Performance Analysis and Integrity (PA&I) | Business Intelligence

Efficiency Rate and Endeavor 3.0 Fact Sheet

https://tableau.vba.va.gov/#/workbooks/2995/views

What is the Efficiency Rate Metric?

The **efficiency rate** is a measure of transaction activity used to determine how effectively claims are moving through the claims process. **Rework** as referred to within these dashboards, is defined as any deviation from a claim's expected linear path based on system transactions generated by users. These indications are recorded as Forward Transactions and Rework which are displayed as a ratio and referred to as Efficiency.

In examining efficiency, we have made every effort to reduce the amount of work that is not attributable to an individual by excluding transactions that should not be included because it was marked RFD, RDC, or Award for purposes of workload management or other administrative functions. Transactions that fall into this category are referred to as **redundant** and are excluded from transaction counts.

The efficiency rate is a product of the transactional activity that is generated as claims move through cycles and compared to the previous claim status to determine whether there is an indication that they were reworked regardless of what triggered the rework.

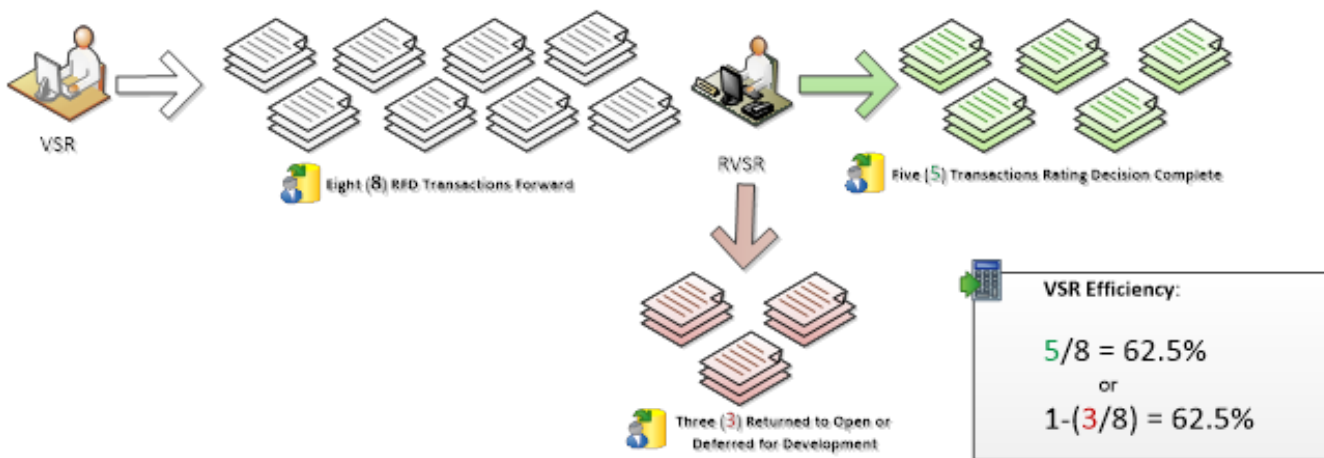Three metrics used to evaluate efficiency:

Forward Indicator: We record one marker where a person moves a claim forward based on the type of from the transaction that is generated

Rework Indicator: We record one marker if that same claim has an indication that the activity was not sufficient to complete the claim.

Efficiency: The sum of the number or rework indicators divided by the number of forward indicators plus any mitigated deferrals within the same period. That number is presented as a percentage.

Using Transactions to Measure Claims Processing Effectiveness

Marking a claim RFD indicates that the claim is ready for completion. If the development was done effectively and we do not receive additional evidence from the claimant, then the claims process more efficient. Because all claims have the potential for additional evidence, no employee will ever be 100% efficient and all employees have equal chance of that occuring.
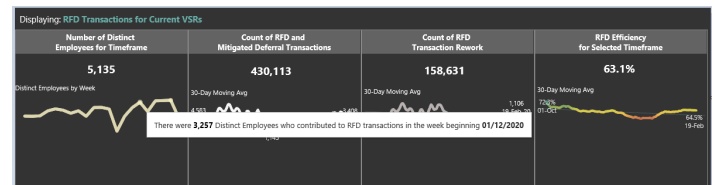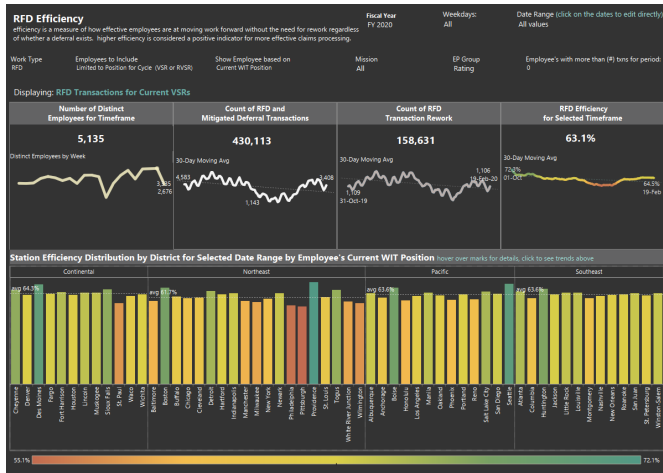

VSR

Eight (8) RFD Transactions Forward

RVSR

Five (5) Transactions Rating Decision Complete

Three (3) Returned to Open or Deferred for Development

VSR Efficiency:

$$5/8 = 62.5\%$$
or
$$1-(3/8) = 62.5\%$$

Endeavor 3.0 and Endeavor Executive LTD

Endeavor 3.0 is located on Tableau Server and can be located by the above link or by searching for **Endeavor 3.0**. The workbook has the traditional **About Page** that you see in all PA&I products, which contains information about the dashboard to include the definition of efficiency rate, examples, key terms, and other pertinent information to understanding the workbook. In the "Welcome to Endeavor" page, a walkthrough of efficiency along with examples for each work type is provided.

The first Dashboard in the workbook is titled the **Endeavor Executive LTD** view and it provides District and Station Overview of the transactions and efficiency for a selected period. Because of the complexity between employees and teams we've attempted to make these dashboards easier to navigate by reducing the number of overall filter choices but the filters you will see are like filters that you might see on other PA&I products. Be aware though that you can only select one option from each of the following filters:

Work Type:
- RFD
- RDC
- AWD

Employees to Include:
- Employees in Any Role *(includes Supervisors and other people who have activity but where the work is not a primary function of their position.)*
- Limited by Position *(employees who would generally perform actions for the specific work type selected. For example, the RFD work type combined with this selection would display VSRs only.)*

Show Position By: *This filter is only available on the Executive Dashboard. All over dashboards are based on Current Position and geared towards the current supervisor.*

- Position at Time of Transaction *(individuals as displayed based on their Position and Station at the time the transaction occurred.)*
- Current Position *(individuals as displayed based on their Current Position and Station as indicated in WIT.)*

Another filter that might not look familiar to you is the filter entitled, **Employees with more than (#) txns for period** – this filter will allow you to filter out employees that have fewer transactions than you specify.

In the middle of the view you can see four charts that will provide you trends over time. Notice when you hover of a point on the line, a tool tip will show that will provide you additional information.

In the lower part of the view you will see the station efficiency distribution based on the selected filters. As you hover of a station a tool tip will show you additional information for the station's efficiency.

You can also click one station and the trends in the above charts will update to that selected station.
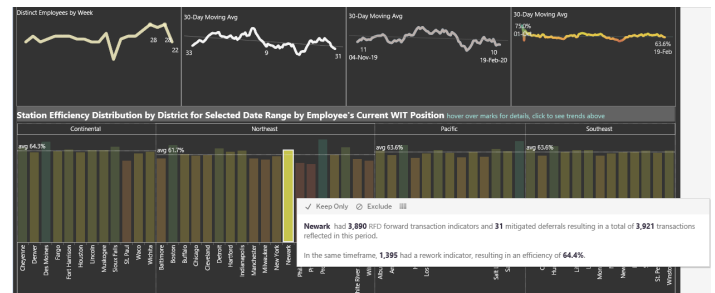

To deselect you can also click that station again and the dashboard will return to the earlier view.

Endeavor Team

The next view is **Endeavor Team**. This view will show you a specific team's efficiency. Notice the filters at the top are like the filters on the Endeavor Executive LTD view. If you select a station you will see the national and station efficiency is populated in the upper right-hand corner.
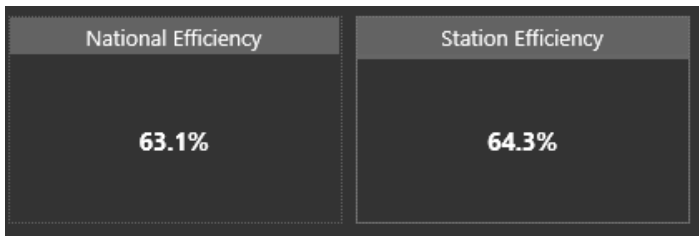
You will also notice the specific VBMS Teams for the station selected are now showing. You can hover over a team and see additional information in the tooltip, and you can click one of more teams to use them as a filter to see the individual employee's information. As in all PA&I Dashboards, if you want to view more than one team you can do so by using the CONTROL (CTRL) key and clicking multiple data points.
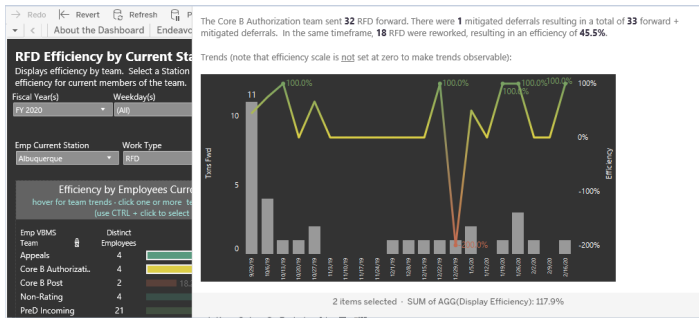
In the lower left corner, you will see the distribution of selected employees based on their number of RFDs forward and their efficiency rate. When you hover over a data point a tool tip will provide additional information on that employee.
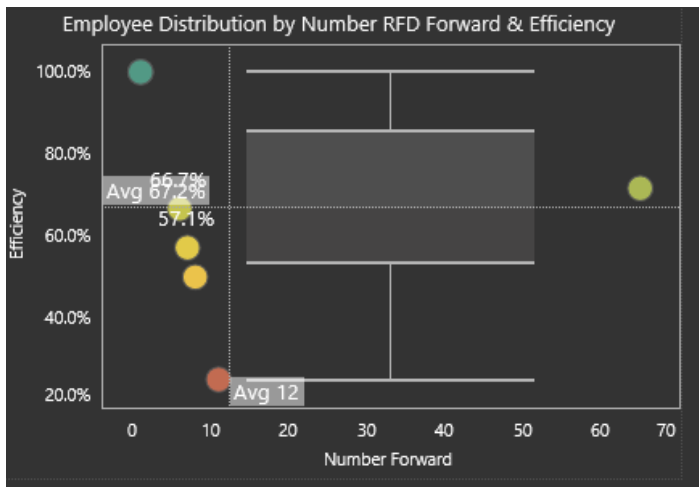
If you click on an individual's name in the middle chart that has the following heading:

It will route you straight to the **Employee's Rework Details** View.

Employee's Rework Details

This view provides a detail listing of all the rework transactions for that specific employee. If you want to return to the previous view you can click on the grey carrot at the top of the page.

However, if you want to dig a little deeper, and you want to see additional details on a specific claim that the employee worked, click on the **file number** in the detail list. After you click on the file number you are routed to the **ALL TXNS by Claim ID** view.

ALL TXNS by Claim ID

This view will show you the claim details for the specific benefit claim ID, to include the file number, transaction category, and work credit. You can click the back carrot on this view and the Employee Rework Details view to take you back to Endeavor Team.
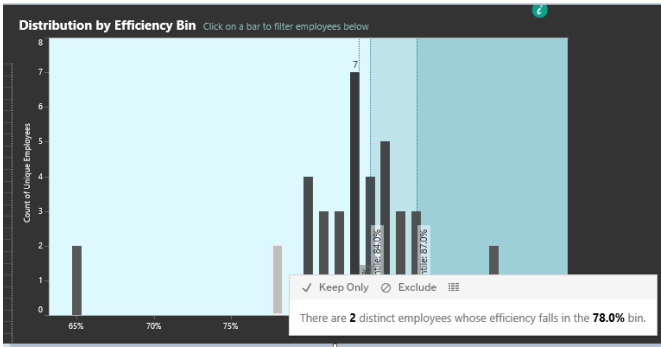
Efficiency Distribution

The new Efficiency Distribution view displays the distribution of employees based on the work type selected. The view will default to only show employees with more than 50 **Forward Transactions** in the selected **Work Type.**

You can see the Distinct Employees and Efficiency rate for the Districts and Stations. By Clicking on a District or Station the rest of the dashboard will updated based on that selection.
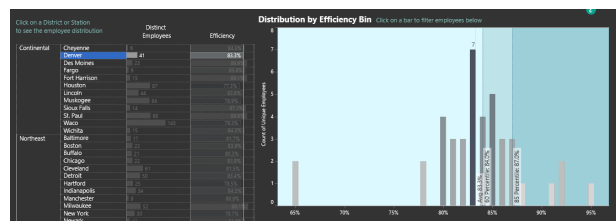
This chart will show the number of employees who fall into each efficiency bin. You can select one of the bars to filter to related employees in the chart that displays beneath the bars.

Individual Overview

The next view is the **Individual Overview**. When you select a Station and Employee the view will populate with the employee's data. You will see the breakdown of how many transactions went forward and how many transactions required some rework, and what the employee's efficiency rate is.

You will notice the visualizations in this view will show additional information on the employee's transactions that moved forward, transactions by day, as well as the caused by status for the transactions that were reworked.
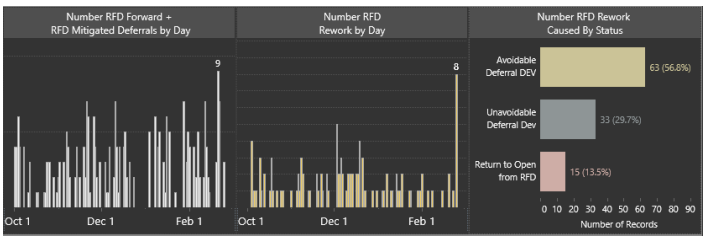

The bottom two charts will show the 30-day moving average for that employee and the scatter plot will show where the employee falls compared to other individuals at the Regional Office. Select the "**CLICK HERE**" in yellow, to see where the individual falls.
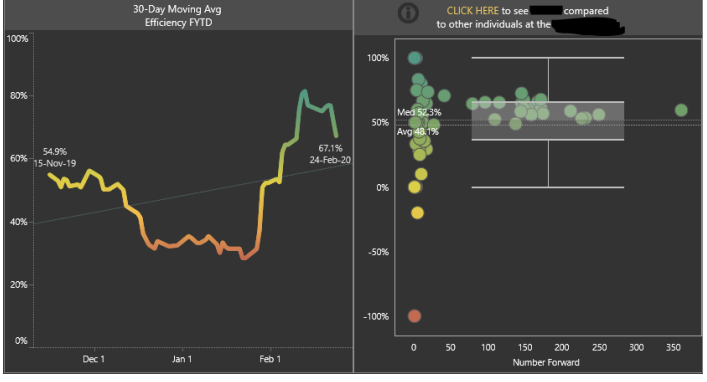
One of the other features on this view is at the top of the view: the option to print. If you would like to print this view for your employee, select the "Click Here for Print Friendly Version."

Station FYTD RFD Efficiency

The next two views will focus on fiscal year to date performance as defined in the FY20 Directors Performance Plan as of February 2020. Let's start with the **Station FYTD RFD Efficiency**. This view shows each station's fiscal year to date efficiency rate along with the calculation. You can hover over a station and see the number of claims that moved forward and mitigated, number reworked, and the efficiency rate.

In the same view, along the bottom, you will see the monthly efficiency and the moving average over the course of the fiscal year. You can hover over a station and the bottom two charts will highlight that Station.
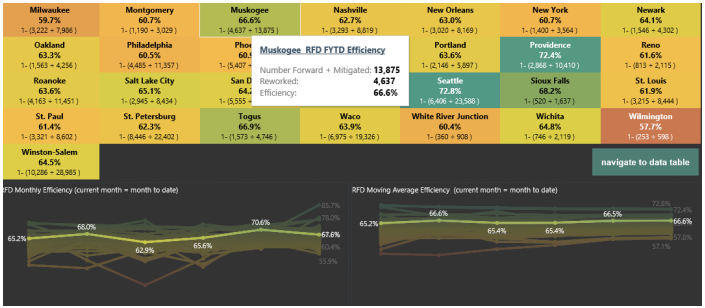
On the bottom right hand side of the view there is an option to **navigate to the data table**. If you select that option it will take you to the **FYTD RFD Efficiency Table**.

FYTD RFD Efficiency Table
The **FYTD RFD Efficiency Data** Table's filters will default to the FY20 Directors Performance Plan. You will see all the stations, their distinct employees, and the number of forward RFDs and mitigations

Questions

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