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Purpose of this Instructional Guide

The purpose of this instructional guide is to provide CaseWorks Admin users with additional guidance in utilizing CaseWorks Reports using analysis tools in Excel.

Run the CaseWorks ‘Modified By Report’

Follow the instructions in the CaseWorks Admin Manual to run the ‘Forms Processed Report by Modified’. This report is built to provide data on documents being modified (processed and filed down). This report includes documents that have were **modified** within the date range in the report parameters.

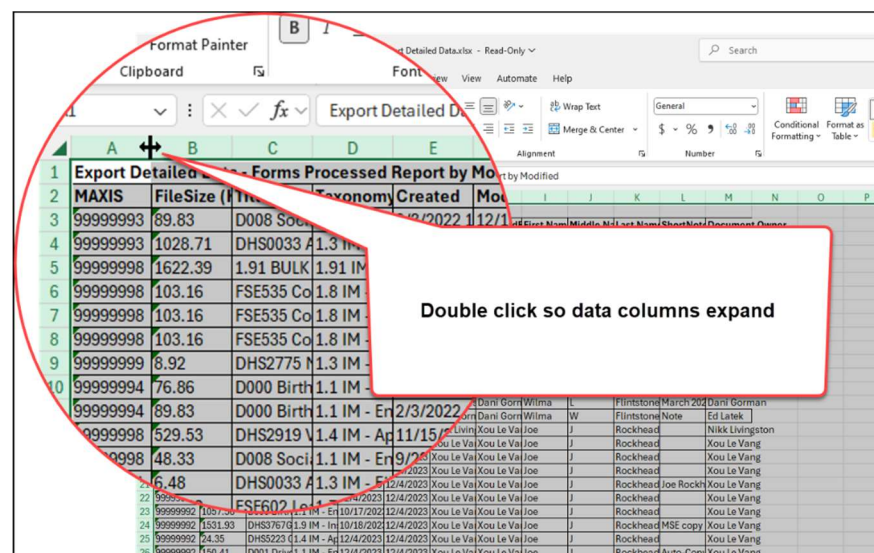
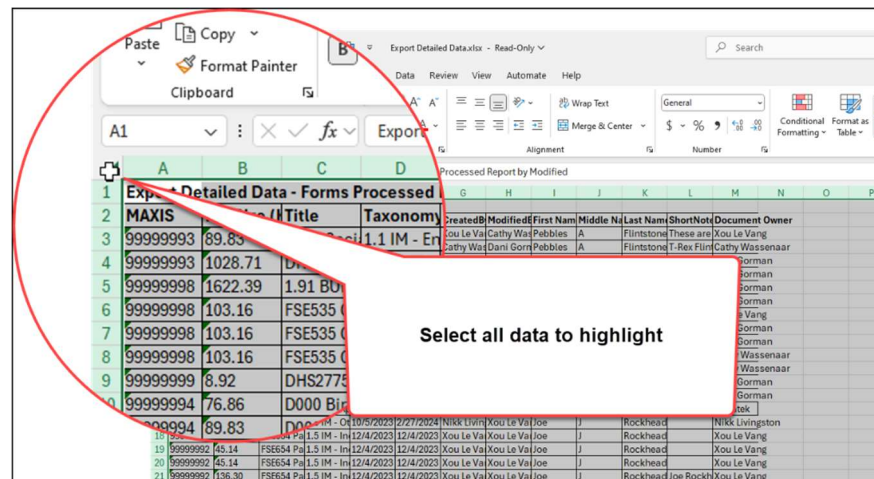
This report can provide insight into the DocTypes being processed, how many documents are being processed, and staff processing them. This guide will also instruct on how to get average time for processing by type of document and by worker.

The purpose of this instructional guide is to aid CaseWorks Report Users in summarizing document processing for your County.

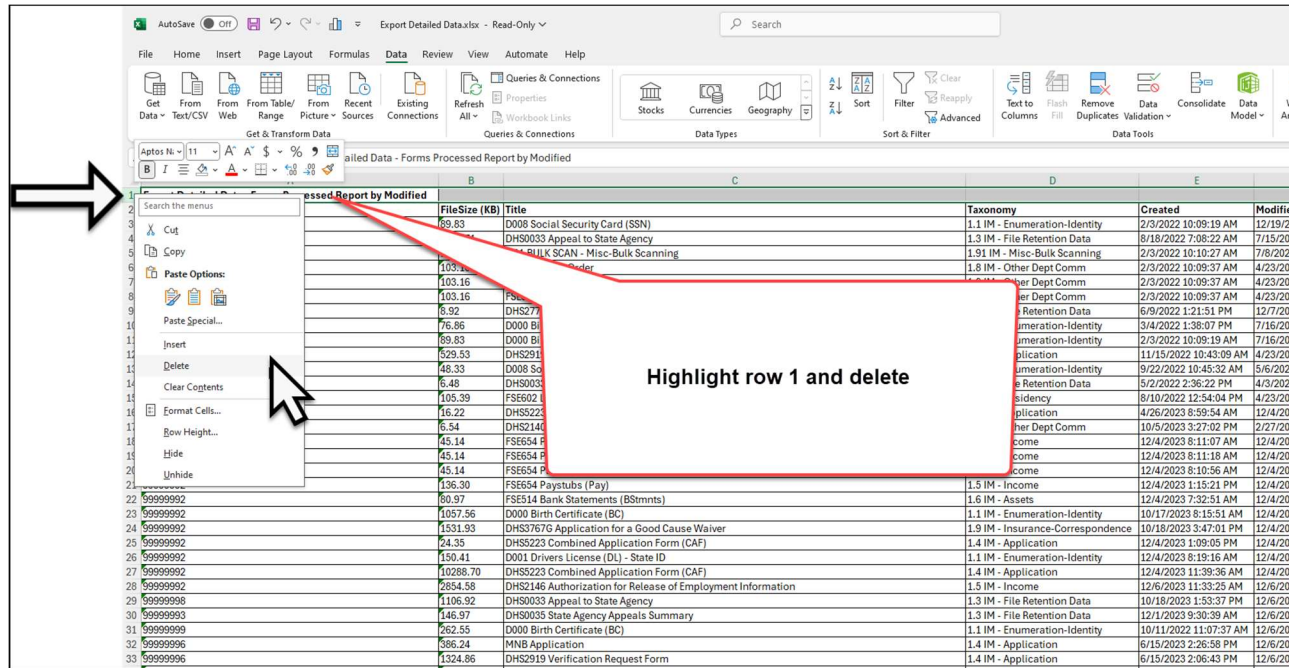
Tip: when you run your report, immediately save the report with a name that helps you identify the parameters you set for the report, like the time period. Example: Modified By Report_Intake Team_Sept2024_Novemeber2024

Preparing the Report

Adjust your table to easily read all data



Add filters



Highlighted row 1 and delete

FileSize (KB)	Title	Taxonomy	Created	Modified
69.83	D008 Social Security Card (SSN)	1.1 IM - Enumeration-Identity	2/3/2022 10:09:19 AM	12/19/2022
69.83	DHS0033 Appeal to State Agency	1.3 IM - File Retention Data	8/18/2022 7:08:22 AM	7/15/2024
103.16	DHS0033 Appeal to State Agency	1.91 IM - Misc-Bulk Scanning	2/3/2022 10:10:27 AM	7/8/2024
103.16	DHS0033 Appeal to State Agency	1.8 IM - Other Dept Comm	2/3/2022 10:09:37 AM	4/23/2024
103.16	DHS0033 Appeal to State Agency	1.8 IM - Other Dept Comm	2/3/2022 10:09:37 AM	4/23/2024
6.92	DHS0033 Appeal to State Agency	1.8 IM - Other Dept Comm	2/3/2022 10:09:37 AM	4/23/2024
76.86	D000 Birth Certificate (BC)	1.1 IM - Enumeration-Identity	3/4/2022 1:38:07 PM	7/16/2024
69.83	D000 Birth Certificate (BC)	1.1 IM - Enumeration-Identity	2/3/2022 10:09:19 AM	7/16/2024
529.53	DHS0291 Application for a Good Cause Waiver	1.1 IM - Enumeration-Identity	11/15/2022 10:43:09 AM	4/23/2024
48.33	D008 Social Security Card (SSN)	1.1 IM - Enumeration-Identity	9/22/2022 10:45:32 AM	5/6/2024
6.48	DHS0033 Appeal to State Agency	1.3 IM - File Retention Data	5/2/2022 2:36:22 PM	4/3/2024
105.39	FS6021 Application for a Good Cause Waiver	1.1 IM - Enumeration-Identity	8/10/2022 12:54:04 PM	4/23/2024
16.22	DHS0223 Combined Application Form (CAF)	1.1 IM - Enumeration-Identity	4/26/2023 8:59:54 AM	12/4/2023
6.54	DHS02146 Authorization for Release of Employment Information	1.5 IM - Income	10/5/2023 3:27:02 PM	2/27/2024
45.14	FS6541 Application for a Good Cause Waiver	1.1 IM - Enumeration-Identity	12/4/2023 8:11:07 AM	12/4/2023
45.14	FS6541 Application for a Good Cause Waiver	1.1 IM - Enumeration-Identity	12/4/2023 8:11:18 AM	12/4/2023
45.14	FS6541 Application for a Good Cause Waiver	1.1 IM - Enumeration-Identity	12/4/2023 8:10:56 AM	12/4/2023
136.30	FS6541 Paystubs (Pay)	1.5 IM - Income	12/4/2023 1:15:21 PM	12/4/2023
60.97	FS6514 Bank Statements (BStmnts)	1.6 IM - Assets	12/4/2023 7:32:51 AM	12/4/2023
1057.56	D000 Birth Certificate (BC)	1.1 IM - Enumeration-Identity	10/17/2023 8:15:51 AM	12/4/2023
1531.93	DHS3767G Application for a Good Cause Waiver	1.9 IM - Insurance-Correspondence	10/18/2023 3:47:01 PM	12/4/2023
24.35	DHS0223 Combined Application Form (CAF)	1.4 IM - Application	12/4/2023 1:09:05 PM	12/4/2023
150.41	D001 Drivers License (DL) - State ID	1.1 IM - Enumeration-Identity	12/4/2023 8:19:16 AM	12/4/2023
10288.70	DHS0223 Combined Application Form (CAF)	1.4 IM - Application	12/4/2023 11:39:36 AM	12/4/2023
2854.58	DHS02146 Authorization for Release of Employment Information	1.5 IM - Income	12/6/2023 11:33:25 AM	12/6/2023
1106.92	DHS0033 Appeal to State Agency	1.3 IM - File Retention Data	10/18/2023 1:53:37 PM	12/6/2023
146.97	DHS0035 State Agency Appeals Summary	1.3 IM - File Retention Data	12/1/2023 9:30:39 AM	12/6/2023
262.55	D000 Birth Certificate (BC)	1.1 IM - Enumeration-Identity	10/11/2022 11:07:37 AM	12/6/2023
386.24	MNB Application	1.4 IM - Application	6/15/2023 2:26:58 PM	12/6/2023
1324.86	DHS2919 Verification Request Form	1.4 IM - Application	6/15/2023 2:06:43 PM	12/6/2023

1 Export Detailed

2

Select Data Tab

Click Filter to add filters

	A	B	C	D	E	F
		File Size (K)	Title	Taxonomy	Created	Modified
1	MAXIS					
2	99999993	69.83	D008 Social Security Card (SSN)	1.1 IM - Enumeration-Identity	2/3/2022 10:09:19 AM	12/19/2023 12:24:54 PM
3	99999993	1026.71	DHS0033 Appeal to State Agency	1.3 IM - File Retention Data	8/18/2022 7:08:22 AM	7/15/2024 11:11:01 AM
4	99999996	1622.39		1.3 IM - File Retention Data	2/3/2022 10:10:27 AM	7/8/2024 2:39:27 PM
5	99999996	103.16		1.91 IM - Enumeration-Identity	2/3/2022 10:09:37 AM	4/23/2024 10:31:43 AM
6	99999996	103.16		1.91 IM - Enumeration-Identity	2/3/2022 10:09:37 AM	4/23/2024 10:31:11 AM
7	99999996	103.16		1.91 IM - Enumeration-Identity	2/3/2022 10:09:37 AM	4/23/2024 10:30:54 AM
8	99999996	6.92		1.8 IM - File Retention Data	6/9/2022 12:11:51 PM	12/7/2023 11:20:55 AM
9	99999994	76.86		1.4 IM - Enumeration-Identity	3/4/2022 1:38:07 PM	7/16/2024 9:53:39 AM
10	99999994	69.83		1.1 IM - Enumeration-Identity	2/3/2022 10:09:19 AM	7/16/2024 9:54:28 AM
11	99999996	529.53	DHS2919 Verification Request Form	1.4 IM - Application	11/15/2022 10:43:09 AM	4/23/2024 10:30:13 AM
12	99999996	48.33	D008 Social Security Card (SSN)	1.1 IM - Enumeration-Identity	9/22/2022 10:45:32 AM	5/6/2024 3:26:41 PM
13	99999991	6.48	DHS0033 Appeal to State Agency	1.3 IM - File Retention Data	5/2/2022 2:36:22 PM	4/3/2024 9:31:27 AM
14	99999996	105.39	FS6502 Lease Agreement (LA)	1.7 IM - Residency	8/10/2022 12:34:04 PM	4/23/2024 10:29:44 AM
15	99999996	16.22	DHS5223 Combined Application Form (CAF)	1.4 IM - Application	4/26/2023 6:59:54 AM	12/4/2023 3:14:29 PM

Add Days to Process column

Highlight column after **Created** and **Modified** and right click to **Insert** a new column

	Taxonomy	Created	Modified	CreatedBy	Name	Middle Name	Last Name	ShortNote/NextStep
	1.1 IM - Enumeration-Identity	2/3/2022 10:09:19 AM	12/19/2023 12:24:54 PM	Xou Le Vang	bles	A	Flintstone	These are ID's for 3 clients,
	1.3 IM - File Retention Data	8/18/2022 7:08:22 AM	7/15/2024 11:11:01 AM	Cathy Wassenaar	bles	A	Flintstone	T-Rex Flintstone
	1.91 IM - Misc-Bulk Scanning	2/3/2022 10:10:27 AM	7/8/2024 2:39:27 PM	Dani Gorman	na	L	Flintstone	Case Transfer In
	1.8 IM - Other Dept Comm	2/3/2022 10:09:37 AM	4/23/2024 10:31:43 AM	Dani Gorman	na	L	Flintstone	December 2023
	1.8 IM - Other Dept Comm	2/3/2022 10:09:37 AM	4/23/2024 10:31:11 AM	Syste	na	L	Flintstone	June 2023
	1.8 IM - Other Dept Comm	2/3/2022 10:09:37 AM	4/23/2024 10:31:11 AM	Dani Gorman	na	L	Flintstone	February 2023
	1.3 IM - File Retention Data	6/9/2022 1:21:51 PM	4/23/2024 11:20:55 AM	Dani Gorman	na	M	Flintstone	Ready for signature
	1.1 IM - Enumeration-Identity	3/4/2022 10:09:19 AM	7/16/2024 9:53:39 AM	Mega	N	Rubble	copying documents from C	
		4/23/2024 10:30:13 AM	4/23/2024 10:30:13 AM	Dani Gorman	Bam	N	Rubble	John Rubble
		5/6/2024 3:26:41 PM	5/6/2024 3:26:41 PM	Cathy Wassenaar	na	L	Flintstone	November 2022 Renewal
		4/3/2024 9:31:27 AM	4/3/2024 9:31:27 AM	Mega	na	S	Slagheap	123456789 - Claim note
		4/23/2024 10:29:44 AM	4/23/2024 10:29:44 AM	Cathy Wassenaar	na	L	Flintstone	March 2024
		12/4/2023 3:14:29 PM	12/4/2023 3:14:29 PM	Dani Gorman	na	W	Flintstone	Note
		2/27/2024 1:36:50 PM	2/27/2024 1:36:50 PM	Nikk	J		Rockhead	
		12/4/2023 1:15:25 PM	12/4/2023 1:15:25 PM	Xou Le Vang	J		Rockhead	
		12/4/2023 1:15:25 PM	12/4/2023 1:15:25 PM	Xou Le Vang	J		Rockhead	
		12/4/2023 1:15:25 PM	12/4/2023 1:15:25 PM	Xou Le Vang	J		Rockhead	
		12/4/2023 1:17:49 PM	12/4/2023 1:17:49 PM	Xou Le Vang	J		Rockhead	Joe Rockhead's Past 3 mon
	1.6 IM - Assets	12/4/2023 7:32:51 AM	12/4/2023 1:19:29 PM	Xou Le Vang	Xou Le Vang	Joe	J	Rockhead
	1.1 IM - Enumeration-Identity	10/17/2023 8:15:51 AM	12/4/2023 1:19:29 PM	Xou Le Vang	Xou Le Vang	Joe	J	Rockhead
	1.9 IM - Insurance-Correspondence	10/18/2023 3:47:01 PM	12/4/2023 1:19:29 PM	Xou Le Vang	Xou Le Vang	Joe	J	Rockhead
	1.4 IM - Application	12/4/2023 1:09:05 PM	12/4/2023 1:22:49 PM	Xou Le Vang	Xou Le Vang	Joe	J	Rockhead
	1.1 IM - Enumeration-Identity	12/4/2023 8:19:16 AM	12/4/2023 2:18:40 PM	Xou Le Vang	Xou Le Vang	Joe	J	Rockhead
	1.4 IM - Application	12/4/2023 11:39:36 AM	12/4/2023 2:19:15 PM	Xou Le Vang	Xou Le Vang	Joe	J	Rockhead
	1.5 IM - Income	12/6/2023 11:33:25 AM	12/6/2023 1:07:35 PM	Xou Le Vang	Xou Le Vang	Joe	J	Rockhead
	1.3 IM - File Retention Data	10/18/2023 1:53:37 PM	12/6/2023 2:01:13 PM	Dani Gorman	Dani Gorman	Wilma	W	Flintstone
	1.3 IM - File Retention Data	12/1/2023 9:30:39 AM	12/6/2023 2:02:35 PM	Dani Gorman	Dani Gorman	Pebbles	P	Flintstone
	1.1 IM - Enumeration-Identity	10/11/2023 11:07:37 AM	12/6/2023 2:02:35 PM	Dani Gorman	Dani Gorman	Fred	M	Flintstone
	1.4 IM - Application	6/15/2023 2:26:58 PM	12/6/2023 2:17:42 PM	Cathy Wassenaar	Dani Gorman	Betty	B	Rubble
	1.4 IM - Application	6/15/2023 3:06:43 PM	12/6/2023 2:17:42 PM	Cathy Wassenaar	Dani Gorman	Betty	B	Rubble
	1.4 IM - Application	6/22/2023 3:46:24 PM	12/6/2023 2:17:43 PM	Cathy Wassenaar	Dani Gorman	Betty	B	Rubble
	1.4 IM - Application	6/20/2023 2:40:49 PM	12/6/2023 2:17:43 PM	Cathy Wassenaar	Dani Gorman	Betty	B	Rubble

	C	D	E	F	G	H	I	J	K
1		Taxonomy	Created	Modified	Days to Process	CreatedBy			
2	Identity Card (SSN)	1.1 IM - Enumeration-Ident	2/3/2022 10:09:19 AM	12/19/2023 12:24:54 PM	=F2-E2	Xou Le Vang			
3	to State Agency	1.3 IM - File Ret	8/18/2022 7:08:22 AM	7/15/2024 11:11:01 AM		Cathy Wassenaar			
4	Misc-		2/3/2022 10:10:27 AM	7/8/2024 2:39:27 PM		Dani Gorman			
5	er		2/3/2022 10:09:37 AM	4/23/2024 10:31:43 AM		Dani Gorman			
6	er		2/3/2022 10:09:37 AM	4/23/2024 10:31:11 AM		System Account			
7	er		2/3/2022 10:09:37 AM	4/23/2024 10:30:54 AM					
8	of Overp		6/9/2022 1:21:51 PM	12/7/2023 11:20:55 AM					
9	ate (BO		3/4/2022 1:38:07 PM	7/16/2024 9:53:39 AM					
10	ate (BO		2/3/2022 10:09:19 AM	7/16/2024 9:54:28 AM					
11	tion Rev		11/15/2022 10:43:09 AM	4/23/2024 10:30:13 AM					
12	ity Card		9/22/2022 10:45:32 AM	5/6/2024 3:26:41 PM					
13	to State		5/2/2022 2:36:22 PM	4/3/2024 9:31:27 AM					
14	reement		8/10/2022 12:54:04 PM	4/23/2024 10:29:44 AM		Cathy Wassenaar	Dani Gorman	Wilma	L
15	ed Appl		4/26/2023 8:59:54 AM	12/4/2023 3:14:29 PM		Dani Gorman	Dani Gorman	Wilma	W
16	tion for		10/5/2023 3:27:02 PM	2/27/2024 1:36:50 PM		Mick Linder	Xou Le Vang	Joe	I

3. Create your formula
Type = (equals sign)
Click in first cell with data under **Modified**
Type - (minus sign)
Click in first cell with data under **Created**
Hit Enter

2. Click in first cell
under Days to
Process

1. Name column
Days to Process

	E	F	G	H
	Created	Modified	Days to Process	CreatedBy
	2/3/2022 10:09:19 AM	12/19/2023 12:24:54 PM	=F2-E2	
	8/18/2022 7:08:22 AM	7/15/2024 11:11:01 AM		
	2/3/2022 10:10:27 AM	7/8/2024 2:39:27 PM		
	2/3/2022 10:09:37 AM	4/23/2024 10:31:43 AM		
	2/3/2022 10:09:37 AM	4/23/2024 10:31:11 AM		

Formula
=F2-E2

	E	F	G	H
	Created	Modified	Days to Process	CreatedBy
	2/3/2022 10:09:19 AM	12/19/2023 12:24:54 PM	684.0941551	Xou Le Vang
	8/18/2022 7:08:22 AM	7/15/2024 11:11:01 AM		Cathy Wassenaar
	2/3/2022 10:10:27 AM	7/8/2024 2:39:27 PM		Dani Gorman
	2/3/2022 10:09:37 AM	4/23/2024 10:31:43 AM		Dani Gorman
	2/3/2022 10:09:37 AM	4/23/2024 10:31:11 AM		System Account
	2/3/2022 10:09:37 AM	4/23/2024 10:30:54 AM		Dani Gorman
	6/9/2022 1:21:51 PM	12/7/2023 11:20:55 AM		Dani Gorman
	3/4/2022 1:38:07 PM	7/16/2024 9:53:39 AM		Megan Otto
	2/3/2022 10:09:19 AM	7/16/2024 9:54:28 AM		Megan Otto
	11/15/2022 10:43:09 AM	4/23/2024 10:30:13 AM		Dani Gorman

You will see a number with many decimals

Click on dropdown in Number option

Highlight column

	Created	Days to Process	CreatedBy	ModifiedBy
n-Identity	2/3/2022 10:09:00 AM	684.0941551	Xou Le Vang	
n Data	8/18/2022 7:08:00 AM		Ca	
Scanning	2/3/2022 10:10:27 AM	7/8/2024 2:39:27 PM	Da	
Comm	2/3/2022 10:09:37 AM	4/23/2024 10:31:43 AM	Da	
Comm	2/3/2022 10:09:37 AM	4/23/2024 10:31:11 AM	System Account	Dani Gorman
Comm	2/3/2022 10:09:37 AM	4/23/2024 10:30:54 AM	Dani Gorman	Dani Gorman
n Data	6/9/2022 1:21:51 PM	12/7/2023 11:20:55 AM	Dani Gorman	Jimmy Corder
n-Identity	3/4/2022 1:38:07 PM	7/16/2024 9:53:39 AM	Megan Otto	Megan Otto
n-Identity	2/3/2022 10:09:19 AM	7/16/2024 9:54:28 AM	Megan Otto	Megan Otto
	11/15/2022 10:43:09 AM	4/23/2024 10:30:13 AM	Dani Gorman	Dani Gorman
n-Identity	9/22/2022 10:45:32 AM	5/6/2024 3:26:41 PM	Cathy Wassenaar	Dani Gorman
n Data	5/2/2022 2:36:22 PM	4/3/2024 9:31:27 AM	Megan Otto	Dani Gorman
	8/10/2022 12:54:04 PM	4/23/2024 10:29:44 AM	Cathy Wassenaar	Dani Gorman
	4/26/2023 8:59:54 AM	12/4/2023 3:14:29 PM	Dani Gorman	Dani Gorman
Comm	10/5/2023 3:27:02 PM	2/27/2024 1:36:50 PM	Nikk Livingston	Xou Le Vang
	12/4/2023 8:11:07 AM	12/4/2023 1:15:25 PM	Xou Le Vang	Xou Le Vang
	12/4/2023 8:11:18 AM	12/4/2023 1:15:25 PM	Xou Le Vang	Xou Le Vang

Click on Number format

	Days to Process	CreatedBy	ModifiedBy	First Name	Middle Name	Last Name	ShortNote/NextStep
Days to Process	684.0941551	Xou Le Vang	Cathy Wassenaar	Pebbles	A	Flintstone	These are ID's for 3 clients, please
		Cathy Wassenaar	Dani Gorman	Pebbles	A	Flintstone	T-Rex Flintstone
		Dani Gorman	Dani Gorman	Wilma	L	Flintstone	Case Transfer In
		Dani Gorman	Dani Gorman	Wilma	L	Flintstone	December 2023
		System Account	Dani Gorman	Wilma	L	Flintstone	June 2023
		Dani Gorman	Dani Gorman	Wilma	L	Flintstone	February 2023
		Dani Gorman	Jimmy Corder	Fred	M	Flintstone	Ready for signature
		Megan Otto	Megan Otto	Joe	N	Rubble	copying documents from CP woi
		Megan Otto	Megan Otto	Bam Bam	N	Rubble	John Rubble
		Dani Gorman	Dani Gorman	Wilma	L	Flintstone	November 2022 Renewal
		Cathy Wassenaar	Dani Gorman	Wilma	L	Flintstone	123456789 - Claim note
		Megan Otto	Dani Gorman	Sam	S	Slagheap	March 2024
		Cathy Wassenaar	Dani Gorman	Wilma	L	Flintstone	Note
		Dani Gorman	Dani Gorman	Wilma	W	Flintstone	

To adjust number of decimals, click these icons (more or less)

You will want a 2 decimal number

	ModifiedBy	First Name	Middle Name	Last Name
1.8 IM - Other Dept Comm	12/3/2022 10:09:37 AM			
1.8 IM - O				
1.8 IM - O				
1.3 IM - Fi				
1.1 IM - En				
1.1 IM - En				
1.4 IM - Ap				
1.1 IM - En				
1.3 IM - File Retention Data	5/2/2022 2:36:22 PM	4/3/2024 9:31:27 AM		
1.7 IM - Residency	8/10/2022 12:54:04 PM	4/23/2024 10:29:44 AM		
1.4 IM - Application	4/26/2023 8:59:54 AM	12/4/2023 3:14:29 PM		
1.8 IM - Other Dept Comm	10/5/2023 3:27:02 PM	2/27/2024 1:36:50 PM		

Click into the corner of the cell until you see the plus icon to drag down the entire column

Taxonomy	Created	Days to Process	Create	First Name	Middle Name	Last Name	ShortNote/NextStep
1.1 IM - Enumeration-Identity	2/3/2022 10:09:19 AM	684.09	Xou Le V	ssenaar	Pebbles	Flintstone	These are ID's for 3 clients, plea
1.3 IM - File Retention Data	8/18/2022 7:08:22 AM		Sathy W	man	Pebbles	A	Flintstone
1.91 IM - Misc-Bulk Scanning	2/3/2022 10:10:27 AM			man	Wilma	L	Flintstone
1.8 IM - Other Dept Comm	2/3/2022 10:09:37 AM			man	Wilma	L	Flintstone
1.8 IM - Other Dept Comm	2/3/2022 10:09:37 AM				Wilma	L	Flintstone
1.8 IM - Other Dept Comm	2/3/2022 10:09:37 AM				Wilma	L	Flintstone
1.3 IM - File Retention Data	6/9/2022 1:21:51 PM						Flintstone
1.1 IM - Enumeration-Identity	3/4/2022 1:38:07 PM						Flintstone
1.1 IM - Enumeration-Identity	2/3/2022 10:09:19 AM						Flintstone
1.4 IM - Application	11/15/2022 10:43:09 AM						Flintstone
1.1 IM - Enumeration-Identity	9/22/2022 10:45:32 AM						Flintstone
1.3 IM - File Retention Data	5/2/2022 2:36:22 PM						Flintstone
1.7 IM - Residency	8/10/2022 12:54:04 PM						Flintstone
1.4 IM - Application	4/26/2023 8:59:54 AM						Flintstone
1.8 IM - Other Dept Comm	10/5/2023 3:27:02 PM						Flintstone
1.5 IM - Income	12/4/2023 8:11:07 AM						Flintstone
1.5 IM - Income	12/4/2023 8:11:18 AM						Flintstone
1.5 IM - Income	12/4/2023 8:10:56 AM						Flintstone
1.5 IM - Income	12/4/2023 1:15:21 PM						Flintstone
1.6 IM - Assets	12/4/2023 7:32:51 AM						Flintstone
1.1 IM - Enumeration-Identity	10/17/2023 8:15:51 AM						Flintstone
1.9 IM - Insurance-Correspondence	10/18/2023 3:47:01 PM						Flintstone

	C	D	E	F	G	H	I	J	K	L	M
		Taxonomy	Created	Modified	Days to Process	CreatedBy	ModifiedBy	First Name	Middle Name	Last Name	ShortNote/NextStep
1	City Card (SSN)	1.1 IM - Enumeration-Identity	2/3/2022 10:09:19 AM	12/19/2023 12:24:54 PM	684.09						
2	to State Agency	1.3 IM - File Retention Data	8/18/2022 7:08:22 AM	7/15/2024 11:11:01 AM							
3	Misc-Bulk Scanning	1.91 IM - Misc-Bulk Scanning	2/3/2022 10:10:27 AM	7/8/2024 2:39:27 PM							
4	er	1.8 IM - Other Dept Comm	2/3/2022 10:09:37 AM	4/23/2024 10:31:43 AM							
5	er	1.8 IM - Other Dept Comm	2/3/2022 10:09:37 AM	4/23/2024 10:31:11 AM							
6	er	1.8 IM - Other Dept Comm	2/3/2022 10:09:37 AM	4/23/2024 10:30:54 AM							
7	Overpayment	1.3 IM - File Retention Data	6/9/2022 1:21:51 PM	12/7/2023 11:20:55 AM							
8	ate (BC)	1.1 IM - Enumeration-Identity	3/4/2022 1:38:07 PM	7/16/2024 9:53:39 AM							
9	ate (BC)	1.1 IM - Enumeration-Identity	2/3/2022 10:09:19 AM	7/16/2024 9:54:28 AM							
10	tion Request Form	1.4 IM - Application	11/15/2022 10:43:09 AM	4/23/2024 10:30:13 AM							
11	ity Card (SSN)	1.1 IM - Enumeration-Identity	9/22/2022 10:45:32 AM	5/6/2024 3:26:41 PM							
12	to State Agency	1.3 IM - File Retention Data	5/2/2022 2:36:22 PM	4/3/2024 9:31:27 AM							
13	ement (LA)										
14	ed Application Form (CAF)										
15	tion for Social Services										
16	(Pay)										
17	(Pay)										
18	(Pay)										
19	(Pay)										
20	ements (BSTmnts)										
21	ate (BC)										
22	ation for a Good Cause Waiver										
23	ed Application Form (CAF)										
24	hse (DL) - State ID										
25	ed Application Form (CAF)										
26	ation for Release of Employment Information										
27	to State Agency										
28	ency Appeals Summary										
29	ate (BC)										
30	tion Request Form										
31	tion Request Form										
32	tion Request Form										
33	tion Request Form										
34	tion Request Form										
35	tion Request Form										
36	Overpayment										
37	ency Appeals Summary										
38	ed Application Form (CAF)										
39	ency Appeals Summary										

Drag down the entire row to add the formula to all documents

	D	E	F	G	H	I	J	K	L	M	N
		Taxonomy	Created	Modified	Days to Process	CreatedBy	ModifiedBy	First Name	Middle Name	Last Name	ShortNote/NextStep
1		1.1 IM - Enumeration-Identity	2/3/2022 10:09:19 AM	12/19/2023 12:24:54 PM	684.09	Xou Le Vang					
2		1.3 IM - File Retention Data	8/18/2022 7:08:22 AM	7/15/2024 11:11:01 AM	697.17	Cathy Was					
3		1.91 IM - Misc-Bulk Scanning	2/3/2022 10:10:27 AM	7/8/2024 2:39:27 PM	886.19	Dani Gorm					
4		1.8 IM - Other Dept Comm	2/3/2022 10:09:37 AM	4/23/2024 10:31:43 AM	810.02	Dani Gorm					
5		1.8 IM - Other Dept Comm	2/3/2022 10:09:37 AM	4/23/2024 10:31:11 AM	810.01	System Ac					
6		1.8 IM - Other Dept Comm	2/3/2022 10:09:37 AM	4/23/2024 10:30:54 AM	810.01	Dani Gorm					
7		1.3 IM - File Retention Data	6/9/2022 1:21:51 PM	12/7/2023 11:20:55 AM	545.92	Dani Go					
8		1.1 IM - Enumeration-Identity	3/4/2022 1:38:07 PM	7/16/2024 9:53:39 AM	864.84	Megar					
9		1.1 IM - Enumeration-Identity	2/3/2022 10:09:19 AM	7/16/2024 9:54:28 AM	893.99	Megar					
10		1.4 IM - Application	11/15/2022 10:43:09 AM	4/23/2024 10:30:13 AM	524.99	Xou Le Vang					
11		1.1 IM - Enumeration-Identity	9/22/2022 10:45:32 AM	5/6/2024 3:26:41 PM		Xou Le Vang					
12		1.3 IM - File Retention Data	5/2/2022 2:36:22 PM	4/3/2024 9:31:27 AM		Xou Le Vang					
13		1.7 IM - Residency	8/10/2022 12:54:04 PM			Xou Le Vang					
14		1.4 IM - Application	4/28/2023 8:59:54 AM			Xou Le Vang					
15		1.8 IM - Other Dept Comm	10/5/2023 3:27:02 PM			Xou Le Vang					
16		1.5 IM - Income	12/4/2023 8:11:07 AM			Xou Le Vang					
17		1.5 IM - Income	12/4/2023 8:11:18 AM			Xou Le Vang					
18		1.5 IM - Income	12/4/2023 8:10:56 AM			Xou Le Vang					
19		1.5 IM - Income	12/4/2023 1:15:25 PM			Xou Le Vang					
20		1.5 IM - Income	12/4/2023 1:17:49 PM			Xou Le Vang					
21		1.6 IM - Assets	12/4/2023 7:32:51 AM			Xou Le Vang					
22		1.1 IM - Enumeration-Identity	10/17/2023 8:15:51 AM			Xou Le Vang					
23		1.91 IM - Insurance-Correspondence	10/18/2023 3:47:01 PM			Xou Le Vang					
24		1.4 IM - Application	12/4/2023 1:09:05 PM			Xou Le Vang					
25		1.1 IM - Enumeration-Identity	12/4/2023 8:19:16 AM			Xou Le Vang					

You will now have "Days to Process" for all documents

Analyzing the Data

Click on the **Insert** tab in Excel and select **Pivot Table**

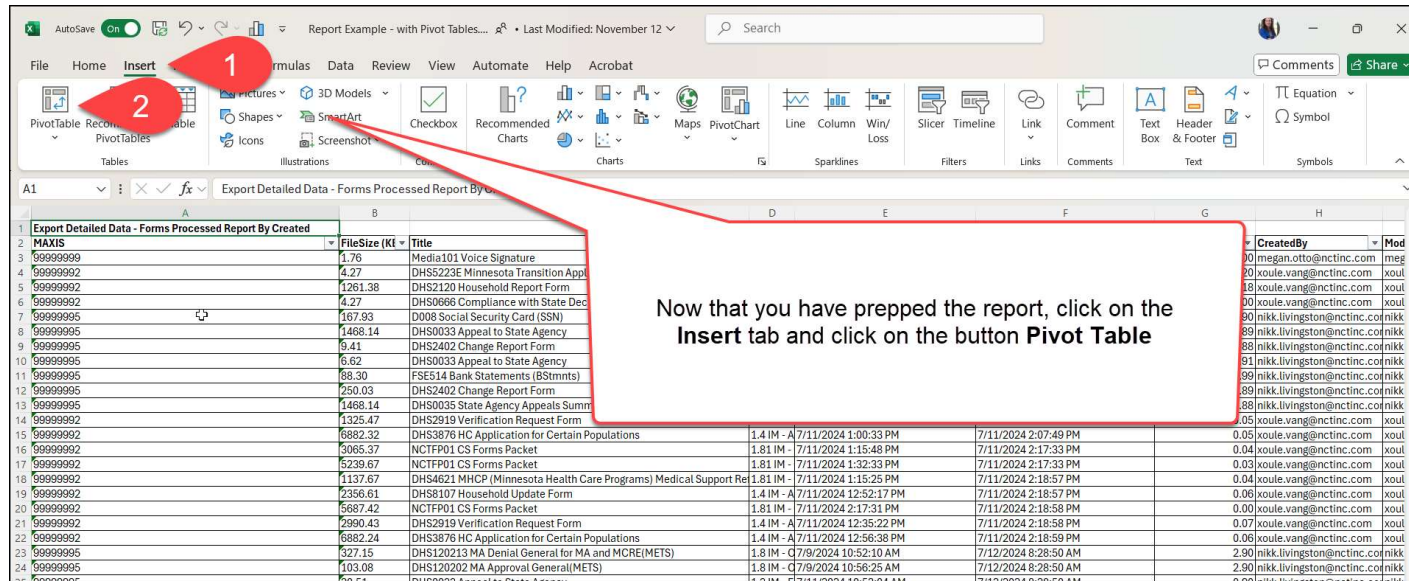
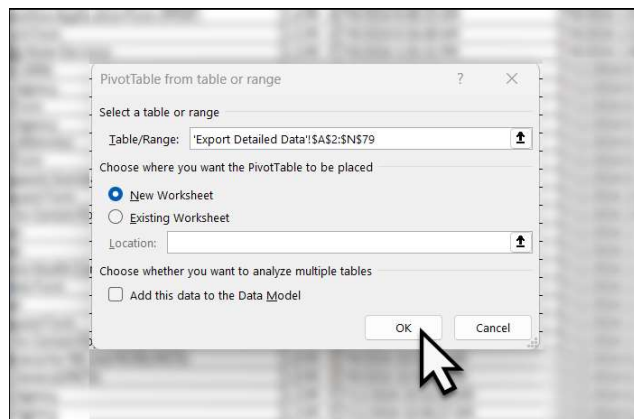


Table will auto populate. The selection should be **New Worksheet**, then click OK



A new worksheet will be created within your excel document with a pivot table for analyzing your data

The screenshot displays the Microsoft Excel interface. The 'PivotTable Fields' task pane is open on the right side, showing a list of fields to add to the report: MAXIS, FileSize (KB), Title, Taxonomy, Created, Modified, and Days to Process. Below this list, there are sections for 'Filters', 'Columns', 'Rows', and 'Values'. A red callout box with a pointer to the worksheet grid contains the text: 'A new sheet will be created with a pivot table for analyzing data'. The worksheet grid shows a new sheet named 'Sheet1' at the bottom. The 'PivotTable Fields' task pane also includes a search bar and a 'Defer Layout Update' checkbox.

Pivot Tables for Analysis

Average Time to Process Specific Document Types

Follow the below steps to build a table to look at the **average time to process a specific type of document**.

Build your pivot table by dragging the appropriate data fields to the pivot table fields.

The screenshot shows an Excel spreadsheet with a list of document types in column A and their corresponding 'Sum of Days to Process' in column B. The PivotTable Fields task pane on the right shows the 'Title' field dragged to the Rows area and the 'Days to Process' field dragged to the Values area. Two callout boxes provide instructions:

Build Pivot Tables by dragging data fields to the boxes below

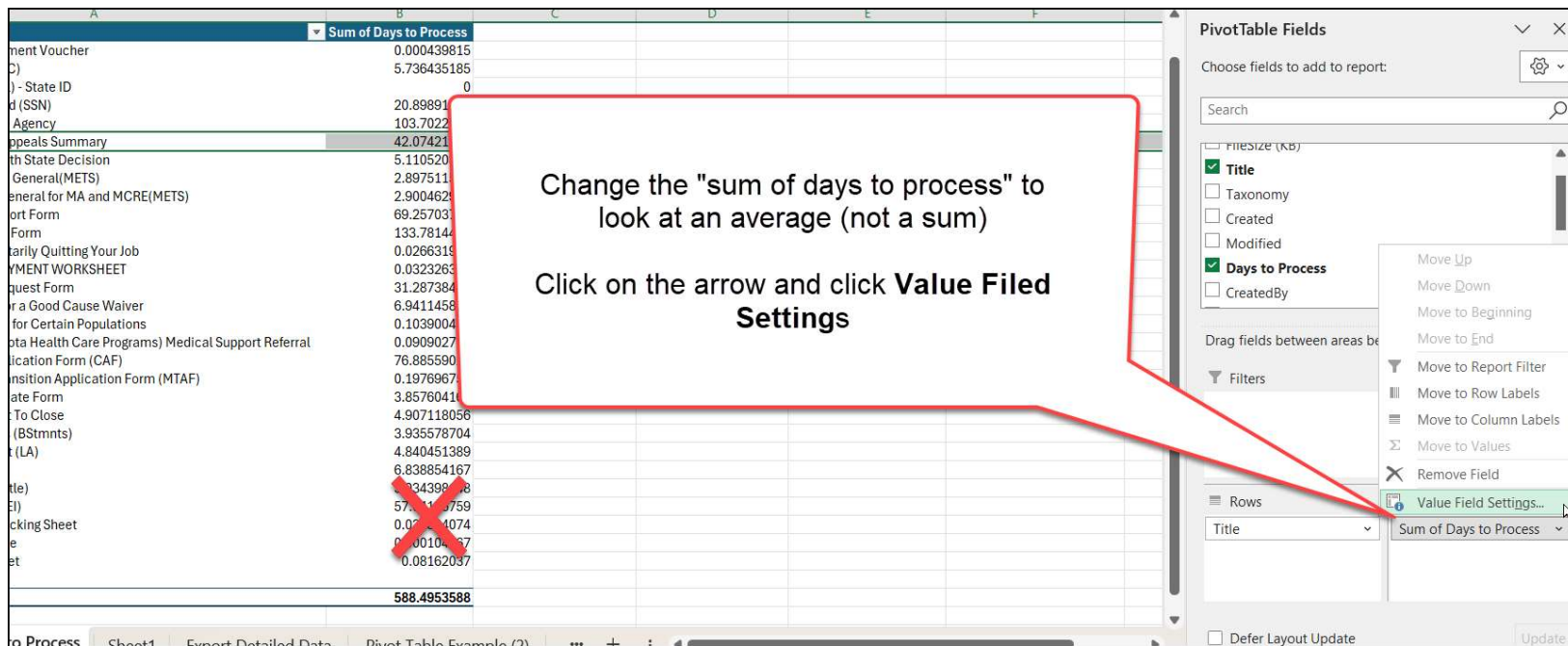
To look at Average Days to process specific DocTypes, drag
 (1) Title to Rows
 (2) Days to Process to Values

Row Labels	Sum of Days to Process
BLF010 CEHI Reimbursement Voucher	0.000439815
D000 Birth Certificate (BC)	5.736435185
D001 Drivers License (DL) - State ID	0
D008 Social Security Card (SSN)	20.89891204
DHS0033 Appeal to State Agency	103.7022801
DHS0035 State Agency Appeals Summary	42.07421296
DHS0666 Compliance with State Decision	5.110520833
DHS120202 MA Approval General(METS)	2.897511574
DHS120213 MA Denial General for MA and MCRE(METS)	2.900462963
DHS2120 Household Report Form	69.25703704
DHS2402 Change Report Form	133.7814468
DHS2707 Facts on Voluntarily Quitting Your Job	0.026631944
DHS2776D RCA OVERPAYMENT WORKSHEET	
DHS2919 Verification Request Form	
DHS3767G Application for a Good Cause Waiver	
DHS3876 HC Application for Certain Populations	
DHS4621 MHCP (Minnesota Health Care Programs) Medical Support Referral	
DHS5223 Combined Application Form (CAF)	
DHS5223E Minnesota Transition Application Form (MTAF)	
DHS8107 Household Update Form	
EA303 Voluntary Request To Close	
FSE514 Bank Statements (BSTmnts)	
FSE602 Lease Agreement (LA)	4.840451389
FSE707 Utility Bill (UT)	6.838854167
FSE709 Vehicle Title (VTitle)	5.034398148
FSE736 Earned Income (EI)	57.04196759
FSE924 HMLS Shelter Tracking Sheet	0.032824074
Media101 Voice Signature	0.000104167
NCTFP01 CS Forms Packet	0.08162037
(blank)	
Grand Total	588.4953588

PivotTable Fields task pane:

- Choose fields to add to report:
 - Title
 - Taxonomy
 - Created
 - Modified
 - Days to Process
 - CreatedBy
- Drag fields between areas below:
 - Rows: Title
 - Values: Sum of Days to Process

Important: Change the “Sum of Days to Process” by clicking on **Value Field Settings**. We want to see an average, not a sum of days to process.



Change the "sum of days to process" to look at an average (not a sum)

Click on the arrow and click **Value Field Settings**

	Sum of Days to Process
ment Voucher	0.000439815
D)	5.736435185
) - State ID	0
d (SSN)	20.89891
Agency	103.7022
peals Summary	42.07421
th State Decision	5.110520
General(METS)	2.897511
eneral for MA and MCRE(METS)	2.900462
ort Form	69.25703
Form	133.7814
arily Quitting Your Job	0.026631
YMENT WORKSHEET	0.0323263
quest Form	31.287384
r a Good Cause Waiver	6.9411458
for Certain Populations	0.1039004
ota Health Care Programs) Medical Support Referral	0.0909027
ication Form (CAF)	76.885590
nsition Application Form (MTAF)	0.1976967
ate Form	3.8576041
To Close	4.907118056
(BStmnts)	3.935578704
t (LA)	4.840451389
	6.838854167
tle)	0.034398
l)	57.1113759
cking Sheet	0.0311074
e	0.0010457
et	0.08162037
	588.4953588

PivotTable Fields

Choose fields to add to report:

Search

File Size (KB)

- ☒ Title
- ☐ Taxonomy
- ☐ Created
- ☐ Modified
- ☒ Days to Process
- ☐ CreatedBy

Drag fields between areas below

Filters

Rows

Title

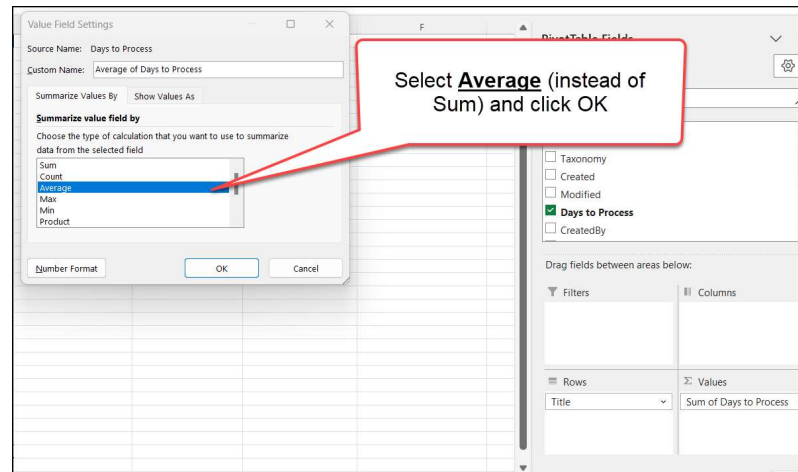
Sum of Days to Process

Value Field Settings...

Defer Layout Update

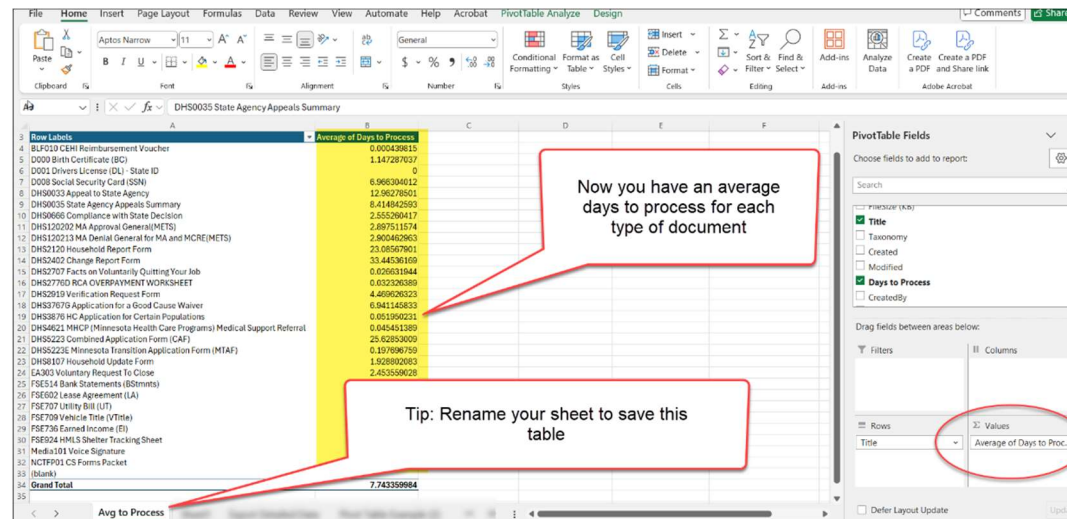
Update

Once the Value Field Settings box comes up, click on **Average** (instead of Sum) and click OK.



Now you have a table to look at each type of document and the average days to process

Tip: Rename your tab to describe the data on it. In the next steps, we will instruct how to add more tables to the same report.



Average Days to Process All DocTypes

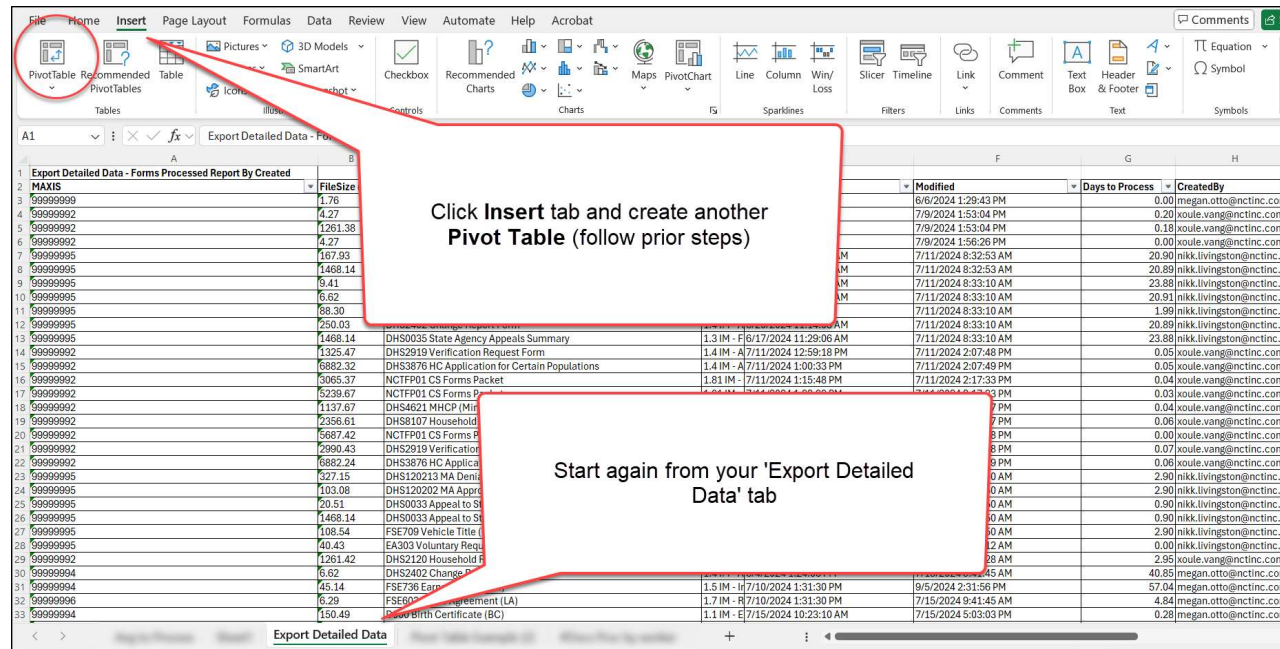
The same table as shown above will show an average to process all Document Types.

B34		6.95218333333284				
Row Labels	Average of Days to Process					
BLF010 CEHI Reimbursement Voucher	0.000439815					
D000 Birth Certificate (BC)	1.147287037					
D001 Drivers License (DL) - State ID	0					
D008 Social Security Card (SSN)	6.966304012					
DHS0033 Appeal to State Agency	12.96278501					
DHS0035 State Agency Appeals Summary	8.414842593					
DHS0666 Compliance with State Decision	2.555260417					
DHS120202 MA Approval General(METS)	2.897511574					
DHS120213 MA Denial General for MA and MCRE(METS)	2.900462963					
DHS2120 Household Report Form	23.08567901					
DHS2402 Change Report Form	33.44536169					
DHS2707 Facts on Voluntarily Quitting Your Job	0.026631944					
DHS2776D RCA OVERPAYMENT WORKSHEET	0.032326389					
DHS2919 Verification Request Form	4.469626323					
DHS3767G Application for a Good Cause Waiver	6.941145833					
DHS3876 HC Application for Certain Populations	0.051950231					
DHS4621 MHCP (Minnesota Health Care Programs) Medical Support Referral	0.045451389					
DHS5223 Combined Application Form (CAF)	4.901990741					
DHS5223E Minnesota Transition Application Form (MTAF)	0.197696759					
DHS8107 Household Update Form	1.928802083					
EA303 Voluntary Request To Close	2.453559028					
FSE514 Bank Statements (BStrmnts)	1.311859568					
FSE602 Lease Agreement (LA)	4.840451389					
FSE707 Utility Bill (UT)	2.279618056					
FSE709 Vehicle Title (VTitle)	2.517199074					
FSE736 Earned Income (EI)	57.04196759					
FSE924 HMLS Shelter Tracking Sheet	0.006564815					
Media101 Voice Signature	0.000104167					
NCTFP01 CS Forms Packet	0.020405093					
(blank)						
Grand Total	6.952183333					

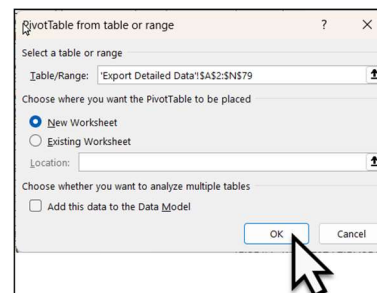
This table will also tell you an Average Time to Process for all DocTypes

Documents processed (filed down) by Worker

Start again from your 'Export Detailed Data' tab and click on Insert and Pivot Table



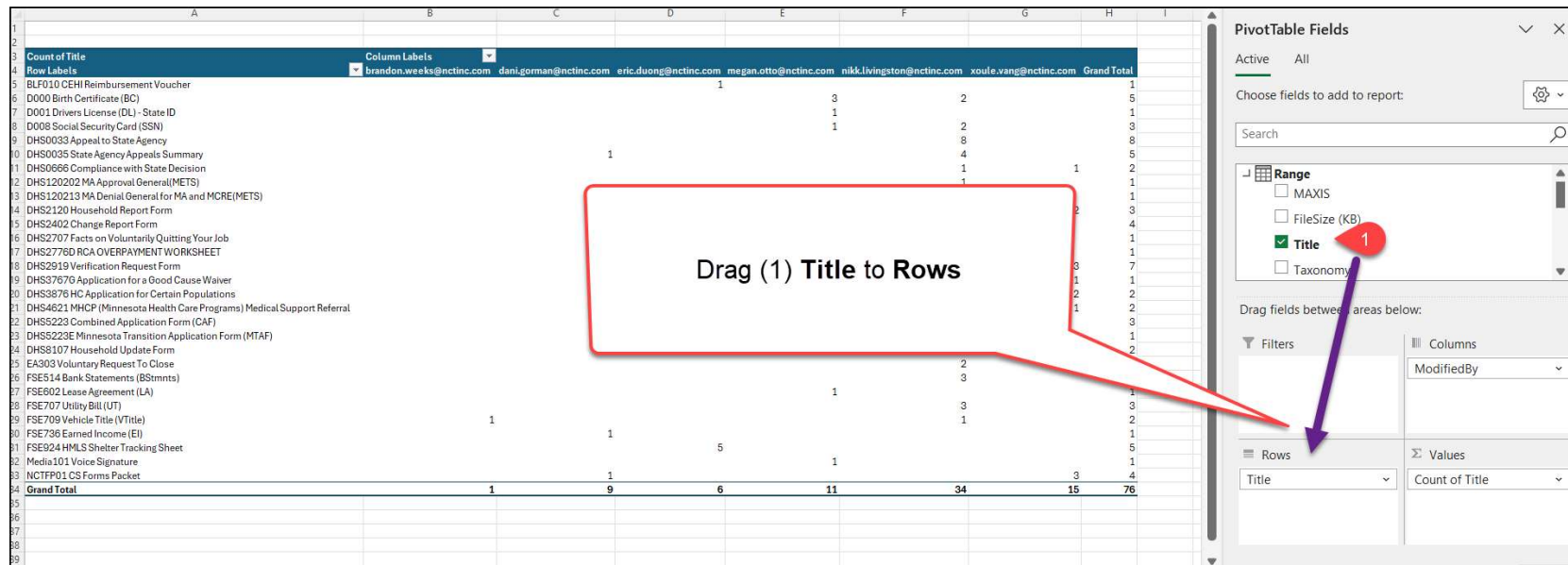
Click OK to create the Pivot Table on a new tab



This time, we are looking at the Count of specific documents processed and the workers that processed (filed down) those documents from a DocBox.

In this table, follow these steps to build your pivot table:

1. Title to Rows



PivotTable Fields

Active All

Choose fields to add to report:

Search

Range

- ☐ MAXIS
- ☐ FileSize (KB)
- ☒ Title
- ☐ Taxonomy

Drag fields between areas below:

Filters

Columns

ModifiedBy

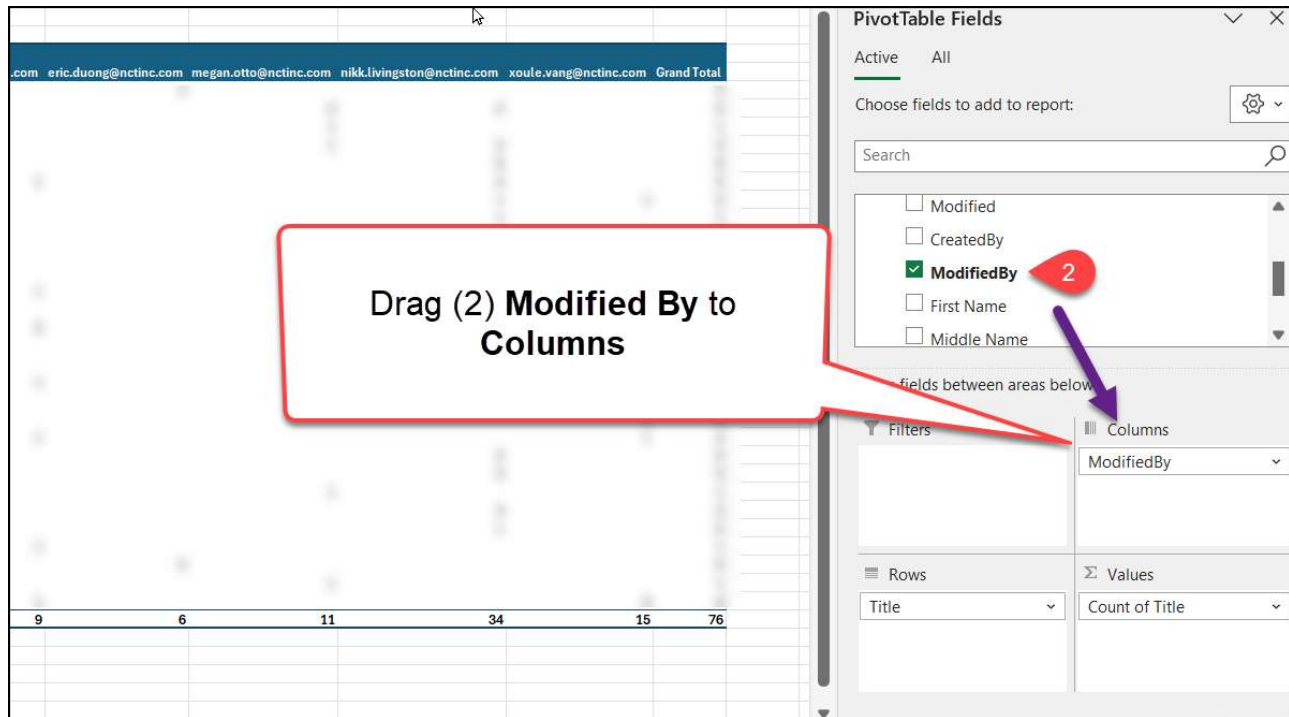
Rows

Title

Values

Count of Title

2. Modified By to Columns



Drag (2) Modified By to Columns

PivotTable Fields

Active All

Choose fields to add to report:

Search

- ☐ Modified
- ☐ CreatedBy
- ☒ ModifiedBy
- ☐ First Name
- ☐ Middle Name

fields between areas below

Filters

Columns

ModifiedBy

Rows

Title

Values

Count of Title

3. Title to Values

The screenshot shows the Excel PivotTable Fields task pane. In the 'Range' section, 'Title' is selected with a green checkmark. A red circle with the number '3' is next to it. A purple arrow points from this circle to the 'Count of Title' in the 'Values' area. A text box with a red border contains the following text:

Drag (3) Title to Values

Note: This should read as **"Count of Title"**. If not, click on the arrow and update Value Field Settings to 'Count'

The background shows a PivotTable with the following data:

	nic.com	nikk.livingston@nctinc.com	xoule.vang@nctinc.com	Grand Total
1	3	2	1	6
5	1	2	3	6
8	1	8	8	17
	11	34	15	76

Note: This should read as **"Count of Title"**. If not, click on the arrow and update Value Field Settings to 'Count'

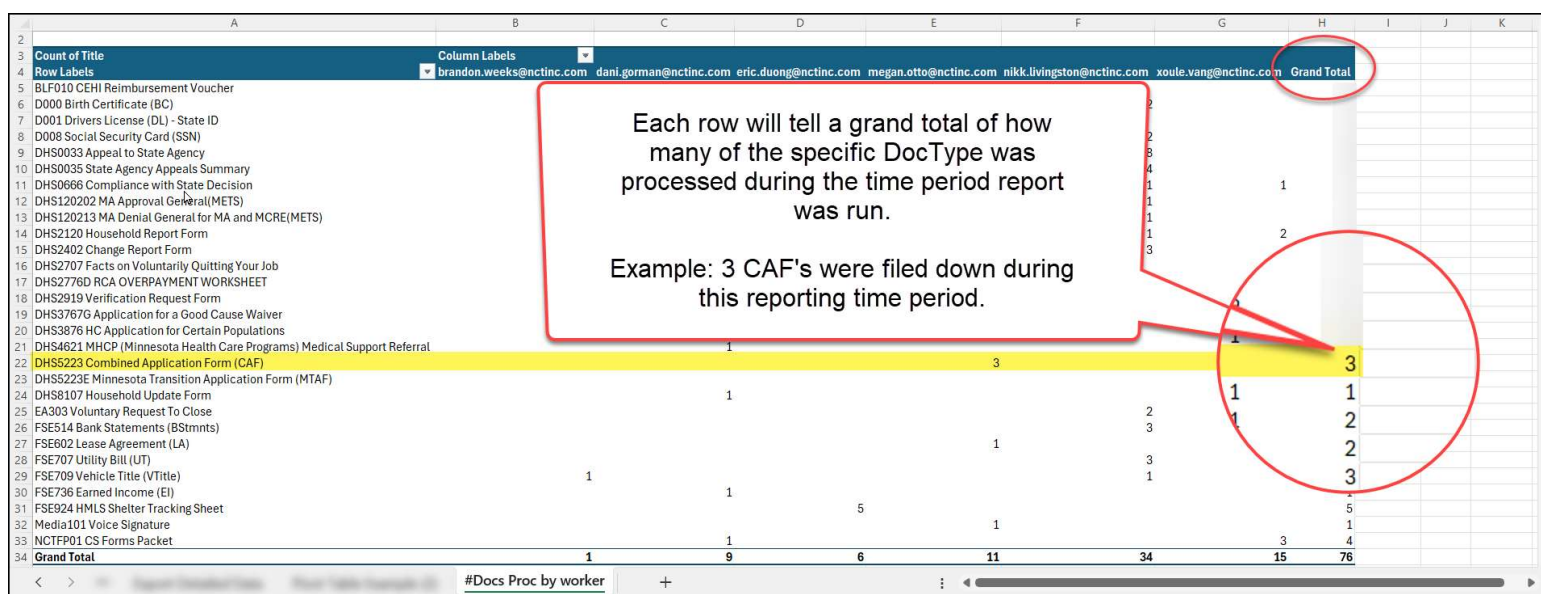
The first screenshot shows the 'Value Field Settings' button in the task pane. A right-click context menu is open, and 'Value Field Settings...' is selected. The second screenshot shows the 'Value Field Settings' dialog box. The 'Source Name' is 'Title' and the 'Custom Name' is 'Count of Title'. In the 'Summarize value field by' section, 'Count' is selected from the list. A purple arrow points to 'Count'.

Looking at the table:

Each row shows a **DocType**.

By following the row across, you can see the total number of that DocType that was processed (filed to EFC) during the time period you set when you ran the report.

Example: During the time period, 3 Combined Application Forms (CAF) were filed in total.



Count of Title	Column Labels	Grand Total
Row Labels	brandon.weeks@nctinc.com dani.gorman@nctinc.com eric.duong@nctinc.com megan.otto@nctinc.com nikk.livingston@nctinc.com xoule.vang@nctinc.com	
BLF010 CEHI Reimbursement Voucher		
D000 Birth Certificate (BC)		
D001 Drivers License (DL) - State ID		
D008 Social Security Card (SSN)		
DHS0033 Appeal to State Agency		
DHS0035 State Agency Appeals Summary		
DHS0666 Compliance with State Decision		
DHS120202 MA Approval General(METS)		
DHS120213 MA Denial General for MA and MCRE(METS)		
DHS2120 Household Report Form		
DHS2402 Change Report Form		
DHS2707 Facts on Voluntarily Quitting Your Job		
DHS2776D RCA OVERPAYMENT WORKSHEET		
DHS2919 Verification Request Form		
DHS3767G Application for a Good Cause Waiver		
DHS3876 HC Application for Certain Populations		
DHS4621 MHCP (Minnesota Health Care Programs) Medical Support Referral	1	
DHS5223 Combined Application Form (CAF)	3	3
DHS5223E Minnesota Transition Application Form (MTAF)		
DHS8107 Household Update Form	1	1
EA303 Voluntary Request To Close		2
FSE514 Bank Statements (BSTmnts)		3
FSE602 Lease Agreement (LA)		1
FSE707 Utility Bill (UT)		3
FSE709 Vehicle Title (VTitle)	1	1
FSE736 Earned Income (EI)		5
FSE924 HMLS Shelter Tracking Sheet	1	1
Media101 Voice Signature		3
NCTFP01 CS Forms Packet	1	4
Grand Total	1 9 6 11 34 15	76

This number tells the Grand Total of all documents processed during the time period.

Row Labels	brandon.weeks@nctinc.com	dani.gorman@nctinc.com	eric.duong@nctinc.com	megan.otto@nctinc.com	nikk.livingston@nctinc.com	xoule.vang@nctinc.com	Grand Total
BLF010 CEHI Reimbursement Voucher			1				1
D000 Birth Certificate (BC)			3		2		5
D001 Drivers License (DL) - State ID			1				1
D008 Social Security Card (SSN)			1				1
DHS0033 Appeal to State Agency					2		2
DHS0035 State Agency Appeals Summary					8		8
DHS0666 Compliance with State Decision					4		4
DHS120202 MA Approval General(METS)	1				1		2
DHS120213 MA Denial General for MA and MCRE(METS)					1	1	2
DHS2120 Household Report Form					1		1
DHS2402 Change Report Form					1	2	3
DHS2707 Facts on Voluntarily Quitting Your Job					3		3
DHS2776D RCA OVERPAYMENT WORKSHEET							1
DHS2919 Verification Request Form					1		1
DHS3767G Application for a Good Cause Waiver					1	3	4
DHS3876 HC Application for Certain Populations						1	1
DHS4621 MHCP (Minnesota Health Care Programs) Medical Support Referral						2	2
DHS5223 Combined Application Form (CAF)						1	1
DHS5223E Minnesota Transition Application Form (MTAF)							1
DHS8107 Household Update Form						1	1
EA303 Voluntary Request To Close					2		2
FSE514 Bank Statements (BSTmnts)					3		3
FSE602 Lease Agreement (LA)							1
FSE707 Utility Bill (UT)							1
FSE709 Vehicle Title (VTitle)	1						1
FSE736 Earned Income (EI)		1					1
FSE924 HMLS Shelter Tracking Sheet			5				5
Media101 Voice Signature					1		1
NCTFP01 CS Forms Packet		1					1
Grand Total	1	9	6	11	34	15	76

This number tells the Grand Total of all documents processed

Each **column** will show **how many of each DocType was processed by each staff member** and the grand total for that person at the bottom.

Row Labels	brandon.weeks@nctinc.com	dani.gorman@nctinc.com	eric.duong@nctinc.com	megan.otto@nctinc.com	nikk.livingston@nctinc.com	xoule.vang@nctinc.com	Grand Total
BLF010 CEHI Reimbursement Voucher			1				1
D000 Birth Certificate (BC)				3		2	5
D001 Drivers License (DL) - State ID				1			1
D008 Social Security Card (SSN)				1		2	3
DHS0033 Appeal to State Agency					8		8
DHS0035 State Agency Appeals Summary		1			4		5
DHS0666 Compliance with State Decision					1		1
DHS120202 MA Approval General(METS)					1		1
DHS120213 MA Denial General for MA and MCRE(METS)					1		1
DHS2120 Household Report Form					1	2	3
DHS2402 Change Report Form				1	3		4
DHS2707 Facts on Voluntarily Quitting Your Job		1					1
DHS2776D RCA OVERPAYMENT WORKSHEET					1		1
DHS2919 Verification Request Form		3			1		4
DH						3	3
DH						1	1
DH		1					1
DH				3			3
DH						1	1
DH		1				1	2
EA3							
FSE					2		2
FSE					3		3
FSE				1			1
FSE					3		3
FSE					1		1
FSE736 Earned Income (EI)							
FSE924 HMLS Shelter Tracking Sheet			5				5
Medicaid Voice Signature				1			1
NCTFP01 CS Forms Packet						3	3
Grand Total		9	6	11	34	15	76

Grand total of documents
processed by person

Average Days to Process by Worker

To add the Average Days to Process to look at worker detail, add 'Days to Process' to Values and make sure the '**Value Field Settings**' are set to **average**.

Now the column to the left of each worker shows (1) average days to process for each DocType and (2) average overall by worker.

Column Labels	Count of Title	Average of Days to Process	Count of Title	Average of Days to Process	Count of Title	Average of Days to Process	Count of Title	Average of Days to Process
Row Labels								
BLF010 CEHI Reimbursement Voucher					1	0.000439815		
D000 Birth Certificate (BC)								
D001 Drivers License (DL) - State ID								
D008 Social Security Card (SSN)								
DHS0033 Appeal to State Agency								
DHS0035 State Agency Appeals Summary			1	0.072326389				
DHS0666 Compliance with State Decision								
DHS120302 MA Approval General (METS)								
DHS120213 MA Denial General for MA and MORE (METS)								
DHS2120 Household Report Form								
DHS2402 Change Report Form								
DHS2707 Facts on Voluntarily Quitting Your Job			1	0.028631944				
DHS2776D RCA OVERPAYMENT WORKSHEET								
DHS2919 Verification Request Form			3	10.38861111				
DHS3767G Application for a Good Cause Waiver								
DHS3876 HC Application for Certain Populations								
DHS4621 MHCP (Minnesota Health Care Programs) Medical Support Referral			1	0.046782407				
DHS5223 Combined Application Form (CAF)								
DHS5223E Minnesota Transition Application Form (MTAF)								
DHS8107 Household Update Form			1	3.797418981				
EA303 Voluntary Request To Close								
FSE514 Bank Statements (BSmnts)								
FSE602 Lease Agreement (LA)								
FSE707 Utility Bill (UT)								
FSE709 Vehicle Title (VTitle)	1	2.13287037						
FSE736 Earned Income (EI)			1	57.04196759				
FSE924 HMLS Shelter Tracking Sheet					5	0.006564815		
Media101 Voice Signature								
NCTFP01 CS Forms Packet			1	0.006481481				
(blank)								
Grand Total	1	2.13287037	9	10.23971579	6	0.005543981		

PivotTable Fields

Choose fields to add to report:

☐ Modified
☒ Days to Process
☐ CreatedBy
☒ ModifiedBy
☐ First Name
☐ Middle Name
☐ Last Name

Drag fields between areas below:

Filters

Columns

ModifiedBy

Σ Values

Rows

Title

Values

Count of Title

Average of Days to Proc...

Looking at Specific Data Points

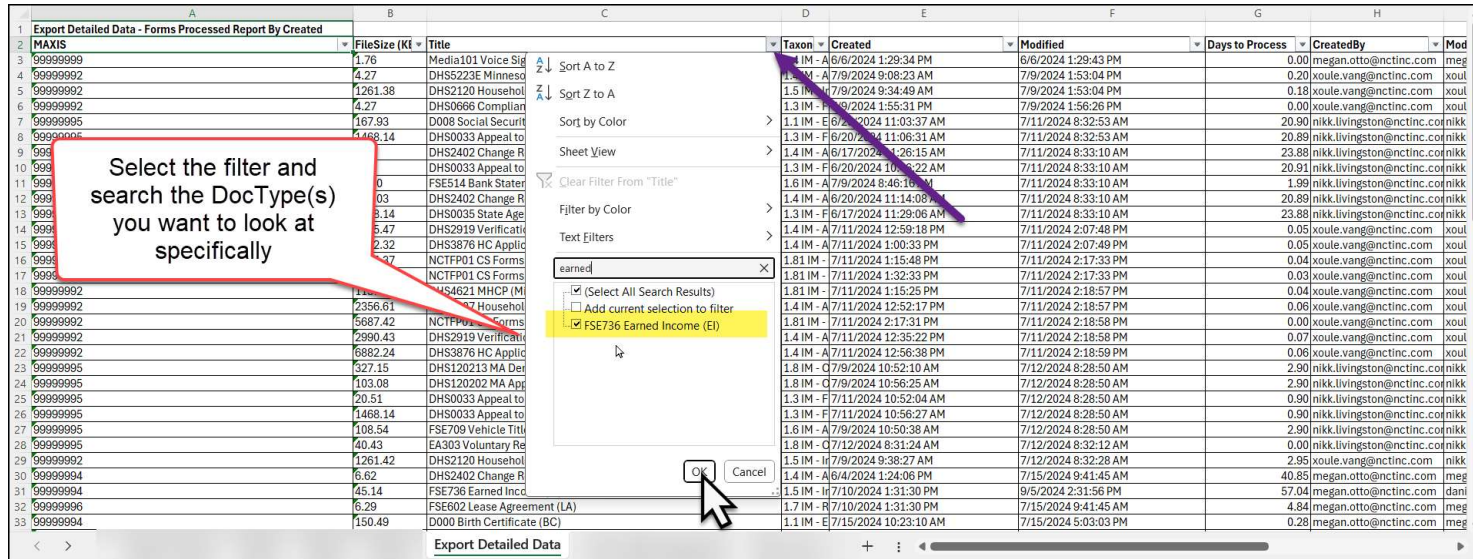
Using Filters

Tip: to 'drill down' on a specific data point, go back to the Export Detailed Data tab on your report and use filters to look at specific document processing.

For example, I noticed that the average time to process Earned Income during this time period was higher than most other DocTypes.

Row Labels	Average of Days to Process
BLF010 CEHI Reimbursement Voucher	0.000439815
D000 Birth Certificate (BC)	1.147287037
D001 Drivers License (DL) - State ID	0
D008 Social Security Card (SSN)	6.966304012
DHS0033 Appeal to State Agency	12.96278501
DHS0035 State Agency Appeals Summary	8.414842593
DHS0666 Compliance with State Decision	2.555260417
DHS120202 MA Approval General(METS)	2.897511574
DHS120213 MA Denial General for MA and MCRE(METS)	2.900462963
DHS2120 Household Report Form	23.08567901
DHS2402 Change Report Form	33.44536169
DHS2707 Facts on Voluntarily Quitting Your Job	0.026631944
DHS2776D RCA OVERPAYMENT WORKSHEET	0.032326389
DHS2919 Verification Request Form	4.469626323
DHS3767G Application for a Good Cause Waiver	6.941145833
DHS3876 HC Application for Certain Populations	0.051950231
DHS4621 MHCP (Minnesota Health Care Programs) Medical Support Referral	0.045451389
DHS5223 Combined Application Form (CAF)	0.01188899
DHS5223E Minnesota Transition Application Form (MTAF)	4.840451389
DHS8107 Household Update Form	2.279618056
EA303 Voluntary Request To Close	2.517199074
FSE514 Bank Statements (BStmnts)	57.04196759
FSE602 Lease Agreement (LA)	0.006564815
FSE707 Utility Bill (UT)	0.000104167
FSE709 Vehicle Title (VTitle)	0.020405093
FSE736 Earned Income (EI)	
FSE924 HMLS Shelter Tracking Sheet	
Media101 Voice Signature	
NCTFP01 CS Forms Packet	
(blank)	
Grand Total	

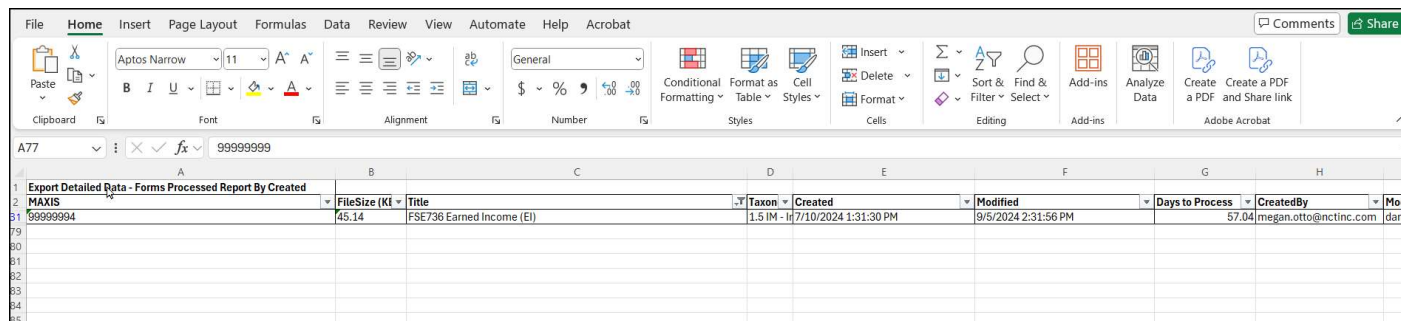
If I go back to my Export Detailed Data tab, I can filter down to see if there may have been an outlier that took longer to process (possible it remained in a DocBox for some time after being reviewed and processed).



Select the filter and search the DocType(s) you want to look at specifically

FileSize (K)	Title	Taxon	Created	Modified	Days to Process	CreatedBy	Mod
1.76	Media101 Voice Sig	1.1 IM - A/6/6/2024 1:29:34 PM	6/6/2024 1:29:43 PM	0.00	megan.otto@nctinc.com	meg	
4.27	DHS223E Minneso	1.1 IM - A/7/9/2024 9:08:23 AM	7/9/2024 1:53:04 PM	0.20	xoule.vang@nctinc.com	xoul	
1261.38	DHS120 Househol	1.5 IM - A/7/9/2024 9:34:49 AM	7/9/2024 1:53:04 PM	0.18	xoule.vang@nctinc.com	xoul	
4.27	DHS0666 Compilan	1.3 IM - A/7/9/2024 1:55:31 PM	7/9/2024 1:56:26 PM	0.00	xoule.vang@nctinc.com	xoul	
167.93	D008 Social Secur	1.1 IM - E/6/9/2024 11:03:37 AM	7/11/2024 8:32:53 AM	20.90	nikk.livingston@nctinc.com	nikk	
1468.14	DHS0033 Appeal to	1.3 IM - F/6/20/2024 11:06:31 AM	7/11/2024 8:32:53 AM	20.89	nikk.livingston@nctinc.com	nikk	
0.00	DHS2402 Change R	1.4 IM - A/6/17/2024 11:26:15 AM	7/11/2024 8:33:10 AM	23.88	nikk.livingston@nctinc.com	nikk	
0.00	DHS0033 Appeal to	1.3 IM - F/6/20/2024 10:56:22 AM	7/11/2024 8:33:10 AM	20.91	nikk.livingston@nctinc.com	nikk	
0.00	FSE514 Bank Stater	1.6 IM - A/7/9/2024 8:46:18 AM	7/11/2024 8:33:10 AM	1.99	nikk.livingston@nctinc.com	nikk	
0.00	DHS2402 Change R	1.4 IM - A/6/20/2024 11:14:08 AM	7/11/2024 8:33:10 AM	20.89	nikk.livingston@nctinc.com	nikk	
0.00	DHS0035 State Age	1.3 IM - F/6/17/2024 11:29:06 AM	7/11/2024 8:33:10 AM	23.88	nikk.livingston@nctinc.com	nikk	
5.47	DHS2919 Verificati	1.4 IM - A/7/11/2024 12:59:18 PM	7/11/2024 2:07:48 PM	0.05	xoule.vang@nctinc.com	xoul	
2.32	DHS3876 HC Applic	1.4 IM - A/7/11/2024 1:00:33 PM	7/11/2024 2:07:49 PM	0.05	xoule.vang@nctinc.com	xoul	
0.00	NCTFP01 CS Forms	1.81 IM - 7/11/2024 1:15:48 PM	7/11/2024 2:17:33 PM	0.04	xoule.vang@nctinc.com	xoul	
0.00	NCTFP01 CS Forms	1.81 IM - 7/11/2024 1:32:33 PM	7/11/2024 2:17:33 PM	0.03	xoule.vang@nctinc.com	xoul	
0.00	DHS4621 MHCP (M)	1.81 IM - 7/11/2024 1:15:25 PM	7/11/2024 2:18:57 PM	0.04	xoule.vang@nctinc.com	xoul	
2356.61	DHS120 Househol	1.4 IM - A/7/11/2024 12:52:17 PM	7/11/2024 2:18:57 PM	0.06	xoule.vang@nctinc.com	xoul	
5687.42	NCTFP01 CS Forms	1.81 IM - 7/11/2024 2:17:31 PM	7/11/2024 2:18:58 PM	0.00	xoule.vang@nctinc.com	xoul	
2990.43	DHS2919 Verificati	1.4 IM - A/7/11/2024 12:35:22 PM	7/11/2024 2:18:58 PM	0.07	xoule.vang@nctinc.com	xoul	
6882.24	DHS3876 HC Applic	1.4 IM - A/7/11/2024 12:56:38 PM	7/11/2024 2:18:59 PM	0.06	xoule.vang@nctinc.com	xoul	
327.15	DHS120213 MA Der	1.8 IM - C/7/9/2024 10:52:10 AM	7/12/2024 8:28:50 AM	2.90	nikk.livingston@nctinc.com	nikk	
103.08	DHS120202 MA App	1.8 IM - C/7/9/2024 10:56:25 AM	7/12/2024 8:28:50 AM	2.90	nikk.livingston@nctinc.com	nikk	
20.51	DHS0033 Appeal to	1.3 IM - F/7/11/2024 10:52:04 AM	7/12/2024 8:28:50 AM	0.90	nikk.livingston@nctinc.com	nikk	
1468.14	DHS0033 Appeal to	1.3 IM - F/7/11/2024 10:56:27 AM	7/12/2024 8:28:50 AM	0.90	nikk.livingston@nctinc.com	nikk	
108.54	FSE709 Vehicle Titl	1.6 IM - A/7/9/2024 10:50:38 AM	7/12/2024 8:28:50 AM	2.90	nikk.livingston@nctinc.com	nikk	
40.43	EA303 Voluntary Re	1.8 IM - C/7/12/2024 8:31:24 AM	7/12/2024 8:32:12 AM	0.00	nikk.livingston@nctinc.com	nikk	
1261.42	DHS120 Househol	1.5 IM - A/6/4/2024 1:24:06 PM	7/15/2024 8:32:28 AM	2.95	xoule.vang@nctinc.com	nikk	
6.62	DHS2402 Change R	1.4 IM - A/7/10/2024 1:31:30 PM	9/5/2024 2:31:56 PM	40.85	megan.otto@nctinc.com	meg	
45.14	FSE736 Earned Inco	1.5 IM - A/7/10/2024 1:31:30 PM	9/5/2024 2:31:56 PM	57.04	megan.otto@nctinc.com	dani	
6.29	FSE602 Lease Agreem (LA)	1.7 IM - A/7/10/2024 1:31:30 PM	7/15/2024 9:41:45 AM	4.84	megan.otto@nctinc.com	meg	
150.49	D000 Birth Certificate (BC)	1.1 IM - E/7/15/2024 10:23:10 AM	7/15/2024 5:03:03 PM	0.28	megan.otto@nctinc.com	meg	

This will filter down to one or more Titles (DocTypes) that the filter was applied to.



FileSize (K)	Title	Taxon	Created	Modified	Days to Process	CreatedBy	Mod
45.14	FSE736 Earned Income (EI)	1.5 IM - A/7/10/2024 1:31:30 PM	9/5/2024 2:31:56 PM	57.04	megan.otto@nctinc.com	dani	

Tip: a filter can be applied to any column on the Export Detailed Data tab to look at report results.

Looking at Outliers

If an outlier is found, it can be removed from the analysis by clicking on the row and deleting it from the Export Detailed Data Tab. Please note that outliers should be considered and/or removed at the Counties discretion to more accurately reflect overall document processing.

Highlight the outlier and delete entire **row**.

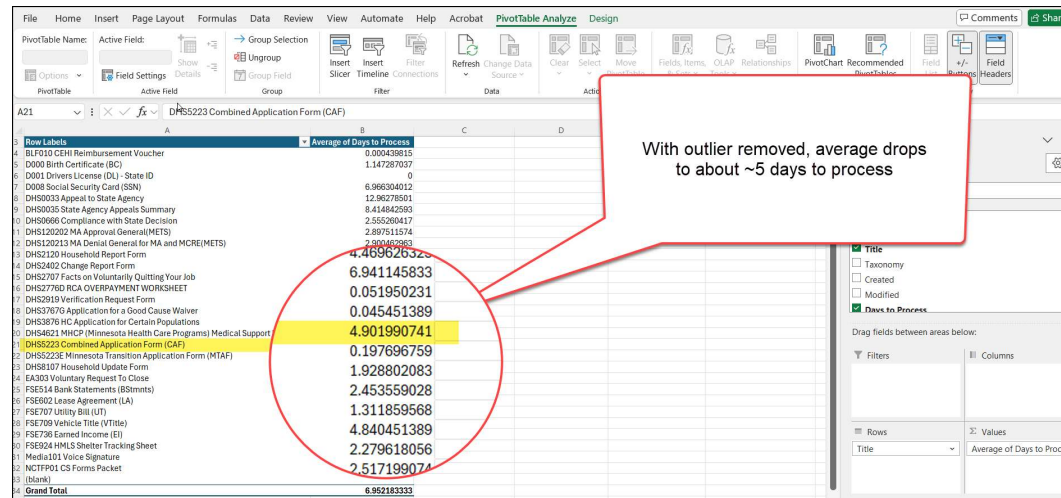
	FileSize (KB)	Title	Taxon	Created	Modified	Days to Process	Created By
57	7936.38	DHS5223 Combined Application Form (CAF)	1.4 IM - A	7/25/2024 2:22:26 PM	7/25/2024 2:22:33 PM	0.00	meg...
58	150.16	DHS5223 Combined Application Form (CAF)	1.4 IM - A	9/6/2024 2:36:18 PM	9/16/2024 9:53:55 AM	9.80	xoul...
59	7516.47	DHS5223 Combined Application Form (CAF)	1.4 IM - A	7/11/2024 9:17:30 AM	10/16/2024 11:15:01 AM	67.08	meg...

On your Average to Process tab, follow these steps

- (1) PivotTable Analyze tab
- (2) Click Refresh

Row Labels	Average of Days to Process
BLF010 CEH Reimbursement Voucher	0.00439815
D000 Birth Certificate (BC)	1.147287037
D001 Drivers License (DL) - State ID	0
D008 Social Security Card (SSN)	6.968304012
DHS0033 Appeal to State Agency	12.96278501
DHS0036 State Agency Appeals Summary	6.414842953
DHS0666 Compliance with State Decision	2.555260417
DHS120202 MA Approval General (METS)	2.897511574
DHS120213 MA Denial General for MA and MCRE (METS)	2.900462963
DHS2120 Household Report Form	23.06567901
DHS2402 Change Report Form	33.44536109
DHS2707 Facts on Voluntarily Quitting Your Job	0.026631944
DHS27760 RCA OVERPAYMENT WORKSHEET	0.032326389
DHS2919 Verification Request Form	4.469263223
DHS37670 Application for a Good Cause Waiver	6.941145833
DHS3876 HC Application for Certain Populations	0.051950231
DHS4621 MHCP (Minnesota Health Care Programs) Medical Support Referral	0.045451389
DHS5223 Combined Application Form (CAF)	25.02853009
DHS5223C Minnesota Transition Application Form (MTAF)	0.19766759
DHS8107 Household Update Form	1.928802083
EA303 Voluntary Request To Close	2.453559028
FSE514 Bank Statements (BStmnts)	1.311859568
FSE602 Lease Agreement (LA)	4.840451389
FSE707 Utility Bill (UT)	2.279618056
FSE708 Vehicle Title (VTitle)	2.517198074
FSE736 Earned Income (EI)	57.04196759
FSE924 HMLS Shelter Tracking Sheet	0.006564815
Media101 Voice Signature	0.000104167
NCTFPD1 CS Forms Packet	0.020405093
(blank)	
Grand Total	7.743359984

With the outlier removed, and a pivot table refresh, the average time for processing goes down to about ~5 days for processing.



Appendix –Pivot Table Setup

Average Time to Process (file down) Specific DocTypes

Rows: Title

Values: Days to Process (Value Field Settings: Average)

Drag fields between areas below:

Filters	Columns
Rows Title	Σ Values Average of Days to Proc...

☐ Defer Layout Update Update

Documents Processed By Worker

Columns: Modified By

Rows: Title

Values: Title (Values Field Settings: Count of)

Drag fields between areas below:

Filters	Columns
	ModifiedBy
Rows Title	Σ Values Count of Title

☐ Defer Layout Update Update

Average Days to Process By Worker

Columns: Modified By

Rows: Title

Values: Title (Value Field Settings: Count)

Values: Days to Process (Value Filed Settings: Average)

Drag fields between areas below:

Filters 	Columns ModifiedBy Σ Values
Rows Title 	Σ Values Count of Title Average of Days to Proc...