

RETAIN Technical Assistance Resource

Recruitment-to-Enrollment Pipeline Dashboard Tool:

User’s Guide Addendum

Overview

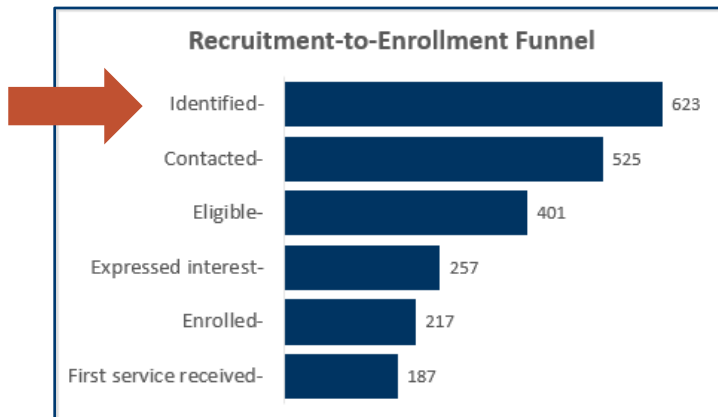
This User’s Guide Addendum is a companion tool, developed to support the use of the RETAIN Recruitment-to-Enrollment Pipeline Dashboard tool—a continuous quality improvement (CQI) resource designed to help states understand the effectiveness of their recruitment and enrollment efforts.

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

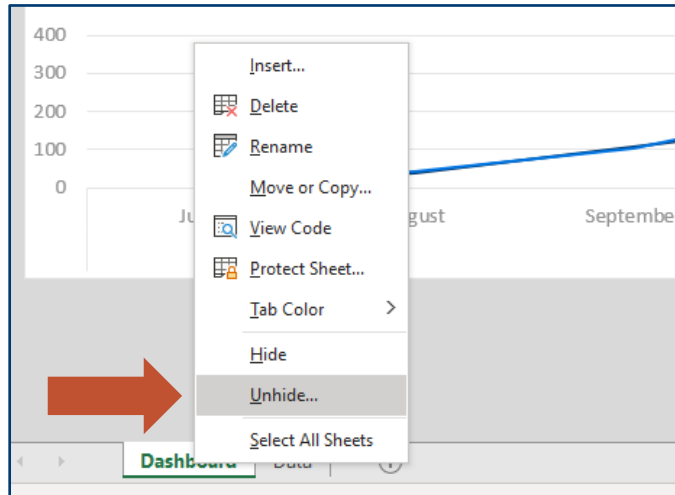
1. Modifying the Recruitment-to-Enrollment funnel pathway and
2. Editing and adding filters to the Recruitment-to-Enrollment Dashboard.

Modifying the Recruitment-to-Enrollment Funnel Pathway

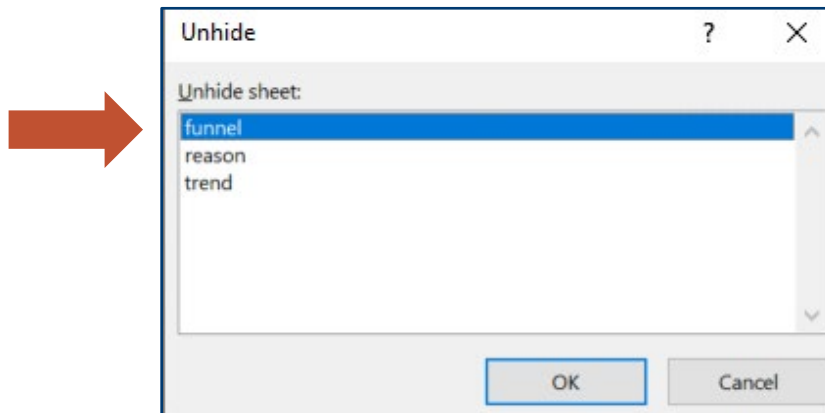
If the existing pathway does not work for a state’s project, states may modify the steps so that they are aligned with their project’s recruitment process. The following instructions are a step-by-step description of how to change the “Identified” category with “REVISE NAME HERE.”



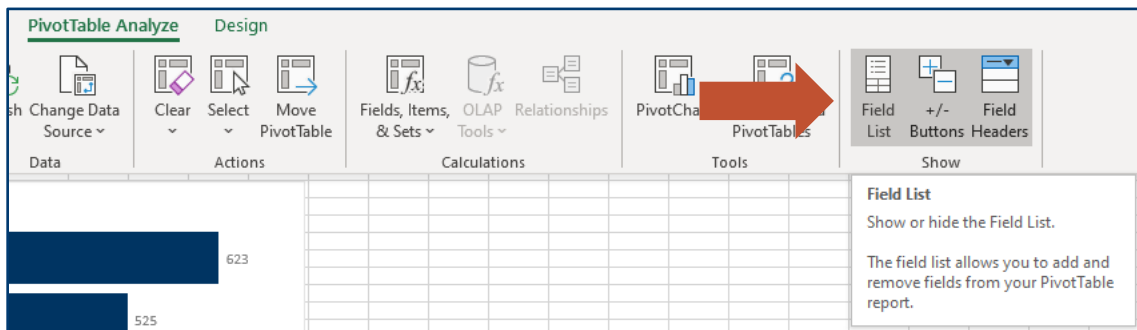
Step 1: Right-click the “Dashboard” tab at the bottom of the Excel spreadsheet and select “Unhide.”



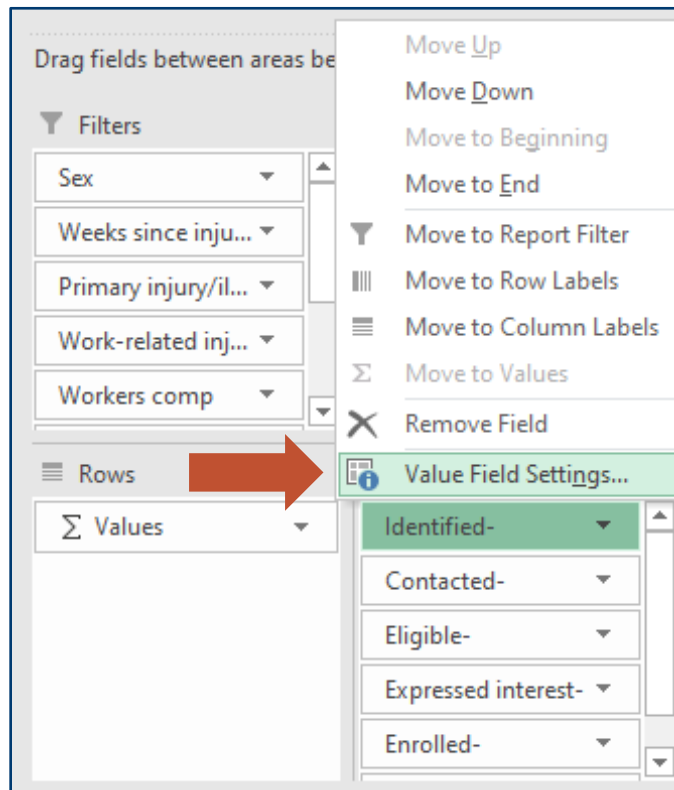
Step 2: Select “funnel” from the list provided.



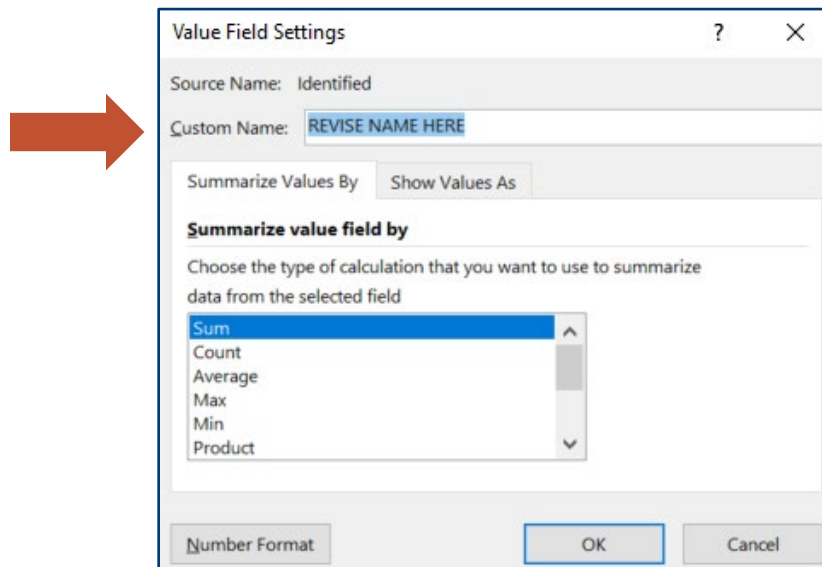
If the pivot table “Field List” does not automatically pop up, click on “PivotTable Analyze” at the top and select “Field List.”



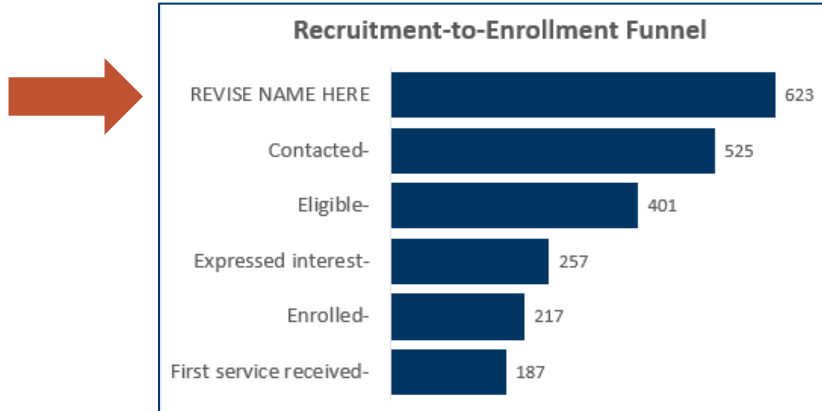
Step 3: In the pivot table field list bottom right quadrant (Values quadrant), left-click on the category to revise and select “Value Field Settings.”



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



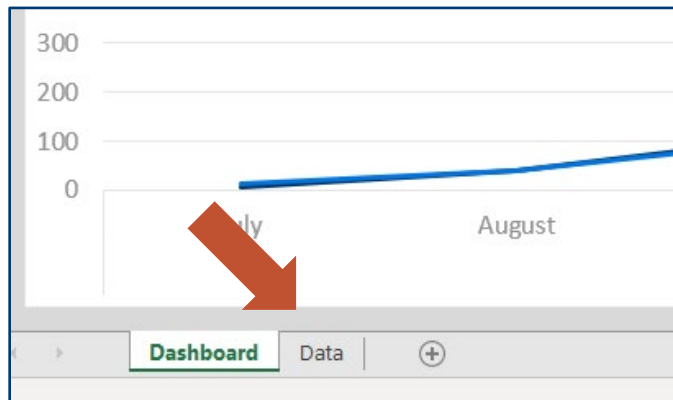
Step 5: Verify that your category name has been updated by returning to the “Dashboard” tab and confirming that the name has been changed.



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.



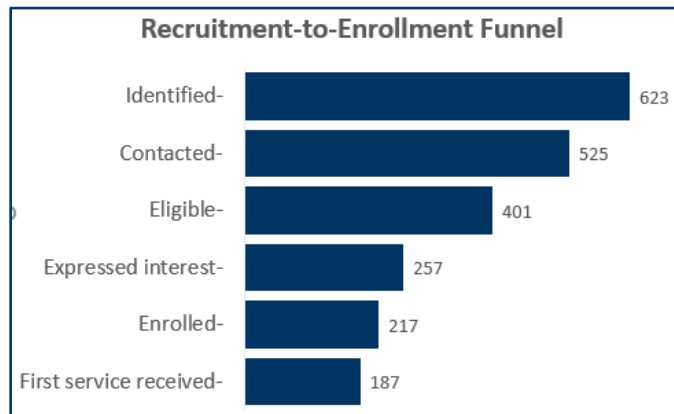
Step 2: Change column header name of column you would like to change.

C	D	E	F	Wo
CHANGE HEADER NAME	Sex	Hispanic	Race	Wo

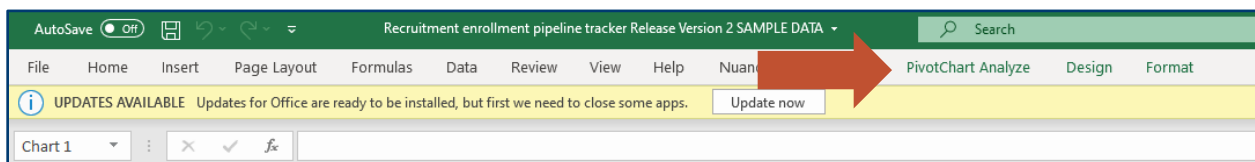
Note: When you return to the “Dashboard” tab, the corresponding filter box on the dashboard has now disappeared.



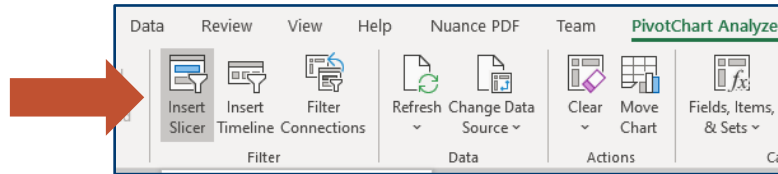
Step 3: Return to the “Dashboard” tab. Select one of the three graphics.



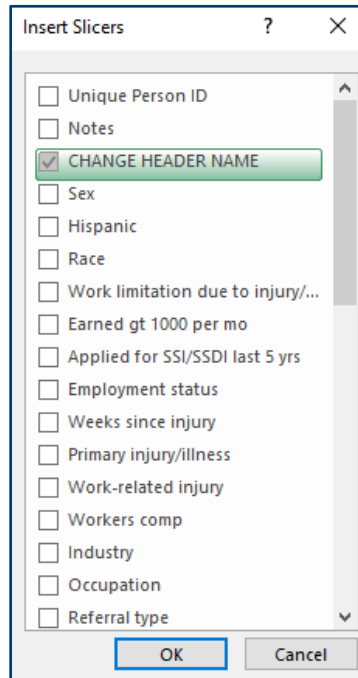
Step 4: Select “PivotChart Analyze.”



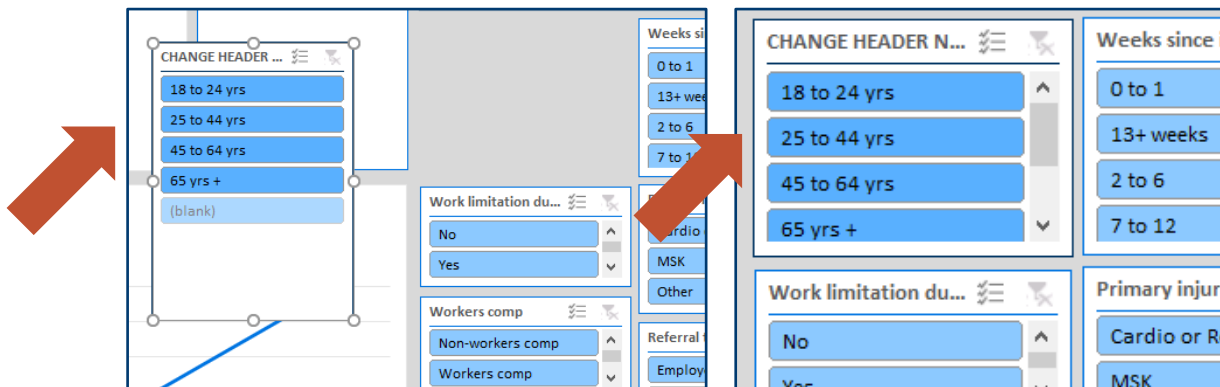
Step 5: Select "Insert Slicer" from the "PivotChart Analyze" drop-down menu.



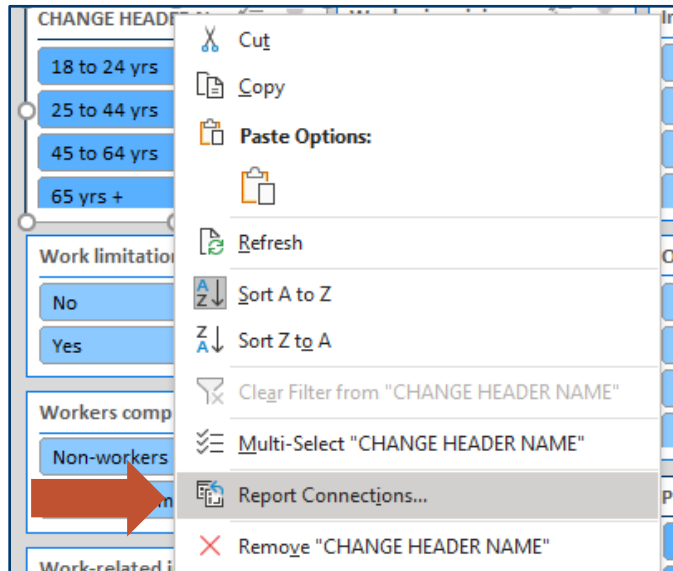
Step 6: Select the new filter that you created and click "OK."



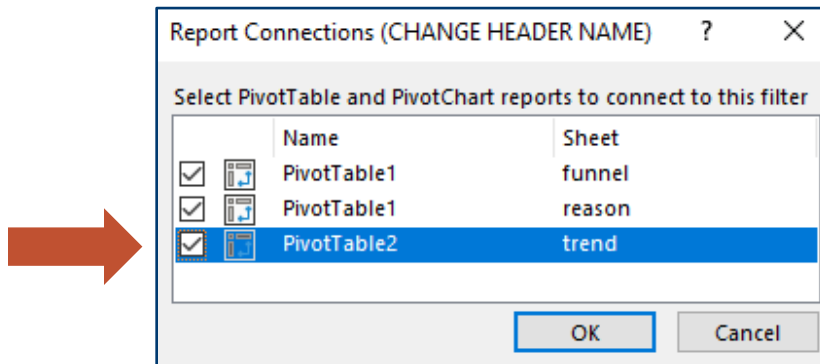
Step 7: Move filter to empty spot on dashboard.



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



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



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.