

Data Dashboards: What should you be tracking?

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Today's Presenter

Sue Coppola, R.N., B.S, CHC

Sue Coppola, RN, BS, CHC, joined *Sunrise Senior Living* in 2015 as Senior Vice President of Care. In her role, Sue oversees all care-related programs and policies impacting Sunrise's communities. This includes the management of the Quality department for Sunrise in addition to the implementation of electronic health records and clinical operations.

With more than 25 years of leadership experience in health care, Sue possesses a wealth of expertise in clinical areas such as processes to monitor and validate outcomes, quality assurance and compliance.



Today's Presenter
Donna J. Thiel, CHC

Donna Thiel is the Director of the new Compliance Integrity division of ProviderTrust.

ProviderTrust, an exclusion and license monitoring SAAS company, is located in Nashville, Tennessee. With clients ranging from Acute Care, Post-Acute Care, LTC/Home Health, Renal Dialysis and Health Plans, thousands of compliance officers depend on ProviderTrust for their OIG exclusions and state license monitoring compliance dashboard.

Donna has over 30 years of experience in the long-term care industry with nearly 15 of those years in legal and compliance. She is the former Chief Compliance Officer of a nationwide post-acute health care company.



Today's Presenter
Michael Rosen, Esq.

Mr. Rosen, who co-founded ProviderTrust, an exclusion monitoring SAAS company, brings over 25 years of experience in founding and leading service-oriented business. He was formerly President of Kroll Background Screening, of the largest pre-employment background screening firms in healthcare.

He grew up in Nashville, Tennessee, graduated from the University of Texas and the University of Memphis Law School, and enjoys traveling and spending time with his family.

Today's Agenda

- The History of Data
- The importance of a Compliance Dashboard
- How do you decide which metrics to include?
- Sample Compliance Dashboards
- What to do with all that data?

Section 1

The history of data

The History of Data – The power of the 20th Century

Think Horse Power.

Did you know? The term “dashboard” was the barrier of wood/leather at the front of a horse drawn carriage. Used to protect driver from debris.

Then Think Automobile.

Advent of collecting engine metrics needed to see under the hood.

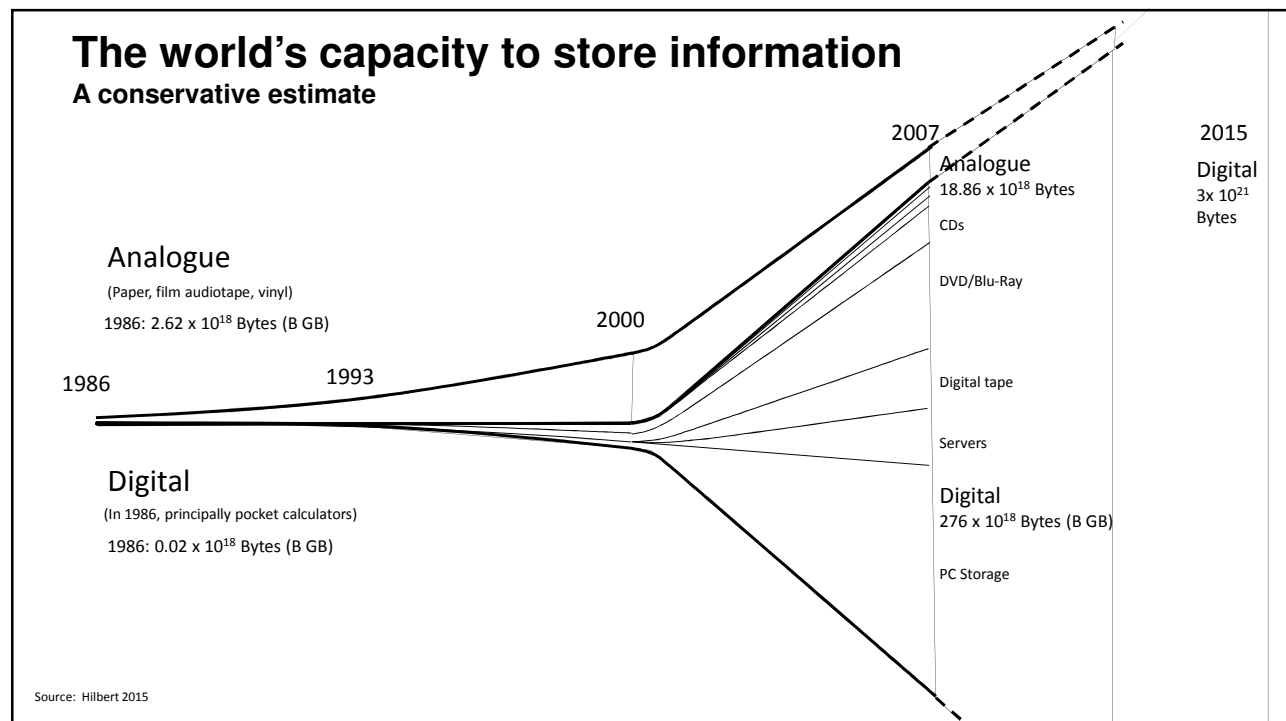
Google, circa 1997



Source: Bit Rebels

The History of Data

- So data dashboards went from protective barrier to protective communication
- Businesses today can't function without up to the minute data
- Visualization of data simplifies complex and sometimes unrelated data to share across company
- Real time data allows to pivot, respond and forecast- but need to decide what is important vs. "shiny"
- The right data metrics allow for increased compliance and improved quality outcomes



What Makes a Great Data Dashboard?

- **Discover, Design, Decompose and Deliver**
- Tricky: balance key overall with deep dive capabilities
- It's about catering for personalization and prioritization of the right metrics
- Keeps everyone on the same page = collaboration
- Contextualizes Data = automate process of data gathering and empower people with business intelligence
- Provides Social Intelligence = people want to be in the know

Stats Don't Lie: They have no hidden Agenda

- Avoid data entry errors
- Shows the good and the bad
- Ability to identify and correct negative trends
- Demonstrates good governance and performance over time
- Aligns strategies and organizational goals
- Essential that it fit on one page only

Section 2

Why is a dashboard so important?

Why have a dashboard?

- Saves you time
- Likely not to review individual reports
- Individual metrics may be misleading
- Metrics trended or grouped should tell a story
- Allows you to determine where to focus more time and resources
- Dashboards should make data management easier
- Turns data into information

Why have a Compliance Dashboard?

- View of what is happening holistically
 - Not just your functional area
- Gives you the bigger picture
- Must see big picture to know where to ask more questions
- Allows you to see company-wide trends

Example of Big Picture Dashboard: Cyber Security



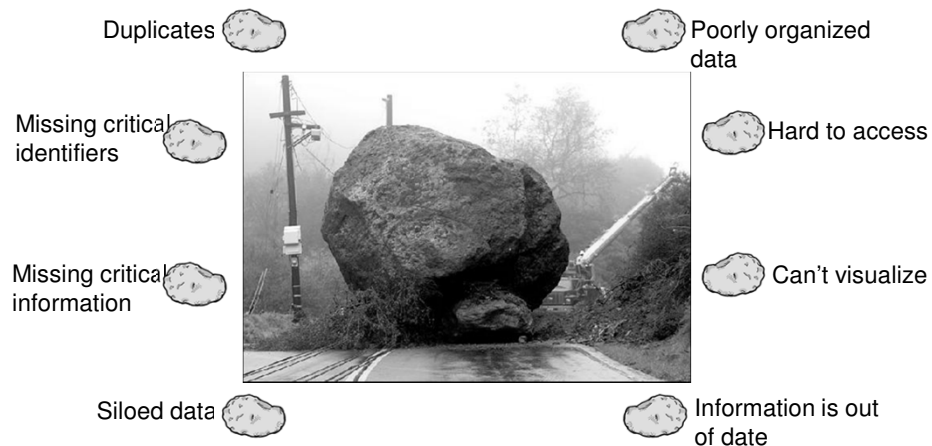
Dashboard Considerations

- Frequency of Data
 - Daily
 - Weekly
 - Monthly
 - Quarterly
 - Annually
- Trend Line
 - Benchmark
 - Peer Group
- How many metrics should be grouped together?
- Which metrics should be grouped together?
- How many dashboards?

Section 3

How do you pick your metrics?

Roadblocks on the road to useful data



Initial Steps

- Identify key business risk drivers
 - Quality
 - Litigation
 - Government Trends
 - Financial
 - Satisfaction/Hotline
- Each business line will influence metrics
- Have to meet with key stakeholders to identify these key risk drivers
- Don't pick these in a vacuum

Sample Metrics

- Quality of Care
- Compliance
- Training
- Billing
- Turnover
- Customer/Employee Satisfaction
- Staffing
- Licensing
- High Risk Operational Risks
- Internal Risk Assessment
- New Operational Initiatives
- Government Focus Areas
- Litigation Trends
- Worker's Compensation
- HIPAA (Breaches)
- Ethics and Compliance Hotline Calls

How to organize your metrics?

Structure, process and outcomes

- Measurements of structure
 - Turnover/Retention
 - Staffing/Labor
 - Ethics Hotline Notification
- Process or System Measure
 - Falls, Weight Loss, Pressure Ulcers
 - Reporting of Allegations of Abuse/Neglect
 - Compliance with Mandatory Meetings or Processes
- Outcome measures
 - Regulatory/State Survey
 - Denial Trends
 - Financials (EBIDA, NOI)
 - Employee and Resident Satisfaction

Organize the information to support its meaning and use

- Think Studio apartment not 10 bedroom mansion

A studio apartment is a small space and each item serves a purpose; nothing is extraneous.

1. Visually identify and monitor at a glance
2. Single computer screen or report page
3. Most important trends, patterns and/or variances that are needed to think, reason and make informed decisions

Section 4

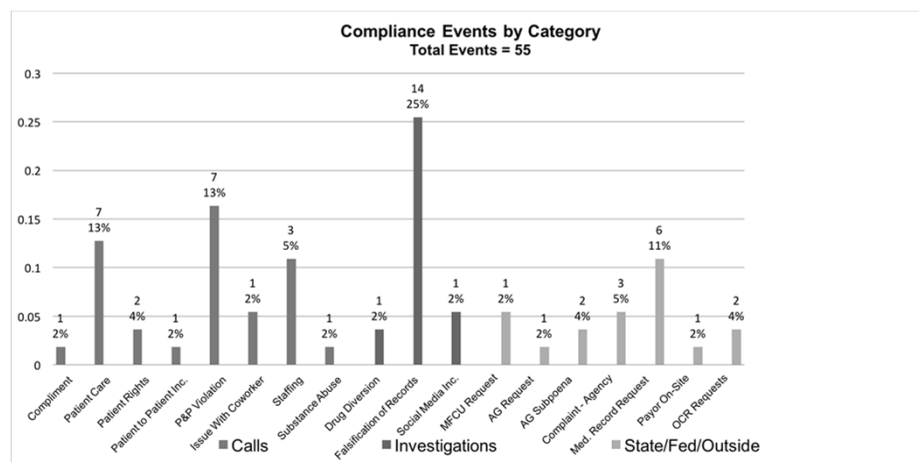
Sample dashboards

Quality of Care

Compliance

- All Compliance Events
 - Calls
 - Investigations
 - Investigations, requests
- Volume of hotline calls
- Type of issues
- Number of anonymous vs. not
- Open investigations

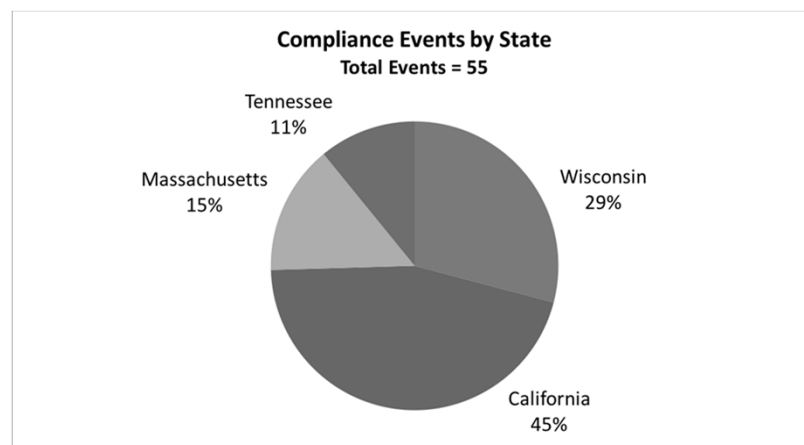
Compliance Event Dashboard Example



Board of Directors Dashboard

- High Level
- Big Picture of Compliance
- Color Coded vs. specific scores

Board of Directors Example



Training

- Mandatory: compliance with topics such as Code of Conduct and Integrity, Abuse Neglect and Misappropriation, Privacy or HIPAA
- Orientation: completion of assigned on-boarding or at hire training

Sample Training or Onboarding Dashboard



Regulatory Outcomes

- Standard Surveys or Inspections
- Complaint Surveys or Inspections- if you can differentiate results between self reported and unexpected
- Fines and Penalties
- Imposition of Denial of Payments for New Admissions
- By Severity Rating
- Compare to State and Federal Outcome Trends

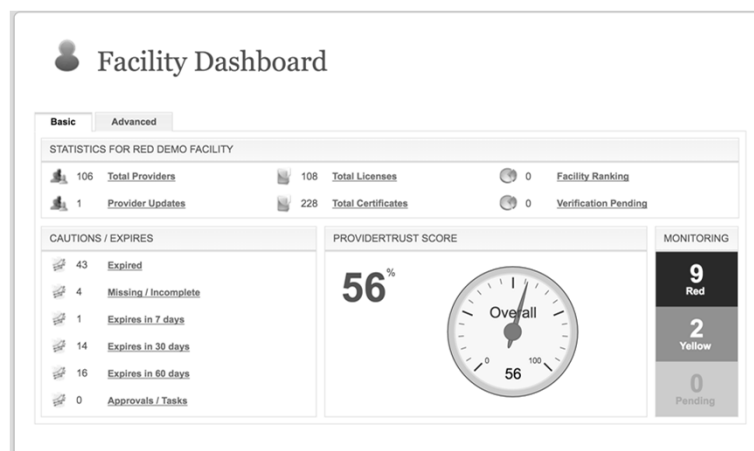
Section 5

Bringing data alive

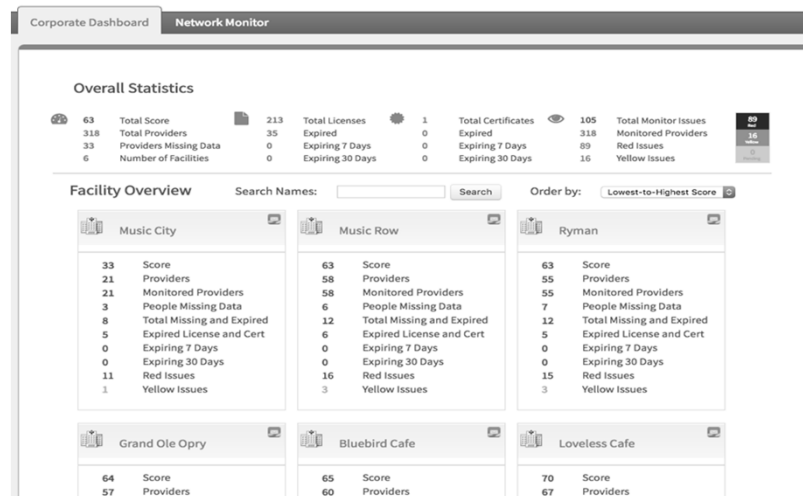
Great, but what do we do with it?



Organize the information to support its meaning and use - *who is the audience?*



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Looking at your results

- Metrics, targets thresholds
- Did you pick the right metrics?
- Are the definitions right?
- Were your metrics effective?
- Are you evaluating ongoing business needs?
- Ability to communicate and understand the business

Looking at your results

- Year over year
- Positive Trend or Negative?
- Do you need to modify?

Is there transparency in reporting?

Communicating Outcomes

Who Needs to Know?

- Line Management
- Department
- Compliance
- Legal
- Board

How to Capture Attention?

- Monthly Report vs. Interactive
- Dashboard Alert- when needed
- Ability to Update or Notation?
- How to track outcomes?
- Knowledge is Notice- Do Something!

CIA Impact

More input

- CIA requirements
- Monitor requirements
- OIG requirements

More Scrutiny

- Monitor participation in Compliance Committee
- Monitor participation in Board Meetings
- Quarterly/semi-annual reports/feedback from Monitor
- Annual feedback from OIG

Key takeaways

- There is more data available than ever before...it can be useful or useless
- There are new ways to make data meaningful
- There are new ways to gain knowledge from data
- Organizations are adapting at different paces but all are adapting

Questions

Feel