Frequently Asked Questions (FAQs)
Department of Developmental Services (DDS)
Research, Audits, and Evaluation Branch
External Comprehensive Dashboard

The following FAQs are provided to support use of the External Comprehensive Dashboard, which provides a summary of DDS caseload and expenditure information. This dashboard is configured to mask values for small population subgroups to protect confidential information, in accordance with the California Health and Human Services Deidentification Guidelines.

1. **How is this dashboard different from the Annual Purchase of Service (POS) Report?**
   There are some key differences between this dashboard and the Annual Purchase of Service Data Reports shared by DDS and the Regional Centers (RCs). Key differences include:
   - Time period: This dashboard is organized by month and includes all fiscal years (FYs) since FY 2011/12. Annual POS Reports summarize one FY at a time.
   - Caseload counts:
     - The Annual POS Reports use a point-in-time method, counting individuals with either active status in January of the FY or at least one POS authorization in the FY.
     - This dashboard shows individuals who were active at any point in the FY or had a POS expenditure during the FY. In addition to displaying caseload and POS expenditures for active individuals in Early Start or Lanterman programs, the dashboard includes individuals in intake and other, inactive statuses.
   - Some information in the Annual POS Reports is not available in this dashboard. Most notably, data describing service utilization and POS authorizations can only been seen in the Annual POS Reports.

2. **How do I use the dashboard?**
   - Users can select up to two filters on the right-hand side of this dashboard. Users can filter by status, regional center, age group, race/ethnicity, primary language, major disability, and residence type.
   - Users can select specific time periods by clicking on the month or FY in the table on the left-hand side of the dashboard.

- All filters will apply to the whole dashboard, including the three graphs in the middle of the display.

3. **How is this dashboard put together?**
   The methods used to create this dashboard can be seen on the Methodology Overview document.

4. **Are any data excluded?**
   - Contract records, which are not associated with specific individuals, are excluded.
   - All non-missing POS expenditure records are included. POS expenditure records include zero dollar claims as well as any credits/adjustments (negative amounts).
   - Any individuals with a POS expenditure, who are missing from the Client Master File for the month, are excluded.

5. **Who can I contact for comments and/or further questions?**
   Please let us know via e-mail if you have any suggestions or see any problems or errors: Analytics@dds.ca.gov

6. **Can I save my current view – or multiple views – of the dashboard for future visits to the site?**
   The dashboard view and settings are saved in each visitor's browser cookies and cache. Unless cleared between visits, the dashboard will display as it was at the end of the prior visit.

7. **May I subscribe to the dashboard? If yes, how?**
   This dashboard does not support e-mail notices when the data is updated. However, PowerBI Pro Users, DDS Staff, and authorized Regional Center staff may set up a PowerBI dashboard subscription. A subscription is a way to have a PowerBI report automatically sent to you on a chosen schedule. For example, to see a summary of caseload and expenditures on the 15th of each month, you can subscribe to the dashboard and schedule an email notification that will deliver the latest data and visualizations to you on the 15th of each month. Requirements and instructions for setting up a subscription to the report are provided by Microsoft here: https://learn.microsoft.com/en-us/power-bi/collaborate-share/end-user-

subscribe

8. **How often does the dashboard get refreshed? When refreshed, do users receive a notification?**
   The dashboard is refreshed monthly. Users will not receive a notification when the dashboard is updated. Please see question #7 regarding subscription options.

9. **Can I download the dataset behind the dashboard?**
   No. To ensure that Protected Health Information (PHI) held by DDS remains secure, users are not permitted to view the underlying dataset for this dashboard.