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1 Acronyms

Acronym/Term	Definition
ABD	Aged Blind and Disabled
CFR	Code of Federal Regulations
FDD	Functional Design Document
FFE	Federally Facilitated Exchange
KPI	Key Performance Indicator
MAGI	Modified Adjusted Gross Income
PREE	Puerto Rico Eligibility and Enrollment
PRMP	Puerto Rico Medicaid Program
ROP	Reasonable Opportunity Period

Table 1: Acronyms

2 Introduction

2.1 Purpose

The purpose of the Management Report FDD is to provide design details related to PREE KPI dashboards and the Online Application Survey report that will provide transaction data and performance information. The dashboards and report will include analytics for key performance indicators that are of interest to PRMP that will contribute to program evaluation, resulting in continuous improvement in business operations.

2.2 Scope

This design document will include the design details related to the PREE Dashboards that the support the below KPIs:

KPIs / Report
Abandoned Online Applications Submitted through the Caseworker Portal
Automated "No Touch" Eligibility Determinations
Average Number of Days an Online MAGI or a Non-MAGI Application Remains Open
Backlog of Non-Disability & Disability Related Applications (non-FFE)
Ex Parte Renewals
MAGI and Non-MAGI Annual Renewals
MAGI or Non-MAGI Applications Completed Online
Online Application Survey Report
Timeliness of Non-Disability & Disability Related Determinations

Table 2: PREE KPIs



2.3 Not in scope

This document does not include functionality and design decisions related to the PREE management reports or regulatory reports.

3 Key Assumptions

Below are the Key Assumptions made during Fit/Gap and Design Processes related to this FDD:

- The Dashboard design represented within this document is based on the reporting capabilities of the Microsoft Power BI software and Cúram Version 7.0.10.
- Power BI will connect to PREE Reporting database tables that will include a daily extract of the PREE data. This will allow all dashboards to be refreshed daily with the appropriate data. This will prevent the dashboard from reading directly from the PREE production database and recalculating all the numbers every time the user goes to the dashboard.
- The artifacts documented in this FDD serve as a direct input for the development effort. All documented design has been technically assessed for feasibility; however, there may be instances during the build process where new or conflicting information may force the design to be updated. In these instances, the updated proposed design will be presented for Puerto Rico Medicaid Program (PRMP)'s review and approval before any build activity commences.
- References to 'Online' within the document represent the Client Portal.



4 Automated (“No Touch”) Eligibility Determinations

4.1 KPI Overview

Metric	Automated (“No touch”) Eligibility Determinations
Purpose	To ascertain the portion of eligibility determinations determined without worker touch.
Supports This Outcome	Individuals receive timely and accurate determinations of eligibility and are promptly enrolled.
Performance Target	TBD
Frequency	Reported monthly
Calculation	$\% = 100 \times \# \text{ of individuals' whose determinations made in the month were entirely automated} / \text{Total \# of determinations made in the month}$
Definitions	Automated (“no touch”) eligibility determinations are those made in real-time by the system and do not require worker touch or additional information from the applicant.
Example Calculation	In June, a state made determinations on 5,492 individuals. Of those, 1,111 involved manual intervention. $\% = \frac{5,492 - 1,111}{5,492} \times 100 = \frac{4,381}{5,492} \times 100 = 79.8\%$
Exceptions & Clarifications	This does not include applications/determinations transferred from the FFE.

4.2 Dashboard Design Details

The ‘Automated “No Touch” Eligibility Determinations’ dashboard will include metrics for the ‘Automated “No Touch” Eligibility Determinations’ KPI.

Design Element	Description	Details
Dashboard Title	Automated “No Touch” Eligibility Determinations	
Chart Type	Combination Stacked Column and Line Chart	



Design Element	Description	Details
Frequency	Daily	Dashboard data will refresh at the end of day on the last day of each day.
Security Access		PRMP Operations
Dashboard Data		<ul style="list-style-type: none"> Total number of application determinations made during the application process within PREE for a given month. Total number of automated application (no-touch) determinations made during the application process within PREE for a given month. Percentage of automated application (no-touch) determinations made during the application process within PREE within a given month.
X Axis	Previous 12 months and year	Report generated within the current month will display data for the previous 12 months. For example, between May 1, 2020 to May 31, 2020, the dashboard will display data from "May 2019" to "April 2020".
Primary: Y Axis	Number of application determinations	One stacked column will be displayed for each month. The column will display the total number of application determinations and the number of automated application (no-touch) determinations.
Secondary: Y Axis	Percentage of no-touch application determinations	A line graph will be used to display the percentage of no-touch application determinations made within PREE for a given month.

Table 3: Automated "No Touch" Eligibility Determinations - Design Details

5 Timeliness of Non-Disability and Disability Related Determinations

5.1 KPI Overview



Metric	Timeliness of Non-disability Related Determinations
Purpose	To ensure that determinations of eligibility on any basis other than disability do not exceed 45 days.
Supports This Outcome	Individuals receive timely and accurate determinations of eligibility and are promptly enrolled.
Performance Target	100%, per CFR 435.912
Frequency	Reported monthly
Calculation	$\% = 100 \times (\# \text{ of non-disability related determinations (individuals) made in the month which took less than or equal to 45 days} / \text{Total \# of non-disability related determinations (individuals) made in the month})$
Definitions	Non-disability related determinations are those for which the individual applied on any basis other than disability. Determinations are counted by individual applicant rather than by application as there may be multiple individuals with different timeliness requirements on one application.
Example Calculation	In January, a state made determinations on 11,498 applicants. Of those, 6,265 were non-disability related. The state took 46 days or more to process 345 of those. The rest of the non-disability related determinations made in January had been processed in 45 or fewer days. $\% = \frac{6,265 - 345}{6,265} \times 100 = \frac{5,920}{6,265} \times 100 = 94.5\%$
Exceptions & Clarifications	The time count begins when the state receives the individual's application or account transfer from the FFE. This metric does not include renewals or changes in circumstance.

Metric	Timeliness of Disability Related Determinations
Purpose	To ensure that eligibility determinations based on disability do not exceed 90 days.
Supports This Outcome	Individuals receive timely and accurate determinations of eligibility and are promptly enrolled.
Performance Target	100%, per CFR 435.912
Frequency	Reported monthly
Calculation	$\% = 100 \times (\# \text{ of disability related determinations (individuals) made in the month which took less than or equal to 90 days} / \text{Total \# of disability related determinations (individuals) made in the month})$



Definitions	Disability related determinations are those for which the individual applied for Medicaid on the basis of a disability... Determinations are counted by individual applicant rather than by application as there may be multiple individuals with different timeliness requirements on one application.
Example Calculation	<p>In January, a state made determinations for 11,498 applicants. Of those, 5,233 of the determinations were for those individuals that applied for Medicaid on the basis of disability. From these, 803 took 91 or more days to process. The rest of the disability related determinations made in January had been processed in 90 or fewer days.</p> $\% = \frac{5,233 - 803}{5,233} \times 100 = \frac{4,430}{5,233} \times 100 = 84.7\%$
Exceptions & Clarifications	The time count begins when the state receives the individual's application or account transfer from the FFE. This metric does not include renewals or changes in circumstance.

5.2 Dashboard Design Details

The 'Timeliness of Non-Disability & Disability Related Determinations' dashboard will include metrics for both the 'Timeliness of Non-disability Related Determinations' and the 'Timeliness of Disability Related Determinations' KPIs.

Design Element	Description	Details
Dashboard Title	Timeliness of Non-Disability & Disability Related Determinations	
Chart Type	Combination Clustered Stacked Column and Line Chart	
Frequency	Daily	Dashboard data will refresh at the end of day on the last day of each day.
Security Access		PRMP Operations
Dashboard Data		<ul style="list-style-type: none"> Total number of non-disability related determinations (individuals) made during the application process in a given month which took less than or equal to 45 days. Total number of non-disability related determinations (individuals)



Design Element	Description	Details
		<p>made during the application process in a given month.</p> <ul style="list-style-type: none"> ▪ Percentage of eligibility determinations made for non-disabled individuals in a given month, during the application process AND completed less than or equal to 45 days from the application date. Additional development details: <ul style="list-style-type: none"> ◆ Refer to the Rules – Categorically Needy ABD workbook for the rules to determine if a person is disabled. ▪ Total number of disability related determinations (individuals) made during the application process in a given month which took less than or equal to 90 days. ▪ Total number of disability related determinations (individuals) made during the application process in a given month. ▪ Percentage of eligibility determinations made for disabled individuals in a given month, during the application process AND completed less than or equal to 90 days from the application date.
X Axis	Previous 12 months and year	Report generated within the current month will display data for the previous 12 months. For example, between May 1, 2020 to May 31, 2020, the dashboard will display data from “May 2019” to “April 2020”.
Primary: Y Axis	Number of non-disability AND disability related application determinations	Two stacked columns will be displayed within the bar graph for each month. One column will display the total number of non-disability related determinations and the number of non-disability related determinations (individuals) which took less than or equal to 45 days.



Design Element	Description	Details
		The other column will display the total number of disability related determinations and the number of disability related determinations (individuals) which took less than or equal to 90 days.
Secondary: Y Axis	Percentage of timely non-disability AND disability related application determinations	Two line graphs will be displayed for each month. One line will display the percentage of application eligibility determinations made for non-disabled individuals within 45 days of the application date in a given month. The other line will display the percentage of application eligibility determinations made for disabled individuals within 90 days of the application date in a given month.

Table 4: Timeliness of Non-Disability & Disability Related Determinations - Design Details

6 Backlog of Non-disability and Disability Related Applications (non-FFE)

6.1 KPI Overview

Metric	Backlog of Non-Disability Related Applications (non-FFE)
Purpose	To determine if there is a significant backlog of non-disability related applications
Supports This Outcome	Individuals receive timely and accurate determinations of eligibility and are promptly enrolled.
Performance Target	TBD
Frequency	Reported monthly
Calculation	$\% = 100 \times (\# \text{ of undetermined non-disability related applications (individuals) that are greater than 45 days from when they were received} / \text{Total \# of non-disability related applications (individuals) undetermined in the month})$
Definitions	Non-disability related applications are those for which the individual applied on any basis other than disability. Applications are counted by individual applicant rather than by application as there may be multiple individuals with different timeliness requirements on one application



Example Calculation	<p>A state ran a report for September and found that there were undetermined, non-disability related applications for 1,294 individuals. Of those, 241 were over 45 days since the date of application.</p> $\% = \frac{241}{1,294} \times 100 = 18.6\%$
Exceptions & Clarifications	<p>This metric applies to individuals' applications that remain undetermined beyond their regulatory target, whether processing has started or not. This calculation <u>should not</u> include assessments, applications with inconsistencies and determination transferred by the FFE. This metric could be impacted by outside influences that could lead to states not being able to efficiently process applications when received. (e.g., open enrollment, policy/system changes, economic downturns, state population changes). This metric does not include individuals determined eligible during a reasonable opportunity period (ROP) pending final verification of citizenship or immigration status. The time count begins when the state receives the individual's application. This metric does not include renewals or changes in circumstance.</p>

Metric	Backlog of Disability Related Applications (non-FFE)
Purpose	To determine if there is a significant backlog of disability related applications.
Supports This Outcome	Individuals receive timely and accurate determinations of eligibility and are promptly enrolled.
Performance Target	TBD
Frequency	Reported monthly
Calculation	$\% = 100 \times \left(\frac{\text{\# of undetermined disability related applications (individuals) that are greater than 90 days from when they were received}}{\text{Total \# of disability related applications (individuals) undetermined in the month}} \right)$
Definitions	Disability related applications are those for which the individual applied for Medicaid on the basis of a disability. Applications are counted by individual applicant rather than by application as there may be multiple individuals with different timeliness requirements on one application.
Example Calculation	<p>A state ran a report for June and found that there were undetermined disability related applications for 1,294 individuals. Of those, 241 were over 90 days since the date of application.</p> $\% = \frac{241}{1294} = 18.6\%$
Exceptions & Clarifications	<p>This metric applies to individuals' applications that remain undetermined beyond their regulatory target, whether processing has started or not. This calculation <u>should not</u> include assessments, applications with inconsistencies and determination transferred by the FFE. This metric could be impacted by outside influences that could lead to states not being able to efficiently</p>



	<p>process applications when received. (e.g., open enrollment, policy/system changes, economic downturns, state population changes). This metric does not include individuals determined eligible during a reasonable opportunity period (ROP) pending final verification of citizenship or immigration status. The time count begins when the state receives the individual's application. This metric does not include renewals or changes in circumstance.</p>
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6.2 Dashboard Design Details

The 'Backlog of Non-Disability & Disability Related Applications' dashboard will include metrics for both the 'Backlog of Non-Disability Related Applications' and the 'Backlog of Disability Related Applications' KPIs.

Design Element	Description	Details
Dashboard Title	Backlog of Non-Disability & Disability Related Applications	
Chart Type	Combination Clustered Stacked Column and Line Chart	
Frequency	Daily	Dashboard data will refresh at the end of day on the last day of each day.
Security Access		PRMP Operations
Dashboard Data		<ul style="list-style-type: none"> ▪ Total number of undetermined non-disability related applications (individuals) that are greater than 45 days from the application date on the last day of the month. ▪ Total number of undetermined non-disability related applications (individuals) on the last day of the month. ▪ Percentage of undetermined non-disability related applications (individuals) in a given month that are greater than 45 days from the application date. Additional development details: <ul style="list-style-type: none"> ◆ Refer to the Rules – Categorically Needed ABD workbook for the rules



Design Element	Description	Details
		<p>to determine if a person is disabled.</p> <ul style="list-style-type: none"> ▪ Total number of undetermined disability related applications (individuals) that are greater than 90 days from the application date on the last day of the month. ▪ Total number of undetermined disability related applications (individuals) on the last day of the month. ▪ Percentage of undetermined disability related applications (individuals) in a given month that are greater than 90 days from the application date.
X Axis	Previous 12 months and year	Report generated within the current month will display data for the previous 12 months. For example, between May 1, 2020 to May 31, 2020, the dashboard will display data from "May 2019" to "April 2020".
Primary: Y Axis	Number of backlogged non-disability AND disability applications	Two stacked columns will be displayed within the bar graph for each month. One column will display the total undetermined non-disability related applications (individuals) on the last day of the month and the number of undetermined non-disability related applications (individuals) that are greater than 45 days from the application date. The other column will display the total number of undetermined disability related applications (individuals) on the last day of the month and the number of undetermined disability related applications (individuals) that are greater than 90 days from the application date.
Secondary: Y Axis	Percentage of backlogged non-disability AND disability applications	Two line graphs will be displayed for each month. One line will display the percentage of undetermined non-disability related applications (individuals) in a given month that are



Design Element	Description	Details
		greater than 45 days from the application date. The other line will display the percentage of undetermined disability related applications (individuals) in a given month that are greater than 90 days from the application date.

Table 5: Backlog of Non-Disability & Disability Related Determinations (non-FFE) - Design Details

7 Ex Parte Renewals

7.1 KPI Overview

Metric	Ex Parte Renewals
Purpose	To ascertain the portion of annual redeterminations conducted through the ex parte process.
Supports This Outcome	Individuals receive timely and accurate determinations of eligibility and are promptly enrolled.
Performance Target	TBD
Frequency	Monthly
Calculation	$\% = 100 \times (\# \text{ Individuals whose redeterminations were made using the ex parte process} / \text{Total \# of individuals whose redeterminations were made in the month})$
Definitions	Ex parte renewals are those that are made without requiring information from the individual on the basis of reliable information available to agency contained in the individual's account or other more current information available to the agency, including but not limited to information accessed through any data bases accessed by the agency under § § 435.948, 435.949 and 435.956 of this part.
Example Calculation	In September, a state made redeterminations for 15,000 individuals. Of those, 9,025 were made using the ex parte process and did not require information or action by the beneficiary. $\% = \frac{9025}{15,000} \times 100 = 60.2\%$
Exceptions & Clarifications	This excludes all renewals conducted outside of the ex parte process (i.e., renewals requiring pre-populated forms to be sent).



7.2 Dashboard Design Details

The 'Ex Parte Renewals' dashboard will include metrics for the 'Ex Parte Renewals' KPI.

Design Element	Description	Details
Dashboard Title	Ex Parte Renewals	
Chart Type	Combination Stacked Column and Line Chart	
Frequency	Daily	Dashboard data will refresh at the end of day on the last day of each day.
Security Access		PRMP Operations
Dashboard Data		<ul style="list-style-type: none"> Total number of individual renewals completed within PREE for a given month. Total number of individual renewals completed via the ex parte process within PREE for a given month. Percentage of individual renewals completed via the ex parte process within PREE for a given month.
X Axis	Previous 12 months and year	Report generated within the current month will display data for the previous 12 months. For example, between May 1, 2020 to May 31, 2020, the dashboard will display data from "May 2019" to "April 2020".
Primary: Y Axis	Number of Renewals	One stacked column will be displayed for each month. The column will display the total number of individual renewals and the number of renewals completed via the ex parte process.
Secondary: Y Axis	Percentage of Ex Parte Renewals	A line graph will be used to display the percentage of renewals completed via the ex parte process within PREE for a given month.

Table 6: Ex Parte Renewals - Design Details



8 MAGI and Non-MAGI Annual Renewals

8.1 KPI Overview

Metric	MAGI Annual Renewals
Purpose	To ascertain the percentage of annual renewals conducted before the annual renewal date for MAGI-based renewals.
Supports This Outcome	Individuals receive timely and accurate determinations of eligibility and are promptly enrolled.
Performance Target	TBD
Frequency	Monthly
Calculation	$\% = 100 \times (\# \text{ Individuals whose MAGI-based renewals were made before their annual renewal date} / \text{Total \# of individuals whose MAGI-based renewals were made in the month})$
Definitions	Medicaid renewals that were due for annual redetermination during the calendar month and were to be redetermined under MAGI rules.
Example Calculation	The state conducted 18,339 MAGI renewals in October. Of those, 500 were not completed until <i>after</i> the beneficiary's annual renewal date. $\% = \frac{18,339-500}{18,339} \times 100 = 97.3\%$
Exceptions & Clarifications	This measurement does not include redeterminations based on reported changes in circumstances throughout the year.

Metric	Non-MAGI Annual Renewals
Purpose	To ascertain the percentage of annual renewals conducted before the annual renewal date for non-MAGI-based renewals.
Supports This Outcome	Individuals receive timely and accurate determinations of eligibility and are promptly enrolled.
Performance Target	TBD
Frequency	Monthly
Calculation	$\% = 100 \times (\# \text{ Individuals whose non-MAGI-based renewals were not made by their annual renewal date} / \text{Total \# of individuals whose non-MAGI-based renewals were made in the month})$
Definitions	Medicaid renewals that were due for annual redetermination during the calendar month and were to be redetermined under non-MAGI rules.



Example Calculation	<p>The state conducted non-MAGI renewals in March for 19,490 individuals. Of those, 452 were not completed until <i>after</i> the annual renewal date.</p> $\% = \frac{19,490-452}{19,490} \times 100 = 97.7\%$
Exceptions & Clarifications	<p>This measurement does not include redeterminations based on reported changes in circumstances throughout the year.</p>

8.2 Dashboard Design Details

The 'MAGI & Non-MAGI Annual Renewals' dashboard will include metrics for both the 'MAGI Annual Renewals' and the 'Non-MAGI Annual Renewals' KPIs.

Design Element	Description	Details
Dashboard Title	MAGI & Non-MAGI Annual Renewals	
Chart Type	Combination Clustered Stacked Column and Line Chart	
Frequency	Daily	Dashboard data will refresh at the end of day on the last day of each day.
Security Access		PRMP Operations
Dashboard Data		<ul style="list-style-type: none"> ▪ Total number of MAGI-based renewals completed before the last day of the certification period within a given month. <ul style="list-style-type: none"> ▪ MAGI-based renewal: Individual should be receiving MAGI coverage on the first day of the 9th month of the certification period. ▪ Refer to the Rules – PREE Program Hierarchy workbook for the categories with status equal to "MAGI". ▪ Total number of MAGI-based renewals completed within a given month. ▪ Percentage of MAGI-based renewals completed before the last day of the



Design Element	Description	Details
		<p>certification period within a given month.</p> <ul style="list-style-type: none"> ▪ Total number of non-MAGI-based renewals completed before the last day of the certification period within a given month. <ul style="list-style-type: none"> ▪ Non-MAGI based renewal: Individual should be receiving non-MAGI coverage on the first day of the 9th month of the certification period. ▪ Refer to the Rules – PREE Program Hierarchy workbook for the categories with status NOT equal to “MAGI”. ▪ Total number of non-MAGI-based renewals completed within a given month. ▪ Percentage of non-MAGI-based renewals completed before the last day of the certification period within a given month.
X Axis	Previous 12 months and year	Report generated within the current month will display data for the previous 12 months. For example, between May 1, 2020 to May 31, 2020, the dashboard will display data from “May 2019” to “April 2020”.
Primary: Y Axis	Number of MAGI AND Non-MAGI Renewals	<p>Two stacked columns will be displayed within the bar graph for each month. One column will display the total number of MAGI-based renewals completed within a given month and the number of MAGI-based renewals completed before the last day of the certification period within a given month. The other column will display the total number of non-MAGI-based renewals completed within a given month and the number of non-MAGI-based renewals</p>



Design Element	Description	Details
		completed before the last day of the certification period within a given month.
Secondary: Y Axis	Percentage of MAGI AND Non-MAGI Renewals	Two line graphs will be displayed for each month. One line will display the percentage of MAGI-based renewals completed before the last day of the certification period within a given month. The other line will display the percentage of non-MAGI-based renewals completed before the last day of the certification period within a given month.

Table 7: MAGI and Non-MAGI Annual Renewals - Design Details

9 Average Number of Days an Online MAGI or a non-MAGI Application Remains Open

9.1 KPI Overview

Metric	Average Number of Days an Online MAGI Application Remains Open
Purpose	To determine if the online application is easy to complete using multiple online browser options, including the phone application.
Supports This Outcome	The state ensures a user-friendly and accessible experience for applicants and beneficiaries.
Performance Target	TBD
Frequency	Reported monthly
Calculation	$\text{Mean} = \frac{x}{N}$ <p>x = sum of (# of online MAGI applications completed * number of days to complete an online application) (1 to 30 days) N = the number of online MAGI applications completed in one month</p>
Definitions	Time is defined by the average number of days within the reporting month that it takes an applicant to start and complete an online MAGI application. Applications are counted by entire application rather than individual applicant.



Example Calculation	<p>In July, 2,658 MAGI applications were completed via the client portal. Of these applications, 987 applications were completed in 2 days, 1,345 applications were completed in 12 days, and 326 applications were completed in 29 days:</p> $x = (987*2)+(1345*12)+(326*29) = 27,568 \text{ days}$ $N = 987+1,345+326 = 2,658 \text{ applications}$ <p>27,568 total days / 2,658 applications = an average of 10.4 days to complete an application</p>
Exceptions & Clarifications	An application is archived in the client portal after 30 days.

Metric	Average Number of Days an Online non-MAGI Application Remains Open
Purpose	To determine if the online application is easy to complete using multiple online browser options, including the phone application.
Supports This Outcome	The state ensures a user-friendly and accessible experience for applicants and beneficiaries.
Performance Target	TBD
Frequency	Reported monthly
Calculation	$\text{Mean} = \frac{x}{N}$ <p>x = sum of (# of online non-MAGI applications completed * number of days to complete an online application) (1 to 30 days) N = the number of online non-MAGI applications completed in one month</p>
Definitions	Time is defined by the average number of days within the reporting month that it takes an applicant to start and complete an online non-MAGI application. Applications are counted by entire application rather than individual applicant.
Example Calculation	<p>In July, 2,658 non-MAGI applications were completed via the client portal. Of these applications, 987 applications were completed in 2 days, 1,345 applications were completed in 12 days, and 326 applications were completed in 29 days:</p> $x = (987*2)+(1345*12)+(326*29) = 27,568 \text{ days}$ $N = 987+1,345+326 = 2,658 \text{ applications}$ <p>27,568 total days / 2,658 applications = an average of 10.4 days to complete an application</p>
Exceptions & Clarifications	An application is archived in the client portal after 30 days.



9.2 Dashboard Design Details

The 'Average Number of Days an Online MAGI or a non-MAGI Application remains open' dashboard will include metrics for both the 'Average Number of Days an Online MAGI Application Remains Open' and the 'Average Number of Days an Online non-MAGI Application Remains Open' KPIs.

Design Element	Description	Details
Dashboard Title	Average Number of Days an Online MAGI or a non-MAGI Application Remains Open	
Chart Type	Combination Clustered Column and Line Chart	
Frequency	Daily	Dashboard data will refresh at the end of day on the last day of each day.
Security Access		PRMP Operations
Dashboard Data		<ul style="list-style-type: none"> ▪ Total number of online MAGI applications submitted in a given month where the application submission date is less than or equal to 30 days from the application start date. ▪ Average number of days an online MAGI application remained open prior to submission in a given month. Additional development details: <ul style="list-style-type: none"> ◆ A MAGI application is an applicant's request for 'MAGI-only' evaluation ◆ Days an application remain open = Application Submission Date – Start Date of Online Application ▪ Total number of online non-MAGI applications completed for a given month where the application submission date is less than or equal to 30 days from the application start date. ▪ Average number of days an online non-MAGI application remained open prior to submission in a given month. Additional development details:



Design Element	Description	Details
		<ul style="list-style-type: none"> ◆ A non-MAGI application is an applicant’s request for requesting ‘MAGI and non-MAGI’ OR ‘non-MAGI only’ evaluation ◆ Days an application remain open = Application Submission Date – Application Start Date
X Axis	Previous 12 months and year	Report generated within the current month will display data for the previous 12 months. For example, between May 1, 2020 to May 31, 2020, the dashboard will display data from “May 2019” to “April 2020”.
Primary: Y Axis	Number of online MAGI or Non-MAGI applications	Two columns will be displayed within the bar graph for each month. One column will display the total number of online MAGI applications completed for a given month where the application submission date is less than or equal to 30 days from the application start date. The other column will display the total number of online non-MAGI applications completed for a given month where the application submission date is less than or equal to 30 days from the application start date.
Secondary: Y Axis	Average number of days a MAGI or a Non-MAGI application remained open	Two lines will be displayed within the line graph for each month. One line graph will display the average number of days an online MAGI application remained open prior to submission in a given month. The other line graph will display the average number of days an online non-MAGI application remained open prior to submission in a given month.

Table 8: Average Number of Days an Online MAGI or a Non-MAGI Application Remains Open - Design Details



10 MAGI or Non-MAGI Applications Completed Online

10.1 KPI Overview

Metric	MAGI Applications Completed Online
Purpose	To determine if the online application is easy to complete using multiple online browser options, including the phone application.
Supports This Outcome	The state ensures a user-friendly and accessible experience for applicants and beneficiaries.
Performance Target	TBD
Frequency	Reported monthly
Calculation	$\% = 100 \times (\# \text{ of MAGI applications completed online in the month} / \text{total} \# \text{ of MAGI applications completed via all modes of submission})$
Definitions	The online application is defined by applications submitted using the client portal via online browsers and the phone browser. Applications are counted by entire application rather than individual applicant.
Example Calculation	In July, a total of 12,456 MAGI applications were submitted. Of those, 4,572 were submitted through the online application. $\% = \frac{4,572}{12,456} \times 100 = 36.7\%$
Exceptions & Clarifications	If an application contains both MAGI and non-MAGI applicants, the application will be included in the non-MAGI KPI measurement.

Metric	Non-MAGI Applications Completed Online
Purpose	To determine if the online application is easy to complete using multiple online browser options, including the phone application.
Supports This Outcome	The state ensures a user-friendly and accessible experience for applicants and beneficiaries.
Performance Target	TBD
Frequency	Reported monthly
Calculation	$\% = 100 \times (\# \text{ of non-MAGI applications submitted online in the month} / \text{total} \# \text{ of non-MAGI applications completed via all modes of submission})$



Definitions	The online application is defined by applications submitted using the client portal via online browsers and the phone browser. Applications are counted by entire application rather than individual applicant.
Example Calculation	In July, a total of 12,456 non-MAGI applications were submitted. Of those, 4,572 were submitted through the online application. $\% = \frac{4,572}{12,456} \times 100 = 36.7\%$
Exceptions & Clarifications	If an application contains both MAGI and non-MAGI applicants, the application will be included in the non-MAGI KPI measurement.

10.2 Dashboard Design Details

The 'MAGI or Non-MAGI Applications Completed Online' dashboard will include metrics for both the 'MAGI Applications Completed Online' and the 'Non-MAGI Applications Completed Online' KPIs.

Design Element	Description	Details
Dashboard Title	MAGI or Non-MAGI Applications Completed Online	
Chart Type	Combination Clustered Stacked Column and Line Chart	
Frequency	Daily	Dashboard data will refresh at the end of day on the last day of each day.
Security Access		PRMP Operations
Dashboard Data		<ul style="list-style-type: none"> ▪ Number of online MAGI applications submitted within a given month. – MAGI application is an application where an individual requests 'MAGI-only' evaluation. ▪ Number of MAGI applications submitted from the client and caseworker portals within a given month. ▪ Percentage of applications submitted from the client portal within a given



Design Element	Description	Details
		<p>month for individuals requesting 'MAGI-only' evaluations.</p> <ul style="list-style-type: none"> ▪ Number of online non-MAGI applications submitted within a given month. – Non-MAGI application is an application where an individual requests 'MAGI and non-MAGI' OR 'non-MAGI only' evaluation. ▪ Number of non-MAGI applications submitted from the client and caseworker portals within a given month ▪ Percentage of applications submitted from the client portal within a given month for individuals requesting 'MAGI and non-MAGI' OR 'non-MAGI only' evaluations.
X Axis	Previous 12 months and year	Report generated within the current month will display data for the previous 12 months. For example, between May 1, 2020 to May 31, 2020, the dashboard will display data from "May 2019" to "April 2020".
Primary: Y Axis	Number of MAGI or Non-MAGI Application	<p>Two stacked columns will be displayed within the bar graph for each month. One column will display the total number of online MAGI applications submitted within a given month and the number of MAGI applications submitted from the client and caseworker portals within a given month.</p> <p>The other column will display the total number of online non-MAGI applications submitted within a given month and the number of non-MAGI applications submitted from the client and caseworker portals within a given month.</p>
Secondary: Y Axis	Percentage of Online MAGI or	Two line graphs will be displayed for each month. One line will display the percentage of applications submitted



Design Element	Description	Details
	Online Non-MAGI Application	from the client portal within a given month for individuals requesting 'MAGI-only' evaluations. The other line will display the percentage of applications submitted from the client portal within a given month for individuals requesting 'MAGI and non-MAGI' OR 'non-MAGI only' evaluations..

Table 9: MAGI or Non-MAGI Applications Completed Online - Design Details

11 Abandoned Online Applications Submitted through the Caseworker Portal

11.1 KPI Overview

Metric	Abandoned Online Applications Submitted Through the Caseworker Portal
Purpose	To determine if the online application is easy to complete using multiple online browser options, including the phone application.
Supports This Outcome	The state ensures a user-friendly and accessible experience for applicants and beneficiaries.
Performance Target	TBD
Frequency	Reported monthly
Calculation	# = total number of applications started through the caseworker portal that match an application currently in the client portal with the current status as either "In Progress" or "Archived" during the same month it was started in the caseworker portal.
Definitions	Abandoned online applications refer to applications that were started and never completed by the applicant in the client portal. Applications started in the caseworker portal refers to all the applications that were started within the month being measured. The measurement will include applications with both a finished and unfinished status.
Example Calculation	In May, 5,432 applications were started in the caseworker portal that matches an application in the client portal with either an archived date during May or an "in process" status.



Exceptions & Clarifications	Archived applications will only provide a match to an application in the caseworker portal if the archive date is during the same month of the measurement. An assumption is made that if an application is archived prior to the current month, the applicant abandoned the application for reasons others than user friendliness of the system.
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11.2 Dashboard Design Details

The 'Abandoned Online Applications submitted through Caseworker Portal' dashboard will include metrics for the 'Abandoned Online Applications submitted through Caseworker Portal' KPI.

Design Element	Description	Details
Dashboards Title	Abandoned Online Applications submitted through Caseworker Portal	
Chart Type	Bar Chart	
Frequency	Daily	Dashboard data will refresh at the end of day on the last day of each day.
Security Access		PRMP Operations
Dashboard Data		<ul style="list-style-type: none"> ▪ Total number of online applications with status of "In Progress" OR "Archived" AND Date Archived is this month for an applicant who has an application in the caseworker portal with Application Start Date equal to this month. Additional development details: <ul style="list-style-type: none"> ◆ Number of primary applicants with an online application with status of "In Progress" AND an application was created within the caseworker portal with Application Start Date equal to the reporting month. ◆ Number of primary applicants with an online application with status of "Archived" AND online application Archived Date equal to reporting month AND an application was created within the caseworker



Design Element	Description	Details
		<p>portal with Application Start Date equal to the month of reporting.</p> <ul style="list-style-type: none"> ◆ Populate primary applicant’s information within this dashboard, only if the ‘SSN’ primary applicant within the online application matches the ‘SSN’ of the primary applicant within the caseworker portal application.
X Axis	Previous 12 months and year	Report generated within the current month will display data for the previous 12 months. For example, between May 1, 2020 to May 31, 2020, the dashboard will display data from “May 2019” to “April 2020”.
Y Axis	Number of Abandoned Online Applications	A bar graph will be used to display the number of online applications that were abandoned, and an application submitted in the caseworker portal within a given month.

Table 10: Abandoned Online Applications Submitted through Caseworker Portal - Design Details

12 Online Application Survey – Report

The Online Application process has been updated to include four (4) optional survey questions once the application has been submitted. These questions will seek to determine the client’s satisfaction with the PREE online application process and provide PRMP with the feedback necessary to guide future application and process updates. By default, the Online Application Survey – Dashboard will display metrics related to survey responses in the current month. For example, on September 6, 2020, the dashboard will display metrics related to the survey responses from September 1, 2020 through September 6, 2020. The user can modify the reporting date range to show survey responses related to the selected period.

A rating of 1, 2, 3, 4, or 5 will be assigned to each online application survey question response. Below is a mapping of how the responses to the survey questions map to the rating scale.



Rating	How easy was it to understand the information required for the application?	How likely are you to use the online service in the future?	How satisfied are you with the online service?
1	Difficult	Very Unlikely	Not Very Satisfied
2	Not Easy	Not Likely	Not Satisfied
3	Neutral	Neutral	Neutral
4	Somewhat Easy	Somewhat Likely	Somewhat Satisfied
5	Very Easy	Very Likely	Very Satisfied

Table 11: Online Application Survey - Response to Rating Mapping

Citizen Portal Survey Results						
Reporting Period: DD/MM/YYYY - DD/MM/YYYY						
Number of Responses: ###						
	How easy was it to understand the informat required for the application?		How likely are you to use the online service in the future?		How satisfied are you with this online service?	
Rating	Responses	%	Responses	%	Responses	%
5	4 ##	10 ##%	15 ##	21 ##%	26 ##	32 ##%
4	5 ##	11 ##%	16 ##	22 ##%	27 ##	33 ##%
3	6 ##	12 ##%	17 ##	23 ##%	28 ##	34 ##%
2	7 ##	13 ##%	18 ##	24 ##%	29 ##	35 ##%
1	8 ##	14 ##%	19 ##	25 ##%	30 ##	36 ##%
Overall Average	9 ##		20 ##		31 ##	

Figure 1: Example of the Online Application Survey – Dashboard

12.1 Dashboard Design Details

The 'Online Application Survey' will include metrics from the client responses to the survey questions included at the end of the online application. Below is the details related to the design of the dashboard:

#	Design Element	Details
1	Reporting Period Start Date	First Date of the data displayed within the Online Application Survey Dashboard
2	Reporting Period End Date	Last Date of the data displayed within the Online Application Survey Dashboard
3	Number of Responses	Total number of responses to the Online Application survey for the reporting period.
4	Number of Responses to Survey Question # 1	The number of 'Very Easy' responses to the question 'How easy was it to understand the



#	Design Element	Details
		information required for the application?' for the reporting period.
5	Number of Responses to Survey Question # 1	The number of 'Somewhat Easy' responses to the question 'How easy was it to understand the information required for the application?' for the reporting period.
6	Number of Responses to Survey Question # 1	The number of 'Neutral' responses to the question 'How easy was it to understand the information required for the application?' for the reporting period.
7	Number of Responses to Survey Question # 1	The number of 'Not Easy' responses to the question 'How easy was it to understand the information required for the application?' for the reporting period.
8	Number of Responses to Survey Question # 1	The number of 'Difficult' responses to the question 'How easy was it to understand the information required for the application?' for the reporting period.
9	Average Response to Survey Question # 1	The average response to the 'How easy was it to understand the information required for the application?' for the reporting period. The calculation is as follows: $\frac{((\text{Number in \#4} * 5) + (\text{Number in \#5} * 4) + (\text{Number in \#6} * 3) + (\text{Number in \#7} * 2) + (\text{Number in \#8} * 1))}{(\text{Number in \#4} + \text{Number in \#5} + \text{Number in \#6} + \text{Number in \#7} + \text{Number in \#8})}$
10	Response Percentage	The percentage of 'Very Easy' responses in relation to all responses to the question 'How easy was it to understand the information required for the application?' for the reporting period.
11	Response Percentage	The percentage of 'Somewhat Easy' responses in relation to all responses to the question 'How easy was it to understand the information required for the application?' for the reporting period.
12	Response Percentage	The percentage of 'Neutral' responses in relation to all responses to the question 'How easy was it to understand the information required for the application?' for the reporting period.
13	Response Percentage	The percentage of 'Not Easy' responses in relation to all responses to the question 'How easy was it to



#	Design Element	Details
		understand the information required for the application?' for the reporting period.
14	Response Percentage	The percentage of 'Difficult' responses in relation to all responses to the question 'How easy was it to understand the information required for the application?' for the reporting period.
15	Number of Responses to Survey Question # 2	The number of 'Very Likely' responses to the question 'How likely are you to use the online service in the future?' for the reporting period.
16	Number of Responses to Survey Question # 2	The number of 'Somewhat Likely' responses to the question 'How likely are you to use the online service in the future?' for the reporting period.
17	Number of Responses to Survey Question # 2	The number of 'Neutral' responses to the question 'How likely are you to use the online service in the future?' for the reporting period.
18	Number of Responses to Survey Question # 2	The number of 'Not Likely' responses to the question 'How likely are you to use the online service in the future?' for the reporting period.
19	Number of Responses to Survey Question # 2	The number of 'Very Unlikely' responses to the question 'How likely are you to use the online service in the future?' for the reporting period.
20	Average Response to Survey Question # 2	The average response to the 'How likely are you to use the online service in the future?' for the reporting period. The calculation is as follows: $\frac{((\text{Number in \#15} * 5) + (\text{Number in \#16} * 4) + (\text{Number in \#17} * 3) + (\text{Number in \#18} * 2) + (\text{Number in \#19} * 1))}{(\text{Number in \#15} + \text{Number in \#16} + \text{Number in \#17} + \text{Number in \#18} + \text{Number in \#19})}$
21	Response Percentage	The percentage of 'Very Likely' responses in relation to all responses to the question 'How likely are you to use the online service in the future?' for the reporting period.
22	Response Percentage	The percentage of 'Somewhat Likely' responses in relation to all responses to the question 'How likely are you to use the online service in the future?' for the reporting period.
23	Response Percentage	The percentage of 'Neutral' responses in relation to all responses to the question 'How likely are you to use the online service in the future?' for the reporting period.



#	Design Element	Details
24	Response Percentage	The percentage of 'Not Likely' responses in relation to all responses to the question 'How likely are you to use the online service in the future?' for the reporting period.
25	Response Percentage	The percentage of 'Very Unlikely' responses in relation to all responses to the question 'How likely are you to use the online service in the future?' for the reporting period.
26	Number of Responses to Survey Question # 3	The number of 'Very Satisfied' responses to the question 'How satisfied are you with this online service?' for the reporting period.
27	Number of Responses to Survey Question # 3	The number of 'Somewhat Satisfied' responses to the question 'How satisfied are you with this online service?' for the reporting period.
28	Number of Responses to Survey Question # 3	The number of 'Neutral' responses to the question 'How satisfied are you with this online service?' for the reporting period.
29	Number of Responses to Survey Question # 3	The number of 'Not Satisfied' responses to the question 'How satisfied are you with this online service?' for the reporting period.
30	Number of Responses to Survey Question # 3	The number of 'Not Very Satisfied' responses to the question 'How satisfied are you with this online service?' for the reporting period.
31	Average Response to Survey Question # 3	The average response to the 'How satisfied are you with this online service?' for the reporting period. The calculation is as follows: $\frac{((\text{Number in \#26} * 5) + (\text{Number in \#27} * 4) + (\text{Number in \#28} * 3) + (\text{Number in \#29} * 2) + (\text{Number in \#30} * 1))}{(\text{Number in \#26} + \text{Number in \#27} + \text{Number in \#28} + \text{Number in \#29} + \text{Number in \#30})}$
32	Response Percentage	The percentage of 'Very Satisfied' responses in relation to all responses to the question 'How satisfied are you with this online service?' for the reporting period.
33	Response Percentage	The percentage of 'Somewhat Satisfied' responses in relation to all responses to the question 'How satisfied are you with this online service?' for the reporting period.



#	Design Element	Details
34	Response Percentage	The percentage of 'Neutral' responses in relation to all responses to the question 'How satisfied are you with this online service?' for the reporting period.
35	Response Percentage	The percentage of 'Not Satisfied' responses in relation to all responses to the question 'How satisfied are you with this online service?' for the reporting period.
36	Response Percentage	The percentage of 'Not Very Satisfied' responses in relation to all responses to the question 'How satisfied are you with this online service?' for the reporting period.

Table 12: Online Application Survey Dashboard - Design Details

The user will be able to generate an extract of the raw data for the selected date range displayed within the Online Application Survey – Dashboard. The Extract report will include the data points the Online Application Submission Date, the response to Survey Question # 1, the response to Survey Question # 2, the response to Survey Question # 3 and the Survey Comments. The extract should be similar to the example below:

	Online App Submission Date	<Survey Question 1>	<Survey Question 2>	<Survey Question 3>	Survey Comments
1	<App submit date>	<Response to question 1>	<Response to question 2>	<Response to question 3>	xxx xxxxx xx xxxxx x xxxx
2	<App submit date>	<Response to question 1>	<Response to question 2>	<Response to question 3>	xxx xxxxx xx xxxxx x xxxx
3	<App submit date>	<Response to question 1>	<Response to question 2>	<Response to question 3>	xxx xxxxx xx xxxxx x xxxx
4	<App submit date>	<Response to question 1>	<Response to question 2>	<Response to question 3>	xxx xxxxx xx xxxxx x xxxx
5	<App submit date>	<Response to question 1>	<Response to question 2>	<Response to question 3>	xxx xxxxx xx xxxxx x xxxx

Figure 2: Example of the Online Application Survey – Extract

13 Productivity Report <PRMO-2082>

13.1 Productivity Report Overview

Metric	Productivity Report
Purpose	To view productivity of PRMP users with local office and region in the following areas: New Cases, Change of Circumstance (COC), Renewals and Open Tasks.
Supports This Outcome	N/A
Performance Target	TBD
Frequency	Daily



<p>Calculations</p>	<p># = total number of New Cases, COCs, and Recertifications completed by PRMP users (that match definitions in the next section) currently in the caseworker portal for the date range and report selected.</p> <p># = total number of Open Tasks assigned to a PRMP user currently in the caseworker portal for the date range selected.</p>
<p>Input Parameters</p>	<p><u>Date range:</u></p> <ul style="list-style-type: none"> • Start date • End date <p><u>Report:</u> The user can select to view one of the following reports:</p> <ul style="list-style-type: none"> • Open tasks by Region • New cases by Region • Recertifications by Region • Change of Circumstances by Region • Open tasks by Local Office • New cases by Local Office • Recertifications by Local Office • Change of Circumstances by Local Office
<p>Definitions</p>	<p><u>New Cases</u> - New applications that are fully submitted regardless of the result for members that currently do not have coverage. Applications must have a status of Approved or Denied.</p> <p><u>COCs</u> – When the On hold decision is accepted.</p> <p>Developer Note: When there are multiple people within the same IC have accepted On Hold decisions this should count as 1.</p> <p><u>Recertifications</u> - The PDC is marked Complete.</p> <p>Developer Note: When there are multiple people within the same IC are recertified with multiple PDCs this should count as 1.</p> <p><u>Open Tasks</u> – Tasks that are in a Pending status (desired tasks still being defined by PRMP).</p>



User Roles Included	The following user roles should be included in the report:	
	PRMP Functional Position	PREE Security Role Name
	Fraud Worker	VIMAFRAUDWORKERROLE
	Call Center	PRCALLCENTER
	Caseworker Spenddown	PRCASEWORKERSD
	Auxillary Clerk	PRAUXILIARYCLERKROLE
	Caseworker	PRCASEWORKERROLE
	Supervisor	PRSUPERVISORROLE
	Director	
	Regional Functional Help Desk	
	Functional Admin	PRFUNCTIONALADMIN
	Appeals Worker	PRAPPEALWORKER
	Office Clerk	PROFFICECLERKROLE
	Technical Help Desk	PRTECHHELPDESK
	QC Reviewer	PRQCREVIEWER
QC Supervisor	PRQCSUPERVISOR	



Tasks included	The following tasks should be included in the report:	
	Task Name	Include in Report Yes/No
	ASES – Daily Rejection File	YES*
	Central Print - Address Mismatch	YES
	Change Reported	YES
	Evidence for Verification	YES
	Online Application	YES
	PRMMIS – Verify Error in Application	YES
	TBQ - Dual Eligibility Validate Medicare Coverage	YES
	TBQ - Validate Demographic Information	YES
	TBQ - Validate Medicare Coverage	YES
	<External User> submitted a request to link account	
	A change was reported for <IC#> within the Citizen Portal by <External User>	YES
	A Renewal Form was completed within the Citizen Portal by <External User Name> for: <List all the members in the recert period>	YES
Past Due Application Task	YES	



	<table border="1"><tr><td data-bbox="428 239 792 331">Determine if application is ready for determination</td><td data-bbox="792 239 1019 331">YES</td></tr></table>	Determine if application is ready for determination	YES
Determine if application is ready for determination	YES		
Example Calculation	<p><u>COCs</u> – Example: if the date is 11/17 and accept change decision with 5 people all in same IC, should count as 1</p> <p><u>Recertifications</u> - Example: The date is 11/17 a recertification is complete, and there are 5 people with different PDCs within the same IC must count as 1.</p>		
Exceptions & Clarifications			



14 Daily New Applications Report < PRMO-3241 >

Metric	New Applications Report																																		
Purpose	To record new applications for Medicaid services received by the agency																																		
Supports This Outcome	The state ensures a user-friendly and accessible experience for applicants and beneficiaries, as well as outreach when appropriate																																		
Frequency	Daily																																		
Calculation	<p>Capture the following details(where applicable) for all new applications submitted by EOD prior to report run.</p> <ul style="list-style-type: none"> • Application ID • MPI • PDC • Application Date • Method • Region/Local 																																		
Definitions	<ul style="list-style-type: none"> • Application ID- The application reference number • MPI- The person reference number • PDC- Product Delivery Case ID • Application Date- Date application submitted • Method- Method of application receipt (Phone, Online, or In Person) • Region/Local Office- Region associated with the address provided by the primary applicant. 																																		
Example Calculation	<table border="1"> <thead> <tr> <th>Field</th> <th>Application ID</th> <th>MPI</th> <th>PDC</th> <th>Application Date</th> <th>Method of Receipt</th> <th>Region/Local Office</th> </tr> </thead> <tbody> <tr> <td>Description</td> <td>The application reference number</td> <td>The person reference number</td> <td>The product delivery case reference number</td> <td>Date the client application was submitted</td> <td>How the client information was submitted</td> <td>The region/local office associated with the address provided by the primary applicant.</td> </tr> <tr> <td>Notes</td> <td></td> <td></td> <td></td> <td></td> <td>Portal Onsite Phone</td> <td>Arecibo Bayamon Caguas Fajardo Mayaguez Metropolitana Ponce</td> </tr> <tr> <td>Example</td> <td>90001</td> <td>90000000000</td> <td>32369</td> <td>3/4/2023</td> <td></td> <td></td> </tr> </tbody> </table>							Field	Application ID	MPI	PDC	Application Date	Method of Receipt	Region/Local Office	Description	The application reference number	The person reference number	The product delivery case reference number	Date the client application was submitted	How the client information was submitted	The region/local office associated with the address provided by the primary applicant.	Notes					Portal Onsite Phone	Arecibo Bayamon Caguas Fajardo Mayaguez Metropolitana Ponce	Example	90001	90000000000	32369	3/4/2023		
Field	Application ID	MPI	PDC	Application Date	Method of Receipt	Region/Local Office																													
Description	The application reference number	The person reference number	The product delivery case reference number	Date the client application was submitted	How the client information was submitted	The region/local office associated with the address provided by the primary applicant.																													
Notes					Portal Onsite Phone	Arecibo Bayamon Caguas Fajardo Mayaguez Metropolitana Ponce																													
Example	90001	90000000000	32369	3/4/2023																															
Exceptions & Clarifications																																			



15 Daily Completed Applications Report < PRMO-3241 >

Metric	Daily Completed Applications																								
Purpose	To record completed applications for Medicaid services received by the agency																								
Supports This Outcome	The state ensures a user-friendly and accessible experience for applicants and beneficiaries, as well as outreach when appropriate																								
Frequency	Daily																								
Calculation	<p>Capture the following details (where applicable) for all completed applications submitted by EOD prior to report run.</p> <ul style="list-style-type: none"> • Application ID • MPI • PDC • Eligibility Determination • Method 																								
Definitions	<ul style="list-style-type: none"> • Application ID- The application reference number • MPI- The person reference number • PDC- Product Delivery Case ID • Eligibility Determination- Deemed eligible or ineligible (need to specify NO SHOWS or Pending Evidence) • Method- Method of application receipt (Phone, Online, or In Person) 																								
Example Calculation	<table border="1"> <thead> <tr> <th>Field</th> <th>Application ID</th> <th>MPI</th> <th>PDC</th> <th>Eligibility Determination</th> <th>Method of Receipt</th> </tr> </thead> <tbody> <tr> <td>Description</td> <td>The application reference number</td> <td>The person reference number</td> <td>The product delivery case reference number</td> <td>The eligibility decision</td> <td>How the client information was submitted</td> </tr> <tr> <td>Notes</td> <td></td> <td></td> <td></td> <td>(Specify NO SHOWS or Pending Evidence)</td> <td></td> </tr> <tr> <td>Example</td> <td>90000</td> <td>90000000000</td> <td>32369</td> <td>Eligible Ineligible</td> <td>Portal Onsite Phone</td> </tr> </tbody> </table>	Field	Application ID	MPI	PDC	Eligibility Determination	Method of Receipt	Description	The application reference number	The person reference number	The product delivery case reference number	The eligibility decision	How the client information was submitted	Notes				(Specify NO SHOWS or Pending Evidence)		Example	90000	90000000000	32369	Eligible Ineligible	Portal Onsite Phone
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Description	The application reference number	The person reference number	The product delivery case reference number	The eligibility decision	How the client information was submitted																				
Notes				(Specify NO SHOWS or Pending Evidence)																					
Example	90000	90000000000	32369	Eligible Ineligible	Portal Onsite Phone																				
Exceptions & Clarifications																									



16 Daily Completed Renewals Report < PRMO-3241 >

Metric	Daily Completed Renewals																																						
Purpose	To record completed renewals for Medicaid services received by the agency																																						
Supports This Outcome	The state ensures a user-friendly and accessible experience for applicants and beneficiaries, as well as outreach when appropriate																																						
Frequency	Daily																																						
Calculation	<p>Capture the following details (where applicable) for all completed renewals submitted by EOD prior to report run.</p> <ul style="list-style-type: none"> MPI PDC Eligibility Determination Initial Coverage Code New Coverage Code Change in Coverage Method 																																						
Definitions	<ul style="list-style-type: none"> MPI- The person reference number PDC- Product Delivery Case ID Eligibility Determination- Deemed eligible or ineligible (need to specify NO SHOWS or Pending Evidence) Initial Coverage Code- Client's previous coverage code New Coverage Code- Client's new coverage code Change in coverage- Positive, Negative, or No Change Method- Method of application receipt (Phone, Online, or In Person) No Shows- No evidence has been updated by caseworker or client (through the portal); client disenrolled/ deemed ineligible due to no followup 																																						
Example Calculation	<table border="1" style="width: 100%; border-collapse: collapse; text-align: center;"> <thead> <tr> <th style="background-color: #e0e0e0;">Field</th> <th style="background-color: #e0e0e0;"><i>MPI</i></th> <th style="background-color: #e0e0e0;"><i>PDC</i></th> <th style="background-color: #e0e0e0;"><i>Eligibility Determination</i></th> <th style="background-color: #e0e0e0;"><i>Initial Coverage Code</i></th> <th style="background-color: #e0e0e0;"><i>New Coverage Code</i></th> <th style="background-color: #e0e0e0;"><i>Change in Coverage</i></th> <th style="background-color: #e0e0e0;"><i>Method of Receipt</i></th> </tr> </thead> <tbody> <tr> <td style="background-color: #e0e0e0;">Description</td> <td>The person reference number</td> <td>The product delivery case reference number</td> <td>The eligibility decision</td> <td>Client's previous coverage code</td> <td>Client's new coverage code</td> <td>How a client's previous coverage was impacted</td> <td>How the client information was submitted</td> </tr> <tr> <td style="background-color: #e0e0e0;">Notes</td> <td></td> <td></td> <td>(Specify NO SHOWS or Pending Evidence)</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td style="background-color: #e0e0e0;">Example</td> <td>90000000000</td> <td>32369</td> <td><i>Eligible Ineligible</i></td> <td>100</td> <td>120</td> <td><i>Positive Negative No Change</i></td> <td><i>Portal Onsite Phone</i></td> </tr> </tbody> </table>							Field	<i>MPI</i>	<i>PDC</i>	<i>Eligibility Determination</i>	<i>Initial Coverage Code</i>	<i>New Coverage Code</i>	<i>Change in Coverage</i>	<i>Method of Receipt</i>	Description	The person reference number	The product delivery case reference number	The eligibility decision	Client's previous coverage code	Client's new coverage code	How a client's previous coverage was impacted	How the client information was submitted	Notes			(Specify NO SHOWS or Pending Evidence)					Example	90000000000	32369	<i>Eligible Ineligible</i>	100	120	<i>Positive Negative No Change</i>	<i>Portal Onsite Phone</i>
Field	<i>MPI</i>	<i>PDC</i>	<i>Eligibility Determination</i>	<i>Initial Coverage Code</i>	<i>New Coverage Code</i>	<i>Change in Coverage</i>	<i>Method of Receipt</i>																																
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I.4.2.g.ii Completed Management Reports

Exceptions & Clarifications	
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17 Monthly Deemed Eligible File < PRMO-3240 >

Metric	Deemed Eligible File																																																																		
Purpose	To record clients deemed eligible for Medicaid services and provide data to MCOs as needed																																																																		
Supports This Outcome	The state ensures a user-friendly and accessible experience for applicants and beneficiaries, providing a determination of eligibility when all criteria are met.																																																																		
Frequency	Reported monthly																																																																		
Calculation	<p>Capture the following details (where applicable) for all clients deemed eligible</p> <ul style="list-style-type: none"> • MPI • PDC • Eligibility expiration date 																																																																		
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I.4.2.g.ii Completed Management Reports



18 Monthly No Exparte File < PRMO-3240 >

Metric	No Exparte File																																																																																																				
Purpose	To record Medicaid renewals that went through the ex parte process but did not “pass”.																																																																																																				
Supports This Outcome	The state provides outreach to assist clients that were unable to renew services and require caseworker intervention																																																																																																				
Frequency	Reported monthly																																																																																																				
Calculation	<p>Capture the following details (where applicable) for cases that cannot be completed through the ex parte process and require caseworker attention.</p> <ul style="list-style-type: none"> • MPI • PDC • Eligibility/expiration date • Region/local office • MAGI/Non-MAGI 																																																																																																				
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19 KPI Dashboard Layout

19.1 Combination Clustered Column and Line Chart

This chart is applicable to the below KPIs:

- Average Numbers of Days an Online MAGI or a Non-MAGI Application Remains Open

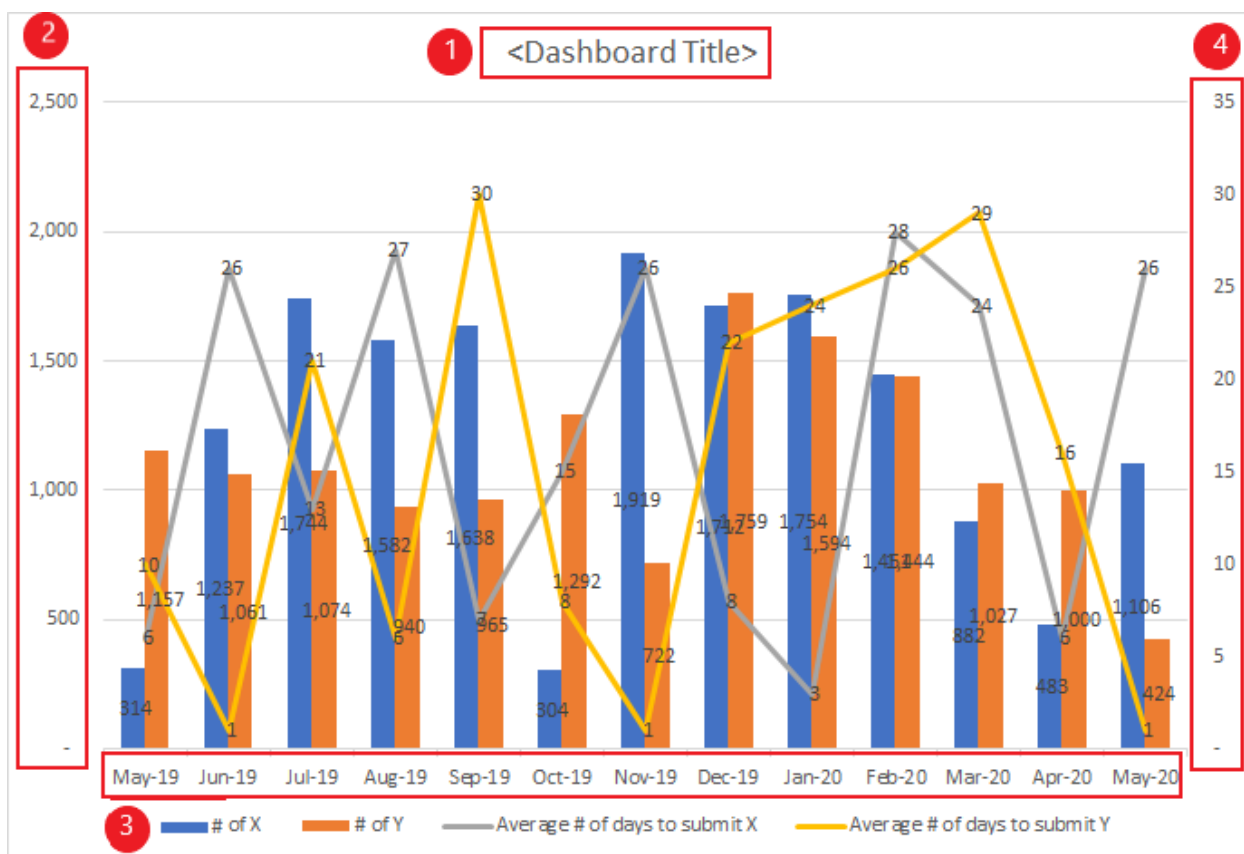


Figure 3: Example of Combination Clustered Column & Line Chart Layout

#	Design Element	Details
1	Dashboard Title	Refer to the applicable KPI dashboard for additional design information.



#	Design Element	Details
2	Primary: Y Axis	Data will be represented by a bar graph. Refer to the applicable KPI dashboard for additional design information. <i>Development Note: The data intervals displayed on the primary Y axis should be automatically selected based on the data within the graph.</i>
3	X Axis	Refer to the applicable KPI dashboard for additional design information.
4	Secondary: Y Axis	Data will be represented by a line graph. Refer to the applicable KPI dashboard for additional design information. <i>Development Note: The data intervals displayed on the secondary Y axis should be automatically selected based on the data within the graph.</i>

Table 13: Combination Bar & Line Chart - Design Details

19.2 Combination Stacked Column and Line Chart

This chart is applicable to the below KPIs:

- Automated “No touch” Eligibility Determinations
- Ex Parte Renewals

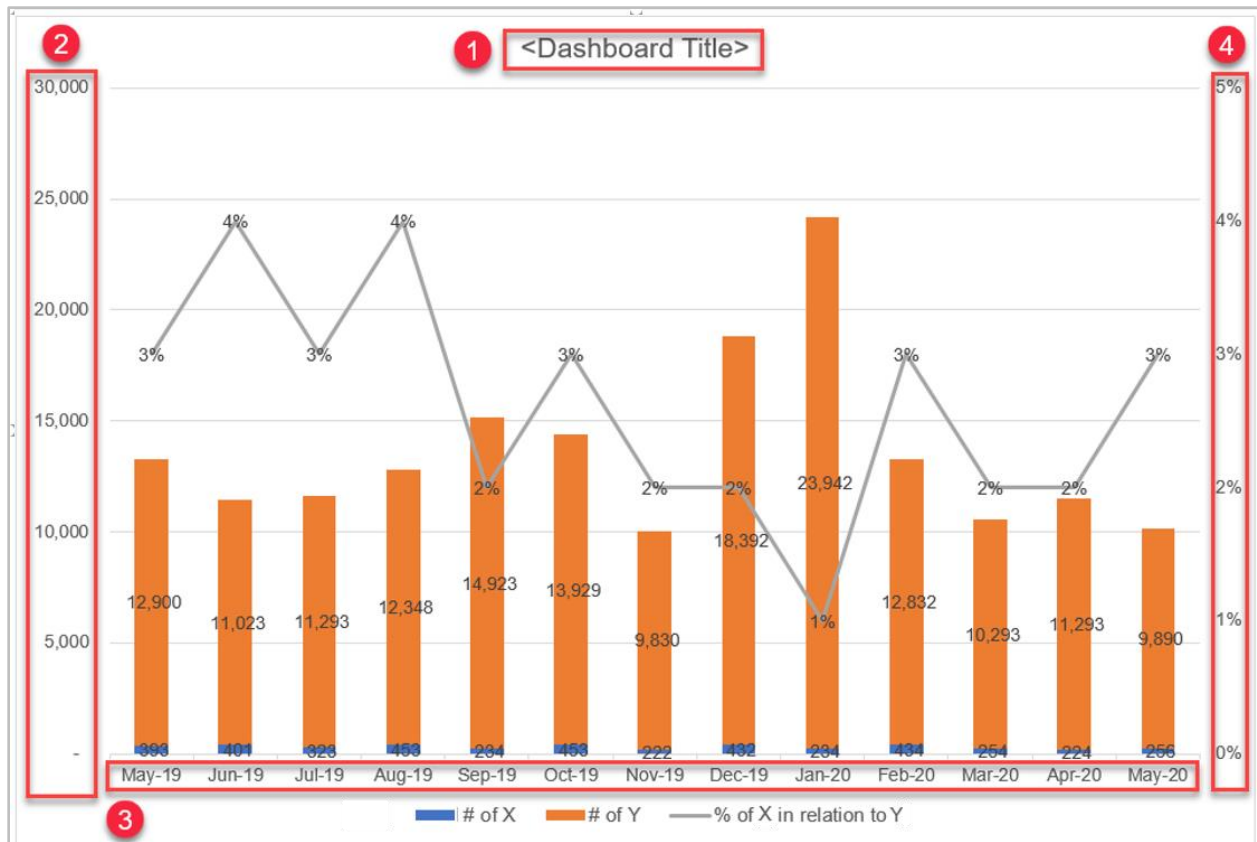


Figure 4: Example of Combination Stacked Column & Line Chart Layout

#	Design Element	Details
1	Dashboard Title	Refer to the applicable KPI dashboard for additional design information.
2	Primary: Y Axis	Data will be represented by a bar graph. Refer to the applicable KPI dashboard for additional design information. <i>Development Note: The data intervals displayed on the primary Y axis should be automatically selected based on the data within the graph.</i>
3	X Axis	Refer to the applicable KPI dashboard for additional design information.
4	Secondary: Y Axis	Data will be represented by a line graph. Refer to the applicable KPI dashboard for additional design information.



#	Design Element	Details
		<i>Development Note: The data intervals displayed on the secondary Y axis should be automatically selected based on the data within the graph.</i>

Table 14: Combination Stacked Column & Line Chart - Design Details

19.3 Combination Clustered Stacked Column and Line Chart

This chart is applicable to the below KPIs:

- Timeliness of Non-Disability & Disability Related Determinations
- Backlog of Non-Disability & Disability Related Applications
- MAGI & Non-MAGI Annual Renewals
- MAGI or Non-MAGI Applications Completed Online

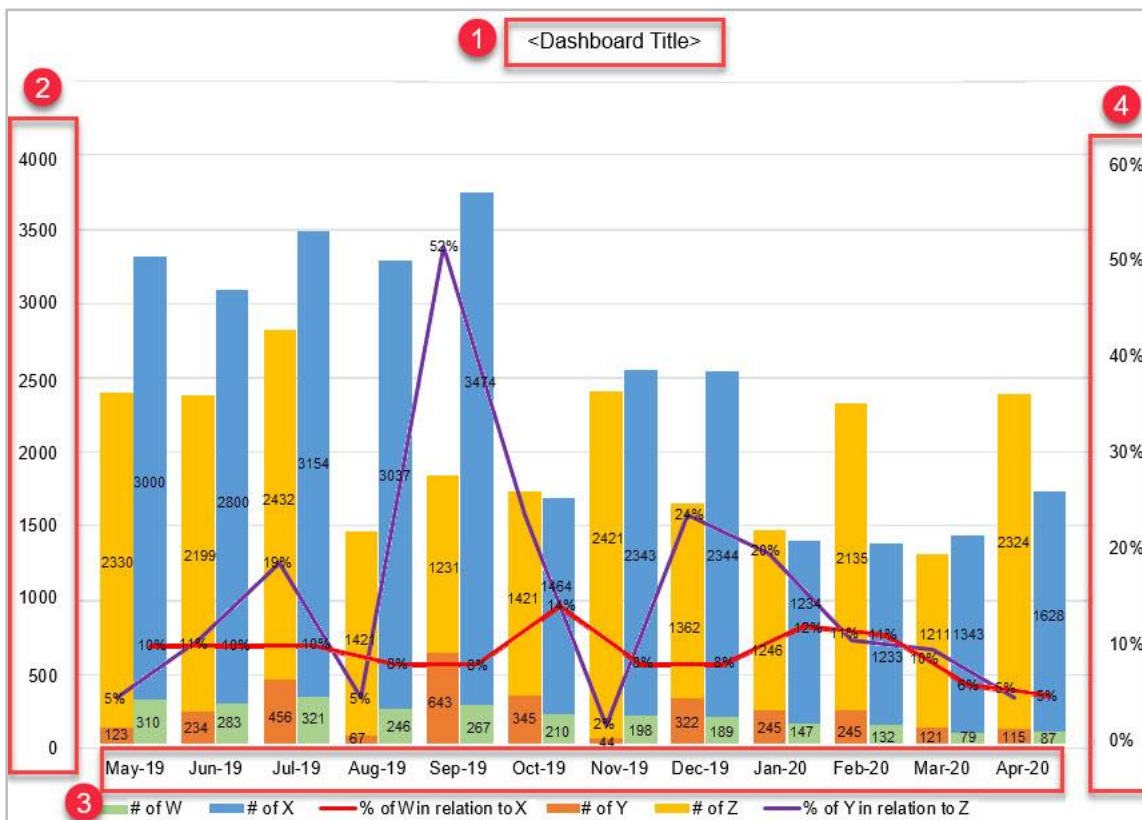


Figure 5: Example of Combination Clustered Stacked Column & Line Chart Layout



#	Design Element	Details
1	Dashboard Title	Refer to the applicable KPI dashboard for additional design information.
2	Primary: Y Axis	Data will be represented by a bar graph. Refer to the applicable KPI dashboard for additional design information. <i>Development Note: The data intervals displayed on the Y axis should be automatically selected based on the data within the graph.</i>
3	X Axis	Refer to the applicable KPI dashboard for additional design information.
4	Secondary: Y Axis	Data will be represented by a line graph. Refer to the applicable KPI dashboard for additional design information. <i>Development Note: The data intervals displayed on the secondary Y axis should be automatically selected based on the data within the graph.</i>

Table 15: Combination Clustered Stacked Column & Line Chart - Design Details

19.4 Bar Chart

This chart is applicable to the below KPI:

- Abandoned Online Applications Submitted through the Caseworker Portal

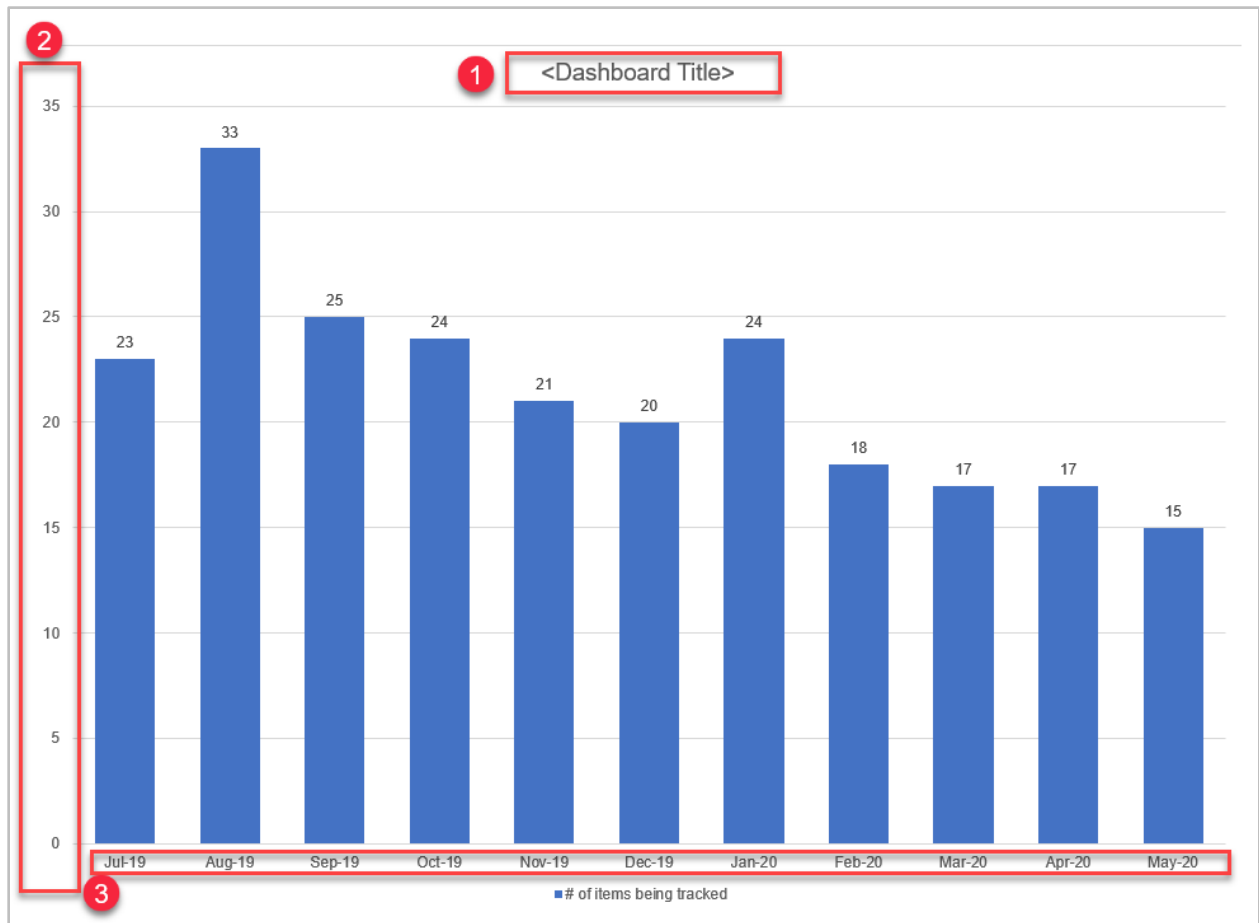


Figure 6: Example of Bar Chart Layout



#	Design Element	Details
1	Dashboard Title	Refer to the applicable KPI dashboard for additional design information.
2	Y Axis	Data will be represented by a bar graph. Refer to the applicable KPI dashboard for additional design information. <i>Development Note: The data intervals displayed on the primary Y axis should be automatically selected based on the data within the graph.</i>
3	X Axis	Refer to the applicable KPI dashboard for additional design information.

Table 16: Bar Chart - Design Details

20 Development Considerations

20.1 KPI Data Retention Plan

1. PREE should retain all KPI and management reports related data for a period of 7 years. KPI dashboards should be able to generate dashboard for up to 7 years in the past.

20.2 Dashboard Filter

1. The dashboard will default to how they are depicted within KPI Dashboard Layout section. The dashboards should provide filters that allow the user to manually update what data is displayed. Filters can include but not limited to:
 - a. Date Range
 - b. Data within the Primary Y-Axis (this applies to all dashboards)
 - c. Data within the Secondary Y-Axis (this applies to all dashboards with a Secondary Y-Axis)