



RETAIN Technical Assistance Resource Recruitment-to-Enrollment Pipeline Dashboard Tool:

User's Guide Addendum

Overview

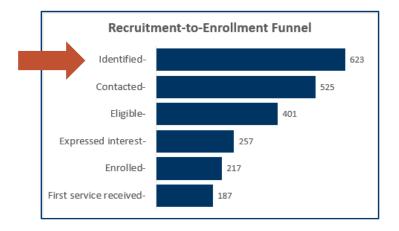
This User's Guide Addendum is a companion tool, developed to support the use of the RETAIN Recruitment-to-Enrollment Pipeline Dashboard tool—a continuous quality improvement (CQI) resource designed to help states understand the effectiveness of their recruitment and enrollment efforts.

This addendum includes step-by-step instructions for dashboard users to customize the tool by:

- 1. Modifying the Recruitment-to-Enrollment funnel pathway and
- 2. Editing and adding filters to the Recruitment-to-Enrollment Dashboard.

Modifying the Recruitment-to-Enrollment Funnel Pathway

If the existing pathway does not work for a state's project, states may modify the steps so that they are aligned with their project's recruitment process. The following instructions are a step-by-step description of how to change the "Identified" category with "REVISE NAME HERE."



Step 1: Right-click the "Dashboard" tab at the bottom of the Excel spreadsheet and select "Unhide."

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300	<u>I</u> nsert		
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JL	🔯 View Code	gust	September
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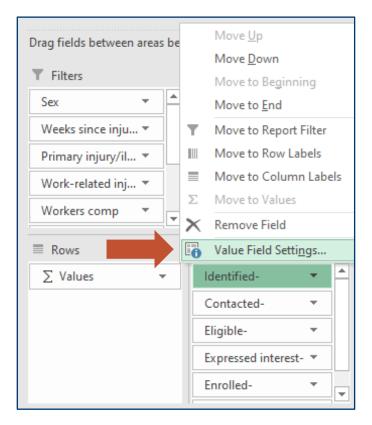
Step 2: Select "funnel" from the list provided.

Unhide sheet:	
funnel	
trend	

If the pivot table "Field List" does not automatically pop up, click on "PivotTable Analyze" at the top and select "Field List."

PivotTable Ar	nalyze	Design								
				fx	$\int f_X$					
sh Change Data			Move		•	Relationships	PivotCha		Field +/- Field	
Source ~	~	✓ Piv	votTable	& Sets ~	Tools ~			PivotTabl_s	List Buttons Headers	
Data		Actions			Calculation	ns		Tools	Show	
		_							Field List Show or hide the Field List.	
		623							The field list allows you to add a remove fields from your PivotT	
	525								report.	

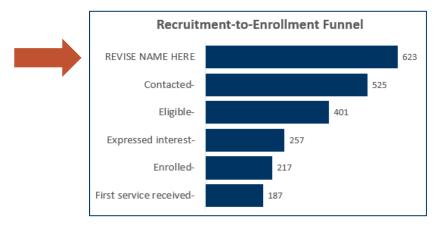
Step 3: In the pivot table field list bottom right quadrant (Values quadrant), left-click on the category to revise and select "Value Field Settings."



Step 4: Go to "Custom Name" and revise category name. Click "OK" when finished.

Source Name:				
Custom Name:	REVISE	NAME HERE		
Summarize Va	alues By	Show Values As		
<u>Summarize</u> v	alue fiel	d by		
Choose the ty data from the		ulation that you want ield	to use to sun	nmarize
Count Average				
Max				

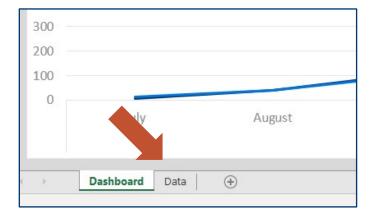
Step 5: Verify that your category name has been updated by returning to the "Dashboard" tab and confirming that the name has been changed.



Editing or Adding Filters to the Recruitment-to-Enrollment Dashboard

The dashboard comes with a predetermined set of filters. However, if the state determines that they would like a different set of filters, it is possible to add new filters or edit the existing set of filters. The following instructions are a step-by-step description of how to revise an existing filter to "CHANGE HEADER NAME."

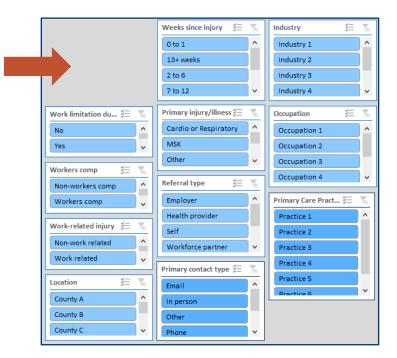
Step 1: Select the "Data" tab at the bottom left of the Recruitment-to-Enrollment Dashboard.



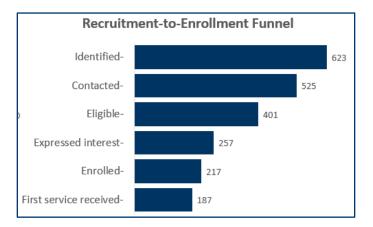
Step 2: Change column header name of column you would like to change.

С	D	E	F	
CHANGE HEADER NAME	Sex	Hispanic	Race	Wo

Note: When you return to the "Dashboard" tab, the corresponding filter box on the dashboard has now disappeared.



Step 3: Return to the "Dashboard" tab. Select one of the three graphics.



Step 4: Select "PivotChart Analyze."

AutoS	ave Off	B 9		Recruit	ment enrol	llment pipelir	ne tracker R	Release Ver	sion 2 SAMPLE DATA 👻		🔎 Search		
File	Home	Insert	Page Layout	Formulas	Data	Review	View	Help	Nuan	Pivot	Chart Analyze	Design	Format
(i) UF	i UPDATES AVAILABLE Updates for Office are ready to be installed, but first we need to close some apps. Update now												
Chart 1		×	√ f _x										

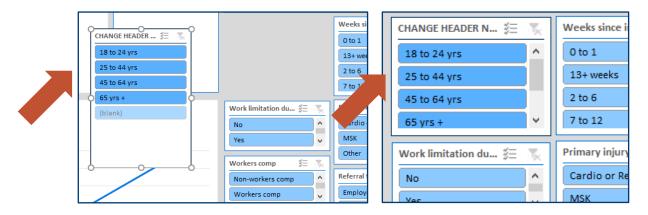
Step 5: Select "Insert Slicer" from the "PivotChart Analyze" drop-down menu.

Insert Filter Slicer Timeline Connections	Data F	Review	View	Help	Nı	iance PDF	Team	Pivot	Chart Analyze
		U	ĽĘ		Refresh			Move	
Filter Data Actions		Timeline	Connectio		~	Source ~	~	Chart	

Step 6: Select the new filter that you created and click "OK."

Insert Slicers ?	×
	_
Unique Person ID	^
Notes	
CHANGE HEADER NAME	
Sex Sex	
Hispanic Hispanic	
Race	
Work limitation due to injury/	
Earned gt 1000 per mo	
Applied for SSI/SSDI last 5 yrs	
Employment status	
Weeks since injury	
Primary injury/illness	
Work-related injury	
Workers comp	
Industry	
Occupation	
Referral type	¥
OK Cancel	

Step 7: Move filter to empty spot on dashboard.



Step 8: Connect your slicer to all three graphics. Right-click the new filter that you created and select "Report Connections."

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CHANGE HEADE	Х	Cu <u>t</u>	Inc
18 to 24 yrs		<u>C</u> opy	
0 25 to 44 yrs	-		
45 to 64 yrs		Paste Options:	1
65 yrs +			
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	A	Sort A to Z	
No		_	C
Yes	Ă↓	Sort Z t <u>o</u> A	C
Workers comp	\sum	Clear Filter from "CHANGE HEADER NAME"	C
Non-workers	¥Ξ	Multi-Select "CHANGE HEADER NAME"	C
	5	Report Connections	Pri
Work-related i	×	Remove "CHANGE HEADER NAME"	F

Step 9: Click on the remaining PivotTables and click "OK."

Report Co	onnections (CHANGE	HEADE	R NAME)	?	×
Select Pive	otTable and PivotCha	rt repor	ts to conne	ct to thi	s filter
	Name		Sheet		
I	PivotTable1		funnel		1
i	PivotTable1		reason		
	PivotTable2		trend		
			OK	Car	ncel

This guide 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.