

# Hospital Based Inpatient Psychiatric Services (HBIPS) National Quality Measures Scorecard and Dashboard User Guide

Most executive teams prefer to see operational measures presented in a consistent manner as:

- **Scorecards** that highlight potential problem areas.
- **Charts** that show performance over time.

The HBIPS Scorecard and Dashboard is designed to provide both using a fill-in-the-blanks approach. All you have to do is:

1. Describe your measures
  - The name of the measure
  - The numerator/denominator used to calculate it
  - A definition of the numerator and denominator and how each is collected.
2. Set the targets and thresholds for color coding results
3. Input your data

The HBIPS Scorecard and Dashboard will do the rest.

## Describing Your Measures

Using the HBIPS Specifications Manual, we have already tried to describe the measures for you.

If you wish to change the wording for the measures, you can do so as follows:

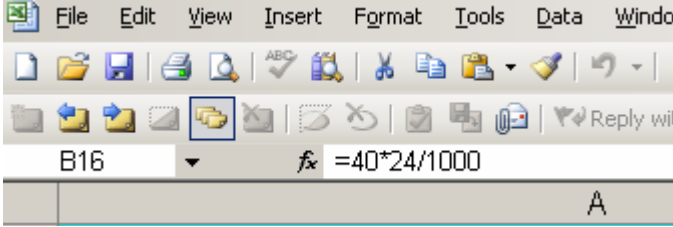
Step	Action																																																							
1	Open the Scorecard and Dashboard template and save it under a new name.																																																							
2	Click on the Describe Your Measures “sheet” <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th>A</th> <th>B</th> <th>C</th> <th>D</th> </tr> </thead> <tbody> <tr> <td>1</td> <td style="background-color: #cccccc;">Measure</td> <td style="background-color: #cccccc;">Name of Measure</td> <td style="background-color: #cccccc;">Numerator /</td> <td style="background-color: #cccccc;"><a href="#">Download Dashboard and Scorecard User Guide</a></td> </tr> <tr> <td>2</td> <td></td> <td></td> <td style="background-color: #cccccc;">Denominator</td> <td style="background-color: #cccccc;">Description (source of data)</td> </tr> <tr> <td>3</td> <td>1a</td> <td>Assessment Completed within 72 hrs Overall Rate</td> <td>Assessments completed within 72 hrs</td> <td>Patients whose records include documentation of initial assessment completed within 72 hours of admission addressing all of the following: risk of violence to self or others; presence of co-occurring substance use disorder, history of psychological trauma; and patient strengths</td> </tr> <tr> <td>4</td> <td></td> <td></td> <td style="background-color: #cccccc;">Discharges</td> <td style="background-color: #cccccc;">All psychiatric inpatient discharges</td> </tr> <tr> <td>5</td> <td>1b</td> <td>Assessment Completed within 72 hrs Children (1-9 yrs)</td> <td>Assessments completed within 72 hrs - Children 1-9 yrs</td> <td>Patients - Children 1-9 whose records include documentation of initial assessment completed within 72 hours of admission addressing all of the following: risk of violence to self or others; presence of co-occurring substance use disorder, history of psychological trauma; and patient</td> </tr> <tr> <td>6</td> <td></td> <td></td> <td style="background-color: #cccccc;">Discharges - Children 1-9yrs</td> <td style="background-color: #cccccc;">Psychiatric inpatient discharges - Children 1-9 yrs</td> </tr> <tr> <td>7</td> <td>1c</td> <td>Assessment Completed within 72 hrs Adolescent (10-17 yrs)</td> <td>Assessments completed within 72 hrs - Adolescent 10-17 yrs</td> <td>Patients - Adolescent 10-17 yrs whose records include documentation of initial assessment completed within 72 hours of admission addressing all of the following: risk of violence to self or others; 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3	1) <b>In cells B3, 5, 7, etc. update the descriptions to meet your needs.</b> Enter them in the order you want them shown on the dashboard.																																																							

4	In cell C3 type in the name of the numerator In cell C4 type in the name of the denominator If you only have the calculated rates and not the numerator and denominator you can define the numerator as the rate (% completed and not use the denominator field).																																																																																																																									
5	If you wish, update descriptions of the numerator and denominator including where and how they are collected. <b>Note:</b> This section is optional and not linked to anything else.																																																																																																																									
6	To decide how to display your scorecard, the template needs to know when to show red, yellow, green or purple backgrounds. To set these values, scroll to the right and put in the target and color coding <i>threshold</i> values.  Since no official targets have yet been set, we included some sample targets to illustrate how they should be defined. You will want to update these values to meet the specific targets and goals of your facility.  <table border="1"> <thead> <tr> <th></th> <th>A</th> <th>B</th> <th>C</th> <th>E</th> <th>F</th> <th>G</th> <th>H</th> <th>I</th> <th>J</th> <th>K</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Measure</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>2</td> <td></td> <td>Name of Measure</td> <td>Numerator / Denominator</td> <td>← Good</td> <td>Red</td> <td>Yellow</td> <td>Target</td> <td>Yellow</td> <td>Red</td> <td>→ Good</td> </tr> <tr> <td>8</td> <td></td> <td></td> <td>Discharges - Adolescent 10-17 yrs</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>9</td> <td>1d</td> <td>Assessment Completed within 72 hrs Adult (18-64 yrs)</td> <td>Assessments completed within 72 hrs - Adult 18-64 yrs</td> <td></td> <td>80</td> <td>85</td> <td>90</td> <td></td> <td></td> <td>95</td> </tr> <tr> <td>10</td> <td></td> <td></td> <td>Discharges - Adult 18-64 yrs</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>11</td> <td>1e</td> <td>Assessment Completed within 72 hrs Geriatric (&gt;65 yrs)</td> <td>Assessments completed within 72 hrs - Geriatric &gt;65 yrs</td> <td></td> <td>80</td> <td>85</td> <td>90</td> <td></td> <td></td> <td>95</td> </tr> <tr> <td>12</td> <td></td> <td></td> <td>Discharges - Geriatric &gt;65 yrs</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>13</td> <td>2a</td> <td>Hours of Restraint - Overall Rate</td> <td>Hours in Restraint</td> <td>30</td> <td></td> <td></td> <td>50</td> <td>75</td> <td>100</td> <td></td> </tr> <tr> <td>14</td> <td></td> <td></td> <td>Inpatient days</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>15</td> <td>2b</td> <td>Hours of Restraint - Children 1-9 yrs</td> <td>Hours in Restraint - Children 1-9 yrs</td> <td>30</td> <td></td> <td></td> <td>50</td> <td>75</td> <td>100</td> <td></td> </tr> </tbody> </table> <ul style="list-style-type: none"> <li>Set the Target Value (green)</li> <li>If increasing values are “bad” (e.g., hours of restraint), put the threshold for the yellow and red values to the <i>right</i> of the target value. Put the value for <i>better than target</i> (i.e., purple) in column E. (This can be left blank if you only want to use 3 colors.)</li> <li>If decreasing values are “bad” (e.g., assessments completed), enter the threshold values for yellow and red to the <i>left</i> of the target value. Put the value for <i>better than target</i> (i.e., purple) in column K. (This can be left blank if you only want to use 3 colors.)</li> <li><b>Note: As you enter values on one side, the other side will change to black to discourage incorrect entry.</b> However, you can enter values for both sides of the target value, but most measures won’t require this.</li> </ul>		A	B	C	E	F	G	H	I	J	K	1	Measure										2		Name of Measure	Numerator / Denominator	← Good	Red	Yellow	Target	Yellow	Red	→ Good	8			Discharges - Adolescent 10-17 yrs								9	1d	Assessment Completed within 72 hrs Adult (18-64 yrs)	Assessments completed within 72 hrs - Adult 18-64 yrs		80	85	90			95	10			Discharges - Adult 18-64 yrs								11	1e	Assessment Completed within 72 hrs Geriatric (>65 yrs)	Assessments completed within 72 hrs - Geriatric >65 yrs		80	85	90			95	12			Discharges - Geriatric >65 yrs								13	2a	Hours of Restraint - Overall Rate	Hours in Restraint	30			50	75	100		14			Inpatient days								15	2b	Hours of Restraint - Children 1-9 yrs	Hours in Restraint - Children 1-9 yrs	30			50	75	100	
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7	Repeat for all measures.																																																																																																																									

### Entering Your Data

Next, you will want to set up the titles for your scorecard and start entering data.

Step	Action
1	Click on the <b>Data Entry Sheet</b> .
2	In F1 and F2 enter your Title and Subtitle for this dashboard and scorecard. The title might be your facility name and the subtitle might be "HBIPS Measures."

	A	B	C	D	E	F	G	H
1		Your Title Here						
2		Your Subtitle Here						
3	Download Dashboard and Scorecard User Guide	2006						
4	2006-2007	JAN	FEB	MAR	APR	MAY	JUN	JUL
5	Assessments completed within 72 hrs	80	96	94				
6	Discharges	1	1	1				
7	Assessments completed within 72 hrs - Children 1-9 yrs	84	93	95				
8	Discharges - Children 1-9yrs	1	1	1				
3	In A4 enter the time period or other title that will appear on the X axis of <i>all</i> of your charts.							
4	<p>In B4-Y4 enter the 24 months, weeks, or days that you want to appear on the scorecard and dashboard charts. If your fiscal year starts in July, change B4-Y4 to start JUL, AUG, etc.</p> <p><b>Requirement:</b> If you decide to change the months, or any other field for that matter:</p> <ul style="list-style-type: none"> <li>▪ <b>Never Edit-Delete cells</b></li> <li>▪ <b>Never Edit-Cut then Edit-Paste cell</b></li> <li>▪ <b>Always type directly into the cell or use Edit-Copy and then Edit-Paste values into the new cells.</b></li> </ul> <p><b>Warning:</b> When you delete or cut cells in Excel, it changes <i>every</i> reference to that cell which may cause #REF errors and all kinds of problems that you don't want.</p>							
5	<p>Enter your numerator and denominator data for each time period on this sheet as it is collected (see cells B5-D8 above).</p> <p>You can either input a value in these cells or you can input a formula. For example, for HBIPS measures 2 and 3, the specifications manual indicates the denominator is inpatient days. However, the manual also defines the denominator as 1000 patient hours. We described the denominators as # of inpatient days converted to 1000 patient hours. You can either do this calculation outside of the data entry sheet or you can build the conversion into the spreadsheet.</p> <p>For example, 40 patient days converted to 1000 patient hours would be:  <math>40 \text{ days} \times 24 \text{ hours} / 1000 \text{ hours} = .96</math>. You can input .96 into the data entry sheet or you can input the formula:</p>  <p>In either case, the cell will show a value of .96 and this will be used to calculate restraint or seclusion hours over 1000 inpatient hours.</p>							

### Check Out Your Scorecard

Next, you will want to see how the scorecard is displaying your data. Click onto the Scorecard worksheet.

	A	B	C18), "", Data Entry Sheet!C17/Data Entry Sheet!C18))							
1						Your Title Here				
2						Your Subtitle Here				
3										
4	Goal	Average	2006-2007			JAN	FEB	MAR	APR	MAY
5	Section Title									
6	Sub Title									
7	90.0	90.0	Assessment Completed - Overall Rate			80.0	96.0	94.0		
8	90.0	90.7	Assessment Completed - Children			84.0	93.0	95.0		

As you can see in this example, the scorecard shows:

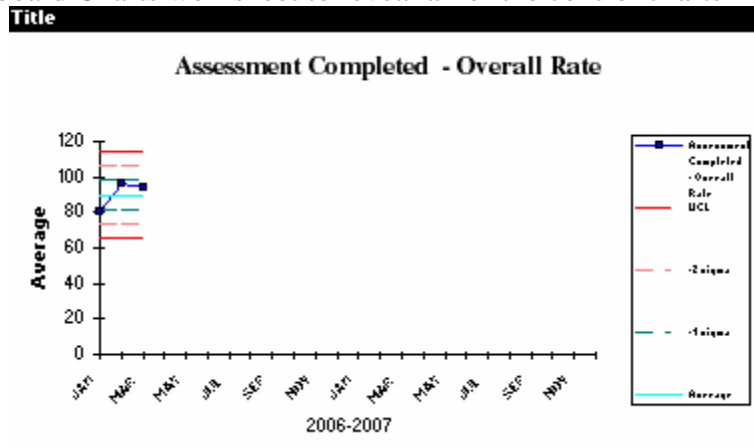
- The target or goal (from the descriptions sheet)
- The year-to-date average (averaged from cells D-Y)
- The name of the measure
- The calculated value of each measure and the color coded scoring based on comparing your actual data to the target data.

Note: This sheet is for display only. Do not type directly onto it. Typing into cells may break formulas and links that will cause error messages. Make your changes in either the “Describe Your Data” or the “Data Entry” sheets.

### Now Check Out Your Dashboard

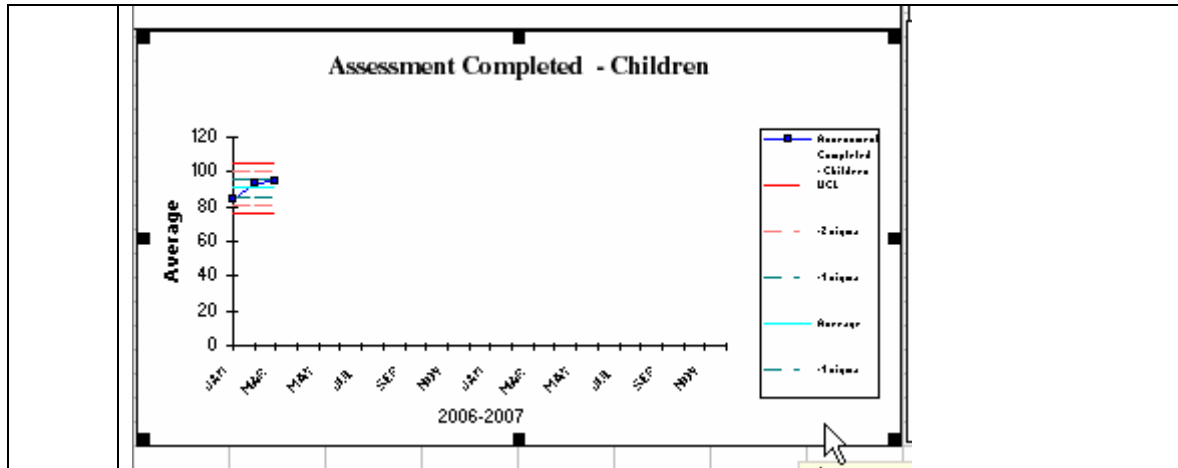
Next, you will want to see how the charts look.

Click on the Dashboard Charts worksheet to reveal all of the control charts from your scorecard:

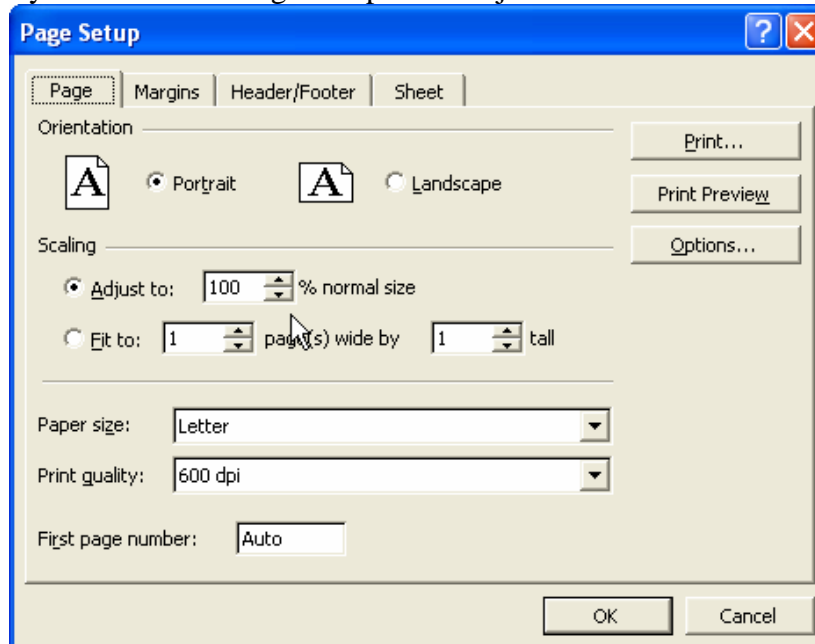


You can change the format of these pages as required.

Step	Action
1	Change the titles on every page of the dashboard (e.g., cell A1).
2	Change the scale on any chart by double clicking on the Y Axis and changing the scale.
3	Resize any chart by clicking in a corner and then grabbing the “handle” using your mouse to click-drag and change the shape of the chart. <b>Hint:</b> Hold down the Shift key to change the shape proportionately.



4 Depending on your printer, you may have to resize the print area to make pages fit properly. Click on File-Page Setup and “Adjust to ??% normal size.

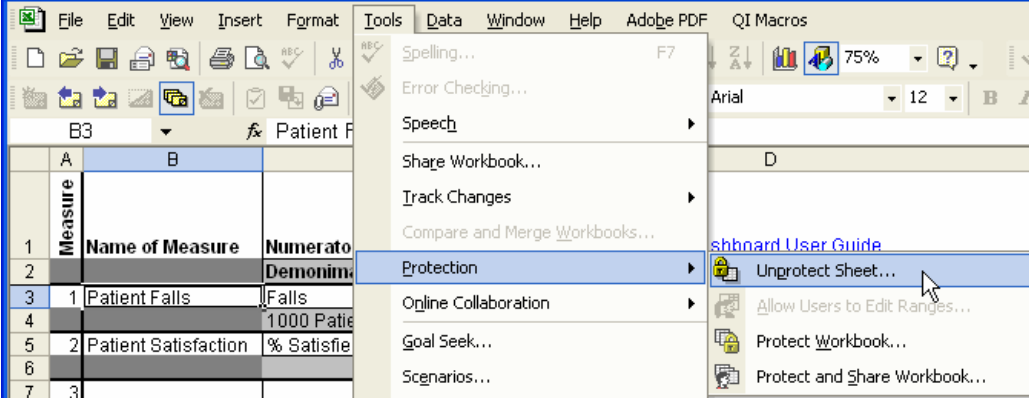


5 You may also delete unused charts. Just click on them to select them and hit the delete key.

### Fine Tuning

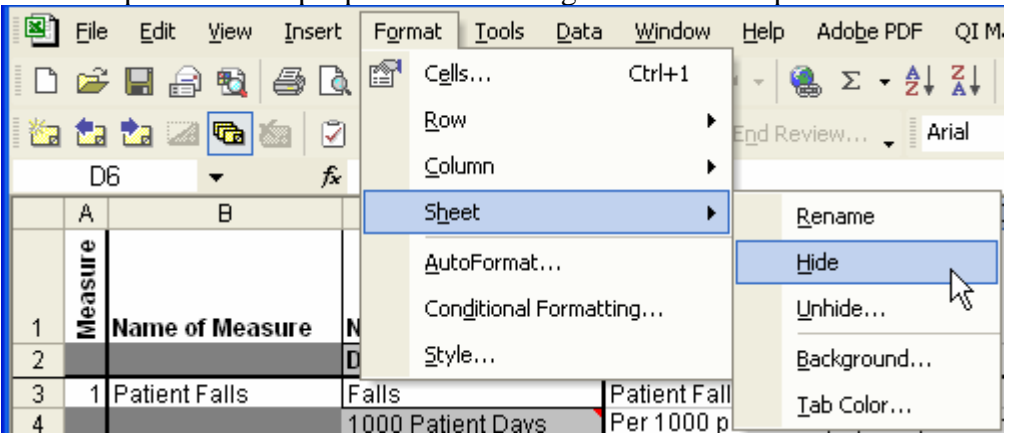
Your dashboard and scorecard system is almost ready to go. Here are some refinements:

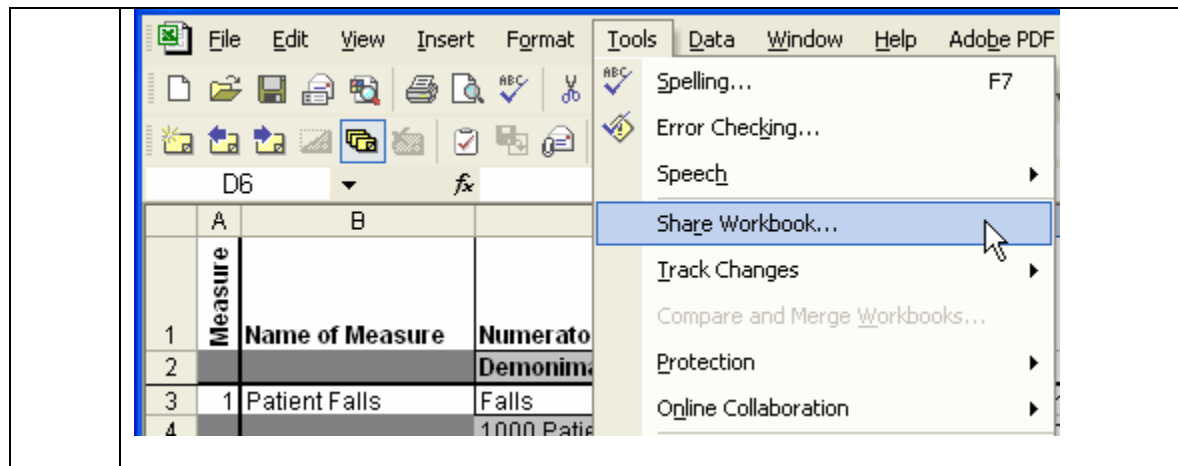
Step	Action
1	<p>The following sheets have been “protected” to prevent changes to formulas in certain cells:</p> <ul style="list-style-type: none"> <li>• Scorecard</li> <li>• Data Entry Sheet</li> <li>• Describe Your Measures</li> </ul> <p>To make changes, simply select the worksheet and click on Tools-Protection-Unprotect Sheet:</p>

	
2	<p>If you don't need two years worth of data, you can:</p> <ol style="list-style-type: none"> <li>1. Unprotect the scorecard and data entry sheets.</li> <li>2. Delete unnecessary columns from each sheet (e.g., second year). Restore protection on these two sheets.</li> </ol>
3	<p>If you don't need all of the measures, you can delete the unnecessary ones:</p> <ol style="list-style-type: none"> <li>1. Unprotect the scorecard and data entry sheets.</li> <li>2. Delete unnecessary charts from the dashboard charts sheet</li> <li>3. Delete unnecessary rows from scorecard and data entry sheets.</li> <li>4. Restore protection on these two sheets.</li> </ol>

### Finishing Touches

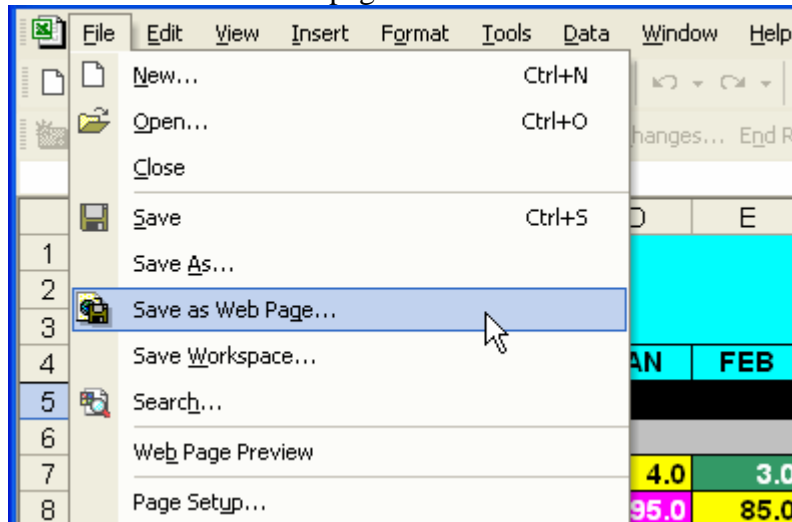
Your dashboard and scorecard system is almost ready to go. Here are some refinements:

Step	Action
1	<p>Select the "Describe Your Measures" worksheet. Click on Format-Sheet-Hide to hide this sheet from view. This will prevent most people from tinkering with the descriptions.</p> 
2	<p>If you want to share the workbook so that it can be opened and updated by anyone, click on Tools-Share Workbook. You can then password protect it or allow others to update it.</p>

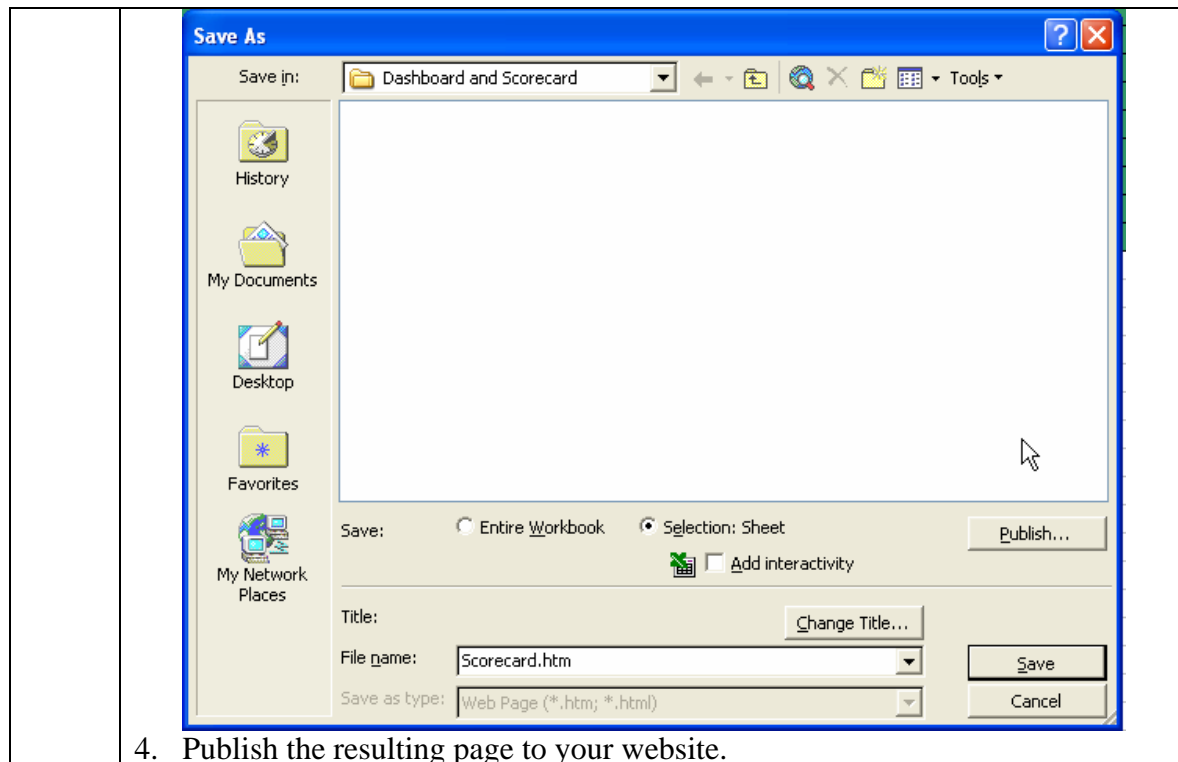


3 You can save the scorecard as a webpage:

1. Click on the Scorecard worksheet
2. Select File-Save As Webpage



3. Click the "Selection: Sheet" button and select a name for the webpage:



4. Publish the resulting page to your website.

## Support

To keep our prices low, this dashboard and scorecard system comes with limited technical support. If there's anything wrong with the system, we'll fix it for free.

It's designed for fill-in-the-blanks simplicity that doesn't require additional coaching. If you can't figure out what to do or how to go about it, we can help you and here's how it works: for \$95/half hour we can coach you on setting up your dashboard or scorecard. Just give us a call to set up a time for personalized coaching on your scorecard. We accept VISA/MC, AMEX.

## Custom Dashboards and Scorecards

This HBIPS fill-in-the-blanks dashboard and scorecard system will handle most of your requirements. If you need a customized scorecard or dashboard, or simply don't have time to do it yourself, please:

- **Call us at 888-468-1537 (303 756-9144) and ask for a free quote on a customized dashboard**
- **Email us at [lifestar@rmi.net](mailto:lifestar@rmi.net) or [knowwareman@mindspring.com](mailto:knowwareman@mindspring.com)**

Let us know how this product works for you and what enhancements you might find desirable.