

# User Guide for Tableau

## Tool to Manage PAS Performance



### Overview:

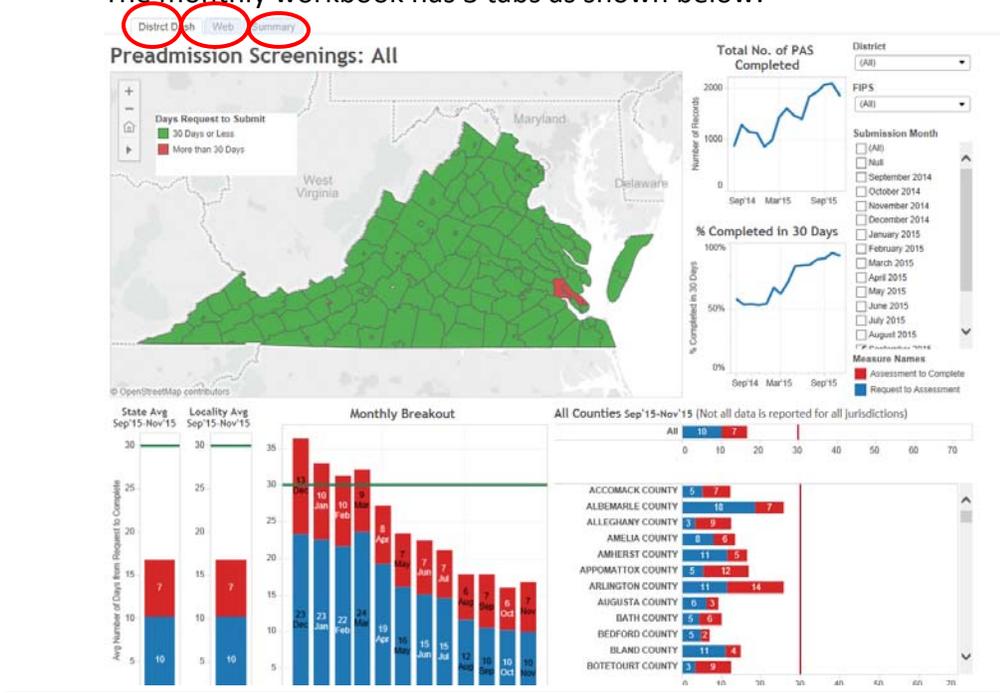
Starting in January 2015, VDH began compiling data on the performance of the 120 Community-Based Teams (CBTs) as they performed Pre-Admission Screenings (PAS). Initially this information (Request Date, Assessment Date and Complete Date) was compiled for each of the 120 jurisdictions via manual tracking and reported via Excel spreadsheets. While ePAS Electronic UAI had a “soft launch” on May 1, 2015, the CBTs were mandated its use effective 07/01/15. Therefore data shown for June 2015 and earlier are CBT self-reported, while results for July 2015 and later are drawn directly from ePAS.

### Assessing the ePAS Dashboard Using Tableau:

- If you are a VDH employee that has access to the VDH Intranet, you can access the ePAS Workbook via VDH’s Tableau Server.
- LDSS and users that want to access the Workbook outside the VDH network need Tableau Reader loaded onto your computer. If you do not have Administrator Rights for your computer (VITA Users typically do not), a VITA ticket is required to load the FREE software.

### Navigating the PAS Dashboard Workbook:

- The monthly workbook has 3 tabs as shown below:



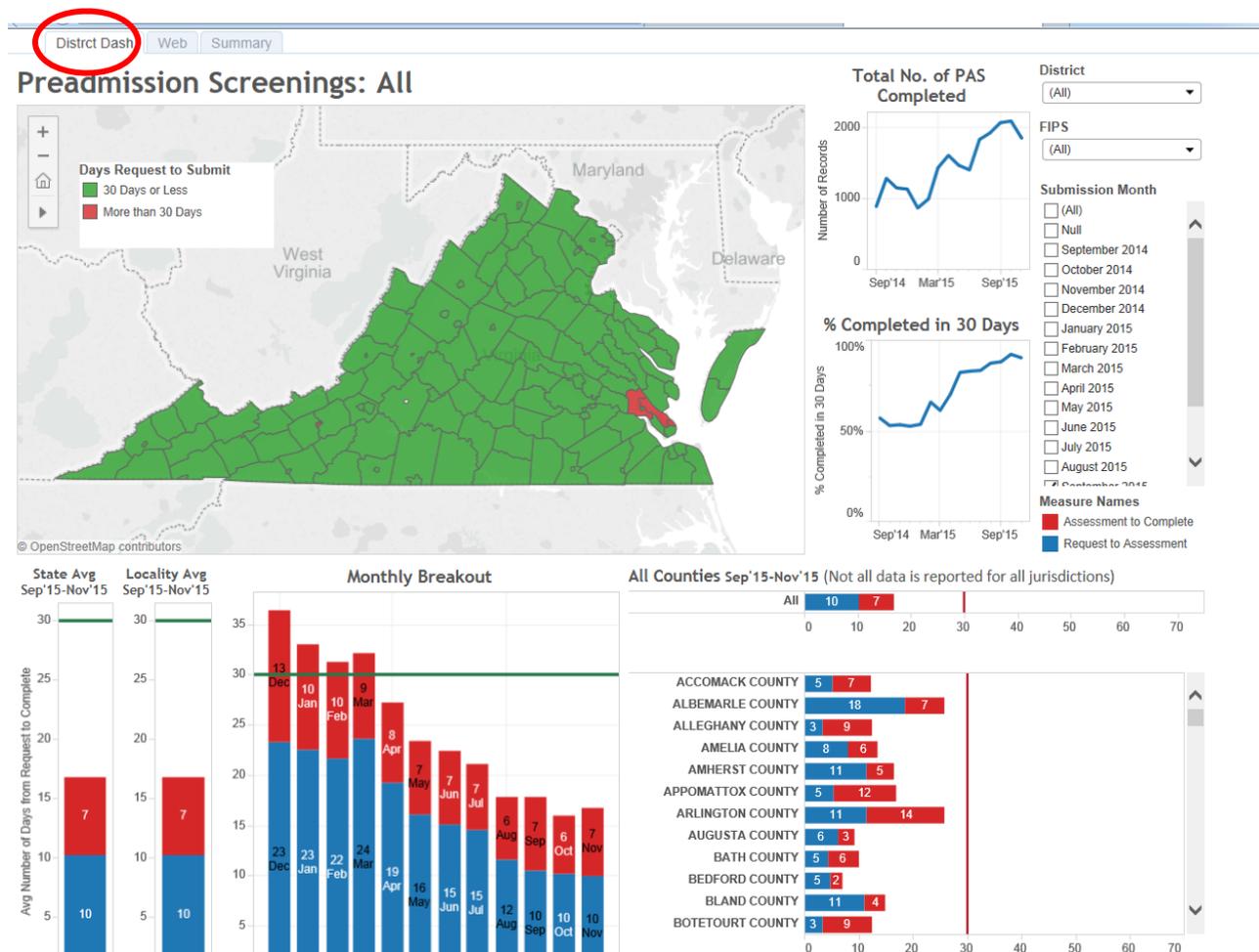
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Each of the tabs will be described individually

### District Dash

- This is the view that should be familiar as it has been the standard since January 2015
- Here is a complete view & each section of the view will be explained:

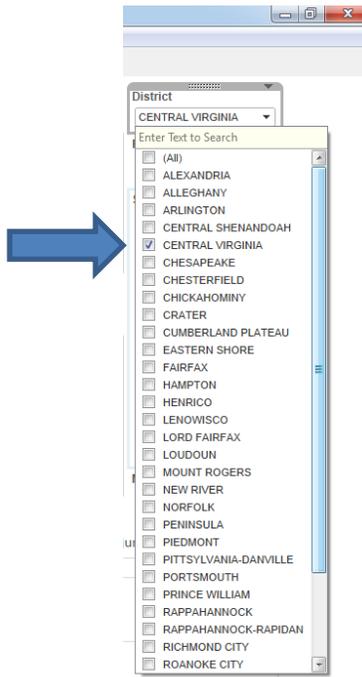


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### Selection Criteria:

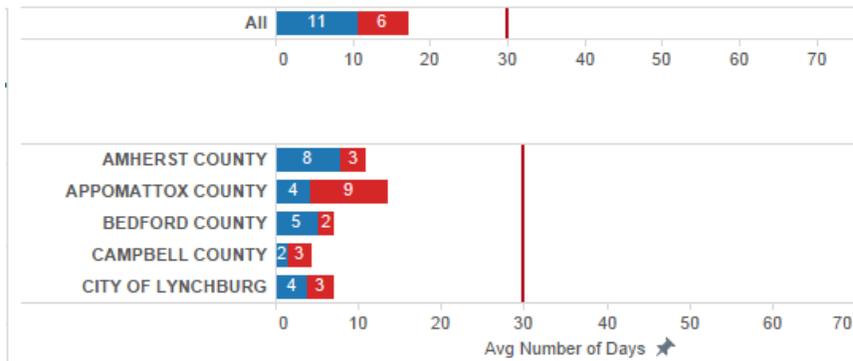
### By District (VDH Health District)



The default is set to "All", so to be able to view data for a single Health District, check the box like shown on the left. In this instance Central Virginia HD has been selected. Once selected the Dashboard should change for the Red/Green Map, FIPS Comparison, % PAS Completed < 30 Days to reflect info only for this Health District.

Title will remain "All".

All Counties Aug'15-Oct'15 (Not all data is reported for all jurisdictions)



This view is especially helpful to compare operational performance by locality within a Health District. This concept is shown for the Central Virginia HD.

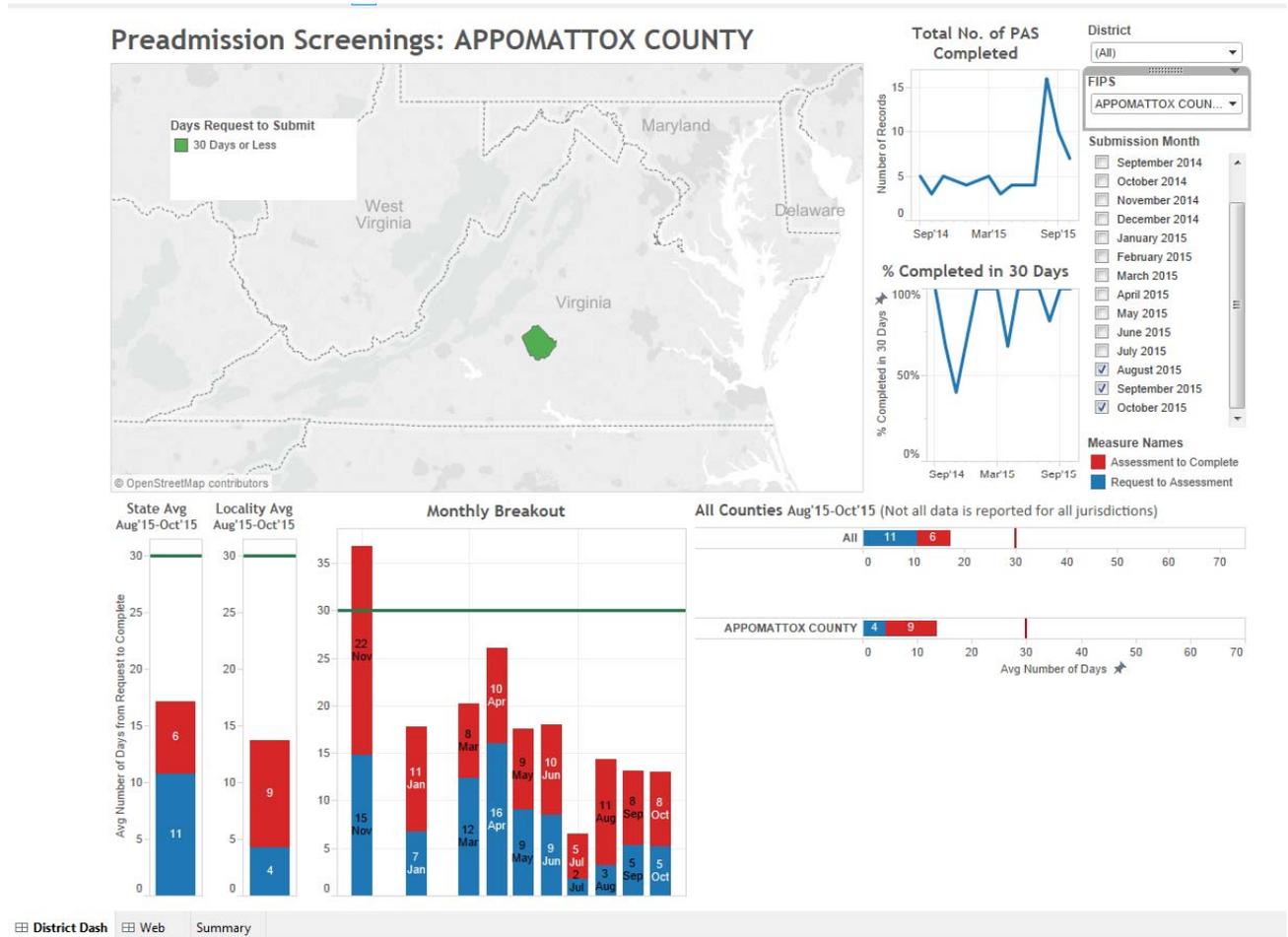
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### By FIPS



Here the FIPS for Appomattox County was selected. As shown below, once selected the Dashboard Title should change as well as the Total No. of PAS Completed and % PAS Completed < 30 Days to reflect info only for this FIPS. The Red/Green map, as well as the Monthly Breakout will show only the locality selected.

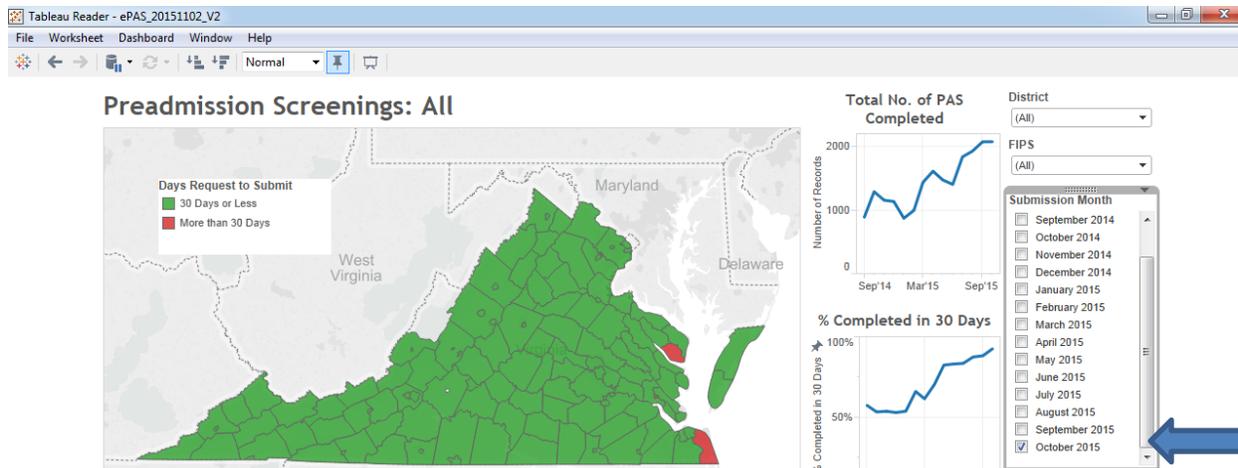


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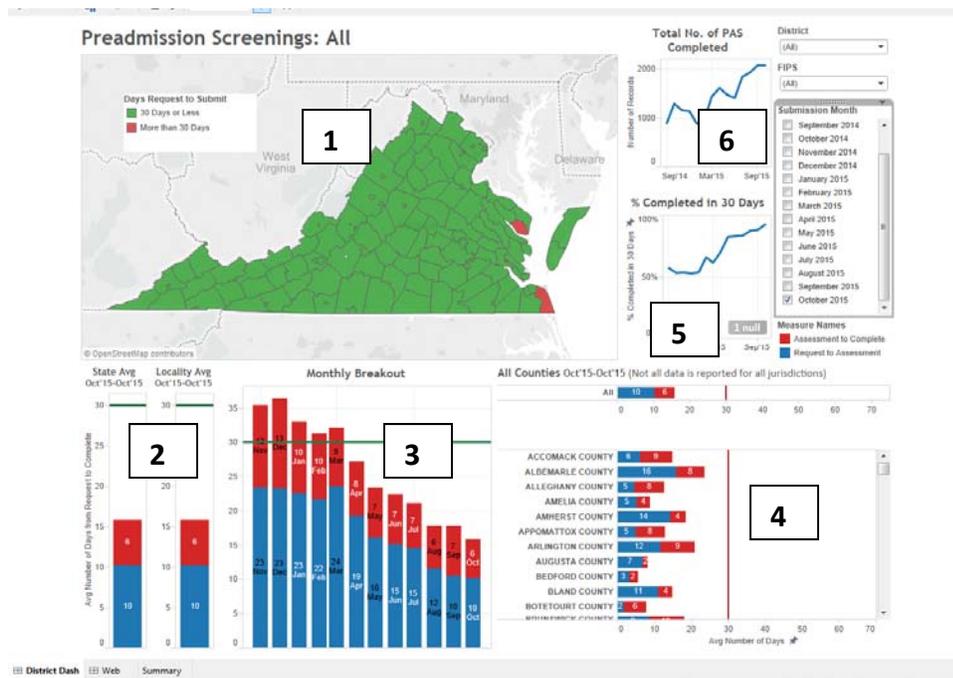
### By Submission Month



Here a single month (October 2015) is selected. Please remember when gauging compliance via the Red/Green Map (3 month weighted/rolling average) to select the last 3 months available, otherwise the map will only show compliance for the month selected.

### Graphs on the District Dash

There are 6 different graphs that make up this tab. Each will be discussed individually.

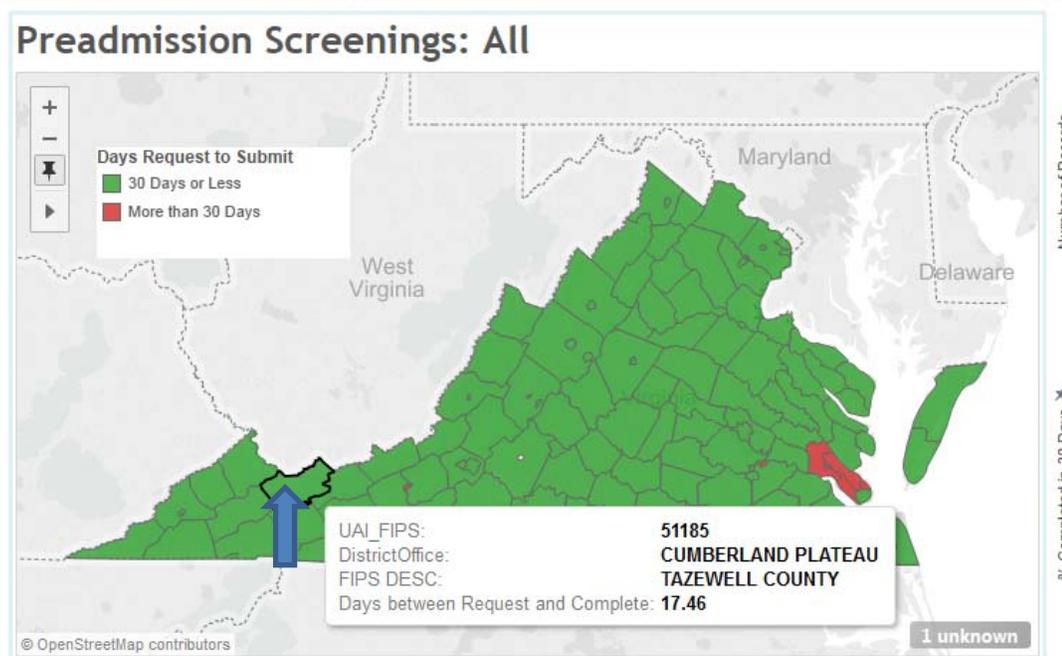


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### 1 – Red/Green Map

- For each of the 120 FIPS, any jurisdiction that has an average Request to Completion time of 30.0 Days is colored **Green**. An average of 30.1 Days > shows as **Red**.
- The map will display different results based on the time period selected. The map used on the previous page has only October 2015 selected, so those results (**Green/Red**) are for that month ONLY.
- Compliance with the 30 Day standard is measured by the 3 most recent months (for the October Dashboard – August, September & October). The **weighted/rolling** aspect means that if the jurisdiction selected did 3 PAS in August, 2 in September and 1 in October, the average time for August (3 PAS) will count 3 times as much as the average time for the 1 PAS completed during October. The weighted/**rolling** component means that each monthly Dashboard the oldest month “rolls” off (for November, August is replaced by November), with the newest month taking its place in the map’s calculation.



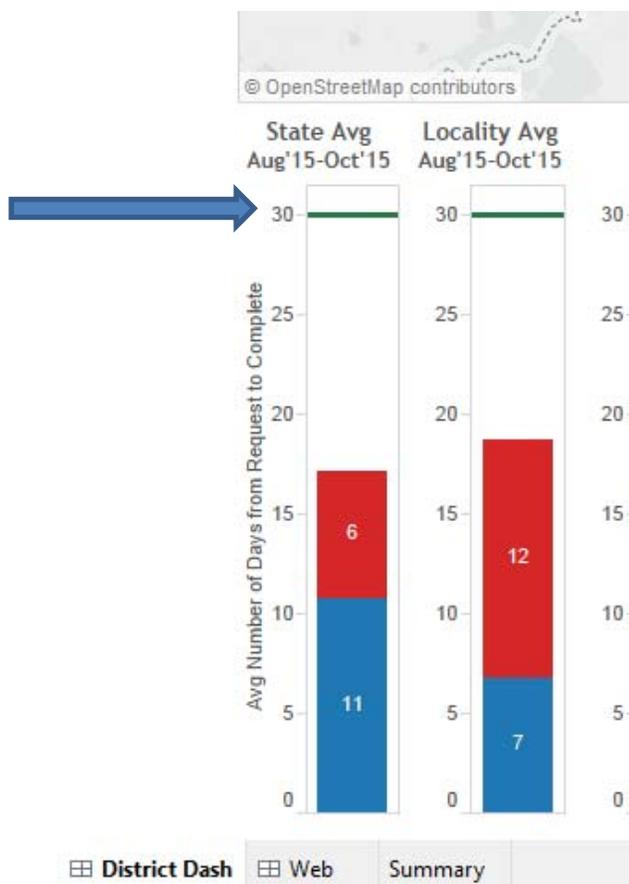
- Another great function of Tableau is that by simply “hovering” the mouse over any field the data underlying the area (in this instance the Piedmont Health District’s Amelia County average days) displays. This feature works throughout the Workbook.
- Any jurisdiction that did not perform any PAS during the time period selected, will show up as “white”.

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### 2 – State Average/Locality Average



**Measure Names**

- Assessment to Complete
- Request to Assessment

The **Blue** Bar shows the time period from Request to Assessment (Home Visit). The **Red** Bar shows the time from Assessment to Complete.

Also, notice that every time that the Dashboard shows performance (**Blue/Red** Bars) there is a Green or Red line that marks the 30 Day threshold.

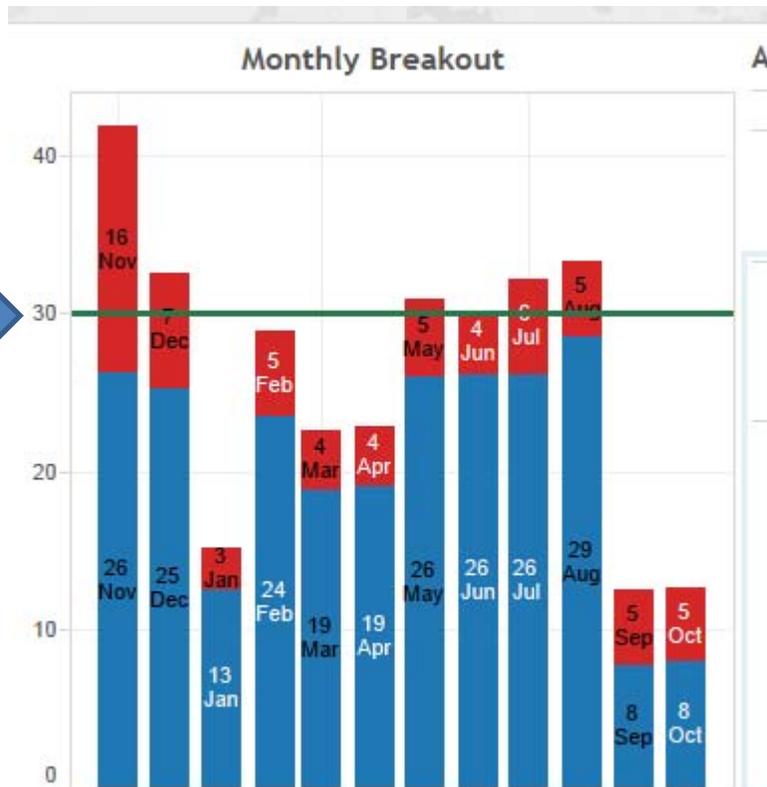
The State Average/Locality Average compares the selected FIPS or Health District's performance for the time period selected. Again, when measuring compliance via the **Red/Green** map, always use the 3 most recent months as it will calculate the 3 month weighted/rolling average.

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### 3 – Monthly Breakout



Regardless of the time period selected, this vertical bar chart will always show the PAS performance for the previous 12 months for "All", the District or FIPS selected.

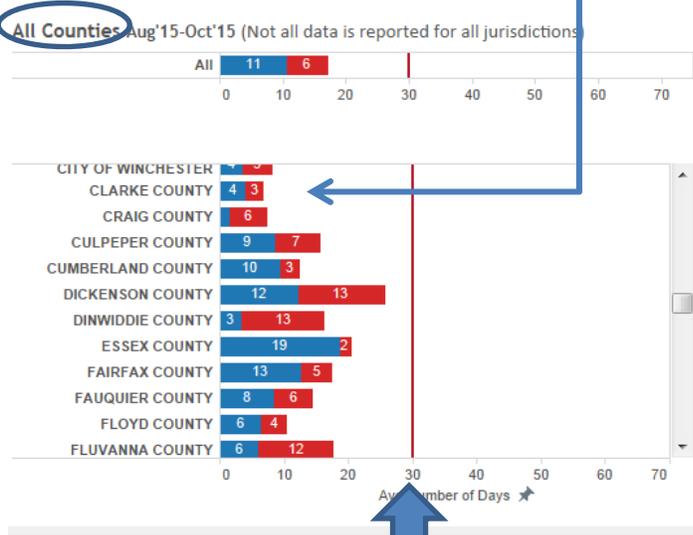
This view is especially helpful to look for trends in performance.

Measure Names & a horizontal 30 Day line are again used.

**Measure Names**

- Assessment to Complete
- Request to Assessment

### 4 – All Counties



This horizontal bar chart shows all of the FIPS selected for "All", the Health District or a single jurisdiction (FIPS). Regardless of the selection, the results will always be compared to the State-wide average (All Counties) for the time period selected.

The 30 Day threshold is displayed with a Red vertical line.

Measure Names are used consistently as with (3) Monthly Breakout.

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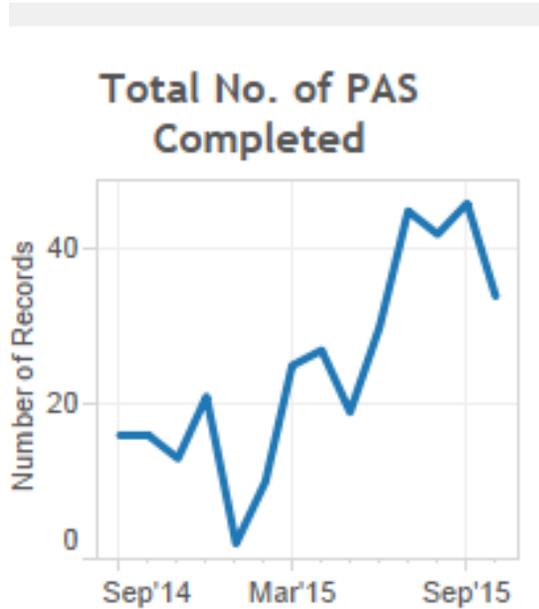
### 5 – % Completed in 30 Days



Regardless of the time period selected, this graph will always show the % of PAS completed each month within the 30 Day threshold (0.1 Days to 30.0 Days) from September 2014 to the most recent month. This graph will show different data depending upon the selection of District, FIPS or All selected.

Hopefully, like the example to the left the % Completed will be increasing over time. This is another graph to analyze trending results over time.

### 6 – Total No. PAS Completed



Regardless of the time period selected, this graph will always show the Total Number of PAS completed each month from September 2014 to the most recent month. This graph will show different data depending upon the selection of District, FIPS or All selected.

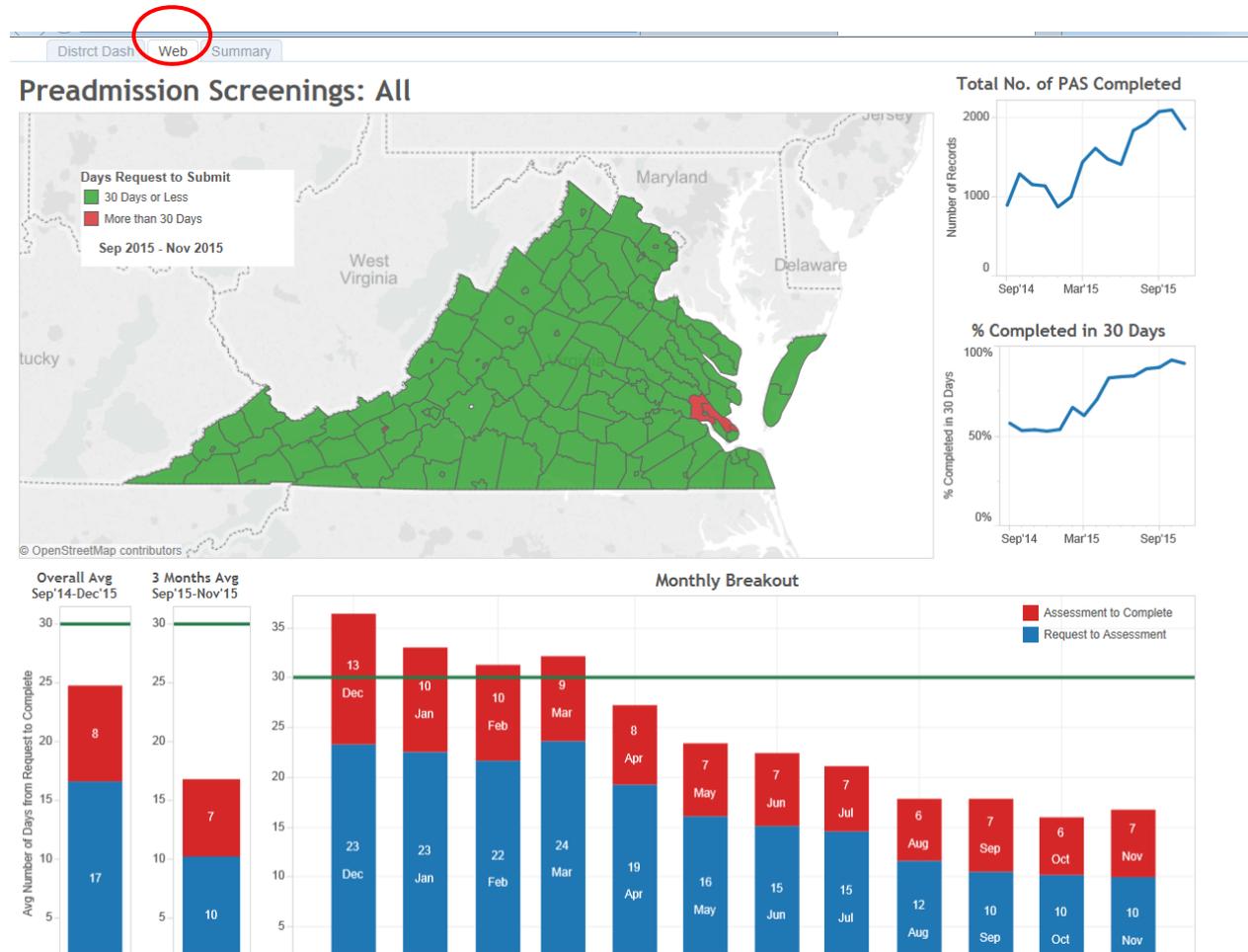
Since PAS is such a manpower intensive effort, this chart will show how many PAS are being completed each month. In this example, the FIPS is now completing about twice the ePAS that it performed 6 months ago. Increasing #'s of PAS may mean a need for additional staffing to maintain results.

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### Web



This is the “static” view that DMAS posts to its website on a monthly basis. There are no selection criteria.

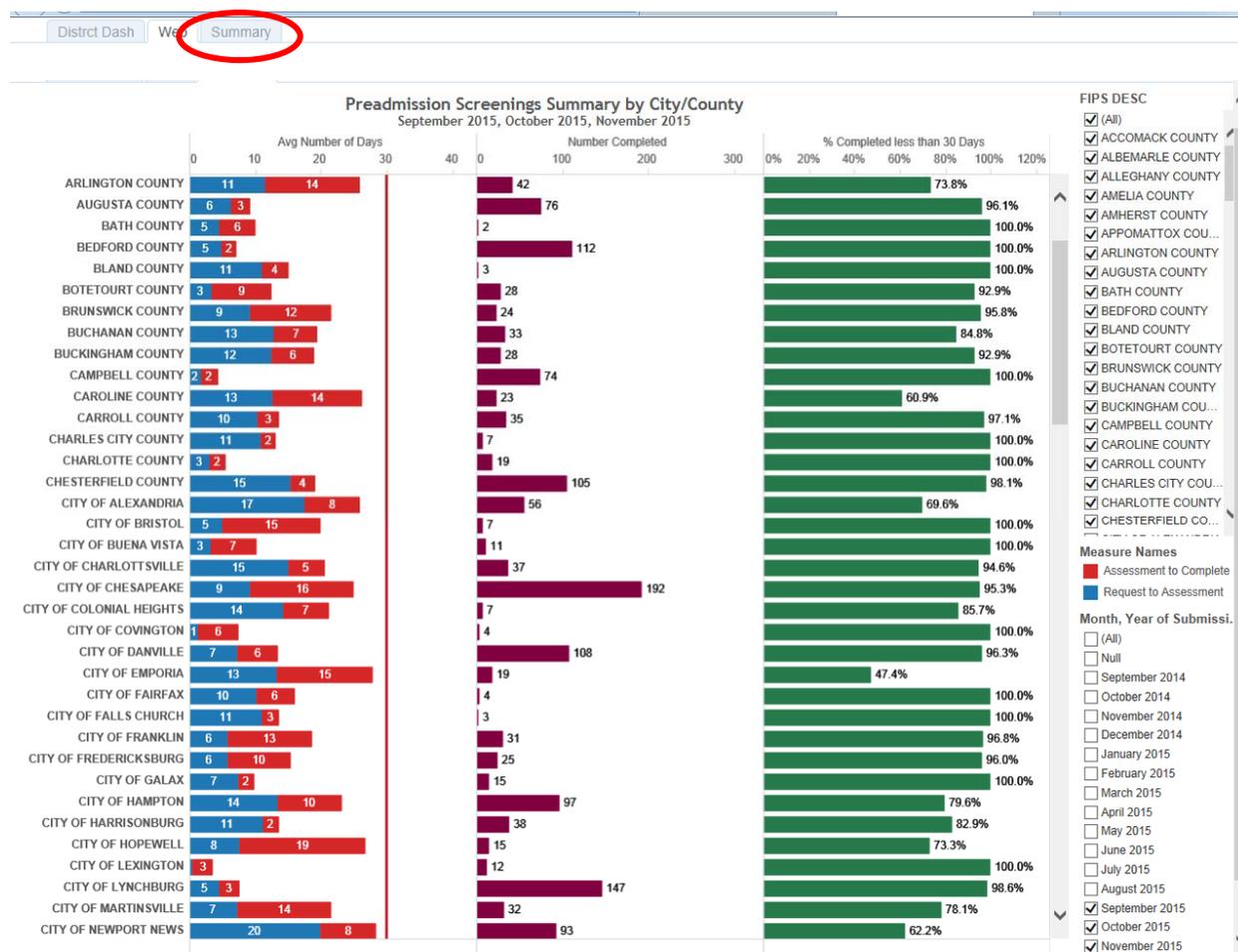
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### Summary

This view allows selection on both FIPS and time period, but not Health District. By selecting “All” you can compare results for all 127 jurisdictions. The view shown below is for September 2015 – November 2015, but any combination of time periods is available. The **Blue/Red** horizontal bars, the 30 day line, the # of PAS Completed (**Purple** bar) and the % Completed <30 Days (**Green** bar) are all shown as part of this view.



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