County Dashboards Toolkit

Colorado Business Process Reengineering Project

Public Consulting Group

April 2020

PUBLIC CONSULTING GROUP

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BACKGROUND

The CBMS county dashboards provide useful information to monitor program workflow and guide decisions about how to manage workload. They are currently accessible to supervisors, administrators or managers. The county dashboards provide information for all high-level program groups currently operating within CBMS.

WHY DASHBOARDS?

Agencies using county dashboards report that they are helpful overview of information that can guide decision-making around workloads and where to prioritize time and resources to support timely and accurate eligibility decisions. For some agencies, the CBMS county dashboards provide information that isn't available through their own site dashboards.

The **Application Timeliness and RRR timeliness** are reported as the most helpful dashboards and the those which are checked most frequently. Agencies also find pending applications, PEAK inbox, and the backlog board dashboards helpful.

HOW TO ACCESS THE COUNTY DASHBOARDS

County dashboards are accessed through the CBMS Home page and require Einstein Analytics Platform user access. All dashboards are updated via nightly batch except for the Colorado Works (CW) Board and Work Programs, and Enhanced Funding.

The County Dashboard home page, "Summary Info" includes the title of each dashboard, a description of the dashboard and live key performance indicators for each dashboard as seen in the example screenshot provided and in Table 1. Tips on how to navigate the County Dashboards can be found in the CBMS Tip Sheet – Updated County Dashboard [link] and the available web-based training.

Dashboard	Dashboard Description	Key Performance Indicator	
Application Timeliness	Data for up to the previous 6 months. Updated via nightly batch.	Application Timely Percentage	89.35
RRR Timeliness	Data for up to the previous 6 months. Updated via nightly batch.	RRR Timely Percentage	91.14
Pending App	Data displays all Pending Applications up until the previous day. Updated via nightly batch.	Number of Application Pending	535
PEAK Inbox	Data displays all records in the PEAK Inbox up until the previous day. Updated via nightly batch.	Number of New Applications	1,733
Backlog	Data displays all Applications that are overdue as of the prior day. Updated via nightly batch.	Backlog Application Pending	180
Claims	Data displays all active or suspended CBMS claims. Updated via nightly batch.	Total Number of Claims	2542
Discrepancy	Data displays all discrepancies for Cash and Food assistance programs. Updated via nightly batch.	Total Number of Discrepancies	404
AF Board	Data displays all Med-9s due for Adult Financial. Updated via nightly batch.	Total MED-9 Due	39
CW Board	Data displays 60 month Time Clock statistics for Colorado Works.	Case count reached 60 moths	2
LTC Board	Data displays Level of Care certifications due within the next 60 days and Diary Dates expiring within the next 60 days for Long Term Care. Updated via nightly	Total LOC Dues	351
Exception	Displays data for all cases that ran the previous day with exceptions, filtered by reason. Updated via nightly batch.	Total Number of Exceptions	214
Work Programs	Displays data for all cases that have been referred to Workforce Development or Employment First.	# of Cases Referred to WorkPrograms	172
WPR Board	Displays data for sample cases that have met/not met Work Participation Rates requirements for the last three months. Updated via nightly batch.	Number of Sampled Cases Not Meeting WPR	No Results Found
Enhanced Funding	Displays data for Employment First cases that have been approved for Enhanced Funding within the last 6 months.	Total Approved Enhanced Funding Cases	51

TABLE 1: COUNTY DASHBOARDS - SUMMARY INFO. VIEW FROM SALESFORCE EINSTEIN ANALYTICS STUDIO.

Dashboard	Dashboard Description	Key Performance Indicator
Application Timeliness	Data for up to the previous 6 months.	Application Timely Percentage
RRR Timeliness	Data for up to the previous 6 months.	RRR Timely Percentage
Pending App	Data displays all Pending Applications up until the previous day.	Number of Application Pending
PEAK Inbox	Data displays all records in the PEAK Inbox up until the previous day.	Number of New Applications
Backlog	Data displays all Applications that are overdue as of the prior day.	Backlog Application Pending
Claims	Data displays all active of suspended CBMS claims.	Total Number of Claims
Discrepancy	Data displays all discrepancies for Cash and Food Assistance programs.	Total Number of Discrepancies.
AF Board	Data displays all Med-9s due for Adult Financial.	Total MED-9 Due
CW Board	Data displays 60 month Time Clock statistics for Colorado Works.	Case count reached 60 months
LTC Board	Data displays Level of Care certifications due within the next 60 days and Diary Dates expiring within the next 60 days for Long Term Care.	Total LOC Dues
Exception	Displays data for all cases that ran the previous day with exceptions, filtered by reason.	Total Number of Exceptions
Work Programs	Displays data for all cases that have been referred to Workforce Development or Employment First	# of Cases Referred to Work Programs
WPR Board	Displays data for sample cases that have met/not met Work Participation Rates requirements for the last three months.	Number of Sampled Cases Not Meeting WPR
Enhanced Funding	Displays data for Employment First cases that have been approved for Enhanced Funding within the last 6 months.	Total Approved Enhanced Funding Cases

Some newer features of the county dashboards that can be helpful to view and analyze dashboard data include:

- Filtering and customization
- Full integration with CBMS
- Expanded claim information
- Expanded date ranges available
- Custom notifications based on daily data
- Ability to view backlog

USING COUNTY DASHBOARD DATA FOR CONTINUOUS IMPROVEMENT

One thing to consider when using the county dashboards is your broader relationship with data. As agencies have become more focused on data to drive decisions, one resulting bad habit is using measures to **judge** people's performance. Instead, the **purpose for measurement should be to focus on continuous improvement**.

People are not perfect, we all make mistakes, and we all work at different paces.

Data can provide trends so we can look for changes over time, and patterns so we can set goals based on a calculated range.

Take a moment to consider the following questions about how you use data at your agency:

1. How well are performance measures improving performance?

2. How can dashboard data help identify opportunities for improvement?

3. When our performance measure falls below our threshold, how should we respond?

4. When our performance measure increases above our threshold, how should we respond?

ACTIVITY: VALUE STREAM IMPROVEMENT

Value stream improvement (VSI) is a Lean process improvement tool that is great for visualizing your work and looking for opportunities for improvement. By creating value stream maps for the business process associated with county dashboard data - such as how your team processes applications or RRRs – you can help your agency identify:

- What does the workflow look like?
- What part of the workflow that data gives them information?
- Who is involved in the workflow and should be included in dashboard discussions?
- Who is involved in the workflow and should be provided dashboard information?

VSI Process

VSI is a method for analyzing the performance of a value stream, uncovering ideas for improvement, and trying them out. Steps within the VSI process are:

1. Pre-scoping to identify and communicate the organizational purpose, top-level value streams that support the organizational purpose, the primary problems from them, and the secondary value streams to the consulting team for use in the scoping and value stream mapping meetings.

2. A scoping process involving management and leadership to identify the major value streams in the organization and set the **scope** for the improvement or change effort.

3. A value stream mapping (VSM) workshop.
    1. The VSM team will map out the way work is done today in a **current state map** and identify **problems.**
    2. Then, they will describe the improvements in a **future state map** and develop an **implementation plan** for piloting improvements.

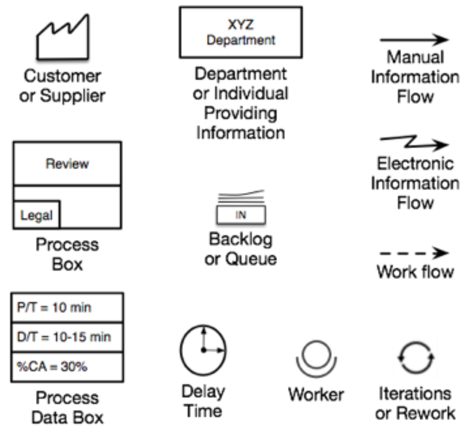
4. 90-day (approx.) **pilots** of the proposed improvements.

5. **Reflection** on the results of the pilots and a plan for full implementation.

What is a Value Stream?

A value stream is a sequence of work or events that an organization does to fulfill a customer's request by delivering something of value to them. A value stream includes all the work that takes place in the delivery of service or product to a customer or constituent. A single value stream can be depicted as a **value stream map**, which is a large-format visual that shows flows of work, materials, and information needed to create or do whatever is needed to fulfill the customer's request.

Value Stream Mapping (VSM) is a tool used to visualize the flow of a process including the materials, information, and work needed. VSMs can be used to describe the current state of a process and the future state. Changes can incorporate shifting the order of work, who does work, and materials needed for work. Iconography that can be used to display these details are shown below. However, the icons are not necessary to gain insights from VSM.



Process metrics

Another component of VSM is process metrics. Process metrics identify how long components of a process takes along with the quality of the output. Each process metric and respective definition can be found in the table below. Process metrics can be used to help identify pain points in the process, signified by long wait or delay times. Process metrics can also be used to evaluate whether changes were successful in improving value. When creating your value stream map, consider tracking the following process metrics:

TABLE 2: PROCESS METRICS

Metric	Abbreviation	Definition	Application to Medicaid Eligibility
Wait Time	W/T	Before work enters a process (inbox time)	The time a verification sits in the front desk inbox, waiting to be time stamped
Process Time	P/T	Time spent actually performing the work	Length of time an eligibility tech needs to review and enter a verification
Delay Time	D/T	After work has entered process, but is delayed	Time waiting on a client to respond to a voicemail requesting follow-up
Lead Time	L/T	total of W/T + P/T + D/T	The time it takes to complete an RRR from when a client drops something off at the office to when a Notice of Action (NOA) is mailed out
Percent Complete and Accurate	%C/A	Percentage complete and accurate of work as it enters a process	The percent of RRRs submitted with all the proper verifications (out of all RRRs submitted)

Value Stream Mapping Assessments

After you've created your current state value stream map, look for problems in the following four areas:

The value created for the customer

1. Compare the output and the customer requirements - see any gaps?

The flow of work

1. Are there delays due to waiting, rework, handoffs, interruptions, leaving things unfinished, etc.?

2. Do excessive requirements or expectations affect the flow of work?

3. Can you find any place where there are **different methods** being used to accomplish the **same thing**?

The product of the work

1. Is quality built in?

2. Are there standards for performance or quality?

3. Are there workarounds in place? Why? Where?

4. Are errors being produced and passed forwards?

Management and Learning

1. Is work being reviewed?

2. Is work being reviewed, but there is no corrective action in place?

3. Are there performance metrics or targets?

4. Is information being reused or recreated?

ACTION PLANNING

An action plan is a set of agreements for making a change. Specific to incorporating county dashboards in your business processes, there are several important decisions to come to agreement on as a team.

1. Which dashboards to incorporate into a regular business process – what are we trying to know? What are we trying to do? Why is that data important to look at?

2. How frequent do we need to check dashboards?

3. What is the best way to share dashboard information with the rest of the team?

4. How often should we revisit our plan for incorporating dashboards into our regular business processes and discuss ways to improve?

After you've answered the questions above, come to agreements on the following areas and complete the Action Planning Worksheet.

- The goal → *an "in order to" sentence*
- Action steps → *a specific sequence of tasks*
- Responsible persons → *people in support roles*
- Performance targets → *should be measurable/observable*
- Timelines → *calendar dates or "week 1, week 2" format*
- Review schedules

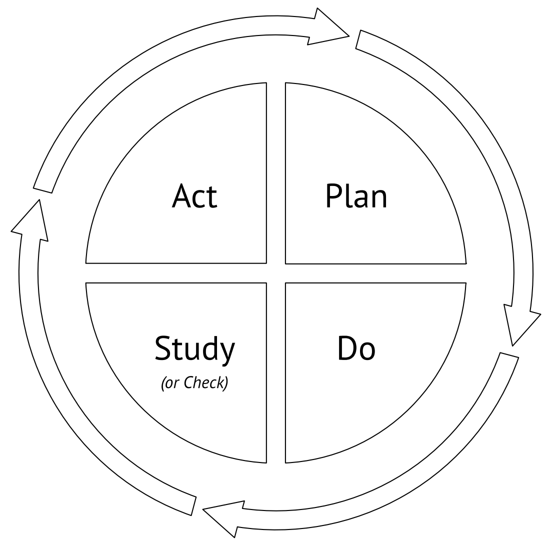
ACTION PLANNING WORKSHEET

Who's working on this plan?	
What is the change you would like to try?	
What is the outcome you want to achieve?	*…in order to…*
List up to three targets you'd like to meet if the change was successful. (Observable, measurable, and timed.)	

Task	Who?	When?	Support and resources

Action planning is typically used in a continuous improvement cycle – **Plan, Do, Study, Act: the PDSA cycle**. For the purpose of incorporating dashboards into your business processes, your team will want to establish a timeframe for how long you want to "do" the action plan before checking the results and determining if you want to make changes.

- Identify the **problem** you want to solve *(Plan)*
- Develop a **theory** about how to remove the problem *(Plan)*
- Develop an experiment to **test** your theory *(Plan)*
- **Run the experiment** and **observe** the results *(Do)*
- **Analyze** the results *(Study)*
- **Confirm or reject** the theory *(Act)*
  - If the experiment **was successful**…
    - Standardize adoption of what was learned
  - If the experiment **was not successful**…
    - No problem! Create a new experiment to try



MEETING AGENDA

A meeting agenda can be helpful to guide discussions and drive actions on incorporating county dashboards into your regular business processes to monitor program workflow and guide decisions about how to manage workload.

Who

It will be important for those that have security privileges to access the dashboards to attend this meeting, in addition to team members identified in the workflow during value steam improvement activities and those responsible for working on the action plan.

What

Topics for discussion during initial phases of incorporating dashboards into your processes include:

- What Dashboards are most useful?
- How can dashboard data supplement other data reporting that we track, like court reports?
- What dashboards should we monitor and how often should we check them?
- What is the best way to share data from dashboards with the team?

Other planned activities during the meeting could include value stream mapping, action planning, and revisiting your dashboard plan throughout the PDSA cycle to make improvements to how you are accessing, using, and sharing dashboard information. This meeting could also be a good opportunity to demonstrate tips and tricks on navigating within a Dashboard.

When

These meetings could either take place during regularly scheduled staff meetings or as their own scheduled meetings depending on where you are at in the process and how much time you need to make progress.

COMMUNICATION TOOLS

Since the county dashboards are only accessible by supervisors, administrators or managers, it is important to consider how the data can be shared so that it is also a useful tool for staff.

1. What is the best way to share dashboard information?

- Sometimes information gets lots in electronic channels – is there a physical location for visible display?
- Do we want to share dashboard information in a newsletter?

2. What is the best location to collect and share dashboard action plans?

3. What is the best location to share information on best practices? For example, compiling tips on filtering and customization

REFERENCES

CBMS Tip Sheet: Updated County Dashboard. December 2019. Deloitte