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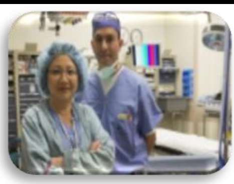

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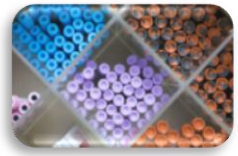

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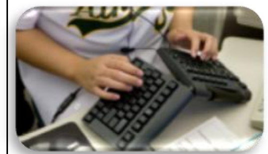


Email Teams

More Info

UBT Tracker Welcome

The UBT Tracker system supports the collection and reporting of data about the activities of unit-based teams (UBTs). Established under the 2005 National Agreement, UBTs are the foundation of Kaiser Permanente's efforts to achieve the goals of the Value Compass: providing the best quality care and service, being the best place to work and remaining affordable for working families while keeping the interests of the member and patient at the center of everything we do.

Excitement about UBTs is growing. Every day, labor and management leaders throughout the company are asked: "How many teams are there?" "What are they working on?" "How do I find out what solutions teams have developed?" UBT Tracker is designed to help answer those questions and others.

UBT Tracker collects data on team activities. UBTs can create a team record in the system. This record allows teams to track membership, assign key team roles, and create records of performance improvement projects and tests of change.

UBT Tracker is designed to support teams in using the Rapid Improvement Model (RIM). This is an approach to improvement that encourages experimenting with small tests of change. Teams plan a test, carry it out, check their results and then decide whether to permanently implement the change. This approach is summarized by the phrase Plan, Do, Study, Act (PDSA).

UBT Tracker is more than just a reporting tool. As its database of projects grows, UBT Tracker becomes a more valuable resource for sharing successful practices across the organization. Teams can look at what teams in similar departments in other regional facilities are doing, or they can search for projects aimed at improving a particular performance measure. Either way, good ideas are being spread.

UBT Tracker is more than just a system. UBT Tracker is part of the movement to transform Kaiser Permanente in order to transform health care. Join us!

TRACKER TRICKS

- **Using this manual:** You can find the topic you're searching quickly by **selecting Ctrl + F in your keyboard > typing the keyword or sentence you're looking for > selecting Enter**. This function searches for the chosen keyword throughout the user guide.

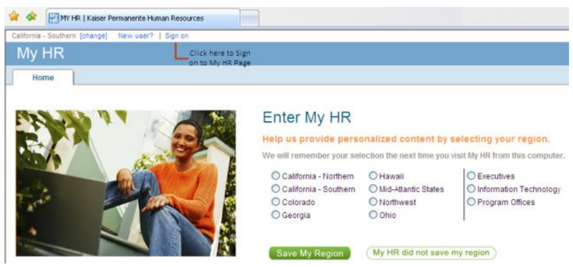
- **Offering Suggestions:** If you can't find the complete steps for the topic you need, or would like to offer feedback, send an email to tiago.m.pinto@kp.org or use the **Feedback** or **Contact Us** Menu in the UBT Tracker.

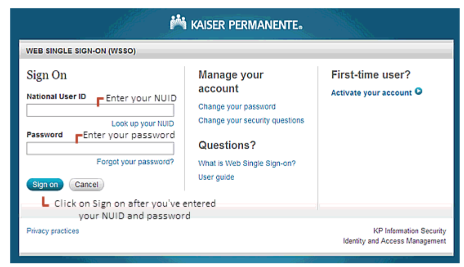
Logging In

UBT Tracker resides within the My HR application. To access UBT Tracker, you must first log in to My HR page.

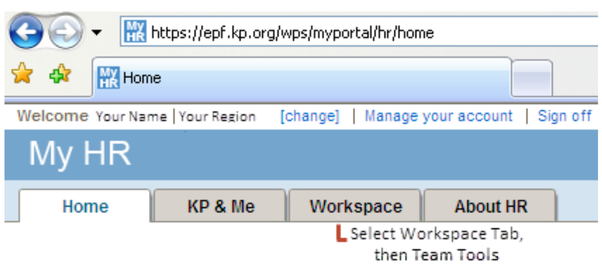
- **First Time User**: If you're first time user and don't know your password, you'll need to contact your Regional Service Desk to reset your password; Otherwise click on the **Activate your Account Now**, and follow the steps.

- **Log In page:** Go to your **My HR** link > **Sign on**, then Enter your **NUID** and **Password**, click on **Sign on**.





- **My HR page**: Select **Workspace** tab > **Team Tools** > **UBT Tracker**



TRACKER TRICKS

- **Password:** If you don't know your password contact the Regional Service Desk:

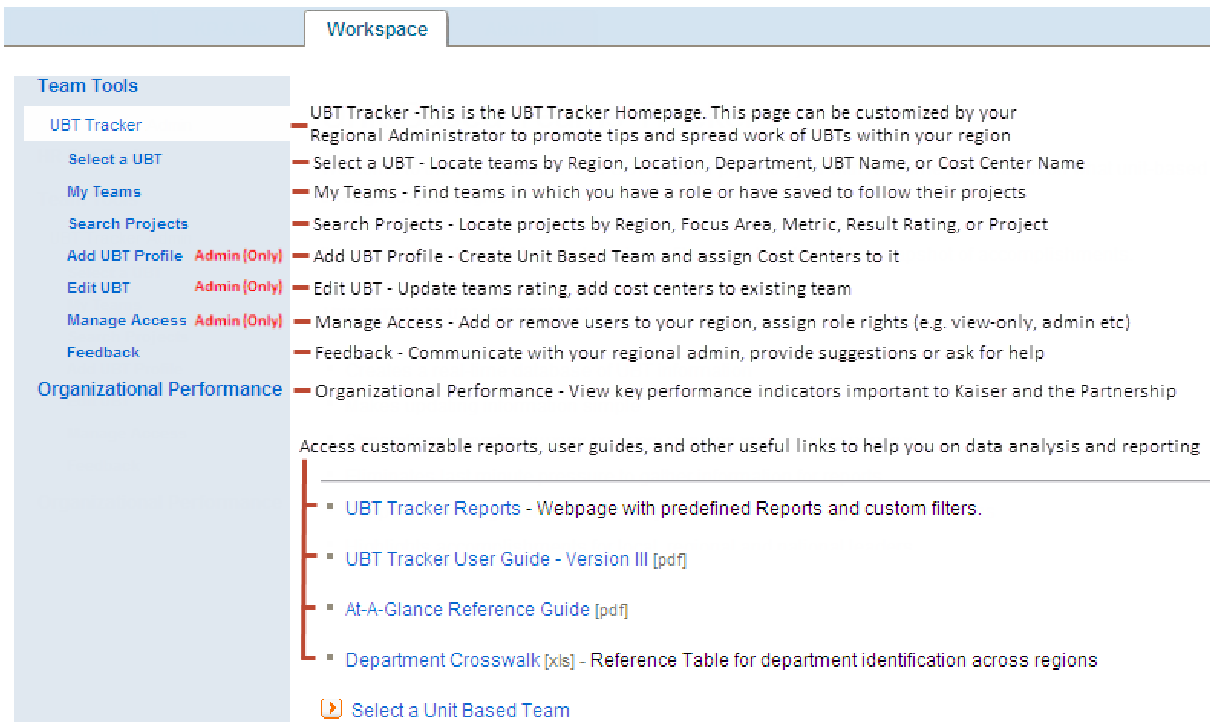
California	8-395-1143 or 888-457-4872 **Physicians:** 8-395-5599 or 951-270-5599
Georgia	404-869-5900
Hawaii	808-432-4100
Mid-Atlantic	301-680-1820
Northwest	503-778-2500
Colorado	303-344-7755

- **Team Tools Page:** This page presents links, information, and resources specific to your region. If you want to make an announcement, promote your team's work, or suggest changes to this page, contact your regional administrator or UBT Consultant.

Logging In

Once you are on the Team Tools page, the UBT Tracker menu displays on the left side of your browser. This menu allows you to navigate through the application. Certain functions in the UBT Tracker Menu (e.g., Add UBT Profile) will only be available for administrators.

UBT Tracker is the UBT Tracker Homepage. The Team Tools page can be customized by your Regional Administrator to promote tips and spread work of UBTs within your region. You can communicate with your Regional Administrator by using the Contact Us page. Below is a helpful summary of the key features of the four UBT Tracker menu options available to most user:



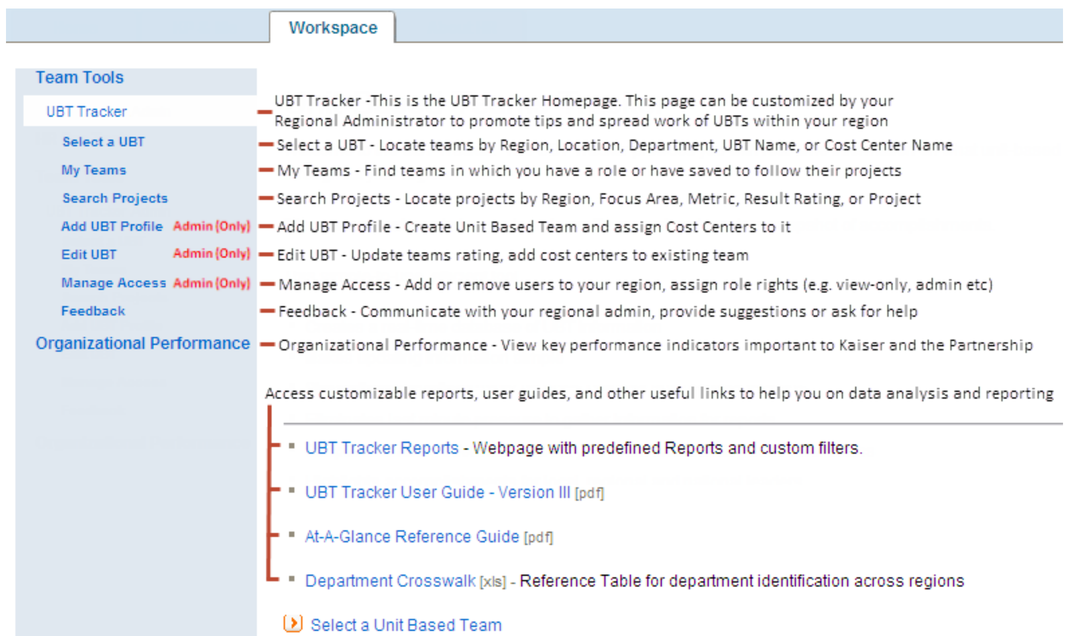
TRACKER TRICKS

- **UBT Tracker Menu:** If you don't see the UBT Tracker Menu under the Team Tools, it's probably because you haven't logged in to the system yet. **See Logging In** for more information.
- **Select a UBT:** Locate teams by Region, Location, Department, UBT Name, or Cost Center Name.
- **My Teams:** Find teams in which you have a role or have saved to follow their projects.
- **Search Projects:** Locate projects by Region, Focus Area, Metric, Result Rating, or Project.
- **Feedback or Contact Us:** Communicate with your Regional Administrator, provide suggestions or ask for help.

UBT Tracker Links are located at the UBT Tracker homepage. Each link provides you with important tools when analyzing data, generating reports on team's performance, or accessing user guides.

ADMINISTRATOR PAGES

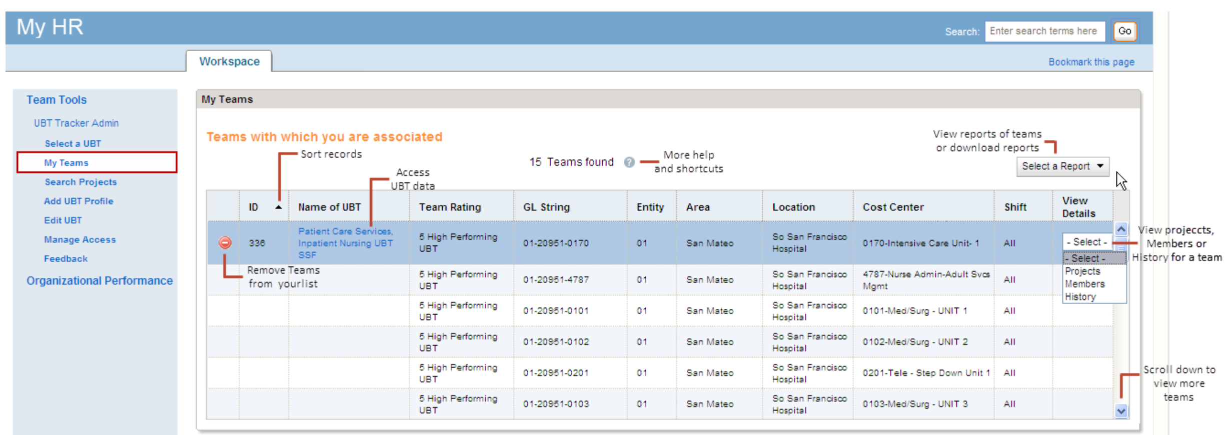
- **Add UBT Profile:** Create Unit Based Team and assign Cost Centers to it.
- **Edit UBT:** Update teams rating, add cost centers to existing team.
- **Manage Access:** Add or remove users to your region, assign role rights (e.g. view-only, administrator etc).



TRACKER TRICKS

- **Organizational Performance:** View key performance indicators important to Kaiser Permanente and the Partnership
- **UBT Tracker Reports:** Work with you Regional Administrator to develop links to reports that you use frequently. Use the Contact Us page to communicate with your regional administrator.

- **Access:** View projects for teams which you have a role (e.g., member, co-lead, sponsor, consultant, proxy, etc.), and teams that you don't have a role, but would like to follow. See **Following Other Teams**.
- **List:** If you are a member of a single team, your team will always show up on your My Teams page. If you are a sponsor or a consultant for multiple teams, those teams will show up on My Teams if you have been added to the team membership record.
- **Sort:** You are able to sort the list of results by clicking in each column header.
- **Remove Team:** Buttons in the first column allow you to add or remove a team from your My Teams page. The team will still remain in the system, but won't be displayed on this page.
- **Team Reports:** Click on Select a Report button to view or download you teams' data and projects.



Tracker Tricks

- **Follow Teams:** If you want to follow a team to learn from their projects and progress, you may add the team to the **My Teams** page. You can add as many teams as you wish to follow.
- **Quick Access:** Quickly view projects, members, and history of teams you have a role or are following. Simply select the desired value in the **View Details** column.
- **Report:** Click on the Select a Report button and view or download a report with all teams in this page.

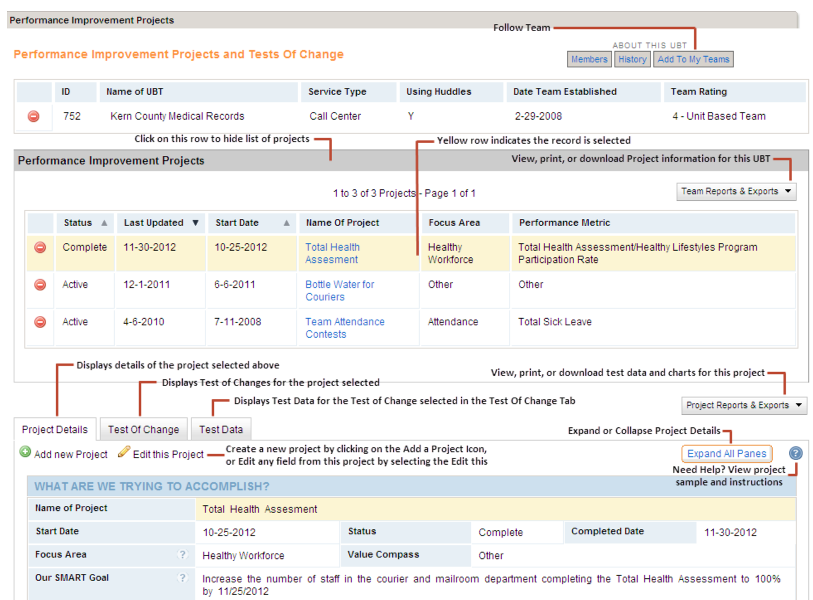
• Following Teams

The My Teams page automatically will display all teams in which you have a role, e.g., as a team member, co-lead, representative, consultant or sponsor.

However, you also can add additional teams to your My Teams list. You may want to do this because a team is working on a similar project and you want to see how they're doing. Or you could follow teams in similar departments in other medical centers and facilities. See **Adding Teams to My Teams page.**

• Adding Teams to My Teams Page

Access the UBT projects by selecting the Project in the **Search Projects** or the Name of UBT in the **Select a UBT** page > Add to My Teams. Note: You may not edit teams' information from other regions.



TRACKER TRICKS

- **Finding UBTs to follow:** Use the **Search Projects** or **Select a UBT** pages to select the team you're interested in following.
- **Collapse Project List:** Click on the bar called **Performance Improvement Projects (PIP)** or click on it again to expand PIP records.
- **Quickly Expand Project Details:** Click on the **Expand All Panes** button.
- **View teams from all facility or region:** Although you have cross-regional view rights, you need to search for teams in each region separately. There is no "all regions" value in any location field.

Managing Data
Viewing Team Reports

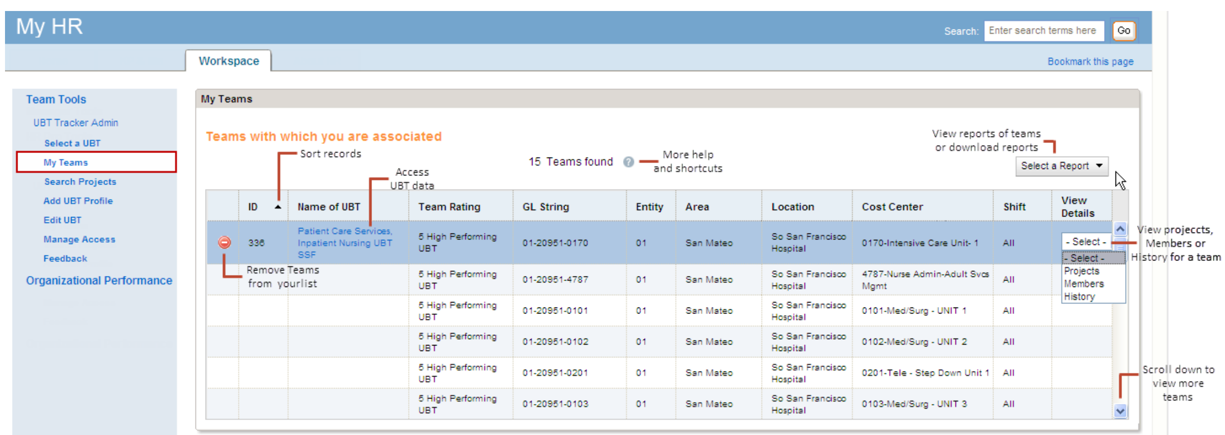
Viewing Team Reports

Once you have a list of UBTs on your My Teams page, you can run reports on team activity. These reports will give you information about the team and the performance improvement projects they are working on.

You choose reports from the drop-down menu on the right side of the screen. This menu also will appear when you view a list of teams created by using the Select a UBT option from the choices in the left menu. It also will appear on any **Team Project** page, where you can run reports for an individual team.

There are two report choices. One is a **Team Summary report**, which provides summary information about all the teams on your list of teams. The start of information for each team is highlighted in blue and yellow, which makes it easier to figure out where a team's information starts and stops. The fields in the report are drawn from the **Team Details** page and the **Performance Improvement Project** page.

A second choice is the **Team Detail report**, which provides all available information on each performance improvement project a team has entered.



TRACKER TRICKS

- **Emailing reports:** You may email reports instead of printing them out.

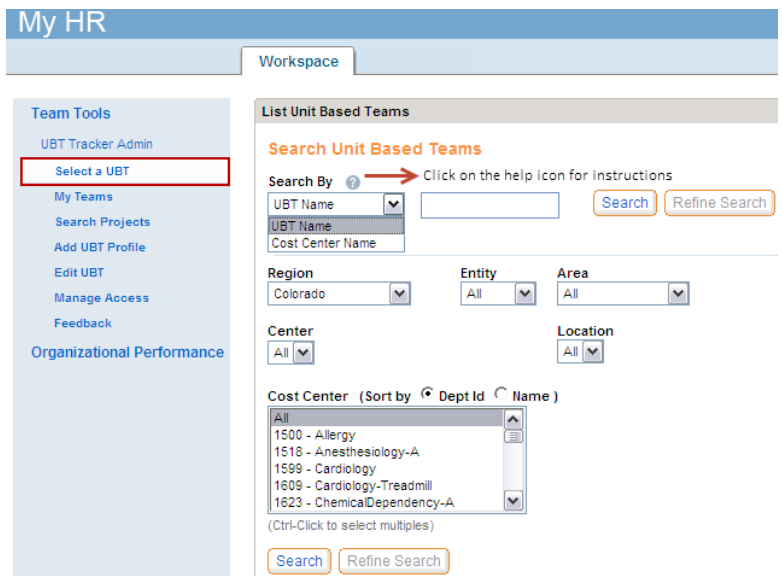
  Open the report you want to attach to an email > Select the Print button (A new pop up window is displayed) > Select "Adobe" as your Printer in the Printer Name field > Click Print > Save report in your desktop > Open your email and attach the Adobe document in from your desktop. The attachment should contain the report you've prepared.

Select a UBT Page

You can use the Select a UBT function to search for UBTs by **geographic area** (Region, Area, Center, Location), by **Cost Center Name** or by **UBT name**. Once you identify teams you are interested in following on a regular basis, you can add them to your My Teams page. See **Following Teams** section for more information.

Go to MyHR > Workspace tab > Select A UBT > Search

The Region auto-populates with your region as the default value. You may, however, change the region value in your search by clicking the Region drop-down menu and selecting the desired region. You may only search for one region at a time.



TRACKER TRICKS

- **Additional Help:** Click on the question mark icon for additional instructions on how to search records by UBT Name or Cost Center Name.
- **Search By Field:** If you are unsure about the exact name, don't search for the full name, because you may not find that team. You need minimum of 3 letters in order to search and find a match.
- **Change Search Criteria:** Click on Refine Search button in order to change search criteria or filters.

Search Projects
Search Closed Projects
Search by Name
Cost Center
UBT
Project

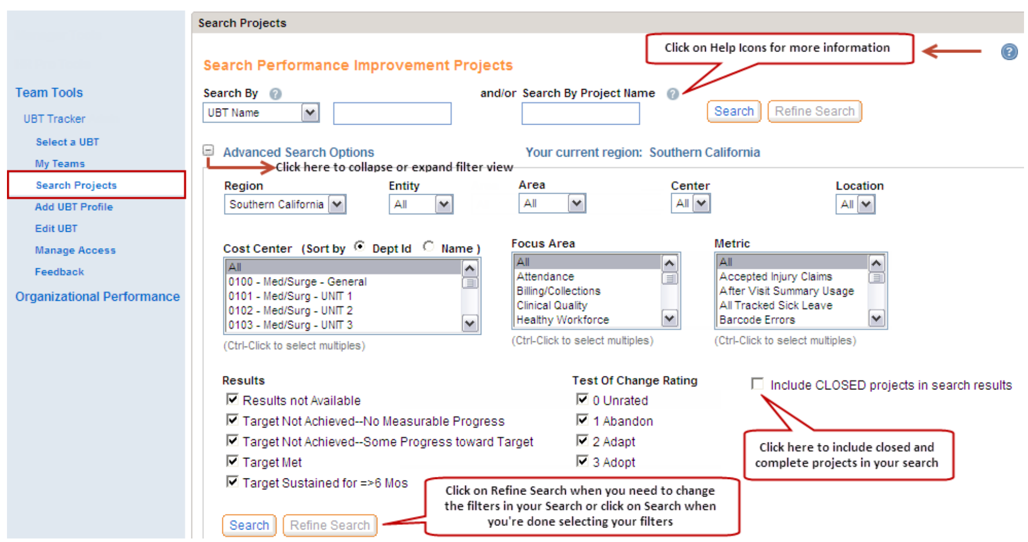
Search for a Performance Improvement Project

You can use the Search a Project function to search for projects by:

- **Geographic Area:** Region, Area, Center, Location.
- **Cost Center, UBT Name, Project Name:** Minimum 3 alpha-numeric characters
- **Focus Area and Metric:** Select Ctrl and click to select multiple lines
- **Results and Test Of Change Rating:** Check or uncheck boxes to filter desired results

The Region auto-populates with your region as the default value. You may, however, change the region value in your search by clicking the Region drop-down menu and selecting the desired region. **You may only search for one region at a time.** This is a powerful feature that you can use to learn best practices and share content knowledge outside your region.

For example, a user might be interested in all the projects aimed at improving mammography screening, regardless of location. Another user can use the Cost Center search to find all the projects being done by a particular type of department in a different region. Go to **MyHR > Workspace tab > Search Projects > Search > Name of Project**



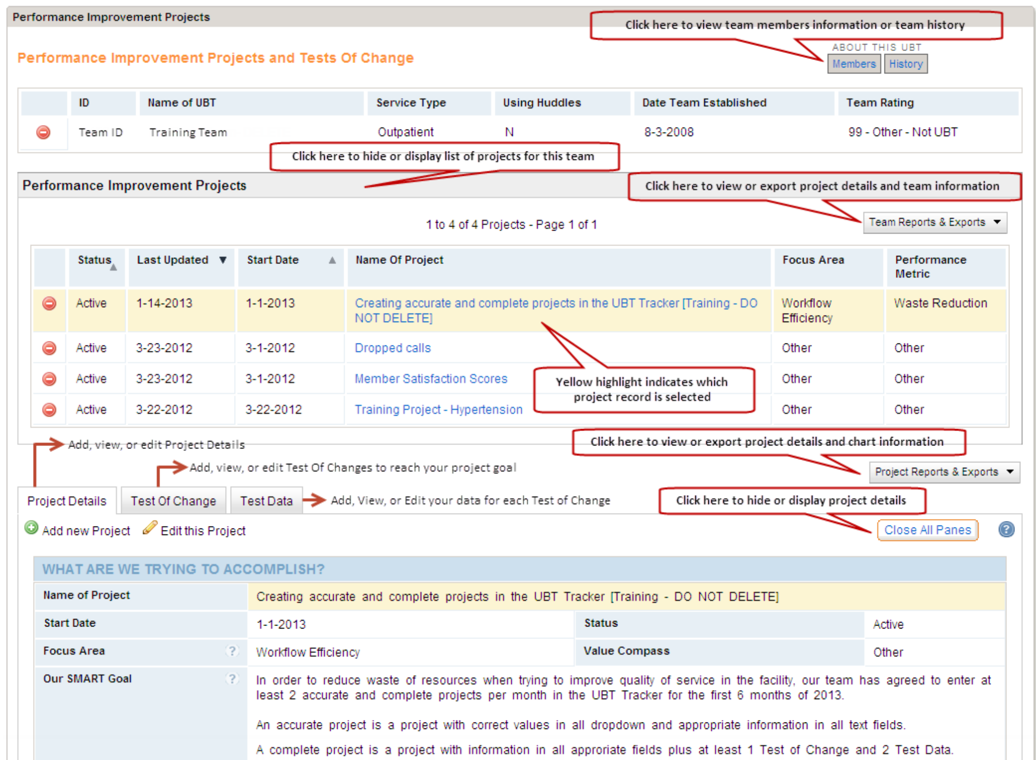
TRACKER TRICKS

- **Search Closed Projects:** By default, the system only searches for open projects. Check the box "Include Closed Projects" if you need to include closed projects in your search.
- **Searching by Name:** You may use a wildcard along with at least 3 characters, for example:
  - **%telemetry** finds information that contains the word telemetry somewhere in the name.
  - **telemetry** finds information that begins with the word telemetry.

Project Details page
- **What are we trying to accomplish?**
- **How will we know that change is an improvement?**
- **What changes can we make that result in improvement?**
- **What results did we obtain?**
- **Define and track your own outcome measure**
- **Project information documents**

Performance Improvement Details

There are 2 ways to navigate to the **Project Details** page. You can view all projects for a specific team (**Select a UBT > Name of UBT**) or you can find a specific project through the **Search Project** page (**Search Projects > Name of Projects**).



TRACKER TRICKS

- **Help Icons:** Help icons are located by several fields in the page to provide you with additional help and instructions.
- **Collapse or Expand Sections:** You may collapse or expand individual sections by clicking the plus or minus sign located on the right side of each section (Blue rows).
- **Can't find appropriate Focus Area or Metric for my project:** Contact your administrator through the Contact Us page (See UBT Tracker Menu on the left side).

Organizing Project Data

- **What are we trying to accomplish?**

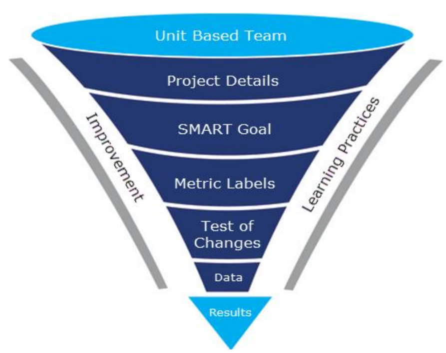
Name of the Project: Project title. Make sure you enter keywords to help you and others to search your project by its project name. See **Search Projects by Name for more information**.

Start Date/Completed Date/Status: Teams enter their start date for the project. If the project is completed, they enter a completion date and the Status field changes to "Closed." NOTE: Completed projects do not display in the reports, unless you select the box called Include Closed Projects in your search. See **Search Projects by Name for more information**.

Focus Area: Each region establishes its own set of high-level focus areas (e.g., Quality, Service, etc.) for UBTs. Selecting a Focus Area generates a list of Performance Metrics the UBT can choose from. If you cannot find appropriate values in this field, contact your UBT Consultant or the Regional Administrator through the Contact Us page. See **Contact Us page for more information**.

Value Compass: Each Focus Area is linked to one of the four points of the Value Compass.

Our SMART Goal: Teams enter a SMART goal for the project. SMART stands for Specific, Measurable, Attainable, Realistic/Relevant and Timely.



TRACKER TRICKS

- **Creating or Updating Project Data:** You need to be a co-lead, proxy or administrator in order to have the ability to edit a project.

- **Required Project Fields:** Required fields have a red asterisk besides the field name. You cannot save a project until you have completed ALL required fields in this page. If you move between pages before saving the record, all entered information will be lost.

Organizing Project Data

- **How will we know that change is an improvement?**

Performance Metric: Each region establishes its own set of performance metrics for teams to choose from. These metrics are specific to your project Focus Areas. If you cannot find appropriate values in this field, contact your UBT Consultant or the Regional Administrator through the Contact Us page. See **Contact Us page for more information**.

PSP Goal: If a particular metric is tied to the region's PSP goals, this flag will read "Y." Each region establishes its own PSP Goals. You cannot edit this field. Contact your Regional Administrator if you have any questions.

Data Source for Metric: Select the department responsible to publish the data within the organization (e.g. Staffing Department), tool or report the team is using to track the metric value (e.g. LMP Dashboard, Electronic Bed Report). If the team is working on a metric not defined by the region, select "other" as the metric and if required enter the data source metric name in the description data box.

Goal Setting Fields: A team can set goals for its project by filling in the baseline, threshold, target and stretch fields. **These are numeric fields. Do not enter fractions or percentage sign.**

- Baseline - Value collected before the team executes tests of change. Use baseline for comparison
- Threshold - Minimum accepted criteria or value for project improvement
- Target - Desired goal or criteria for project success
- Stretch - Value or criteria above target. Incentive or challenge to the UBT

Links to Metric Information: If the region has identified a website for the published report for the metric, a link is displayed in the next blue section under Link to Metric Report. Click the link to go to the report. Teams can use this information to populate both the "Baseline" field and the "Describe Results" field (see below).

TRACKER TRICKS

- **How to create a new project?** Select the team you want to create a project > Select "Add new Project" in your Project Details tab (Green PLUS Sign) > Fill out all required fields (Required fields have a red asterisk by their name) > Click or hover your mouse above the blue question marks in order to get a quick help on how to fill out the field > Contact your UBT Consultant or use the Contact Us page to ask questions on how to fill out the Project Details form.

Organizing Project Data

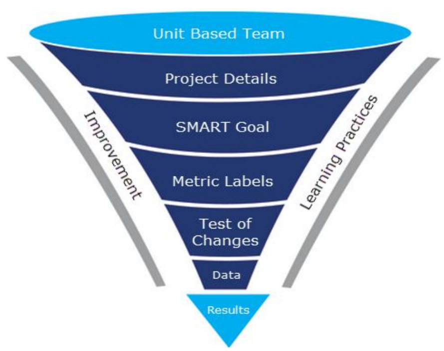
- **What changes can we make that result in improvement?**

What Tools Are We Using? Record the performance improvement tools you are using in your project, such as RIM or process maps. A brief description of these tools can be found in Appendix D.

Ideas From UBTs Doing Similar Work? Learn about how teams are implementing similar projects. Links in this section that will take you, based on your choice of metric, to a list of stories, videos and other material on other KP sites such as the national LMP website, SmartBook, IdeaBook and PI Wiki.

Tools & Tips Check out a link with ideas and directions from your Regional leaders. This link takes users to a regional website that contains tools and tips relating to the project's metric. This information is specific to your region and project's metric. For example, see how this project fits into regional goals and PSP. If you have an idea to share across your region, contact your UBT Consultant or Regional Administrator through the Contact Us page and provide the link with the appropriate information.

Test of Change: Ready to log ideas/actions to reach your project's target? Use the shortcut (link) to access the Test of Change (TOC) tab from the Project Details tab.



TRACKER TRICKS

- **What is the difference between Tools & Tips and Ideas from UBTs Doing Similar Work?**

Tools & Tips links your project to a Regional Site with ideas and directions on what to implement your project. The links from the section called **Ideas From UBTs Doing Similar Work** display initiatives within the Kaiser Permanente Network. Both links are related to your project metric and should give you ideas on how to reach your target faster and successfully.

Organizing Project Data

- **What results did we obtain?**

Result Summary: Teams use this drop-down menu to report results at a high level (e.g., No Results Reported, Target Achieved).

Results Description: Teams use this field to briefly describe results and compare current performance to project measures.

Learnings or Successful Practices: This field is for teams to report high-level learning or successful practices that could be generalized more widely.

Always close the project when you reach your project end date.

Make sure you've logged all of your attempts to reach the goal (e.g. Test of Changes), and fill out the fields in this Results section. Whether your team reached the project goals or not, your results and learning practices are helpful to teams if or when they decide to deal with similar projects in the future.

- **Define and track your own outcome measure**

This section is used by teams to define an outcome metric for a project and track it using the Test of Change and Test Data tabs. **Do not enter numeric values in these fields**. Teams should **use these fields to establish the name of each project variable**. Numeric values are entered in the Test Data tab.

Example: If a team wants **to track the number of welcome packages provided to new members**; the **Numerator is "Delivered Packages"**, the **Denominator is "New Members"**, and the **Calculated Value is "Delivered Packages per New Members (%)"**. Use the Additional Variable field to track a balancing measure, the performance of another department, or timeline, for example, in the scenario above, you can enter **"Department"** or **"Week"** as the **Additional Variable** in order to track the team's performance across departments, or to compare results from week 1 versus week 2. **For more information contact your UBT Consultant or Regional Administrator through the Contact Us page.**

TRACKER TRICKS

- **When to update the project results?** Anytime your target or SMART Goal changes; Anytime you close a project (i.e. Changing the status from "active" to "closed"); Or anytime you end a test of change, you should update the section called "What Results did we obtain?".
- **How to update a project?** Select the project from a team you would like to update > Note the selected project is highlighted in yellow > Click in the Edit this Project in your Project Details tab (Yellow Pencil sign) > Save changes by clicking on the Save button at the bottom of the page.

Organizing Project Data

- **Project information documents**

Team Project Documentation: Teams can attach any file or document (e.g. process map, meeting notes, pictures, flow chart) to the project by copying and pasting a URL containing additional documentation about the project.

UBT Tracker Steps (Part 1)
Select the project you want to add a document > Project Details tab > Select Expand All Panes button > Click in the IdeaBook link located in the section called "What changes can we make that result in improvement?" > Maximize the new pop-up window (IdeaBook website)

IdeaBook Steps
Click on Log in to participate (Upper left in your window) > Fill out the form to create your account (First time users only) > Click on New (Upper left in your window) > Select Document from the dropdown menu > Select Upload a File > Click on Browse locations > Select Upload a File tab > Click on Your Documents > Click on Browse and find the document you want to attach to the project > Give a short description of what the file is about > Enter the name of your project in the Tags field > Select Open to anyone in the Visibility Field > Click on Collaboration Options > Select Anyone in the People who can edit this document Field > Click on Publish at the end of the page > Select and highlight the web address in your browser > Right click with your mouse and copy the web address > Go back to your UBT Tracker window

UBT Tracker Steps (Part 2)
Select the Edit this Project (yellow pencil) > Right click in the Team Project Documentation field at the bottom of your Project Details tab > Select Paste > Click on Save.

Test that your link is saved and works by clicking in the Team Documentation link at the bottom of your Project Details tab

TRACKER TRICKS

- **How to show Return on Investment (ROI) in a project in the UBT Tracker?** You can add a spreadsheet with your logic, calculator, savings, and results to your project. **See Project Information Documents for more information.**
- **Who can access the project documentation?** All UBT Tracker users should be able to search and see the project documents. There are no restrictions.
- **How many documents can I attach to a project?** As many as needed as long as they are all saved in a single web address (URL) in the IdeaBook website.

Test Of Change page

Test Of Change Page

The Rapid Improvement Model (a.k.a. Plan, Do, Study, Act or PDSA) assumes teams will try a lot of different ideas to try to improve performance. **These ideas are meant to be tried quickly and then either adopted, modified and tested again, or abandoned**. UBT Tracker is designed to capture these "tests of change." This allows users to find approaches that really work and identify those that probably won't.

Select the Project > Test of Change page > Add or Edit Test of Change

Any time the team tests an idea or an attempt to reach the project goal.

Clicking on a Test of Change will display fields and information for that Test of Change. There are five fields in the Test of Change:

Title: Brief sentence with the name of the Test of Change

Test of Change: Description of the Test of Change

Outcome: Description of the outcome of the test

Rating: Tests are rated on a four-point scale:

1. Unrated: Not enough information to rate yet
2. Abandon: Test was unsuccessful
3. Adapt: Test was partially successful and shows enough promise to be adapted in some way and tried again
4. Adopt: Test was successful enough to justify implementing the change permanently

Where did you get this idea? Pick the best description of where the team found this Test of Change

Tracker Tricks

- **When to create a Test of Change (TOC)?** For any given project, teams may test many ways of improving something, some of which will fail and some of which will succeed. UBT Tracker allows you to record which tests of change worked and which did not.
- **When should I update a TOC?** Once the team finishes the test, the Outcome and Rating fields should be updated. Results or data from your test of changes should be logged in the Test Data page.
- **Why should I create a TOC?** To track the work and ideas your team has tried to reach the project goal and how that helped or didn't help your team.

Test Data Page

Once you have defined your metric, you need to create Tests of Change in order to begin entering data on them. **See Test of Change for more information.**

Each Test of Change generates its on data results. **If the team has multiple tests of changes, before entering the data (Test Data page), the team must click in the respective Test of Change (Test of Change page)**. The UBT Tracker selects the first Test of Change as a default.

Click on your Test of change in the Test of Change page > Click on the Test Data tab > Add New Test Data

Log the **Date of Test** by clicking on the box brings up a calendar, allowing you to select the date. Or you can simply enter it in the DD-MM-YYYY format.

Choose the **Shift** from a drop-down menu if your unit has different shifts and this is relevant to the test, you can choose the shift.

Enter the **data results (numeric values)** in the next two boxes. The labels at the top of the boxes are the same one you defined on the Project Details page.

If there are any notes you want to include about this particular observation (e.g., something unusual about the day or shift), enter them in the **Notes** Field.

If you defined the **Additional Variable** on the Project Details page, the label will show up here. If not, it will read Do Not Use.

For help click on the question mark icon on the right side of the Test Data page. You can also contact your UBT Consultant or the Support Team through the Contact Us Menu in the left menu.

- **Test Data Chart**

You can print your run chart and table by going to **Project Reports & Exports button > Test Data Charts**. If you want to create a digital file with the report instead of printing it, open your printer dialog window as if you were going to print the report, but pick Printer called "Adobe" instead of your default printer.

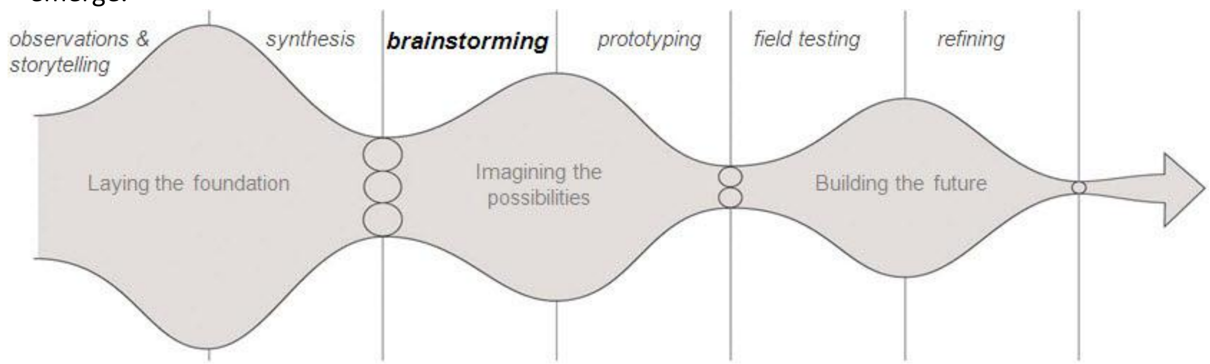
Tracker Tricks

- **When to create a Test Data?** Any time the team has results from a test of change.
- **Why can't I add a Test Data?** You need to define your outcome measures in the **Project Detail page** before you can enter the test data results. **See Project Information Documents for more information.**
- **Why should I record data from a Test of Change (TOC)?** Because you can track your team's progress through Test Data Chart, or you can easily export your Test Data to create graphs or charts outside of the UBT Tracker (e.g. Excel, Access, SAS).

Performance Improvement (PI) Assessment Tools

- **6S (Sort/Standardize etc):** A method to organize a physical space: sort (organization), set in order, shine (cleanliness), standardize, safety and sustain (discipline).

- **Brainstorming:** Generating a lot of ideas so that a great idea can be found. Use creative techniques to break out of traditional thought patterns so new patterns and novel ideas can emerge.

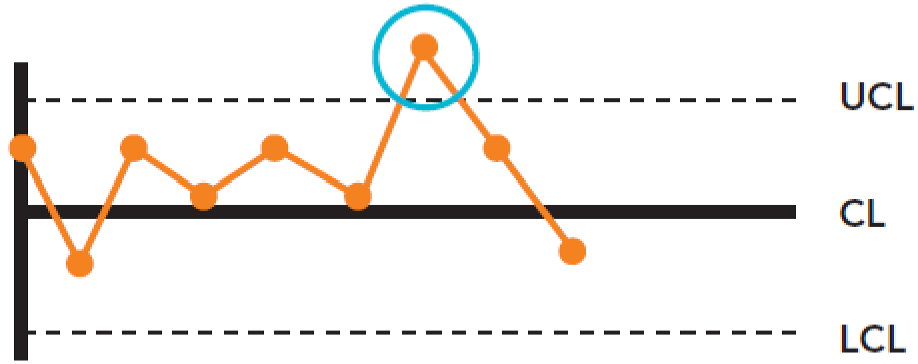


TRACKER TRICKS

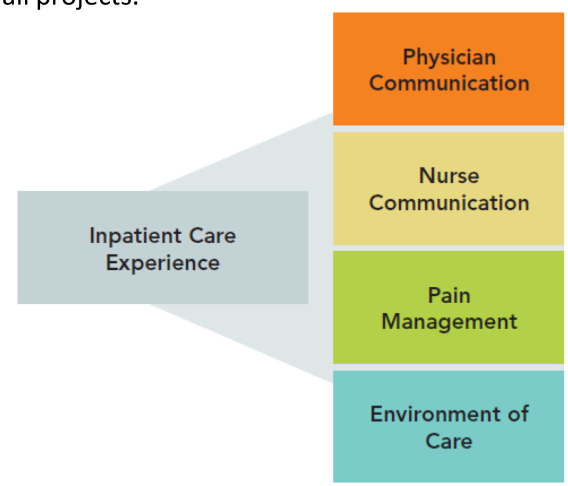
- **Where can I get more information on PI Tools?** Get more information on how to use Performance Improvement tools in your UBT Tracker projects at http://kpnet.kp.org/qrrm/dcsq/contacts.htm or contact the Improvement Advisor at your location.

Performance Improvement (PI) Assessment Tools

- **Control Charts:** Line graphs that display data over time. All projects should use one to track a baseline before changes are tested and post-change results.



- **Driver Diagram:** A method of looking at the individual projects needed to achieve a larger goal, or the different problems that must be solved to achieve an overall goal. An effective planning and communication tool for all projects.



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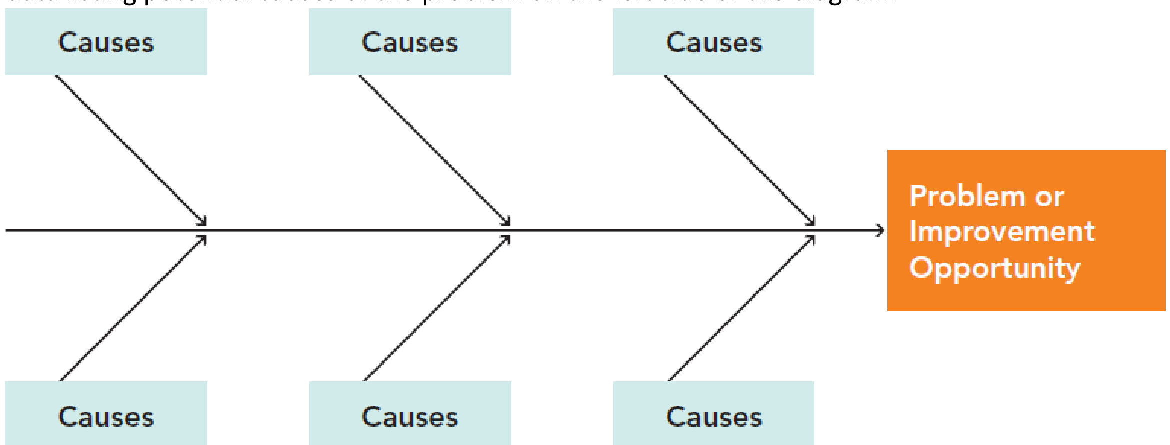
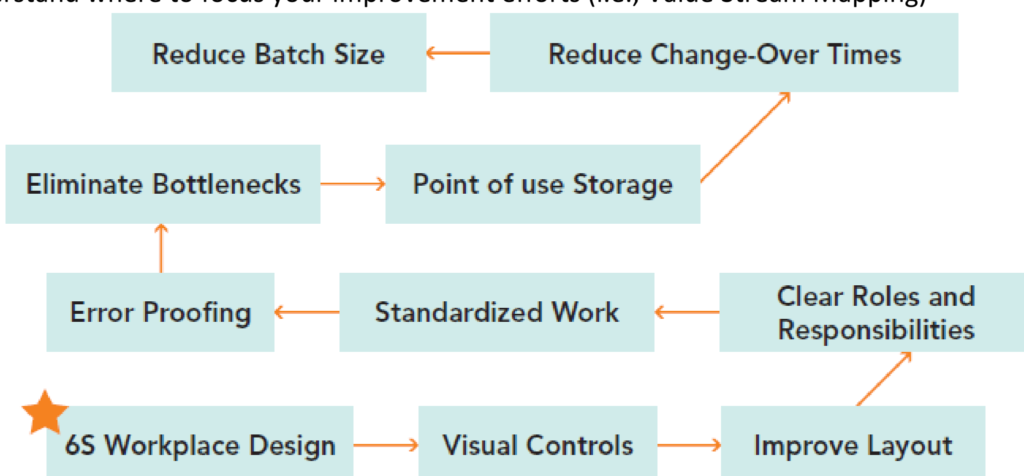
Performance Improvement (PI) Assessment Tools

- **Fishbone Diagram:** Clearly identifies the various factors or causes affecting a process. By identifying the problem on the right side of the diagram, your team can brainstorm and collect data listing potential causes of the problem on the left side of the diagram.



- **Frontline Waste Tool:** An assessment tool used to identify waste in a system and help you understand where to focus your improvement efforts (i.e., Value Stream Mapping)



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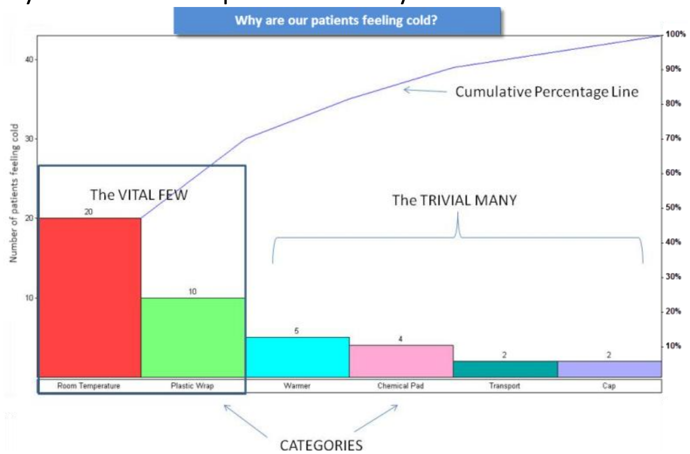
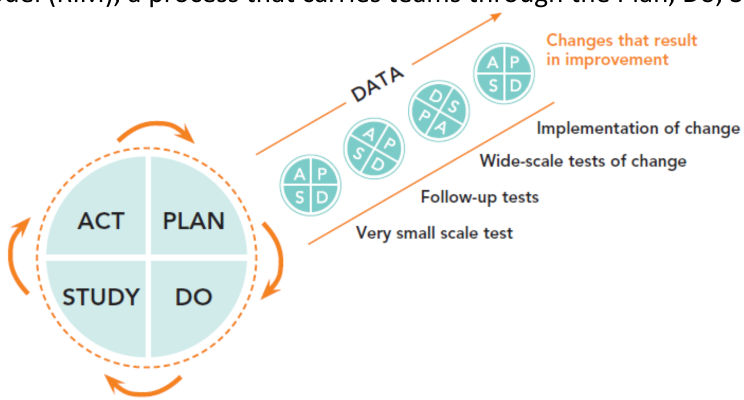
Performance Improvement (PI) Assessment Tools

- **Pareto Charts:** A bar graph that illustrates the percentage of problems caused by different sources. Helps identify the "vital few" problems that you should focus on first.



- **Rapid Improvement Method (RIM) / Plan-Do-Study-Act (PDSA):** Used to explain the rapid improvement model (RIM), a process that carries teams through the Plan, Do, Study, Act steps.



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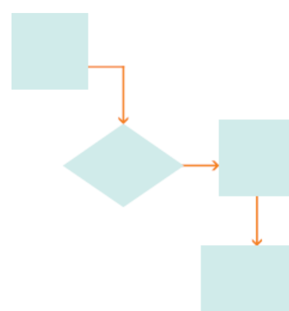
Performance Improvement (PI) Assessment Tools

- **Prioritization Matrix:** This tool helps UBTs decide what to do after key actions or criteria have been identified but their relative importance (priority) is not known with certainty. Prioritization matrices are especially useful if problem-solving resources, such as people, time or money, are limited, or if the identified problem-solving actions are strongly interrelated. To create a matrix, you must judge the relative ability of each possible action to effectively deliver the results you want compared to every other identified action. The product of your work is a weighted ranking of all the possible actions you are considering. The finished matrix can help the UBT to make an overall decision or determine the sequence in which to attack a problem or work toward a SMART goal.

	Criteria being compared to									Row TOTAL	%
Criteria	Low cost a.	Use of technology b.	Potential avings c.	Increased speed d.	Decreased defects e.	Customer Satisfaction f.	Minimum impact g.	Easy to implement h.	Quick results i.		
a. Low cost		5									
b. Use of Technology	0.2										
c. Potential savings											
d. Increased speed											
e. Decreased defects											
f. Cust. satisfaction											
g. Minimum impact											
h. Easy to implement											
i. Quick results											
Column Total											

- **Process Map:** Visually illustrates how work flows and who does what. Very useful in helping understand what is currently happening especially if multiple groups are involved. Use to identify bottlenecks and agree to what should be changed. Recommended for all work that changes a process.



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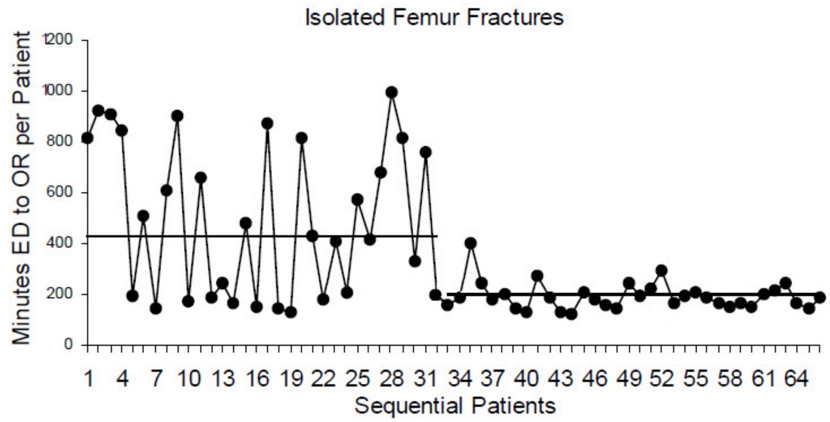
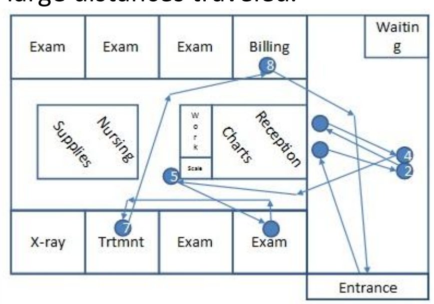
Performance Improvement (PI) Assessment Tools

- **Run Charts:** Line graphs that display data over time and show how the data compare to the median. This tool makes process performance visible, helps to determine if a test of change is an improvement and validates whether the results are holding.



- **Spaghetti Diagrams:** A charting method that uses a continuous line to trace the path of a person or item through all phases of process on a diagram that depicts the physical space. Use it to expose inefficient layouts and large distances traveled.



Step	Begin	End	Activity	Elapsed Time (min)
1 Arrive	1:00	1:00	Sign in	0
Wait	1:00	1:05		5
2 Check-in	1:05	1:08	KP card, Co-pay etc	3
Wait	1:08	1:28		20
3 Vitals/Chart	1:28	1:40	BP, temperature etc	12

TRACKER TRICKS

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UBT Detail Page

- **Add UBT Profile**

While everyone who has access to UBT Tracker can view the information in the system, certain functions are restricted by role. For example, only UBT co-leads or their designated proxies may edit information on team projects.

Certain functions in UBT Tracker can be carried out only by administrators. These include the functions of creating new UBT profiles (i.e., new teams), modifying the Team Rating and creating other administrators.

Add UBT Profile > Add Team Form > Create Team > Cost Center Form > Save & Manage Team

You may not create teams if the location has no cost center, the cost center has no employees, or the location and cost center don't match regional accounting/financial system. The UBT Tracker is updated daily with cost centers and employee information from MyHR. Contact your UBT Tracker Support if you need more information on how to resolve issues related to missing or adding cost centers.

You may not create teams with cost centers outside of your region, except if the cost centers are from IT or Program Office.

TRACKER TRICKS

- **Why I can't find the appropriate cost center under the desired location?**
  Your local accounting or operational database doesn't match the MyHR database; you'll need to work within your Region or Facility to have all databases aligned before creating UBTs.

- **The Add UBT Profile isn't available**
  You might not have administrator rights. Contact your UBT administrator, sponsor, or consultant for further assistance.

- **Edit UBT Information**

Edit UBT > Search > Team Rating

Team Rating reflects the UBT level on the Path to Performance. When the Team Rating is changed, the new information is displayed and saved automatically. This field is available only to system administrators.

Edit UBT > Search > UBT Name > Members > Edit Icon > Edit Icon (2nd time) > Using Huddles > Save

Note: Changes made on the pages above aren't automatically reflected in the reports that users can export from the UBT Tracker system. The system reports are updated through automated procedures executed every night.

- **Add or List Cost Centers**

My Teams > UBT Name > Members > Edit Icon > Add Cost Center > Save and Manage this Team

System administrators may remove cost centers from a team by following the steps above and clicking on the Delete button by the respective cost center(s).

- **Manage Access**

Manage Access > Add User Access

System administrators may remove or modify user role within their regions. Regional user roles are administrators, LMP, or view-only. You may not change your own role within your region, only another administrator may change your Regional Role. If you need to customize a user role within a team, you will need to access the team and manually update the user's role (e.g. co-lead, excluded, member, representative, proxy) within the respective team.

TRACKER TRICKS

- **How often should a Team Rating change and what does it mean?** Team should self- assess in a regular basis. The ratings reflect the development of the UBT in the Path to Performance where 1 stands for Pre-Team Climate and 5 stands for High Performing Team. For more information contact your regional administrator.

- **What does the UBT Rating 99 mean?** Use the 99 Rating to add projects and roles for training purposes. No data from "99 Teams" is officially tracked or used on official reports. Users can see "99 Teams" in their My Teams page and use them for training purposes.

• Email Feature

Select UBT > Members > Mail Icon

The first mail icon opens your Lotus Notes or your default email program. It creates a new window email addressed to the specific role group you've selected.

The second icon lists all the email addresses for a specific role. This icon is used when users want to email many roles or teams at the same time. You will have the option to copy the emails you need from the list and copy at your "Send To" field on your email program or Lotus Notes.

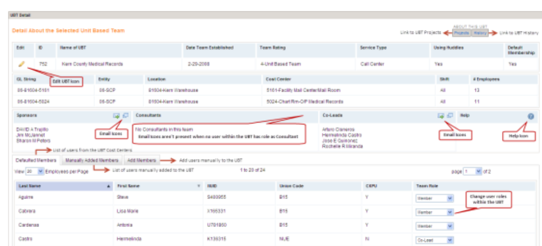
The icons will appear only when member email contacts are available.

• List Member or Change User Roles

My Teams > UBT Name > Members > Team Role > Defaulted or Manually Added Members tabs

If you need to view or customize a user role within a team, you will need to access the team and manually update the user's role (e.g. co-lead, excluded, member, representative, proxy) within the respective team. Any changes made on the Team Role are automatically saved in the system.

Users are organized in tabs based on their association to the team (e.g. manually added or automatically added based on their cost center).



TRACKER TRICKS

- **How can I make Lotus Notes or change my default email program?**
  Contact your local IT for further assistance.
- **How can send emails to multiple teams?**
  Use second email icon > Copy email addresses from the list and paste in your "Send To" Field of your Lotus Notes or preferred email program.
- **Can't add a member?**
  Is your team role other than administrator, consultant, or co-lead? Is the user already part of the team? Is the user in the Manually Added tab? If "yes", you can't add this member.

• Add Members

My Teams > UBT Name > Members > Add Members tab

While everyone who has access to UBT Tracker can view the information in the system, certain functions are restricted by role. Below is a list of the roles in the system and their rights to view and edit team information.

Regional LMP Lead: Creates other users as administrators. The regional LMP lead has to specifically designate him- or herself as an administrator in order to have administrator rights.

UBT Administrator: The primary responsibility of the UBT administrator is to create UBT profiles (e.g., team records) in the system and to manage access rights for other administrators. Only an administrator can create a team, change a team rating or create other users as administrators.

UBT Co-Lead: UBT co-leads are labor and management leaders of a unit-based team. They have the ability to edit all information about a team except for the Team Rating, which can be modified only by an administrator. A UBT co-lead's My Teams page always will display his or her own team.

UBT Proxy: UBT co-leads may designate members of their UBT as proxies. These individuals have the same data entry rights as a co-lead. This role is designed to allow a team to spread the burden of entering data into the system more widely. A UBT proxy's My Teams page always will display his or her own team.

UBT Member: UBT members are employees who have been added to a unit-based team in UBT Tracker. UBT members have view-only rights to their entire region and can view and download all reports and data extracts. A UBT member's My Teams page will always display his or her own team.

UBT Sponsor: Operationally, this role is for higher-level management and labor leadership who support unit-based teams. Within UBT Tracker, sponsors have view-only rights to all of their region's data and their My Teams page will display all teams for which they are a sponsor.

UBT Consultant: Operationally, this role is for consultants and project managers who support unit-based teams. Within UBT Tracker, consultants have view-only rights to all of their region's data and their My Teams page will display all teams for which they are a consultant.

View Only: This role can download UBT reports and view team information maintained in UBT Tracker. This role can be granted by the regional LMP lead or a UBT administrator.

TRACKER TRICKS

- **How can I make Lotus Notes or change my default email program?**
  Contact your local IT for further assistance.

- **How can send emails to multiple teams?**
  Use second email icon > Copy email addresses from the list and paste in your "Send To" Field of your Lotus Notes or preferred email program.

- **Can't add a member?**
  Is your team role other than administrator, consultant, or co-lead? Is the user already part of the team? Is the user in the Manually Added tab? If "yes", you can't add this member.

- **Technical Assistance**

If you have questions or need assistance, we're here to help.

Contact your regional system administrator through the Contact Us page in the UBT Tracker, or send your request for information to Tiago Pinto at tiago.m.pinto@kp.org or at 510-271-2347.

- **UBT Tracker Reporting & Data Utilities System (URDU)**

Having problems viewing web reports? Can't customize your results using available filters? Would like to request another web report to be available on this page? Send email to tiago.m.pinto@kp.org with screenshots and detailed information of your issue or request for more information.

- **Performance Improvement Tools**

Get more information on how to use PI tools in your UBT Tracker projects at http://kpnet.kp.org/qrrm/dcsq/contacts.htm

- **Organization Performance (National Dashboard)**

Lost access to the latest data for your region, facility, or department? Can't compare your performance with other locations? Contact Tiago Pinto at tiago.m.pinto@kp.org or at 510-271-2347.

- **UBT Tracker Homepage**

The homepage in the UBT Tracker is customizable to every Region. Regional Administrators have traditionally used this page to announce events such as UBT Fairs or to promote the work of a specific UBT across the region. You can create a document in Microsoft Word, send it to Tiago Pinto at the tiago.m.pinto@kp.org and he will post the content as the homepage content for your region.

TRACKER TRICKS

- **Need system access?** Contact your regional UBT administrator or Tiago Pinto at tiago.m.pinto@kp.org or at 510-271-2347.
- **Need customized training?** Contact your UBT Consultant or Tiago Pinto at tiago.m.pinto@kp.org or at 510-271-2347.
- **Are you a UBT Tracker user and want to suggest a new feature or change?** Use the Contact Us page in the UBT Tracker system.