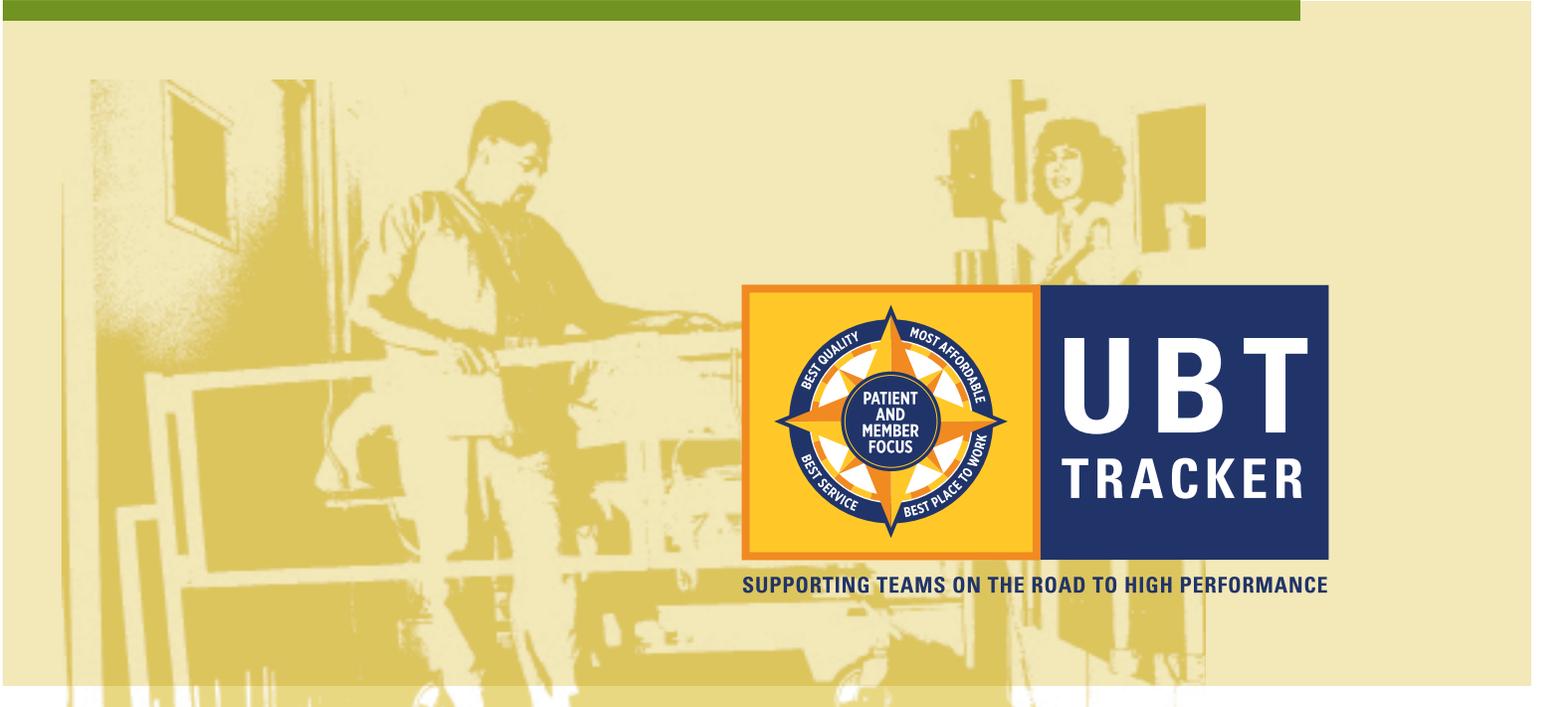




UBT TRACKER USER GUIDE

LMP LABOR MANAGEMENT PARTNERSHIP



**UBT
TRACKER**

SUPPORTING TEAMS ON THE ROAD TO HIGH PERFORMANCE



UBT TRACKER USER GUIDE

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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 of care and service, being the best place to work and remaining affordable for working families while keeping the interests of the member and patient as 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!



SUPPORTING TEAMS ON THE ROAD TO HIGH PERFORMANCE



UBT Tracker: Logging In

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

- Go to the [My HR](#) link.
- Click [Sign On](#).



- Enter [NUID](#) and [Password](#).

Please sign on:

National User ID (NUID) [Look up your NUID](#)

First time user? [Activate your account now](#)

Returning users, [Manage your account](#)

Password [Forgot your password?](#)

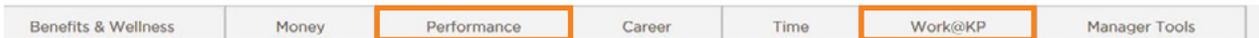
[Sign on](#)

Questions? Please see [user guide](#) (PDF).

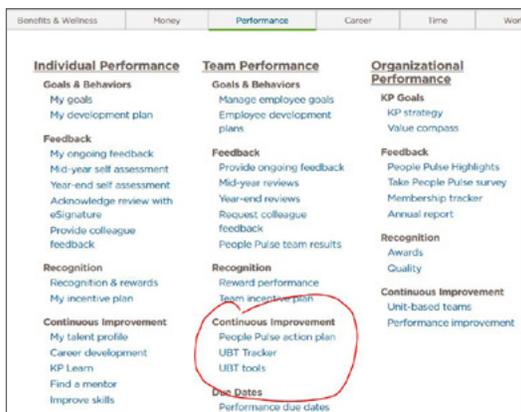
[What is Web Single Sign-on?](#)

[Privacy practices](#)

Once you have logged in to My HR, verify you are logged into the correct region.



1. Click on the [Performance](#) Tab Under the Team Performance heading, look for the Continuous Improvement sub-heading. The link to UBT Tracker is there.

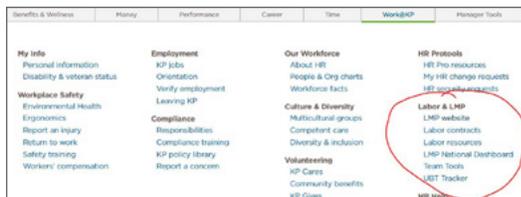


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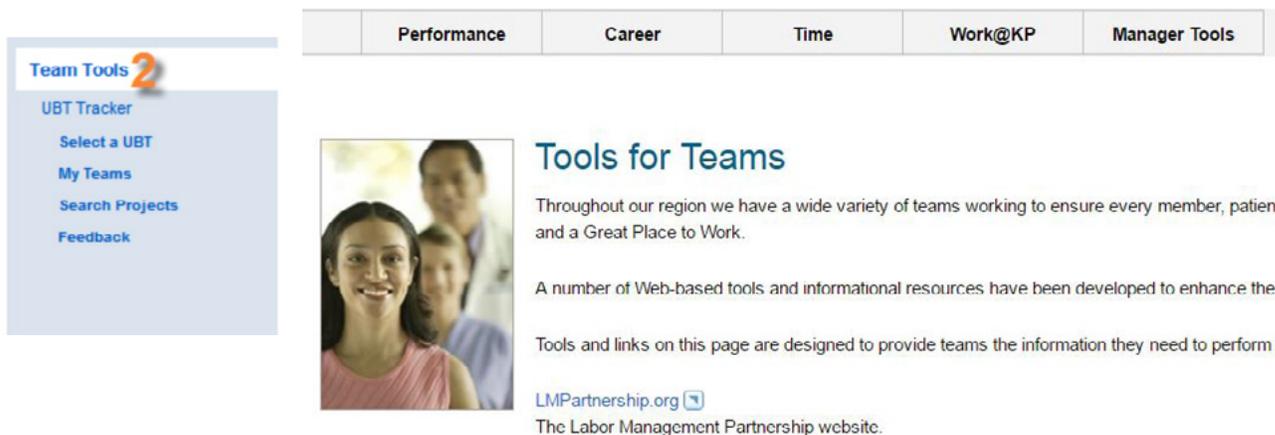


UBT Tracker: Logging In *continued*

Alternatively, click on the **Work@KP** tab. Under the Labor & LMP heading, you will see a link to UBT Tracker.



2. Click **Team Tools** link.



The *Team Tools* page appears. This page presents links to information and resources specific to your region.



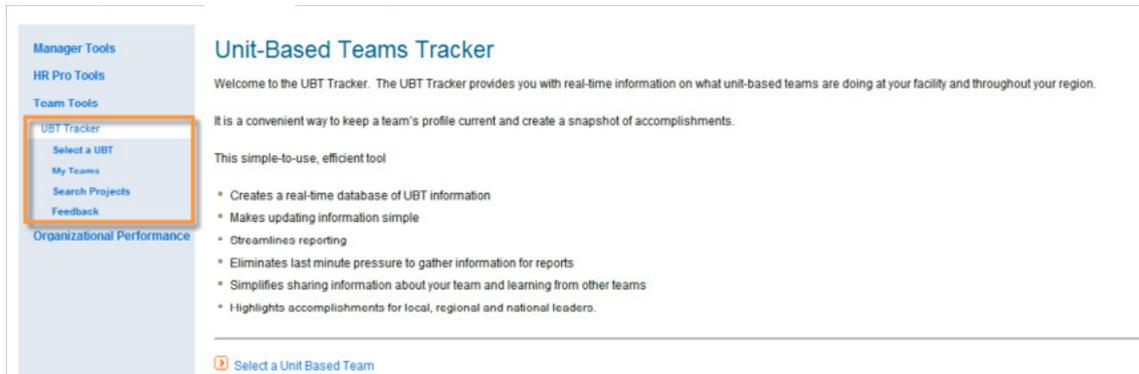
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UBT Tracker: Logging In *continued*

UBT TRACKER MENU

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 (e.g., Add UBT Profile) only will display for administrators (see Part III).



Below is a helpful summary of the key features of the four UBT Tracker menu options available to most users:

Warning: When navigating in the UBT Tracker, do not use the Back button from your Internet browser in order to avoid undesired results.





Part I: Looking at Data in UBT Tracker

UBT Tracker contains records on thousands of unit-based teams and thousands of performance improvement projects. Users can track individual teams or search for particular types of projects and tests of change. The system is designed to support better sharing of effective practices across Kaiser Permanente. UBT Tracker can be of particular help for team sponsors and consultants who are trying to support multiple teams.

These sections help users track individual teams or search for particular types of projects or tests of change.



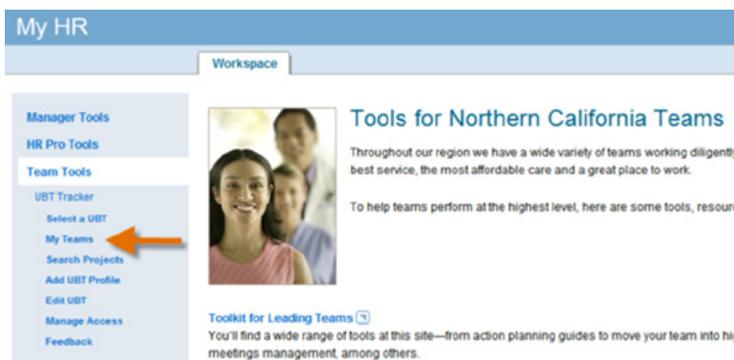


View My Teams Page

The My Teams page allows you to track teams in which you have a role (e.g., member, co-lead, sponsor, consultant, proxy, etc.). 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.

LIST YOUR TEAMS

1. Click on **My Teams** on the UBT Tracker menu (located in the middle left side of your page). *The results will display a list of teams with which you are associated.*



List of teams:

- A. You are able to sort the list of results by clicking in each column header.
- B. The **View Details** column allows you to navigate to **Projects**, **Members** or **History** of a team.
- C. The **Select a Report** button allows you to export reports, or view team summary and detail information in a new window (see pages 3.1-3.2 for more information).
- D. Buttons in the first column allow you to add or remove a team on your My Teams page. You can track projects and changes to teams through the My Teams page.

The screenshot shows the 'My Teams' page with a table of teams. The table has the following columns: ID, Name of UBT, Team Rating, GL String, Entity, Area, Location, Cost Center, Shift, and View Details. The first row is highlighted, and a dropdown menu is open for the 'View Details' column, showing options for Select, Projects, Members, and History. A 'Select a Report' dropdown is also visible on the right side of the table.

ID	Name of UBT	Team Rating	GL String	Entity	Area	Location	Cost Center	Shift	View Details
1529	UAT - 2nd floor PCS	4	08-002-0474	08	Regional Offices	BERKELEY CAMPUS	6474-CHRGCTHNVCS-NO ADMIN	Evening	Select Projects Members History
1538	Admitting Dept	3	01-014-5331	01	Greater Southern Alameda	HAYWARD	5331-Admitting	All	Select a Report



Tracking Teams—Adding Teams to My 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 what they do with it. Or you could track teams in similar departments in other medical centers and facilities.

ADD A TEAM TO YOUR MY TEAMS PAGE

1. Using [Search Projects](#) or [Select a UBT](#), select the team you are interested in.
2. Once you reach the Projects screen, a new gray button will appear that says [Add to My Teams](#).

The screenshot shows the 'Performance Improvement Projects' page. On the left is a navigation menu with options: 'Select a UBT', 'My Teams', 'Search Projects', 'Add UBT Profile', 'Edit UBT', 'Manage Access', and 'Feedback'. A red '1' is next to 'Search Projects'. The main content area has a header 'Performance Improvement Projects and Tests Of Change' with buttons for 'Members', 'History', and 'Add To My Teams'. A table below lists projects with columns: ID, Name of UBT, Service Type, Using Huddles, Date Team Established, and Team Rating. The first row shows ID 1576, Name of UBT CSP, Service Type ---, Using Huddles N, Date Team Established 1-5-2009, and Team Rating 1 - Pre-Team Climate. Below the table is a 'Performance Improvement Projects' section with tabs for 'Project Details', 'Test Of Change Details', and 'Test Data'. A 'Project Reports & Exports' dropdown is on the right. Under 'Project Details', there are links for 'Add new Project' and 'Edit this Project'. A table shows project details: Focus Area (Other), Value Compass (Other), Start Date (1-5-2009), Completed Date (Project status is Active. No Completed Date), Status (Active), Our SMART Goal (7.89 days/TFTE), Performance Metric (Other), PSP Goal? (N), Data Source for Metric (Other), Results (Results Pending), and Describe Results (Improving- 13.48 in Jan. In August - 5.99).

3. Click on the [Add to My Teams](#) button. *A dialogue box will pop up confirming your choice.*

Continued on next page



Tracking Teams—Adding Teams to My Teams *continued*

Performance Improvement Projects and Tests Of Change

ID	Name of UBT	Service Type	Using Huddles	Date Team Established	Team Rating
1576	CSP	---	N	1-5-2009	1 - Pre-Team Climate

UBT Tracker System
Team has been added to your My Teams page

3

Performance Improvement Projects

Focus Area	Other	Value Compass	Other
Start Date	1-5-2009	Completed Date	Project status is Active. No Completed Date
Our SMART Goal	7.89 days/PFTE		
Performance Metric	Other	PSP Goal?	N
Data Source for Metric	Other		
Results	Results Pending		
Describe Results	Improving- 13.48 in Jan. In August - 5.89		
Using RIM / POEA?	N		
Learnings or Successful Practices			

DELETE A TEAM FROM YOUR MY TEAMS PAGE

Teams added to your My Teams page can be deleted. These teams will show up on your My Teams page with a red icon to the left of the team (see item 2 below).

- Using the My Teams page, **select the team** you are interested in.
- Click on the **red icon**.

My Teams

Teams with which you are associated

10 Teams found

Click column header to sort

ID	Name of UBT	Team Rating	GL String	Entity	Area	Location	Cost Center	Shift	View Details
1529	UAT - 2nd floor PCS	4	08-002-6474	08	Regional Offices	BERKELEY CAMPUS	6474-CNSRCTNSVCS-HO ADMIN	Evening	- Select -
1538	Admission Dept	3	01-008-0214	01	Greater Southern Alameda	HAYWARD	0214-Med/Surg - Unit 4	All	- Select -

- Confirm your decision by clicking **Remove** when the dialogue box pops up.

UBT Tracker System

Do you want to remove this team from your My Teams page?

Remove Cancel



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.

The screenshot shows a web browser window displaying the 'My HR' interface. The main content area is titled 'My Teams' and shows a table of teams with columns for ID, Name of UBT, Team Rating, GL String, Entity, Area, Location, Cost Center, and Shift. A dropdown menu labeled 'Select a Report' is open, showing options: Team Summary, Team Details, Export GL Data (CSV), Export Roles (CSV), Export PP History (CSV), Export PP Details (CSV), Export Test of Change (CSV), Export Test Data (CSV), and Export UBT Details (CSV). The table contains 7 teams, with the first two rows highlighted in blue and yellow.

ID	Name of UBT	Team Rating	GL String	Entity	Area	Location	Cost Center	Shift
1538	Admitting Dept	3	01-014-0331	01	Greater Southern Alameda	HAYWARD	5331-Admitting	All
1000	Dermatology	1	00-014-5830	00	Greater Southern Alameda	HAYWARD	5830-Dermatology	All
1538	Admitting Dept	3	01-014-0331	01	Greater Southern Alameda	HAYWARD	5331-Admitting	All
1000	Dermatology	1	00-014-5830	00	Greater Southern Alameda	HAYWARD	5830-Dermatology	All

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 (see next page), 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.

Continued on next page



Viewing Team Reports *continued*

https://epf.qa.kp.org/reportIdentifier=teamsummary?pageid=ubtReportIdMyTeams - UBT Tracker - T - Windows Internet Explorer

Close Window Print Report

September 3, 2010

Team Summary Report

Id	Name of UBT	Center	Location	Service Type	Huddles	Established	Team Rating	Last Updated	Updated By
1538	Admitting Dept	Hayward	HAYWARD		N	06-Jan-09	3 - Transitional	26-Aug-10	Aguilera Jill

Sponsors	Consultants	Co-Leads	Proxies	Representatives
Isabel Smith BEVERLY GAITAN	Rooelio E Clarke Ena Camarena	Ermebil San Juan Bacud testempl Franklin Bridgette L Garner Mylnka Donsay Jarama TRACY SEO Elizabeth De Leon	Edward N. Porter	Deborah R. Emmitt Courtney Michelle Gonzalez Chevon B Mayes

Project ID	Project Name	Focus Area	Metric	PSP Goal	Result	Last Updated	Updated By	Start Date	End Date	Status
3512	Improve Inpatient CoPay Collection	Revenue Capture	Increase POS Co-Pay Collection (Collection Rate)	N	Some Measurable Progress	01-Sep-10	B136345	04-Aug-10		Active
3475	NewTestLinkDoesNotWork	Cost Management (including Attendance)	Missed Meals and Breaks (% total payroll dollars)	Y	No Results Reported	23-Aug-10	B136345	23-Aug-10		Active
3233	Coding workflow	Other	Other	N	No Measurable Progress	04-Feb-10	F546292	21-May-09	28-May-09	Complete
3245	Improve bathroom and room cleanliness	Inpatient Satisfaction	Improve Room / Bathroom Cleanliness (% always)	N	Some Measurable Progress	11-Jan-10	F546292	05-May-09		Active

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

https://epf.qa.kp.org/reportIdentifier=teamedetails?pageid=ubtReportIdMyTeams - UBT Tracker - T - Windows Internet Explorer

Close Window Print Report

September 7, 2010

Team Detail Report

Id	Name of UBT	Center	Location	Service Type	Huddles	Established	Team Rating	Last Updated	Updated By
1529	UAT - 2nd floor PCS	Mult	Mult	Inpatient	N	18-Jun-09	4 - Unit Based Team	28-Jul-10	Paussa Valentino Charles

Sponsors	Consultants	Co-Leads	Proxies	Representatives
Taneka E Johns Matilde R Paulero Patrice L Cole	Lydell L Rider Sara Wiklund Ross	None	Gina D Garrett Chevon B Mayes Willberta Georgiadis	Denise Lynn Foster

Performance Improvement Project	J266-UAT - Canton Hospital - Doses Administered between ADE									
Focus Area	No Harm		Value Compass					Status		Active
Start Date	07-Aug-09		Complete Date							
Last Updated	20-Aug-10		Updated By			Y410184				
Our SMART Goal										
Performance Metric				PSP Goal ?			N			
Data Source for Metric				Using RIM ?						
Results	Results Pending									
Describe Results										
Learnings										

Performance Improvement Project	3269-UAT - Canton Hospital - Falls in Rooms									
Focus Area	No Harm		Value Compass					Status		Active
Start Date	10-Aug-09		Complete Date							
Last Updated	17-Aug-10		Updated By			Y410184				
Our SMART Goal										
Performance Metric				PSP Goal ?			N			
Data Source for Metric				Using RIM ?						
Results	Results Pending									
Describe Results										
Learnings										



Select a UBT

You can use the Select a UBT function to search for UBTs by geographic area (Area, Center, Location), by Cost Center 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 page 2.1).

1. Click **Select a UBT** from the Team Tools directory.
The Region auto-populates with your region.
2. Click the **Area drop-down menu** and **select your Area**.
3. Click the **Center drop-down menu** and **select your Center**.
4. Click the **Location drop-down menu** and **select your Location**.
5. Click the **Search** button.

The screenshot shows the 'List Unit Based Teams' interface. On the left is a navigation menu with 'Manager Tools', 'HR Pro Tools', 'Team Tools', and 'UBT Tracker'. Under 'Team Tools', 'Select a UBT' is highlighted with a red box and the number 1. The main content area has a 'Filter Results' section with the following elements: 'Region' (Northern California), 'Area' (All), 'Location' (All), 'Entity' (All), 'Center' (All), and 'CostCenter' (All, 0001 - Regional Doctors, 5000 - Area Administration, 5001 - Patient Care Svcs). A 'Find by UBT Name' search box is at the bottom. The 'Search' button is highlighted with a red box and the number 5. Other callouts include 2 for the Area dropdown, 3 for the Center dropdown, and 4 for the Location dropdown.

Continued on next page



Select a UBT *continued*

OR

IF YOU KNOW THE NAME OF YOUR UBT:

1. Click **Select a UBT** from the Team Tools directory.
2. Click in the **Find by UBT Name** field and **enter your UBT name**.
The UBT Tracker uses completion matching to locate the name so you only need to type a few letters of the UBT name to receive a match.

Hint: If you are unsure about the exact name, don't search for the full name, because you may not find that team. Try using part of the name.

3. Click the **Search** button.

The screenshot shows the 'List Unit Based Teams' interface. On the left, a sidebar contains 'Manager Tools', 'HR Pro Tools', 'Team Tools', and 'UBT Tracker'. Under 'UBT Tracker', 'Select a UBT' is highlighted with a red box and a '1'. The main content area has a 'Filter Results' section with dropdown menus for Region (Northern California), Area (All), Location (All), Entity (All), Center (All), and CostCenter (All). Below these is a 'Find by UBT Name' field, which is highlighted with a red box and a '2'. At the bottom of the filter section, the 'Search' button is highlighted with a red box and a '3', along with a 'Refine Search' button.



Search for a Performance Improvement Project

UBT Tracker allows you to search for performance improvement projects in your region. You can search by Location (including Cost Center), Focus Area or Metric. 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 across the region.

1. Click **Search Projects** from the Team Tools directory.
The Region auto-populates with your region.
2. You can **filter your search by location** by choosing from the **Region, Entity, Area, Center, or Cost Center drop-downs**. For example, an EVS team working in one medical center can search projects from EVS teams in other medical centers by searching all teams in cost center 5321-Housekeeping.
3. You can also filter your search by type of project by choosing from the **Focus Area or Metric drop-downs**.
This will bring up all projects dealing with a particular Focus Area or Metric.
4. You can also use the **Results** and **Test of Change Rating drop-downs** to filter your search by projects and tests of change that were rated as successful by the teams.
A list of projects will populate.
5. Click the **Project** you are interested in viewing.
 - A. The **Select Report** button allows you to export reports, or view team summary and detail information in a new window (see pages 3.1-3.2 and 16.2-16.3).

Continued on next page



Search for a Performance Improvement Project *continued*

My HR

Workspace

Search Projects

Search Performance Improvement Projects

Region: Northern California

Area: All

Location: All

Focus Area: All

Metric: All

Results:

- No Results Reported
- No Measurable Progress
- Results Pending
- Some Measurable Progress
- Target Achieved
- Target Achieved >= 6 mos

Test Of Change Rating:

- 0 Inrated
- 1 Unsuccessful
- 2 Neutral
- 3 Successful

Entity: All

Center: All

Cost Center (Ctrl-Click to select multiple):

- All
- 0001 - Regional Doctors
- 5000 - Area Administration
- 5001 - Patient Care Svcs
- Value compass
- All

1516 Projects found. Click column header to sort

ID	UBT Name	Team Rating	Center Name	Location Name	Name of Project	Focus Area	Metric	Results	Select a Report
1529	UAT - 2nd floor PCS	Unit Based Team			Attendance	Other	Other	J3 Results Pending	Team Summary
		Unit Based Team			UAT - Canton Hospital - Falls in Rooms	No Harm	Prevent Falls (Incidence Rate / 1000 Patient Days)	J3 Results Pending	Team Details
		Unit Based Team			UAT - Clinton Hosp Knee, Hip & Spine	Inpatient Satisfaction	Improve Admitting Satisfaction (%)	J1 No Results Reported	Export PP History (CSV)
									Export PP Details (CSV)
									Export Test of Change (CSV)
									Export Test Data (CSV)

This will take you to the Project screen for the team that did the project.

Performance Improvement Projects

Performance Improvement Projects and Tests Of Change

ABOUT THIS UBT: Members | History

ID	Name of UBT	Service Type	Using Huddles	Date Team Established	Team Rating
1529	UAT - 2nd floor PCS	Inpatient	N	6-18-2009	4 - Unit Based Team

Performance Improvement Projects

26 to 30 of 40 page 6 of 8 Team Reports & Exports

Status	Last Updated	Start Date	Name Of Project	Focus Area	Performance Metric
Active	5-16-2009	1-5-2009	Attendance	Other	Other
Active	5-16-2009	1-5-2009	Workplace Safety	Other	Other
Active	5-16-2009	1-5-2009	Attendance	Other	Other
Active	5-16-2009	1-5-2009	Improve Admission Factor Target	Other	Other
Active	5-16-2009	1-5-2009	Improving Compliance around Admissions	Other	Other

Project Reports & Exports

Project Details | Test Of Change Details | Test Data

Performance Improvement Projects	Attendance
Focus Area	Other Value Compass Other
Start Date	1-5-2009 Completed Date Project status is Active. No Completed Date Status Active
Our SMART Goal	9.0 days/per FTE
Performance Metric	Other PSP Goal? N

For more information on how to view performance improvement projects and tests of change, see the next section.



Viewing Performance Improvement Projects

One of the most useful features in UBT Tracker is the ability to view performance improvement projects. Looking at what other teams are working on is a great way for UBTs to avoid reinventing the wheel.

VIEWING PROJECTS

After you navigate to a UBT's Project page (see previous section), you will see a list of projects in the middle box on the page. **Clicking on a project** highlights it in yellow and displays the information about that project in the Project Details tab in the bottom box (see screenshot below).

The screenshot shows the 'My HR' workspace with a search bar and a 'Bookmark this page' link. The main content area is titled 'Performance Improvement Projects and Tests Of Change'. It features a table with the following data:

ID	Name of UBT	Service Type	Using Huddles	Date Team Established	Team Rating
1	Unit Assistants and Department Secretaries	Inpatient	N	8-16-2010	2 - Foundational

Below the table, there are tabs for 'Project Details', 'Test Of Change Details', and 'Test Data'. The 'Project Details' tab is selected and highlighted in yellow. It displays the following information for the 'Workplace Safety' project:

Performance Improvement Projects	Workplace Safety		
Focus Area	Employee Well-Being (including Workplace Safety)	Value Compass	Best Place to Work
Start Date	6-1-2009	Completed Date	Project status is Active. No Completed Date
Our SMART Goal	Reduce work related injuries on the 3rd floor.		
Performance Metric	Improve Workplace Safety (reduce # accepted claims)	PSP Goal?	N
Data Source for Metric	WPS Reports or WEISS		
Results	Results not Available		
Describe Results			
Using RIM / PDSA?	Y		
Learnings or Successful Practices	Using RIM within TCAB.		
Set Up Chart Labels			
Numerator Label (Top)		Denominator Label (Bottom)	
Calculated Value Label (Top/Bottom)		Additional Variable Label	
Instructions	The Chart Label Fields are for configuring what data you want to collect and chart for a Test of Change. The Calculated Value is the value you want to track and chart, and is calculated by dividing the Numerator (top number) by the Denominator (bottom number). Use the fields above to label your Numerator, Denominator and Calculated Value. The additional Variable is not usually used without the help of an Improvement Advisor.		
Example	If you wanted to track percent on-time delivery, you would enter '# of on-time deliveries' in the Numerator, and 'total deliveries' in the denominator, and '% on-time' in the Calculated Value. These data labels will appear in the data entry table and the final chart, and the system will plot the % on-time deliveries by date.		

Continued on next page



Viewing Performance Improvement Projects *continued*

THE PROJECT DATA IS ORGANIZED INTO A NUMBER OF FIELDS AS FOLLOWS:

Performance Improvement Project: Project title.

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.

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

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 "Completed."

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

Performance Metric: Each region establishes its own set of performance metrics for teams to choose from. These metrics are tied to specific Focus Areas.

PSP Goal: If a particular metric is tied to the region's PSP goals, this flag will read "Y."

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

Describe Results: Teams use this field to describe results in more detail.

Using RIM/PDSA: Teams indicate whether they used the RIM/PDSA method.

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

Set Up Chart Labels: This section is used by teams to define an outcome metric for the project and track it using the Test Data tab (see page 15.2-15.4).

Continued on next page



Viewing Performance Improvement Projects *continued*

PRINTING REPORTS ON PROJECTS

There are several options for printing reports on a team’s projects.

For a printout of a single project, choose **Print Project Record** from the drop-down menu on the far right-hand side of the Project Details tab.

The screenshot shows the 'Performance Improvement Projects' interface. At the top, there's a table listing projects. Below it, a 'Project Details' tab is selected for a project titled 'Workplace Safety'. A dropdown menu on the right side of the details view is open, showing options: 'Print Project Record', 'Test Data Charts', and 'Export Test Data (CSV)'. An orange arrow points from the 'Print Project Record' option in the dropdown to a 'Print Project' button in a separate window that displays the full project details.

ID	Name of UBT	Service Type	Using Huddles	Date Team Established	Team Rating
1	Unit Assistants and Department Secretaries	Inpatient	N	8-16-2010	2 - Foundational

Performance Improvement Projects		Workplace Safety	
Focus Area	Employee Well-Being (including Workplace Safety)	Value Compass	Best Place to Work
Start Date	6-1-2009	Completed Date	Project status is Active. No Completed Date
Our SMART Goal	Reduce work related injuries on the 3rd floor.		
Performance Metric	Improve Workplace Safety (reduce # accepted claims)	PSP Goal?	N

For a printout of all the projects a team is working on, scroll up to the middle box on the screen, which lists the Performance Improvement Projects. You can choose a **Summary Report** or a **Details Report**, which follows the same format found on pages 3.1-3.2.

VIEWING PROJECT CHARTS

UBT Tracker allows teams to define an outcome metric associated with the project and then to track the impact of multiple Tests of Change on that metric. Instructions for viewing the charts can be found on pages I6.1-I6.3.



Viewing Tests of Change

PRINTING REPORTS ON PROJECTS

The Rapid Improvement Mode (a.k.a. Plan, Do, Study, Act or PDSA) assumes teams will try a lot of different things 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.

You can view Tests of Change associated with a project by navigating to that project on the Performance Improvement screen (see page 6.1).

Once you have the project called up in the window on the bottom of the page, click the **Test of Change** details tab. The tab will display as follows:

The screenshot shows the UBT Tracker interface. At the top, there's a navigation bar with 'My HR', 'Home', 'KP & file', 'Workspace', and 'ABOUT HR'. A search bar is on the right. A left sidebar contains 'Manager Tools', 'HR Pro Tools', 'Team Tools', 'UBT Tracker', 'Select a UBT', 'My Teams', 'Search Projects', 'Feedback', and 'Organizational Performance'. The main content area is titled 'Performance Improvement Projects' and contains a table of projects. The first project is 'Unit Assistants and Department Secretaries' with a rating of '2 - Foundational'. Below this, there's a section for 'Performance Improvement Projects' with tabs for 'Project Details', 'Test Of Change Details', and 'Test Data'. The 'Test Of Change Details' tab is active, showing details for a 'Workplace Safety' project. The details include a description of the test, the outcome 'Results Pending', and a rating of '2'. At the bottom, there's a table with columns for 'Date Last Updated', 'Test Of Change', and 'Rating'. The table shows one entry: '1-19-2010', 'Each bed will start using velcro', and '2-Neutral'.

A list of Tests of Change appears on the left. Clicking on a Test of Change will display that Test of Change in the window on the left. There are three fields in the Test of Change window as follows:

Details: 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



Part II: Managing Team Membership and Data

UBT Tracker is a wonderful source of ideas for improving performance on all four points of the Value Compass. In addition to capturing individual team activity, UBT Tracker allows teams to view what other teams in the region are working on. Thus, teams can learn from the good ideas of others.

UBT Tracker is only as useful as the information that is entered into it. Detailed and complete information in the team and project records creates useful information for others who want to learn from that team's experiences.

These sections walk you through the steps involved in managing team membership and roles and in creating records of performance improvement projects and tests of change.





Edit Member Details

Once you have created a UBT profile and added members to it, you can indicate the role each member plays on the team (e.g., co-lead). If you have a large UBT governed by a representative team, you can indicate which members serve on that team. If there are members who have been added automatically to your Cost Center but who are not, in fact, on your team, you can choose Excluded from the drop-down menu.

Note that co-leads or a team member who has been designated a proxy may edit member details.

LOCATE YOUR UBT

1. Click the **drop-down menu** in the View Details column.
2. Choose **Members** from the list.

ID	Name of UBT	Team Rating	GL String	Entity	Area	Location	Cost Center	Shift	View Details
1538	Admitting Dept	3	01-014-5331	01	Greater Southern Alameda	HAYWARD	5331-Admitting	All	- Select - Select - Projects Members History
1552	Allergy	1	00-014-5800	00	Greater Southern Alameda	HAYWARD	5800-Allergy	All	
1553	Allergy	1	00-016-5054	00	Greater Southern Alameda	FHELMUNI	5004-Infectious Diseases	All	

The UBT Detail window appears.

Continued on next page



Edit Member Details *continued*

3. Scroll down to locate the member names.
4. Click the **Member Status drop-down** menu to the right of the member name.
5. Select **Co-lead**, **Excluded**, **Member**, **Representative** or **Proxy**.

Edit	ID	Name of UBT	Date Team Established	Team Rating	Service Type	Using Huddles	Default Membership
	1538	Admitting Dept	1-5-2009	3-Transitional		No	Yes

GL String	Entity	Location	Cost Center	Shift	# Employees
01-014-5331	01-KFH	014-HAYWARD	5331-Admitting	All	17

UBT Membership Summary	Defaulted	Manually Added	Total
Team Co-Leads and Proxy	4	3	7
Team Representative	2	1	3
Team Members (Total - Excluded)	11	4	15
Defaulted Members Excluded	2	n/a	n/a
Team Sponsors	0	2	n/a
Team Consultants	1	1	n/a
Total			26

Defaulted Members | Manually Added Members | Add Members

View 20 Employees per Page | 1 to 19 of 19 | page 1 of 1

Last Name	First Name	NUID	Union Code	CKPU	Team Role
Bacud	Eyebil San Juan	B721851	A04	Y	Co-Lead
Camarena	Ena	M879285	A04	Y	Co-Lead
De Leon	Elizabeth	L678585	A04	Y	Co-Lead
Dorsey James	Myoka	S760305	NUE	N	Co-Lead
Emmitt	Deborah R.	O624134	A04	Y	Representative



Add Members From Other Cost Centers

UBT Tracker allows you to add members to your team from other Cost Centers without bringing all the employees in that Cost Center into your team. This is also the way you assign Sponsors and Consultants to a team.

Navigate to the UBT Details page:

1. Click the tab labeled **Add Members**.
2. Enter both the **Last Name** and **First Name** of the person to be added in the fields.
3. Click the **Search** button.

Add	Last Name ▲	First Name ▲	NUID	Location	Union Code	CKPU
	Gonzalez	Jose G		063 SAN JOSE	A01	Y
	Gonzalez	Jose Santiago		035 SOUTH SAN FRANCISCO	A01	Y
	Gonzalez	Jose Roberto		044 SANTA CLR-HOMESTEAD	A01	Y

4. Click the **button** next to the name of person to be added.

Once the person has been added to the team, he/she will show up under the **Manually Added Members** tab. Click on this tab to edit the Member Status using the drop-down menu.

You can use this process to **add a Sponsor** or a **Consultant** to a team. Simply choose one of those options from the drop-down menu.

Last Name ▲	First Name ▲	NUID	Union Code	CKPU	Member Status
Mayes	Chevion B	Q695562	NUE	N	Consultant



Adding Physicians to Teams

With Release 2b of UBT Tracker, unit-based teams now can add their physician members to their membership rosters.

Physicians can be added in one of two ways, automatically and manually.

Physicians are automatically added to teams in cases where physicians and employees reside in the same four-digit Cost Center.¹ When a team is created (see page 17.1), the administrator links a set of General Ledger accounting strings (a.k.a. GL Strings) to the team to populate the team membership roster. If the Cost Centers (the four-digit code at the end of the string) contains physicians as well as employees, those physicians will be pulled into the team automatically. Physicians are identified with a three-letter code corresponding to their medical group as follows:

OPM	Ohio PMG
TPM	Northern California PMG
PRM	Program Office PMG
NWP	Northwest PMG
HPM	Hawaii PMG
GPM	Georgia PMG
SCP	Southern California PMG
CPM	Colorado PMG
MAP	Mid-Atlantic PMG

However, in cases where physicians and employees do not reside in the same four-digit Cost Centers, physicians need be added manually as though they were members from other Cost Centers. To do this, follow the directions on page 9.1 and search for the physician name as you would any other employee.

¹ This feature is not enabled in the Northern California region; physicians there must be added to teams manually.



Add a Performance Improvement Project

UBT Tracker allows you to track your team's performance improvement projects. The forms are based on the Rapid Improvement Model/Plan, Do, Study, Act approach. You begin by creating a project and identifying a desired outcome. Then record the various small tests of change you tried to achieve the outcome.

Follow the steps below to create a performance improvement project. Only a co-lead or a designated proxy may enter this data.

1. Click **Select a UBT**.
2. Locate your UBT by **Filter Results** or **Find by UBT Name**.
3. Select **Projects** from the drop-down menu to the right.

The screenshot shows the 'My HR' workspace with a search bar and a 'Workspace' tab. On the left, there is a 'Team Tools' sidebar with 'UBT Tracker' selected. The main area is titled 'List Unit Based Teams' and contains a 'Filter Results' section with dropdowns for Region (Northern California), Area, Location, and Entity. A 'Find by UBT Name' search box is also present. Below the filters, a table displays 721 teams found. The table has columns for ID, Name of UBT, Team Rating, GL String, Entity, Area, Location, Cost Center, Shift, and View Details. A dropdown menu is open over the 'View Details' column for the first row, showing options like 'Select', 'Projects', 'Members', and 'History'. Red numbers 1, 2, and 3 are overlaid on the interface to indicate the steps described in the text.

ID	Name of UBT	Team Rating	GL String	Entity	Area	Location	Cost Center	Shift	View Details
1529	UAT - 2nd floor PCS	4	01-059-5214	01	North Valley	ROSEVILLE	5214-Med-Surg - Unit 4	All	- Select -
		4	08-002-6474	08	Regional Offices	BERKELEY CAMPUS	6474-CHSRCTNSVCS-HO ADMIN	Evening	Projects
1080	Suit 1 Operating Room	3	09-012-5192	09	East Bay	RICHMOND	0102-SURG-BARRA1 RSL	All	Members
1531	AACC Vallejo	3	09-085-5321	09	AACC/Call Center	AACC - VALLEJO	5321-Housekeeping	All	History

The Performance Improvement Projects screen appears.

- A. Note that you are able to navigate through the pages of Performance Improvement Projects by selecting the page number in the page drop-down.

Continued on next page



Add a Performance Improvement Project *continued*

Performance Improvement Projects

Performance Improvement Projects and Tests Of Change ABOUT THIS UBT
Members History

ID	Name of UBT	Service Type	Using Huddles	Date Team Established	Team Rating
1529	UAT - 2nd floor PCS	Inpatient	N	6-18-2009	4 - Unit Based Team

Performance Improvement Projects

1 to 5 of 40 page 1 of 8 Team Reports & Exports

Status	Last Updated	Start Date	Name Of Project	Focus Area	Performance Metric
Active	8-20-2010	8-7-2009	UAT - Canton Hospital - Doses Administered between ALIC	No Harm	Reduce Hospital Acquisitions (Infection Rate)
Active	8-17-2010	8-10-2009	UAT - Canton Hospital - Falls in Rooms	No Harm	Prevent Falls (Incidence Rate / 1000 Patient Days)
Active	8-17-2010	9-9-2009	UAT - Canton Hospital Cardiac Arrests Outside of ICU	No Harm	Reduce Hospital Acquired Infections (Infection Rate)
Active	8-17-2010	9-15-2009	UAT - Clinton Hosp Knee, Hip & Spine Replacement	Inpatient Satisfaction	Improve Admitting Satisfaction (% Avatar Factor Score)
Active	8-17-2010	11-3-2009	UAT - Canton Inpatient Admissions	Hospital Patient Flow	Improve Inpatient Bed Turnaround Time (% leaving ED in under 60 minutes)

Project Details | Test Of Change Details | Test Data Project Reports & Exports

Performance Improvement Projects	UAT - Canton Hospital - Doses Administered between ALIC
Focus Area	No Harm
Value Compass	Best Quality Care
Start Date	8-7-2009
Completed Date	Project status is Active. No Completed
Status	Active

B. Select the [Click Here to Add a Project](#) button to add the first project (only for the first project).

Performance Improvement Projects

Performance Improvement Projects and Tests Of Change ABOUT THIS UBT
Members History Add To My Teams

ID	Name of UBT	Service Type	Using Huddles	Date Team Established	Team Rating
1765	Musculoskeletal Department	---	N	1-5-2009	1 - Pre-Team Climate

No Performance Projects added to the above selected team.

[Click here to Add a Project](#)

After the 1st project:

4. Scroll down to view the [Project Details](#) tab.
5. Click [Add new Project](#).

Continued on next page



Add a Performance Improvement Project *continued*

Performance Improvement Projects

Performance Improvement Projects and Tests Of Change ABOUT THIS UBT
[Members](#) [History](#)

ID	Name of UBT	Service Type	Using Huddles	Date Team Established	Team Rating
1538	Admitting Dept	---	N	1-5-2009	3 - Transitional

Performance Improvement Projects

1 to 4 of 4 page 1 of 1 Team Reports & Exports

Status	Last Updated	Start Date	Name Of Project	Focus Area	Performance Metric
Active	9-1-2010	8-4-2010	Improve Inpatient CoPay Collection	Revenue Capture	Increase POS Co-Pay Collection (Collection Rate)
Active	8-23-2010	8-23-2010	NewTestLinkDoesNotWork	Cost Management (including Attendance)	Missed Meals and Breaks (% total payroll dollars)
Complete	2-4-2010	5-21-2009	Coding workflow	Other	Other
Active	1-11-2010	5-5-2009	Improve bathroom and room cleanliness	Inpatient Satisfaction	Improve Room / Bathroom Cleanliness (% always)

Project Reports & Exports

Project Details | Test Of Change Details | Test Data

5 [Add new Project](#) [Edit this Project](#)

Performance Improvement Projects: Improve Inpatient CoPay Collection

Focus Area: Revenue Capture | Value Compass: Affordable

Start Date: 8-4-2010 | Completed Date: Project status is Active. No Completed Date | Status: Active

Our SMART Goal: Improve Copay collection rate from 75% to 95% by October 1st.

Performance Metric: Increase POS Co-Pay Collection (Collection Rate) | PSP Goal?: N

Data Source for Metric: F-UOI Report | [Data Charts](#)

Results: Some Measurable Progress

Describe Results:

Using RIM / PDSA?: Y

Learnings or Successful Practices:

Set Up Chart Labels

Numerator Label (Top): Co Pays Collected | Denominator Label (Bottom): Registered Patients

Calculated Value Label (Top/Bottom): CoPay Collection | Additional Variable Label: DO NOT USE

Instructions: The Chart Label Fields are for configuring what data you want to collect and chart for a Test of Change. The Calculated Value is the value you want to track and chart, and is calculated by dividing the Numerator (top number) by the Denominator (bottom number). Use the fields above to label your Numerator, Denominator and Calculated Value.

The additional Variable is not usually used without the help of an Improvement Advisor.

Example: If you wanted to track percent on-time delivery, you would enter 'If of on-time deliveries' in the Numerator, and 'total deliveries' in the denominator, and '% on-time' in the Calculated Value. These data labels will appear in the data entry table and the final chart, and the system will plot the % on-time deliveries by date.

Enter the Performance Improvement Project details:

6. Enter the name in the **Performance Improvement Project** field.
7. Select the **Start Date** field.
8. Select the **Focus Area** from the drop-down menu.
9. Enter your **SMART Goal**.

Continued on next page



Add a Performance Improvement Project *continued*

Performance Improvement Projects

Performance Improvement Projects and Tests Of Change ABOUT THIS UBT
Members History

ID	Name of UBT	Service Type	Using Huddles	Date Team Established	Team Rating
1538	Admitting Dept	---	N	1-5-2009	2 - Foundational

Performance Improvement Projects Project Reports & Exports

Project Details | Test Of Change Details | Test Data

* Performance Improvement Project * Start Date Completed Date

* Focus Area Value Compass Status
 -select- Select Focus Area to view Value Compass Active

Our SMART Goal 1074 characters left

- select-
- Cost Management (including Attendance)
- Employee Well-Being (including Workplace Safety)
- Hospital Patient Flow
- Inpatient Satisfaction
- No Harm
- Other
- Outpatient Satisfaction
- Prevention
- Revenue Capture

* Performance Metric * Data Source for Metric
 Select the Focus Area to get list of Performance Metrics Select the Performance Metric to get list of Data Source

- Select - - Select -

PSP Goal? KEY TIPS FOR SMART GOALS
 Select Focus Area to view PSP Goal

* Results Include specific target and deadline
 -select- Example: "We will improve [measure] to 87% by Q4-10"

Describe Results If metric is "Other," describe metric
 Example: "Coding Turn Around Time"

10. Select the applicable **Results** answer.
11. Use the **Describe Results** field to explain your results in more detail.
12. Select the applicable **Using RIM/PDSA?** answer.
13. Enter **Learnings or Successful Practices** in the field provided.
14. Click **Save**.

Note: There is a section at the bottom of the Performance Improvement Project screen under the heading Set Up Chart Labels. Use this section only if you intend to track data on your project using the Test of Change Data Series functionality. For instructions on how to do this, see the Test of Change Data Series section of this manual, Appendix C.

Continued on next page



Add a Performance Improvement Project *continued*

Results 10

Describe Results 11

- No Results Reported
- No Measurable Progress
- Results Pending
- Some Measurable Progress
- Target Achieved
- Target Achieved ~ 6 mos

1024 characters left

KEY TIPS FOR DESCRIBE RESULTS

Include baseline performance on the target metric
Example: "Baseline performance in Q2-09 is 75%"

Include current performance on target metric
Example: "Q3-09 is 77%"

Do not delete previously entered performance data

Include other measurable or observed results if relevant

Using RIM / PDSA? 12

Learnings or Successful Practices 13

1024 characters left

KEY TIPS FOR LEARNINGS OR SUCCESSFUL PRACTICES

Complete and enter a sentence that begins: "The most successful things we've tested so far are: 1)...."

Complete and enter a sentence that begins: "The biggest barriers we've encountered so far are [X & Y] and we have overcome them by...."

If providing updates over multiple time periods, place month/year or quarter/year at end of sentence in parentheses, by writing "(Mar09) or (Q1-09)"

Set Up Chart Labels

Numerator Label (Top) <input type="text"/>	Denominator Label (Bottom) <input type="text"/>
Calculated Value Label (Top/Bottom) <input type="text"/>	Additional Variable Label <input type="text" value="DO NOT USE"/>

Instructions The Chart Label Fields are for configuring what data you want to collect and chart for a Test of Change. The Calculated Value is the value you want to track and chart, and is calculated by dividing the Numerator (top number) by the Denominator (bottom number). Use the fields above to label your Numerator, Denominator and Calculated Value.

The additional Variable is not usually used without the help of an Improvement Advisor.

Example If you wanted to track percent on-time delivery, you would enter '# of on-time deliveries' in the Numerator, and 'total deliveries' in the denominator, and '% on-time' in the Calculated Value. These data labels will appear in the data entry table and the final chart, and the system will plot the % on-time deliveries by date.

14



Edit a Performance Improvement Project

Periodically, you will want to update your project record to track what kind of progress you are making. Follow the steps below to update your projects. Only a co-lead or a designated proxy may enter this data.

From the Performance Improvement Projects page:

1. Click the **Performance Improvement Project** you wish to edit.

The details of the Performance Improvement Project appear.

2. Click **Edit this Project**.

The Performance Improvement Project screen opens for editing.

The screenshot shows the 'Performance Improvement Projects' interface. At the top, there is a header 'Performance Improvement Projects and Tests Of Change' with 'ABOUT THIS LIST' and 'Members History' links. Below this is a table with columns: ID, Name of UBT, Service Type, Using Huddles, Date Team Established, and Team Rating. The first row shows ID 1538, Name of UBT 'Admitting Dept', Service Type '---', Using Huddles 'N', Date Team Established '1-5-2009', and Team Rating '2 - Foundational'.

Below the table is a section titled 'Performance Improvement Projects' with a pagination bar showing '1 to 5 of 6' and 'page 1 of 2'. A 'Team Reports & Exports' dropdown is visible. A table lists projects with columns: Status, Last Updated, Start Date, Name Of Project, Focus Area, and Performance Metric. The first row is highlighted with an orange border and a red '1' icon in the Performance Metric column. The project name is 'Reduce Dept Incremental OT - Data is xyz format'.

Below the table is a section titled 'Project Details' with tabs for 'Project Details', 'Test Of Change Details', and 'Test Data'. A 'Project Reports & Exports' dropdown is visible. There are two buttons: 'Add new Project' and 'Edit this Project'. The 'Edit this Project' button is highlighted with an orange border and a red '2' icon.

The 'Project Details' section shows the following information:

Performance Improvement Projects	Reduce Dept Incremental OT - Data is xyz format		
Focus Area	Cost Management (including Attendance)	Value Compass	Affordable
Start Date	9-10-2010	Completed Date	Project status IS Active. No Completed Date
Our SMART Goal			
Performance Metric	Overtime (% total payroll dollars)	PSP Goal?	N
Data Source for Metric	LMP Dashboard	Data Charts	
Results	Some Measurable Progress		
Describe Results			

3. Enter the necessary edits.

*If you find no edits are needed, click **Cancel**.*

4. Click **Save**.



Add a Test of Change

UBT Tracker is designed to support the Rapid Improvement Model (RIM), also known as Plan, Do, Study, Act (PDSA). 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.

Follow the steps below to add a test of change:

1. Click **Test of Change Details** tab.
2. Click **Add New Test**.

	Date Last Updated	Test Of Change	Rating
	9-28-2010	Tracking our PP results	1- Unsuccessful
	9-13-2010	test this	2-Neutral
	9-10-2010	Target	3-Successful

The Details window appears.

3. Enter the details of your Test of Change in the field provided.
4. Enter the outcome of your Test of Change.
5. Select the applicable Rating.

	Date Last Updated	Test Of Change	Rating
	9-28-2010	Tracking our PP results	1- Unsuccessful
	9-13-2010	test this	2-Neutral
	9-10-2010	Target	3-Successful

6. Click **Save**.



Edit a Test of Change

Once you have created a test of change record, you can go back and edit it to provide additional information.

1. Click **Search for Projects**.
The details of the Performance Improvement Project appear.
2. Click the **Test of Change Details** tab.
3. Click the **Test of Change blue text**.

Performance Improvement Projects

Performance Improvement Projects and Tests Of Change

ID	Name of UBT	Service Type	Using Huddles	Date Team Established	Team Rating
1538	Admitting Dept	---	N	1-5-2009	2 - Foundational

Performance Improvement Projects

1 to 5 of 6 page 1 of 2

Status	Last Updated	Start Date	Name Of Project	Focus Area	Performance Metric
Active	9-28-2010	9-10-2010	Reduce Dept Incremental OT - Data is xyz format	Cost Management (including Attendance)	Overtime (% total payroll dollars)
Active	9-10-2010	9-10-2010	Clinical Services OT - Dont mix whole and decimal numbers	Cost Management (including Attendance)	Overtime (% total payroll dollars)
Active	9-1-2010	8-4-2010	Improve Inpatient CoPay Collection	Revenue Capture	Increase POS Co-Pay Collection (Collection Rate)
Active	8-23-2010	8-23-2010	NewTestLinkDOesNotWork	Cost Management (including Attendance)	Missed Meals and Breaks (% total payroll dollars)
Complete	2-4-2010	5-21-2009	Coding workflow	Other	Other

Test of Change Details

Name Of Project: Reduce Dept Incremental OT - Data is xyz format

Select the icon in order to edit the Test Of Change

Date Last Updated	Test Of Change	Rating
9-28-2010	Tracking our PP results	1-Unsuccessful
9-13-2010	test this	2-Neutral
9-10-2010	Target	3-Successful

Details: Test of Change Tracking our PP results

Outcome: Hope we improve

Rating: 1

4. Enter the necessary edits. If you find no edits are needed, click **Cancel**.

Continued on next page



Edit a Test of Change *continued*

5. Click **Save**.

Project Details | Test Of Change Details | Test Data

Name Of Project: Reduce Dept Incremental OT - Data is xyz format

➕ Add New Test

1 to 3 of 3 page 1 of 1

	Date Last Updated	Test Of Change	Rating
	9-28-2010	Tracking our PP results	1-Unsuccessful
	9-13-2010	test this	2-Neutral
	9-10-2010	Target	3-Successful

Details

Test of Change
Tracking our PP results
1001 characters left

Outcome
Hope we improve
1009 characters left

Rating
1 Unsuccessful | -select-
0 Unrated
1 Unsuccessful
2 Neutral
3 Successful

5 Save Cancel



Track Test of Change Data

“How will we know that change is an improvement?” One of the key skills that unit-based teams need to develop is the ability to know when the changes they are testing actually result in improvement. UBT Tracker can help you generate simple charts to show how your various Tests of Change are affecting your unit’s performance.

CHOOSE AN OUTCOME MEASURE

When you set up a project in UBT Tracker, you should decide how you will measure whether change is an improvement. Because the Plan, Do, Study, Act (PDSA) approach is designed for small, quick tests of change, it is best to use something that will give you feedback quickly.

For example, an Adult Medicine department may want to implement a new protocol that calls for all patients presenting with elevated blood pressure to have a recheck done before the end of the visit. Rather than waiting for the quarterly hypertension control report to come out, it might be good to track the number of patients who received the recheck every day.

Many outcome measures are percentages. In the example above, we want to know the percentage of patients with elevated blood pressure who received a recheck. We get this number by dividing the patients who received the recheck (the numerator or top number) by the total number of patients with elevated blood pressure (the denominator or bottom number).

If your outcome measure is not a percentage, you still can use this tool. Sometimes an outcome measure is just a number, like the number of times something was done. In those cases, you can enter 1 as the denominator and the tool will just display the number you entered in the numerator.

Continued on next page



Track Test of Change Data *continued*

DEFINE YOUR OUTCOME MEASURE IN UBT TRACKER

Once you have decided on an outcome measure, you can define your measure in UBT Tracker and begin tracking it.

1. **Create a new project or open up an existing one** to add a measure (see pages II.I-I2.I).
2. **Scroll** to the bottom of the project record.
3. **Enter** the following items:
 - A. **Numerator Label (Top):** This is the top number of your percentage. In the example above, we are using the share of patients with elevated BP who received a BP recheck.
 - B. **Denominator Label (Bottom):** This is the bottom number of your percentage. In the example above, we are using the total number of patients with elevated BP.
 - C. **Calculated Value Label (Top/Bottom):** This is the result of dividing the top (numerator) by the bottom (denominator).
 - D. **Additional Variable Label:** This field can be used if you want to track an additional piece of information relevant to your test of change. This field should generally be used under the guidance of an improvement adviser (see Appendix C for more details).

Set Up Chart Labels

A	Numerator Label (Top) <input type="text"/>	B	Denominator Label (Bottom) <input type="text"/>
C	Calculated Value Label (Top/Bottom) <input type="text"/>	D	Additional Variable Label <input type="text" value="DO NOT USE"/>

Instructions The Chart Label Fields are for configuring what data you want to collect and chart for a Test of Change. The Calculated Value is the value you want to track and chart, and is calculated by dividing the Numerator (top number) by the Denominator (bottom number). Use the fields above to label your Numerator, Denominator and Calculated Value.

The additional Variable is not usually used without the help of an Improvement Advisor.

Example If you wanted to track percent on-time delivery, you would enter '# of on-time deliveries' in the Numerator, and 'total deliveries' in the denominator, and '% on-time' in the Calculated Value. These data labels will appear in the data entry table and the final chart, and the system will plot the % on-time deliveries by date.

Continued on next page



Track Test of Change Data *continued*

CREATE YOUR TEST OF CHANGE

Once you have defined your metric, you need to create Tests of Change in order to begin entering data on them.

1. Click on the **Test of Change Details** tab.
2. **Add a Test of Change**, filling in all fields (see page 13.1 for more detail). If you do not have an outcome yet (and you won't!), simply put No Outcome Yet in that box.

ENTER DATA ON TEST OF CHANGE

Once you have defined your metric, you need to create Tests of Change in order to begin entering data on them.

1. While still in the Test of Change Details tab, click on your **Test of Change** to select it.
The details for this test of change should show up in the boxes to the right.
2. Click on the **Test Data** tab.
You will see information about the Test of Change in the active window at the bottom of the screen.
3. Click the **green button with the + sign on it labeled Add New Test Data**.
*A form will pop up allowing you to enter data on the metric you defined on the project page. **Enter the data as follows** (the screenshot that follows has letters corresponding to the ones below).*
 - A. **Date of Test:** Clicking on the box brings up a calendar, allowing you to select the date. Or you can simply enter it.
 - B. **Shift:** If your unit has different shifts and this is relevant to the test, you can choose the shift from a drop-down menu.
 - D. **Denominator:** The label at the top of the box is the same one you defined on the Performance Improvement Project tab. This is the bottom number of your percentage. Enter it now.
 - E. **Notes.** If there are any notes you want to include about this particular observation (e.g., something unusual about the day or shift), enter them here.
 - F. **Tracking Field:** If you defined the Tracking Field on the Performance Improvement Project screen, the label will show up here. If not, it will read Do Not Use.

Continued on next page



Track Test of Change Data *continued*

- Click the **Save** button.
- Repeat** for each piece of data you want to enter.

Performance Improvement Projects

Performance Improvement Projects and Tests Of Change ABOUT THIS UBT
Members History

ID	Name of UBT	Service Type	Using Huddles	Date Team Established	Team Rating
2588	Pineapple	Outpatient	Y	8-26-2010	2 - Foundational

Performance Improvement Projects

1 to 2 of 2 page 1 of 1

Status	Last Updated	Start Date	Name Of Project	Focus Area	Performance Metric
Active	9-2-2010	9-2-2010	Blood Pressure Recheck	Prevention	Improve Blood Pressure Control (% Hypertensives in compliance)
Active	8-26-2010	8-19-2010	Attendance	Hospital Patient Flow	Improve Inpatient Bed Turnaround Time (% leaving ED in under 60 minutes)

Project Details | **Test Of Change Details** | **Test Data** Project Reports & Exports

Name Of Project: Blood Pressure Recheck

Last Updated: 9-3-2010

Test of Change: BP alert in KPHC

Rating: Unrated

3 Add New Test Data **5**

Date of Test	Shift	Patients Receiving Recheck	Patients with Elevated BP	% Rechecked	Notes	DO NOT USE
<input type="text"/>	All	<input type="text"/>	<input type="text"/>	0.00	<input type="text"/>	<input type="text"/>

A **B** **C** **D** **E** **F** **4**

Save **Cancel**

	Date of Test	Shift	Patients Receiving Recheck	Patients with Elevated BP	% Rechecked	Notes	DO NOT USE
	9-6-2010	All	25	26	.96		
	9-5-2010	All	22	26	.85		
	9-4-2010	All	20	25	.80		

In the next section, you'll learn how to display the data you entered graphically or export it to another program such as Excel or Statit.



Display Test of Change Data

Once you have entered data into the Test of Change Data Series tool, you can view it and manipulate it in a number of ways. You can find a couple of options under the **Project Reports & Exports** drop-down menu on the right side of the screen (see below).

The screenshot displays the UBT Tracker interface. On the left is a sidebar with navigation options: Search Projects, Add UBT Profile, Edit UBT, Manage Access, and Feedback. The main content area is titled 'Performance Improvement Projects' and shows a table with two rows of project data. Below this is a 'Project Details' section for 'Blood Pressure Recheck', showing 'Last Updated' as 9-3-2010 and 'Rating' as Unrated. A 'Project Reports & Exports' dropdown menu is open, highlighting 'Test Data Charts'. Below the details is a green message 'Successfully created TDS' and a table of test data.

Status	Last Updated	Start Date	Name Of Project	Focus Area	Performance Metric
Active	9-2-2010	9-2-2010	Blood Pressure Recheck	Prevention	Improve Blood Pressure Control (% Hypertensives in compliance)
Active	8-26-2010	8-19-2010	Attendance	Hospital Patient Flow	Improve Inpatient Bed Turnaround Time (% leaving ED in under 60 minutes)

Name Of Project	Test of Change	Rating
Blood Pressure Recheck	BP alert in KPHC	Unrated

Successfully created TDS

Date of Test	Shift	Patients Receiving Recheck	Patients with Elevated BP	% Rechecked	Notes	DO NOT USE
9-5-2010	All	25	26	96		
9-5-2010	All	22	26	85		
9-4-2010	All	20	25	80		

VIEWING TEST DATA

The easiest option for displaying your data is to select the **Test Data Charts** option from the drop-down menu. This will pop up a new window with a simple run chart created from your data.

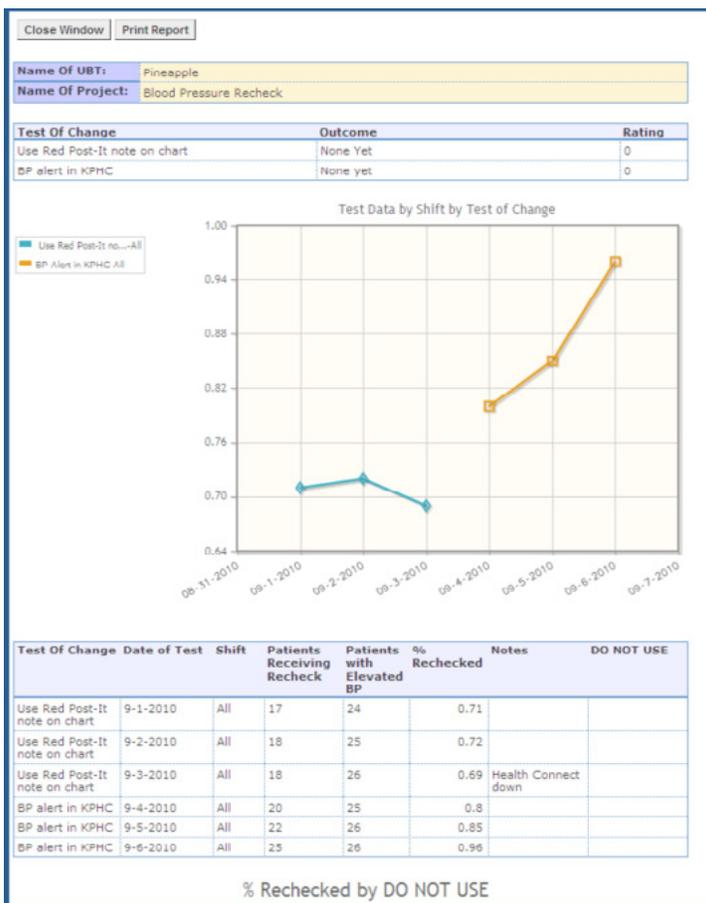
On the run chart, the data associated with each Test of Change is shown by a different color line. This allows you to quickly see which Tests of Change are having an impact on your outcome measure.

In the example here, we see this UBT tried two different approaches to ensure patients presenting with elevated blood pressure received a recheck. The first was using a red Post-it® Note attached to the patient's paperwork. The second was a Best Practice Alert in KP HealthConnect. It's clear from the data the latter seems to be having more of an impact.

The data you entered into the Test of Change Data Series tool are also displayed in a table below the run chart.



Display Test of Change Data *continued*



If you have used the Tracking Field to track an aspect of the test process, it will be displayed in a bar graph below the table (see Appendix C).

PRINTING TEST DATA

You can print your run chart and table by pressing the **Print Report** button at the top of the page.

EXPORTING TEST DATA

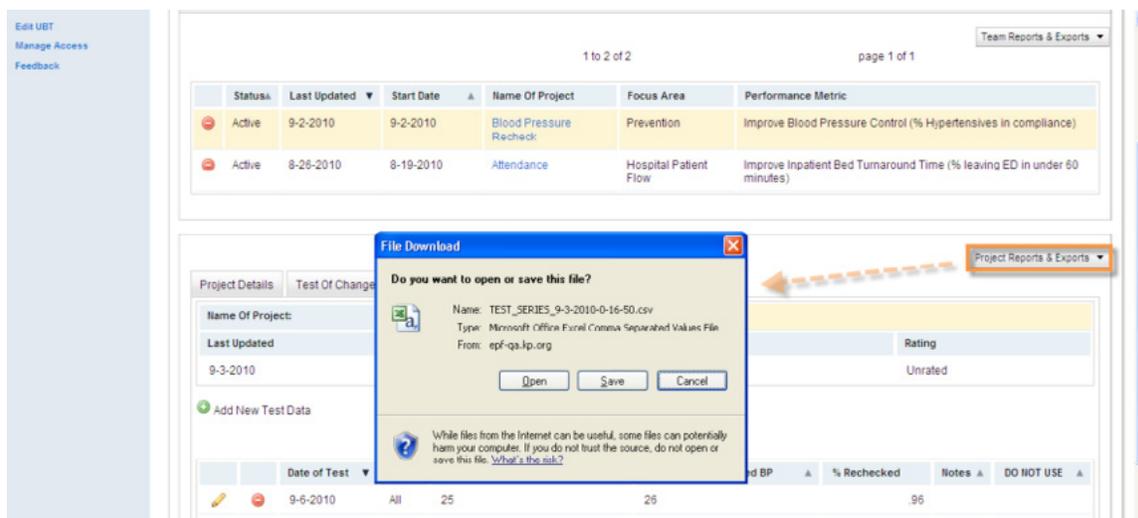
Sometimes you may want to export your test data to another application. For example, applications like ChartRunner and Statit can apply statistical tests to your data that allow you to know whether your changes are real improvements or just statistical noise. Alternatively, you may want to use the data to create charts and graphs in Excel or PowerPoint.

Continued on next page



Display Test of Change Data *continued*

To export your test data, merely choose **Export Test Data (CSV)** from the drop-down menu on the right side. You should get a window that looks like this:



Click **Save** to save the data on your hard drive. You then can open the file in another application and save it in that format. Note that the file will contain data about the *project* and the *team* as well as the specific test of change data, so it may need to be manipulated before it can be pulled into another application. See Appendix B for a list of the specific field names in these exports.

Continued on next page



Part III: Administrator Functions

While everyone who has access to UBT Tracker can view the information in the system, certain functions are restricted by role (see Appendix A). 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 a UBT Profile

1. Click **Add UBT Profile**.
2. Specify **Name of UBT, Date Team Established, Team Rating, Service Type, and Using Huddles** of desired UBT.
3. Click **Create Team**.

Add or Edit a Unit Based Team Profile

Add Team Information

Note that a Unit Based Team must have at least one cost center.

ID	Name of UBT	Date Team Established	Team Rating	Service Type	Using Huddles	Default Membership
		10-08-2010	1 Pre-Team Climate	Call Center	No	Yes

Create Team

4. Specify **Entity, Area, Center, Location, Cost Center** and **Shift** of desired UBT.
5. Click **Save and Manage Team**.

Add or Edit a Unit Based Team Profile

Add Team Information

Note that a Unit Based Team must have at least one cost center.

ID	Name of UBT	Date Team Established	Team Rating	Service Type	Using Huddles	Default Membership
--	UBT 123	10-08-2010	1 Pre-Team Climate	Call Center	No	Yes

Create Team

Edit Delete GL String Entity Location Cost Center Shift # Employees

Region: Your Region

Entity: select Area: - Select -

Center: - Select - Location: - Select -

Cost Center: - select - Shift: All

Save and Manage this Team **Save and Create New**

6. Add additional Cost Centers to this UBT by clicking **Add Cost Center**. Specify the **Entity, Area, Center, Location, and Shift** of desired Cost Center.

Add or Edit a Unit Based Team Profile

Add Team Information

Note that a Unit Based Team must have at least one cost center.

ID	Name of UBT	Date Team Established	Team Rating	Service Type	Using Huddles	Default Membership
		10-08-2010	1 Pre-Team Climate	Call Center	No	Yes

Create Team

Once the UBT has been created, you can edit the team membership and create co-leads by following the directions on pages 8.I-9.I.



Modify Team Rating

Another function that is restricted to administrators is the modification of the Team Rating. The Team Rating usually is set at 1 when the team is established. Administrators may change the team rating as follows:

1. Click **Edit UBT** on the left-side navigation menu.
2. Use the drop-down menus to indicate the **Region, Area, Center** and **Location**. A list of teams will come up.
3. Use the drop-down menu under the **Team Rating** column to change the team rating. The change is saved automatically.

Note: You can sort the list by ID, name of UBT, etc., by using the drop-down menu on the top of the list on the left side.

The screenshot shows the 'Edit UBT' interface. On the left is a navigation menu with 'Edit UBT' selected. The main area has filter options for Region (Northern California), Area (GSA Greater Southern Alameda), Center (All), and Location (All). Below filters is a search box and 'Search'/'Clear' buttons. A 'Sort by:' dropdown is set to 'ID'. The table shows 91 teams found, with the first three rows visible. The 'Team Rating' column for the first row is highlighted with a red box, showing a dropdown menu with options 1, 2, 3, 4, and 5.

ID	Name of UBT	Team Rating	GL String	Entity	Area	Location	Cost Center	Shift	View Details
1538	Admitting Dept	3	01-014-5331	01	Greater Southern Alameda	HAYWARD	5331-Admitting	All	- Select -
1552	Allergy	3	06-014-5800	06	Greater Southern Alameda	HAYWARD	5800-Allergy	All	- Select -
1553	Allergy	1	06-016-5800	06	Greater Southern Alameda	FREMONT	5800-Allergy	All	- Select -



Manage Access

Another important role the administrators play is managing access. The regional LMP lead is the “super user” who initially creates other users as administrators. He or she can grant unlimited administrator rights or can restrict the rights of an administrator to a particular location.

Once someone has been created as an administrator, that person may create other users as administrators within the area where he or she has been granted access.

MANAGE THE RIGHTS OF AN EXISTING ADMINISTRATOR

1. Click on **Manage Access** on the left navigation bar. A list of the administrators you have created will appear.
2. Click the **pencil icon** next to the person whose rights you want to manage. The data in the **Access** column will become drop-down menus. Make new choices and click **Save**.

The screenshot shows the 'My HR' interface with the 'Manage Access' page. The left navigation bar has 'Manage Access' highlighted. The main content area shows a table of administrators with columns for Edit, Delete, Name, Role, and Access. The Access column is expanded to show a list of options for Area, Center, and Location.

Edit	Delete	Name	Role	Access
		Aguilera, Jill Aguilera-B136345	Administrator	Area: CEN-Central Valley Center: MAN-Manteca Location: 049-MANTECA
		Aguilera, Jill Aguilera-B136345	Administrator	Area: CEN-Central Valley Center: STK-Stockton Location: All
		Camarena, Ena Camarena-M879285	View-Only	Area: All Center: All Location: All
		Davis, Edine Davis-F546292	Administrator	Area: MAS-Marin/Sonoma Center: All Location: All

ADD A NEW ADMINISTRATOR

1. Click on **Manage Access** on the left navigation bar.
2. Choose a **Region** from the drop-down menu.
3. **Type the name of the person you are searching for.**
If you only know the first or last name, you can type it and a list of people will appear.
4. Click on the **green plus icon** to add them as an administrator. You then can manage their rights as you would an existing administrator (see above).



Appendix A: System Roles

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: This is the “alpha user” for a given region. However, his or her only role is to create other users as administrators. In fact, a regional LMP lead has to specifically designate him- or herself as an administrator in order to have administrator rights. Changing the regional LMP lead requires a service request to KP-IT.

UBT Administrator: The primary responsibility of the UBT administrator is to create UBT profiles (i.e., 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.



Appendix B: Data Exports

In addition to the Team Summary and Team Detail Reports (see page 3.1), which are fully formatted and suitable for printing, users also may download raw UBT Tracker data in the form of Comma Separated Value (CSV) files. These files can be imported into programs such as Excel or Access.

On the next page, there is a field list for these reports, sorted alphabetically. If you are unclear about the purpose of a particular field, please consult this list.

UBT Details: Contains basic information on unit-based teams, including Name, Location, Service Delivery Type, Date of Inception, Number of Employees, Team Development Rating and Use of Huddles.

Membership Count: Contains data on the number of employees in UBTs in a region, service area or medical center and the number eligible to be on a team (i.e., employees who are members of the Coalition of Kaiser Permanente Unions, managers and physicians in those work units).

PIP Details: Contains data from the Performance Improvement Project screen, including SMART goals, description of results, successful practices, Value Compass Point, Focus Area, Performance Metric, Team Name, ID and Location, etc.

PIP History: Running this report for one or more projects provides all updates to the project, allowing users to see how the information has changed over time.

Tests of Change: Information from UBT Tracker Test of Change Screen, including Test of Change, Result, Rating and basic information on the PIP to which it is linked. Basic identifying data about the project also is included.

Test Data: Contains data entered into the Test of Change Data Series tool, including information on the Tests of Change associated with the data. Users then can import that data into another program (e.g., Excel, Access, Statit, etc., for additional data manipulation).

GL Data: Shows all General Ledger (GL) strings in a region, service area or medical center and UBTs to which they are linked.

Roles: Generates a list of individuals in all team roles, including members. For each team, you can see a list of co-leads, proxies, representatives, sponsors and consultants associated with that team. The inclusion of members can make this a large report and it generally is run for a relatively small number of teams.

Privilege Roles: Generates a list of individuals in all team roles except members. This report is designed for users who want information and who are serving in leadership and sponsorship roles with teams, but don't need information on every single team member. It is a more suitable report to run for a large number of teams.



Appendix B: Data Exports *continued*

CSV EXPORT FIELD LIST

AREA	Name of service area (e.g., Diablo Service Area); defined by region; not all regions use
AREA_CODE	Numerical code for service area; defined by region; not all regions use
CENTER	Name of medical center or other multi-site location; defined by region; not all regions use
CENTER_CODE	Numerical code for medical center or other multi-site location; defined by region; not all regions use
CKPU	“Y” indicates union is member of Coalition of Kaiser Permanente Unions and a participant in the Labor Management Partnership
DATA_DESC	Name of Data Source; defined by region
DATAID	Numeric ID number for Data Source; defined by region
DATE_UBT_CLOSED	If team is deleted from UBT Tracker, this will display the date
DATE_UBT_FORMED	Date UBT was formed; may differ from date team was entered into UBT Tracker
DEPT_ID	Four-digit department ID; a.k.a., Cost Center
DENOMINATOR_NAME	Denominator label defined on Project Details tab for Test Data entry
DEPT_NAME	Name of department (e.g., Admitting)
EMAIL_ADDR	E-mail address
ENTITY	Acronym for entity (e.g., TPM = TPMG)

Continued on next page



Appendix B: Data Exports *continued*

ENTITY_CODE	Entity code (e.g., I = KFH)
FIRST_NAME	First name
FOCUS_AREA_DESC	Name of Focus Area; defined by region
FOCUS_ID	Numeric ID number for Focus Area; defined by region
GL_STRING	General Ledger accounting string; may be attached to a particular team; "Mult" code indicates team has more than one GL string attached to it
LAST_NAME	Last name
LAST_UPD_BY	NUID of person who last updated Performance Improvement Project
LIKERT_RATING_DESCRIPTION	Descriptive text assigned to each stage of the team development ranking (e.g., Pre-Team, Unit-Based Team, etc.)
LIKERT_SCALE_RATING	Five-point team development ranking; ranges from 1 to 5
LOCATION	Name of location (e.g., medical office); defined by region; not all regions use
LOCATION_CODE	Numerical code for location (e.g., medical office); defined by region; not all regions use
MEMBER_ROLE	Role on team (e.g., co-lead, proxy, sponsor, etc.)
METRIC	Name of Performance Metric; defined by region
METRIC_ID	Numeric ID number for Performance Metric; defined by region

Continued on next page



Appendix B: Data Exports *continued*

MIDDLE_NAME	Middle name or initial
NUMBER_OF_EMPLOYEES	<p>UBT Details Report: Total number of employees who are members of the unit-based team</p> <p>UBT GL Data: Total number of employees in that particular GL string who are assigned to that particular UBT; GL strings may be split among multiple teams</p> <p>Membership Count: Total number of employees in a GL string who are members of a particular union or are nonunion employees; GL strings may be split among multiple teams and unions</p>
NUMERATOR_NAME	Numerator Label defined on Project Details tab for Test Data entry
NUMERATOR_VALUE	Numerator value entered by user on Test Data tab data entry screen
OTHER_DATASOURCE	Y/N indicates whether team chose "Other" from Data Source drop-down menu
OTHER_RESULT	Code for PIP where team chooses "Other" from the Results drop-down menu
OUTCOME	Text description of Test of Change outcome
OUTSIDE_VAR_VALUE	Yes/No indicates whether Additional Variable Label on Project Details tab has been used
PARTNERSHIP_SETTING	GL String contains one or more employees whose union(s) is part of the Labor Management Partnership
PERF_END_DATE	Date that Performance Improvement Project was completed

Continued on next page



Appendix B: Data Exports *continued*

PERF_GOAL	SMART goal for Performance Improvement Project
PERF_ID	Unique identifier for each Performance Improvement Project
PERF_LAST_UPD_DATE	Date that Performance Improvement Project last was updated
PERF_LEARNINGS	Text entered from the Performance Learning fields on the PIP form
PERF_OTHER_DATASOURCE_TEXT	Text entered when team chooses "Other" from Data Source drop-down menu
PERF_OTHER_METRIC_TEXT	Text entered when team chooses "Other" from the Performance Metric drop-down menu
PERF_OTHER_RESULT_TEXT	Text entered when team chooses "Other" from the Results drop-down menu
PERF_PSP_GOAL	
PERF_START_DATE	Start Date of the Performance Improvement Project (PIP)
PERF_STATUS	Performance Status; shows as "Active" if project is not complete
PIP_DESC	Title of Performance Improvement Project
PSP_GOAL	Y/N indicates whether the Performance Metric tied to this project is a regional PSP goal
RATING_ID	Number corresponding to rating of Test of Change (0=Unrated; 1=Abandon; 2=Adapt; 3=Abandon)
REGION	Name of region (e.g., Ohio)
REGION_CODE	Numerical code for region (e.g., NCAL = 2)

Continued on next page



Appendix B: Data Exports *continued*

RESULT_DESC	Options from Results drop-down menu (e.g., No Results Reported, etc.)
RESULT_ID	Alphanumeric code for Results drop-down choices (e.g., J6=Target Met >6 Mos.)
SERVICE_DELIVERY_TYPE	General type of service that UBT is delivering (e.g., outpatient, inpatient, pharmacy, etc.)
SHIFT	Membership Count: Shift Code (e.g., I = Day) Test Data: Shift chosen by user entering data into Test Data tab data entry screen
SHIFT_NAME	Shift Name (e.g., Day, Night, etc.)
TEAM_LAST_UPDATED	Displays date that data on a particular team was altered
TEAM_LAST_UPDATED_BY	Displays name of individual who last updated team data
TEST_ID	Unique identifier for each line of data entered on the Test Data tab
TEST_DATE	Date that data is entered into the Test Data tab data entry screen
TEST_OF_CHANGE	Text entered by team to describe the Test of Change
TOC_ID	Unique identifier for each Test of Change; assigned by UBT Tracker system when test is created
UBT_ID	Unique identifier for each unit-based team; assigned by UBT Tracker system when team is created
UBT_NAME	Name of UBT; entered by administrator when team is created; may not be unique

Continued on next page



Appendix B: Data Exports *continued*

UNION_CD	Alphanumeric code for employee's union; "NUE" for nonunion employees, usually indicating managers; shows medical group code for physicians
UNION_DESCR	Text description of union; displays "Non-Union Employee" for managers
URL	Web address of Performance Metric Data Source
USING_HUDDLES	Y/N indicates whether UBT is using huddles
USING_RIM	Y/N indicates whether a particular project used RIM/PDSA
VALUE_COMPASS_DESC	Name of the Value Compass point the project is under
VALUE_COMPASS_ID	Code of the Value Compass point the project is under
VALUE_NAME	Calculated Value label on Project Details tab
VALUE_NAME_VALUE	Actual value of Calculated Value as calculated (numerator divided by denominator) on Test Data tab





Appendix C: Using the Additional Variable Label in the Test of Change Data Series

The Test of Change data collection and charting tool (see pages 15.1-16.3) allows users to define an outcome variable for a project and enter data that can be displayed graphically. This tool is suitable for relatively simple tests where the team can control most of the factors that affect the outcome.

Sometimes, however, there are situations where a known factor that cannot be controlled also affects the outcome. The team may want to track this variable as an additional way of understanding what happened during the test.

As an example, consider the Adult Medicine UBT described on pages 15.1-15.3. That team was testing various approaches to ensuring that patients presenting with elevated blood pressure received a recheck before leaving the visit. They tried various tests of change to ensure this actually happened.

However, what if there was another factor that affected whether rechecks were done? Assume that the Adult Medicine unit in question operated an urgent care clinic on some days, and this increased the pressure on staff to move patients along quickly. This could affect whether rechecks were done, but it is not something the team can control. So it may be important to track.

The **Additional Variable Label** on the Project Details tab is designed for this purpose. It allows the user to track some aspect of the process they are trying to improve. In the example below, the team has entered Urgent Care Clinic in order to track when the clinic was operating.

characters left

Numerator Label (Top)	Set Up Chart Labels
<input type="text" value="Patients Re-Checked"/>	Denominator Label (Bottom)
Calculated Value Label (Top/Bottom)	<input type="text" value="Patients with Elevated BP"/>
<input type="text" value="% of Patients Rechecked"/>	Additional Variable Label
	<input type="text" value="Urgent Care Clinic"/>

Instructions The Chart Label Fields are for configuring what data you want to collect and chart for a Test of Change. The Numerator (top number) is calculated by dividing the Numerator (top number) by the Denominator (bottom number). The Calculated Value is calculated by dividing the Numerator (top number) by the Denominator (bottom number) and multiplying by 100. The additional Variable is not usually used without the help of an Improvement Advisor.

Example If you wanted to track percent on-time delivery, you would enter '# of on-time deliveries' in the Numerator, 'on-time' in the Calculated Value. These data labels will appear in the data entry table and the final chart by date.

Continued on next page



Appendix C: Using the Additional Variable Label in the Test of Change Data Series *continued*

The steps to use the Additional Variable label are as follows:

1. Enter label in **Additional Variable Label**.
2. Save project by clicking **Save**.
3. **Create and Save Tests of Change** (see page 13.1).
4. Click on **Test Data** tab.
5. Click on **Add New Test Data**. This will bring up the data entry form (see below). The last field on the right now will display the variable you entered on the Project Details tab (see orange circle).
6. **Enter your test data** (see page 15.3-15.4), including data in the new field. In this example, the team is entering “Yes” or “No” depending on whether the Urgent Care Clinic is operating that day.
7. Save your data by clicking **Save**.

Date of Test	Shift	Patients Re-Checked	Patients with Elevated BP	% of Patients Rechecked	Notes	Urgent Care Clinic
10-07-2010	All	12	20	0.6000		Yes

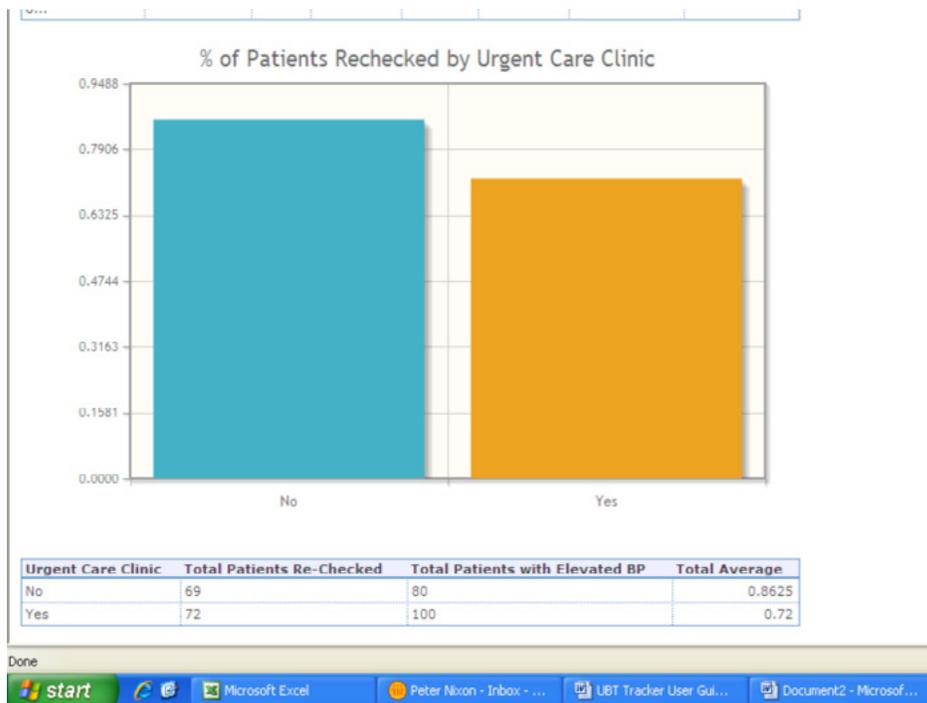
	Date of Test	Shift	Patients Re-Checked	Patients with Elevated BP	% of Patients Rechecked	Notes	Urgent Care Clinic
	10-6-2010	All	15	20	.7500		No
	10-5-2010	All	12	20	.6000		Yes
	10-4-2010	All	15	20	.7500		No
	10-1-2010	All	12	20	.6000		Yes

Continued on next page



Appendix C: Using the Additional Variable Label in the Test of Change Data Series *continued*

Data from the Additional Variable Label is displayed in the same report that displays the run chart or line chart (see pages I6.1-I6.2). However, the data are displayed in a bar chart:



In this example, the UBT can see the Urgent Care Clinic does seem to have a slightly negative impact on the percent of patients who get their blood pressure rechecked. This information might help the team focus on ways to improve the operation of the clinic so that the rest of the unit is not negatively impacted.



For More Information

If you have questions about the content of this manual, please contact one of the following individuals in the national Office of Labor Management Partnership:

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