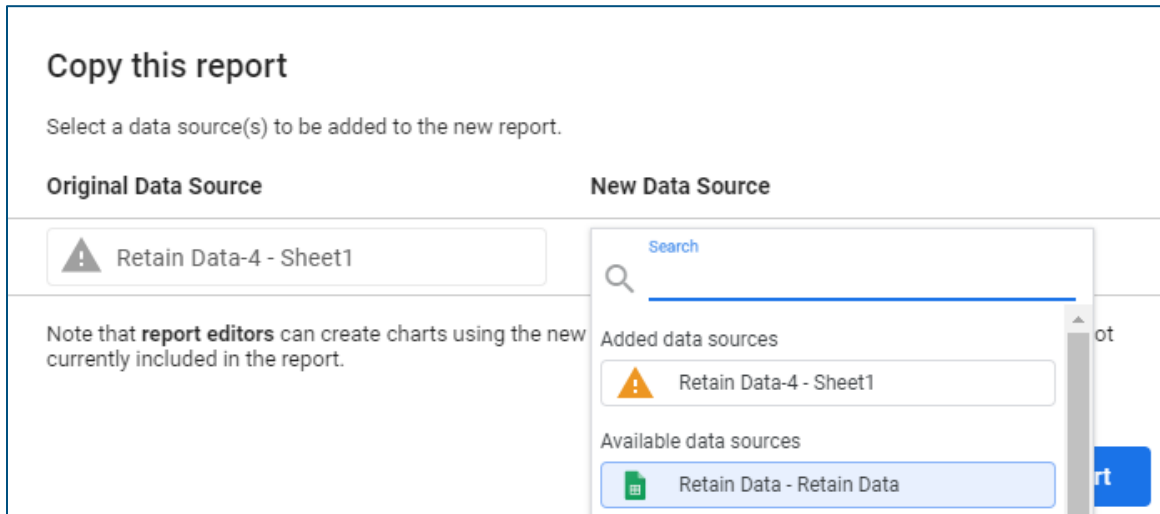
2. In the top right, click  and then click  (“Make a copy”). (See Figure 2.)

Figure 2. Visual Depiction of the “Make a Copy” Action



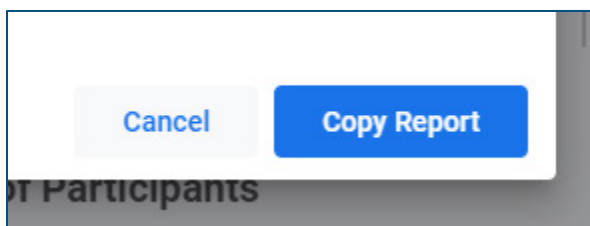
3. Select the Google Sheet created in the earlier section (Figure 3).

Figure 3. Visual Depiction of the “Select New Data Source” Action



4. Click “Copy Report” (Figure 4).

Figure 4. Visual Depiction of the “Copy Report” Action



Viewing and Filtering the Dashboard

The RETAIN Programmatic Success Dashboard user interface has four distinct parts (See Figures 5 and 6 for screenshots of what the user sees when viewing the dashboard.) The four parts include:

- The header (Figure 5, number 1) includes the RETAIN logo, the dashboard title, the data last updated by date, and a description of what the dashboard page is displaying.
- The page tabs (Figure 6, number 2), on the left side of the Google Data Studios user interface, are the list of pages available in this dashboard.
- The filter options (Figure 5, number 3), on the left side of the dashboard, are the list of filters included in this dashboard. The filter options are discussed in more detail in the next section.
- The data charts and tables (Figure 5, number 4) are discussed in detail by page in a subsequent section.

Figure 5. The RETAIN Programmatic Success Dashboard

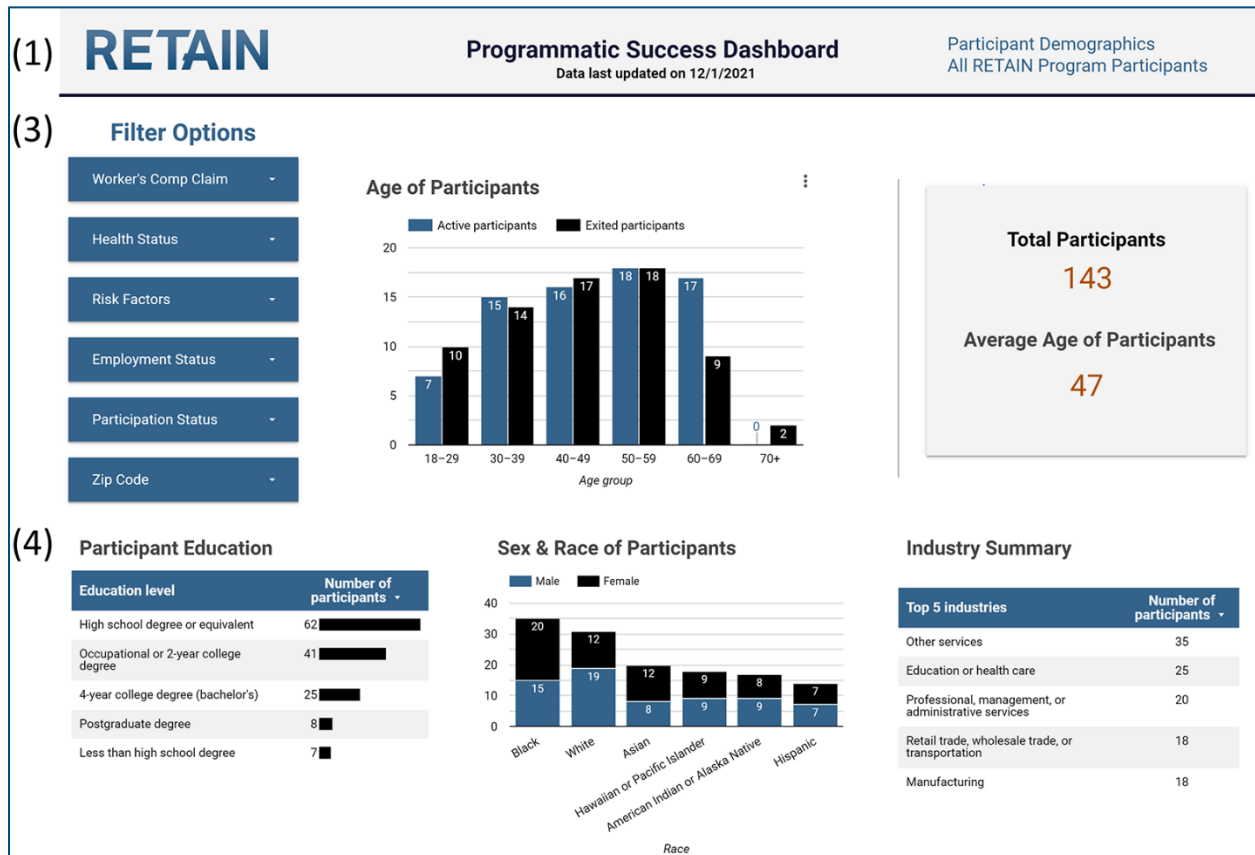
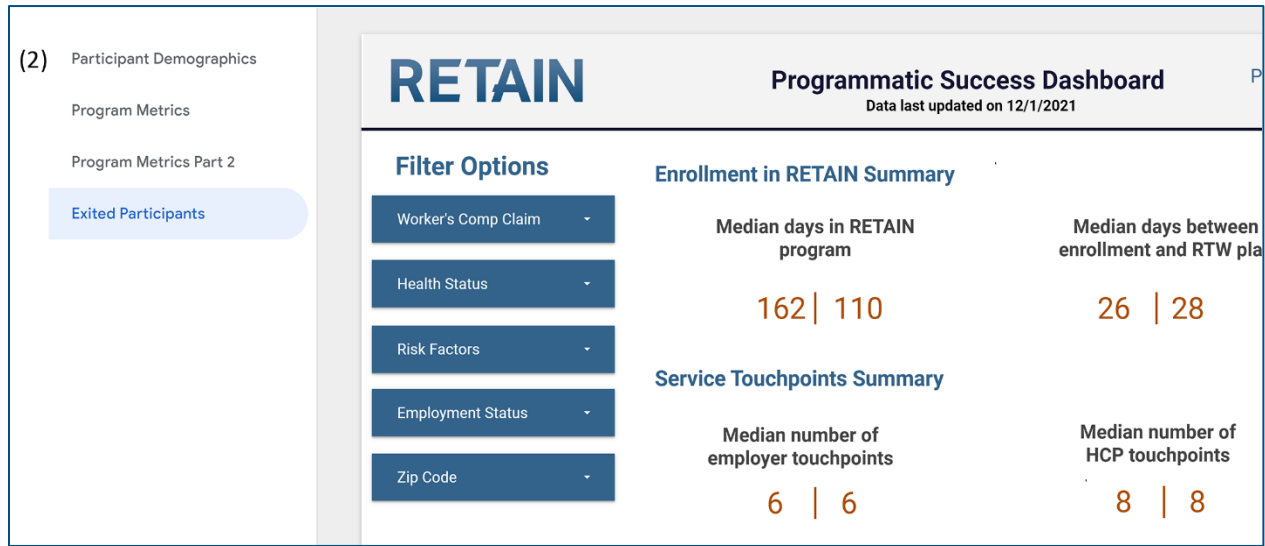


Figure 6. RETAIN Programmatic Success Dashboard: Left-Side Page Tabs



The dashboard has four distinct pages (Figure 6, number 2). These pages include:

1. Participant Demographics—This page describes the demographic profile of all RETAIN participants.
2. Program Metrics—This page describes program implementation metrics. These are metrics that describe how the RETAIN program is being implemented.
3. Program Metrics Part 2—This page includes an additional set of program metrics.
4. Exited Participants—This page describes and compares subsets of participants who have exited the RETAIN program.

Filters

Filters are to the left of the charts (Figure 7). They allow you to view different subsets or combinations of the data. When you select a filter, the data displayed in the charts change.

For example, if you only want to view data for homeless participants who exited the program, begin by clicking on the “Risk Factors” filter and select “Problems Related to Housing and Economic Circumstances.” Then, click on “Participation Status” and select “Exited from RETAIN.” If you select these filters, the data charts change to reflect only data for homeless participants who exited the program.

Figure 7. Filters

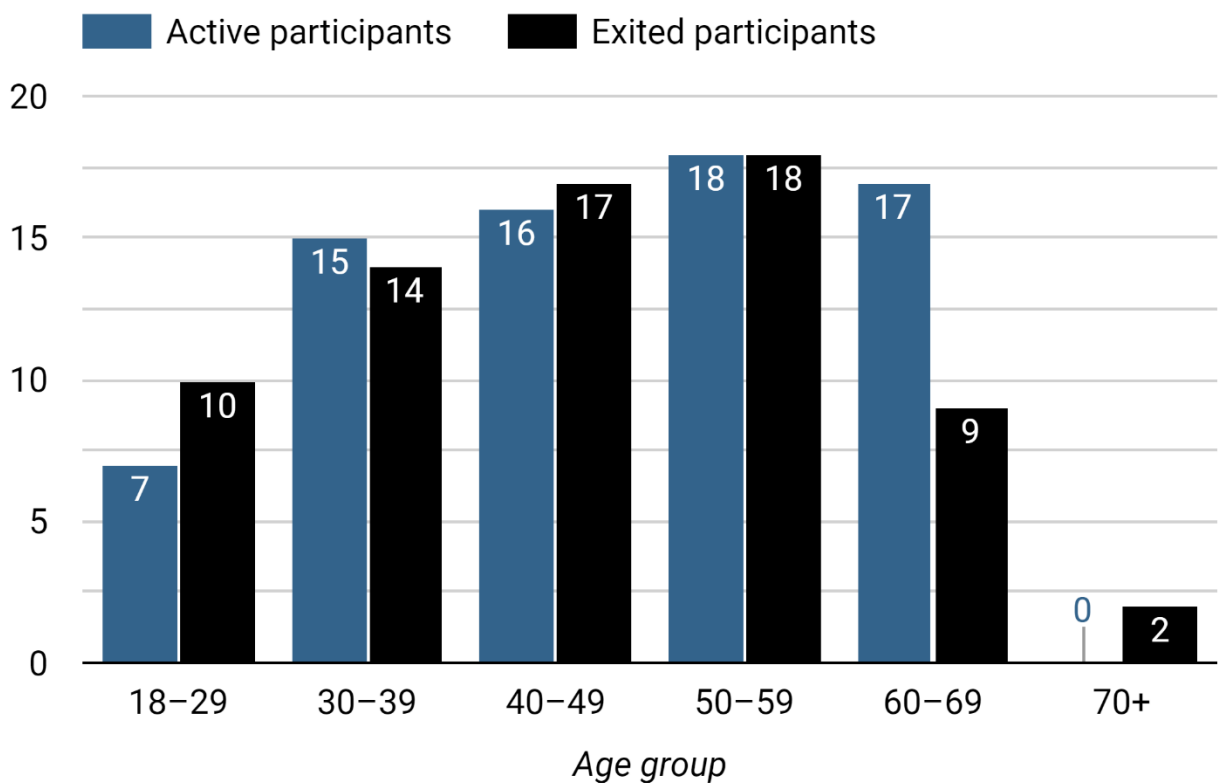


Page 1: Participant Demographics

The first page of the dashboard describes your RETAIN program participant demographics. The default view is all RETAIN program participants. This page includes graphics on the number of participants, participant age, participant education, participant race and ethnicity, and the industry in which the participant works. A brief description of each graphic appears below.

“Age of Participants” (Figure 8) shows the number of participants by age who are currently enrolled in RETAIN (dark blue) and the number of participants who have exited RETAIN (light blue). The x-axis shows the age group of participants, and the y-axis shows the number of participants.

Figure 8. Age of Participants



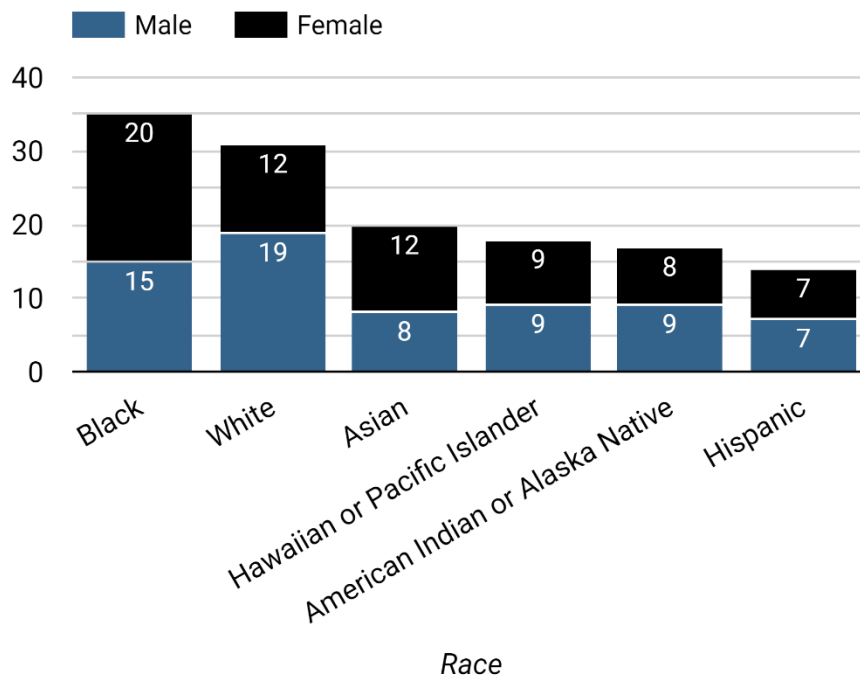
“Participant Education” (Figure 9) shows the number of RETAIN participants by education level. Users can toggle the top right arrow to sort education level by highest or lowest number of participants.

Figure 9. Participant Education

Education level	Number of participants ▾
High school degree or equivalent	62
Occupational or 2-year college degree	41
4-year college degree (bachelor's)	25
Postgraduate degree	8
Less than high school degree	7

“Sex and Race of Participants” (Figure 10) shows the number of RETAIN participants by sex and race. Male RETAIN participants (dark blue) occupy the bottom half of the stacked bar chart, and female participants (light blue) occupy the top half. The x-axis shows race by category, and the y-axis shows the number of participants.

Figure 10. Sex and Race of Participants



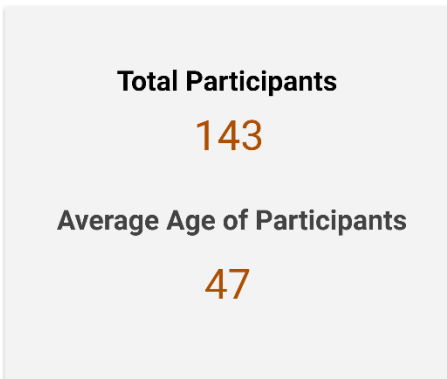
“**Top 5 Industries**” (Figure 11) shows the number of RETAIN participants by the industry in which they work. Users can toggle the top-right arrow to sort the industry type by highest or lowest number of participants.

Figure 11. Industry Summary

Top 5 industries	Number of participants ▾
Other services	35
Education or health care	25
Professional, management, or administrative services	20
Retail trade, wholesale trade, or transportation	18
Manufacturing	18

“**Total Participants and Average Age of Participants**” (Figure 12) shows the total number of RETAIN participants, both currently enrolled and exited, and the average age of all current and exited participants.

Figure 12. Total Participants and Average Age of Participants

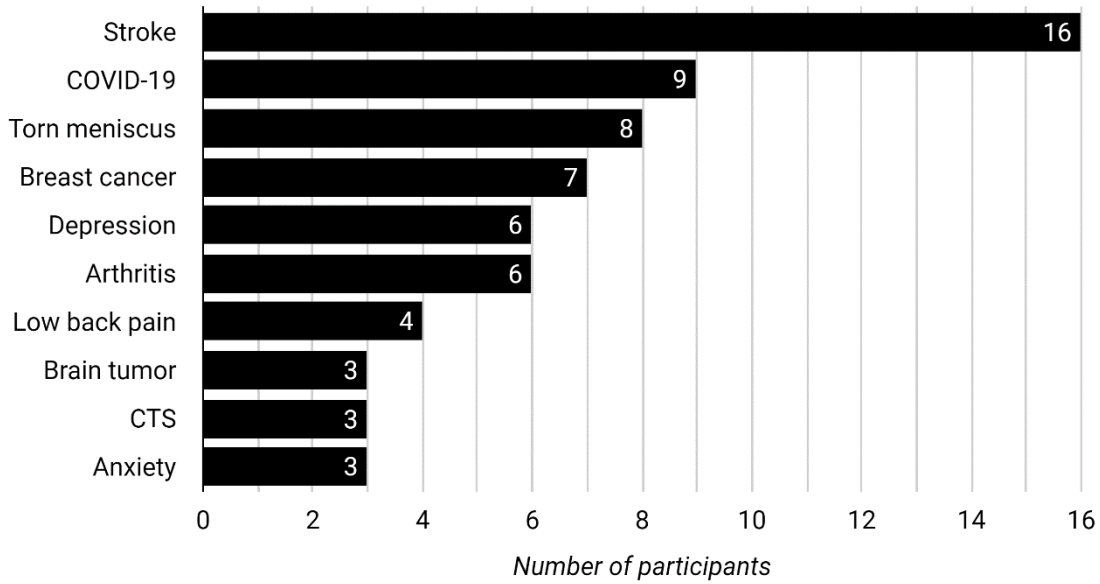


Page 2: Program Metrics

The second page of the dashboard describes RETAIN program implementation metrics. The default view is all RETAIN program participants. This page includes graphics on participant illness or injury, number of weeks enrolled after illness or injury, days in the RETAIN program, days between enrollment and the development of the return-to-work (RTW) plan, days between the development of that plan and participant exit, and number of touchpoints with the employer, health care provider, and RTW coordinator. A brief description of each graphic appears below.

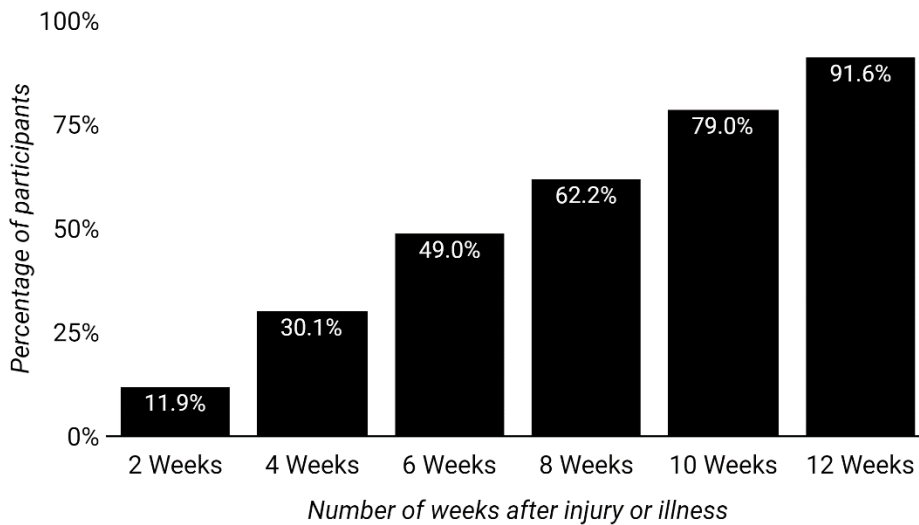
“Top 10 Participant Illnesses or Injuries” (Figure 13) shows the top 10 illnesses or injuries by number of RETAIN participants. The y-axis shows the type of injury, and the x-axis shows the number of participants.

Figure 13. Top 10 Illnesses or Injuries



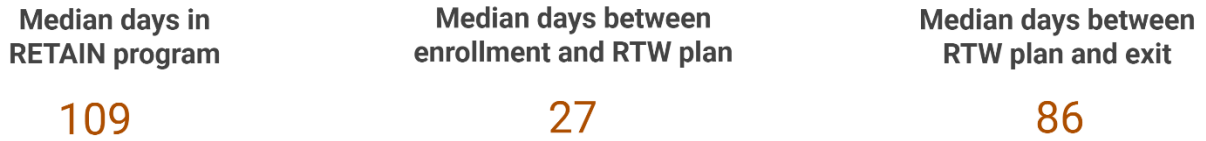
“Percentage of Participants Enrolled, by Number of Weeks After Injury or Illness” (Figure 14) shows the cumulative percentage of participants who enrolled in RETAIN by the number of weeks after their injury or illness. The y-axis shows the percentage of participants, and the x-axis shows the number of weeks after their injury or illness that the participant enrolled in RETAIN.

Figure 14. Percentage of Participants Enrolled, by Number of Weeks After Injury or Illness



“Enrollment in RETAIN Summary” (Figure 15) shows the median days (a) the participants are enrolled in RETAIN, (b) between participant enrollment in RETAIN and signing their RTW plan, and (c) between the participant signing the RTW plan and their exit from the RETAIN program.

Figure 15. Enrollment in RETAIN Summary



“Service Touchpoints Summary” (Figure 16) shows the median number of touchpoints per participant between the RTW coordinators and (a) the participant’s employer, (b) health care professionals, and (c) the participant themselves.

Figure 16. Service Touchpoints Summary

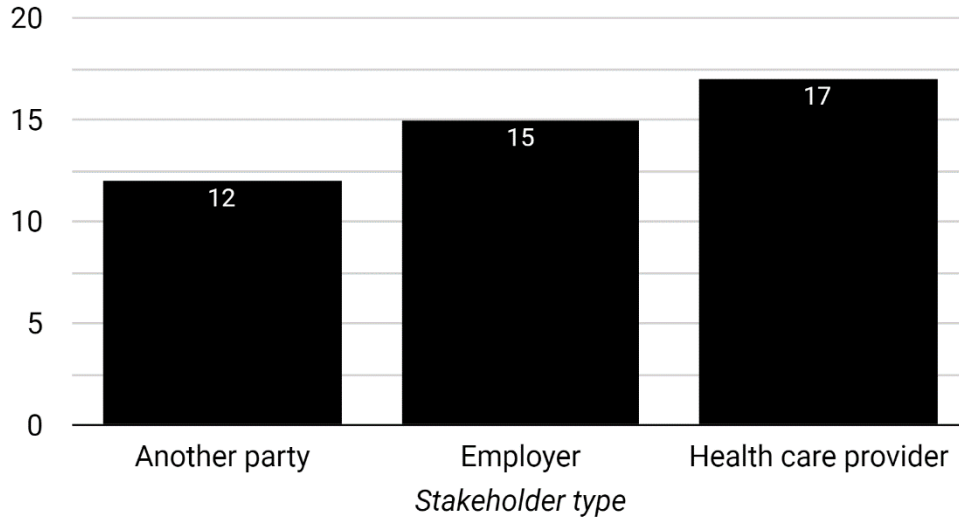


Page 3: Program Metrics (Part 2)

The third page of the dashboard illustrates another set of RETAIN program implementation metrics. The default view is all RETAIN program participants. This page includes graphics on participant interaction for the resolution of RTW obstacles, referral sources, program services and referrals, the number of program services outside RETAIN, and the number of workplace accommodations provided to the participant. A brief description of each graphic appears below.

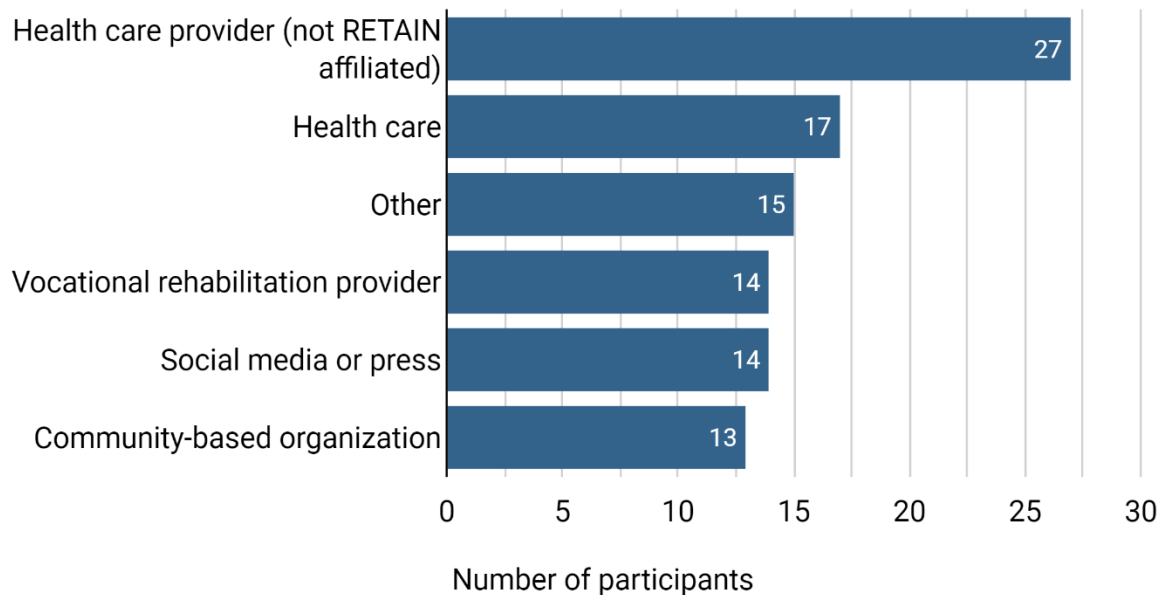
“Number of Participants Who Interacted With RETAIN Stakeholders” (Figure 17) shows the number of RETAIN participants who interacted with different types of RETAIN stakeholders to resolve stay-at-work/return-to-work (SAW/RTW) obstacles. The y-axis shows the number of participants, and the x-axis shows type of RETAIN stakeholder.

Figure 17. Number of Participants Who Interacted With RETAIN Stakeholders



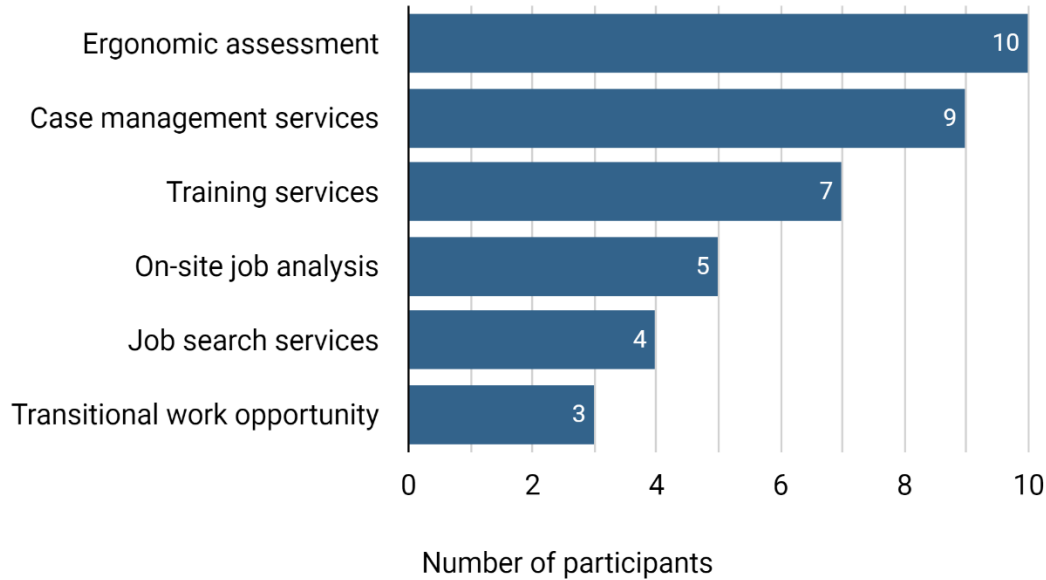
“Referral Sources” (Figure 18) shows the number of participants referred by each source. The y-axis displays the referral source, and the x-axis displays the number of participants.

Figure 18. Referral Sources



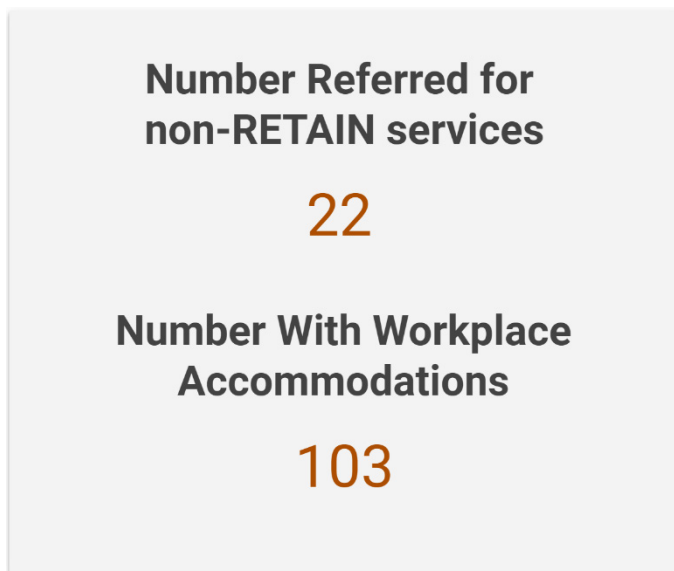
“Program Services and Referrals” (Figure 19) shows the different types of employment outcomes for RETAIN participants at exit. The y-axis displays employment outcomes, and the x-axis displays the number of participants for each employment outcome.

Figure 19. Program Services and Referrals



“Number of Program Services Outside RETAIN and Number of Workplace Accommodations” (Figure 20) shows (a) the number of participants referred to program services outside RETAIN and (b) the number of SAW/RTW workplace accommodations that RETAIN participants received.

Figure 20. Number of Program Services Outside RETAIN and Number of Workplace Accommodations



Page 4: Exited Participant Comparison

The fourth page of the dashboard is a comparison of RETAIN participants who exited and returned to work and participants who exited and did not return to work. The default view is all exited RETAIN program participants. This page includes graphics on participant employment outcomes at exit, percentage of exited participants enrolled by number of weeks after injury or illness, days enrolled in the RETAIN program, days between enrollment and RTW plan, days between RTW plan and exit, and number of referrals to outside services. The page also includes graphics on the number of touchpoints with the employer, health care provider, and RTW coordinator. A brief description of each graphic follows.

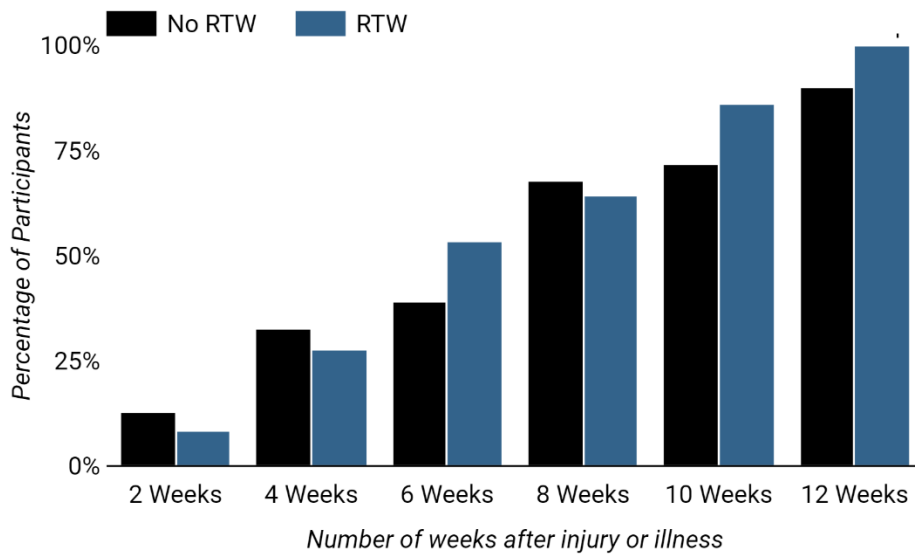
“Employment Outcomes at Exit” (Figure 21) shows the breakdown of participant employment outcomes after the participant exited the RETAIN program. The employment outcomes include (a) the participant is working with accommodations, (b) the participant did not return to work, and (c) the participant is working without accommodations.

Figure 21. Employment Outcomes at Exit

Employment Outcomes	Record Count
Working With Accommodation	78
Did Not Return To Work	38
Working Without Accommodation	27

“Percentage of Participants Enrolled, by Number of Weeks After Injury or Illness” (Figure 22) shows the cumulative percentage of participants who enrolled in RETAIN by the number of weeks after injury or illness for participants who exited and returned to work (dark blue) and participants who exited after six months without returning to work (light blue). The y-axis shows the number of weeks after injury or illness, and the x-axis shows the percentage of participants.

Figure 22. Percentage of Participants Enrolled, by Number of Weeks After Injury or Illness



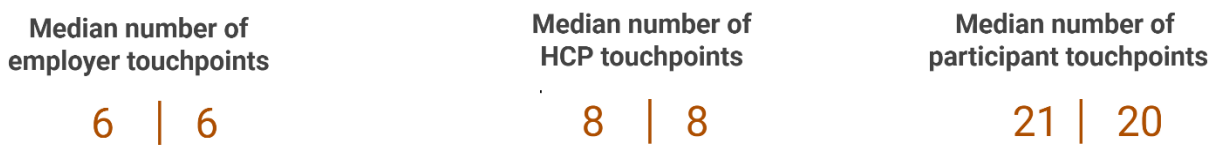
“**Enrollment in RETAIN Summary**” (Figure 23) shows median number of days (a) in the RETAIN program, (b) between enrollment and RTW plan, and (c) in the RETAIN program for RETAIN participants who exited and returned to work (left-hand number) and participants who exited the program after 6 months without returning to work (right-hand number).

Figure 23. Enrollment in RETAIN Summary



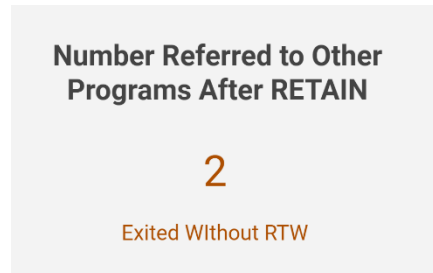
“**Service Touchpoints Summary**” (Figure 24) shows (a) median number of employer touchpoints, (b) median number of health care professional touchpoints, and (c) median number of participant touchpoints by the RETAIN RTW coordinators for participants who exited and returned to work (left-hand number) and participants who exited the program after 6 months without returning to work (right-hand number).

Figure 24: Service Touchpoints Summary



“Number of Participants Referred to Services After RETAIN” (Figure 25) shows the number of participants who exited the RETAIN program and were referred to additional services beyond the RETAIN program.

Figure 25: Number of Participants Referred to Services After RETAIN



“Number of Participants Who Exited RETAIN Without Referral and RTW” (Figure 26) shows the number of participants who exited the RETAIN program but were not referred to additional services beyond the RETAIN program.

Figure 26: Number of Participants Not Referred to Services After RETAIN



Customizing the Tool

The dashboard can be modified if a RETAIN state would like to add or remove components or pages. The following list provides an example of possible ways in which the dashboard can be customized.

1. **Revising the data table:** States may consider adding columns in the Google Sheet. The dashboard is designed for easy copying and pasting of the QPR Appendix A data set to reduce the burden of data entry. However, RETAIN states can choose to add columns to Google Sheets to potentially align with their reporting systems or processes.
2. **Add or remove filters:** The dashboard comes with a predetermined set of filters; however, a state can add or remove the existing filters.
3. **Add or remove metrics or charts:** The dashboard comes with a predetermined set of charts and metrics; however, a state can modify or revise these metrics or charts.

People with a knowledge of Google Data Studios, Google Sheets, and basic spreadsheet formulas (for example, those used in Microsoft Excel) can make these dashboard modifications and others. RETAIN TA can aid with dashboard modification upon request.

RETAIN TA Support

RETAIN state team users who have questions about the dashboard tool or who require any support may submit a request to the state's TA liaison or via email at RETAINTA@air.org. This can include the following:

- developing and implementing a plan to modify the tool to meet the state's needs
- developing a process to move data from the state's internal infrastructure to the tool on a regular basis
- interpreting the dashboard data and developing strategies in response