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Frequently Asked Questions (FAQs)
Research, Audits, and Evaluation Branch
Public Comprehensive Dashboard

The following FAQs are provided to support use of this Public Comprehensive Dashboard, which provides caseload and expenditure information. This Dashboard protects confidential information, in accordance with the California Health and Human Services De-Identification Guidelines.

1. **How is this Dashboard different from the Annual Purchase of Service (POS) Report?**

   Some 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 an active status in January of the FY or at least one POS record in the FY.
     - This Dashboard shows individuals who were active at any point in the FY or had a POS expenditure during the FY.
   - Some information in the Annual POS Reports is not available in this Dashboard. Most notably, data describing service utilization and POS authorizations can be seen only in the Annual POS Reports.

2. **How do I use this Dashboard?**
   - Users can select up to two filters on the right side of this Dashboard. Options include program participation, regional center, age group, race/ethnicity, primary language, diagnosis, and residence type. The two-filter limitation is necessary to protect the privacy of individual information.
   - Users can select specific time periods by clicking on the month or FY in the table on the left side of this Dashboard.

- All selected filters 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 in the Methodology Overview document on this Dashboard's website.

4. **Are any data excluded?**
   - Contract expenditure records, which are not associated with specific individuals, are excluded.
   - 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 e-mail us 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 this Dashboard for future visits to the site?**
   This Dashboard's view and settings are saved in each visitor's browser. Unless the browsing history and tracking cookies are cleared between visits, this Dashboard will display the same filters that were applied at the last visit to this Dashboard website.

7. **How often does this Dashboard get refreshed? When refreshed, do users receive a notification?**
   This Dashboard is refreshed monthly. Users will not receive a notification when this Dashboard is updated. Please see the next question regarding subscription options.

8. **May I subscribe to this Dashboard? If yes, how?**
   A subscription is a way to have a Power BI report automatically sent to you on a chosen schedule. This Dashboard does not support e-mail notices when the data is updated. However, Power BI Pro Users, DDS Staff, and authorized regional center employees may set up a Power BI dashboard subscription.

For example, to receive a summary of caseload and expenditures on the 15th of each month, you can subscribe and schedule an e-mail notification. This will ensure that the latest data and visualizations are delivered to you on the 15th of each month. Requirements and instructions for setting up a subscription to the report are provided by Microsoft: https://learn.microsoft.com/en-us/power-bi/collaborate-share/end-user-subscribe

9. **Can I download this dataset behind this Dashboard?**
   No. To ensure that the information about individuals remains secure, users are not allowed to view or download the underlying dataset for this Dashboard.