

Fill-in-the-Blanks

QI Macros 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.

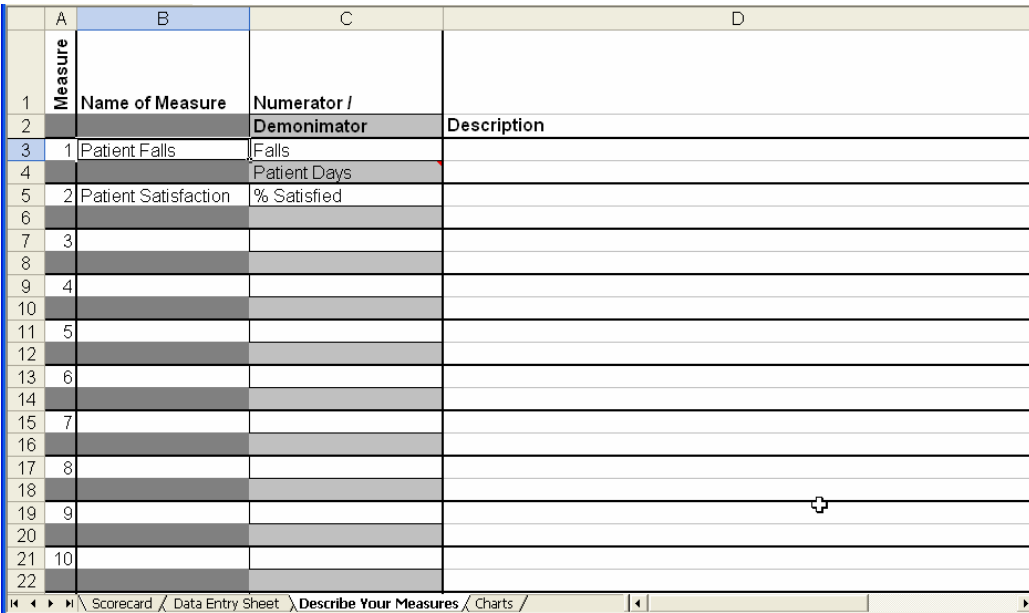
The QI Macros Scorecard and Dashboard is designed to provide both using a fill-in-the-blanks approach. All you have to do is:

1. Define 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 QI Macros Scorecard and Dashboard will do the rest.

Defining Your Measures

To “customize” the generic dashboard, you will want to enter and define your measures.

Step	Action
1	Open the Scorecard and Dashboard template and save it under a new name.
2	Click on the Describe Your Measures “sheet” 
3	In cells B3, 5, 7, etc. put in the names of your measures. Enter them in the order you want them shown on the dashboard. In the example shown above, there are two measures: <ol style="list-style-type: none"> 1) Patient Falls and 2) Patient Satisfaction.

4	In cell C3 type in the name of the numerator (in this case patient falls) In cell C4 type in the name of the denominator (patient days). In some cases like the second example there is only the numerator (% satisfied).																																																																																																										
5	Add descriptions of the numerator and denominator including where and how they are collected. Note: 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: <table border="1" data-bbox="300 472 1356 766"> <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>Low</td> <td></td> <td></td> <td></td> <td></td> <td>High</td> </tr> <tr> <td>2</td> <td></td> <td>Name of Measure</td> <td>Numerator /</td> <td></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>3</td> <td>1</td> <td>Patient Falls</td> <td>Falls</td> <td>0.5</td> <td></td> <td></td> <td></td> <td>3</td> <td>4</td> <td>5</td> <td></td> </tr> <tr> <td>4</td> <td></td> <td></td> <td>Patient Days</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>5</td> <td>2</td> <td>Patient Satisfaction</td> <td>% Satisfied</td> <td></td> <td>80</td> <td>85</td> <td>90</td> <td></td> <td></td> <td></td> <td>95</td> </tr> <tr> <td>6</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>7</td> <td>3</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>8</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <ul style="list-style-type: none"> ▪ Set the Target Value (green) ▪ If increasing values are “bad” (e.g., patient falls), 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.) ▪ If decreasing values are “bad” (e.g., patient satisfaction), 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.) ▪ Note: As you enter values on one side, the other side will change to black to discourage incorrect entry. However, you can enter values for both sides of the target value, but most measures won’t require this. 		A	B	C	E	F	G	H	I	J	K	1	Measure				Low					High	2		Name of Measure	Numerator /		Good	Red	Yellow	Target	Yellow	Red	Good	3	1	Patient Falls	Falls	0.5				3	4	5		4			Patient Days									5	2	Patient Satisfaction	% Satisfied		80	85	90				95	6												7	3											8											
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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 Data Entry Sheet .																																																																																													
2	In F1 and F2 enter your Title and Subtitle for this dashboard and scorecard. <table border="1" data-bbox="300 1501 1356 1837"> <thead> <tr> <th></th> <th>A</th> <th>B</th> <th>C</th> <th>D</th> <th>E</th> <th>F</th> <th>G</th> <th>H</th> <th>I</th> </tr> </thead> <tbody> <tr> <td>1</td> <td colspan="10" style="background-color: cyan;">Your Title Here</td> </tr> <tr> <td>2</td> <td colspan="10" style="background-color: cyan;">Your Subtitle Here</td> </tr> <tr> <td>3</td> <td colspan="10"></td> </tr> <tr> <td>4</td> <td>2006-2007</td> <td>JAN</td> <td>FEB</td> <td>MAR</td> <td>APR</td> <td>MAY</td> <td>JUN</td> <td>JUL</td> <td>AUG</td> </tr> <tr> <td>5</td> <td>Falls</td> <td>4</td> <td>3</td> <td>5</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>6</td> <td>Patient Days</td> <td>1</td> <td>1</td> <td>1</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>7</td> <td>% Satisfied</td> <td>95</td> <td>85</td> <td>93</td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>8</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>		A	B	C	D	E	F	G	H	I	1	Your Title Here										2	Your Subtitle Here										3											4	2006-2007	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	5	Falls	4	3	5						6	Patient Days	1	1	1						7	% Satisfied	95	85	93						8									
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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>Requirement: If you decide to change the months, or any other field for that matter:</p> <ul style="list-style-type: none"> ▪ Never Edit-Delete cells ▪ Never Edit-Cut then Edit-Paste cell ▪ Always type directly into the cell or use Edit-Copy and then Edit-Paste values into the new cells. <p>Warning: 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-D7 above).</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	C	D	E	F	G	H	I	J	K
1	Your Title Here										
2	Your Subtitle Here										
3											
4	Goal	Ytd Average	2006-2007	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG
5	Section Title										
6	Sub Title										
7	3	4	Patient Falls	4	3	5					
8	90	91	Patient Satisfaction	95	85	93					
9											
10											

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

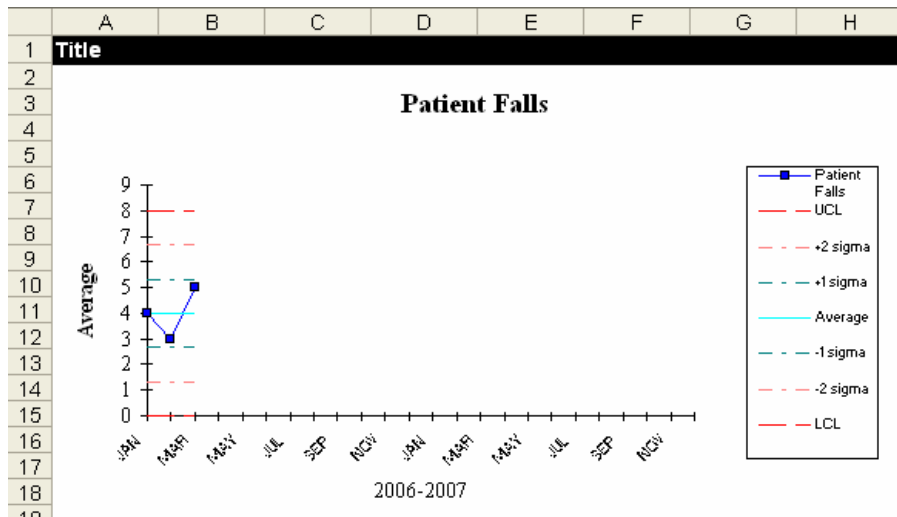
- The target or goal (from the descriptions sheet)
- The year-to-date average (averaged from cells D-Y)
- The name of the measure
- The calculated value of each measure and the color coded scoring based on comparing your actual data to the target data.

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.

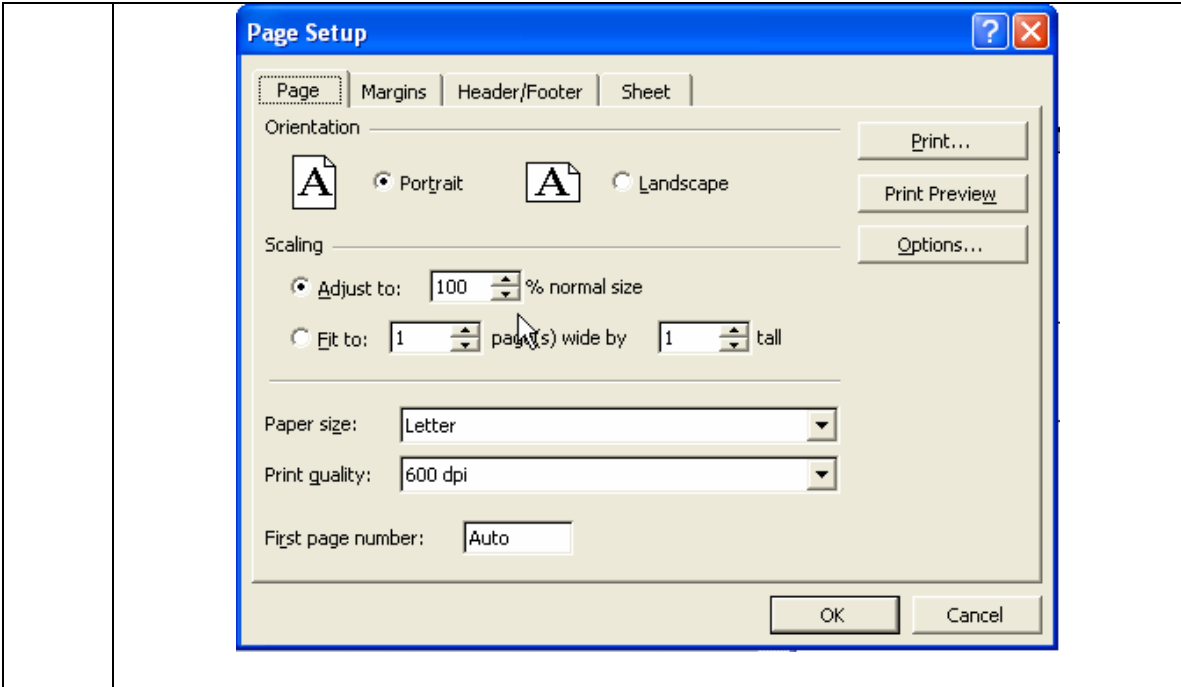
Click on the Dashboard Charts worksheet to reveal all of the control charts from your scorecard:



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	<p>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.</p> <p>Hint: Hold down the Shift key to change the shape proportionately.</p>

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

Fine Tuning

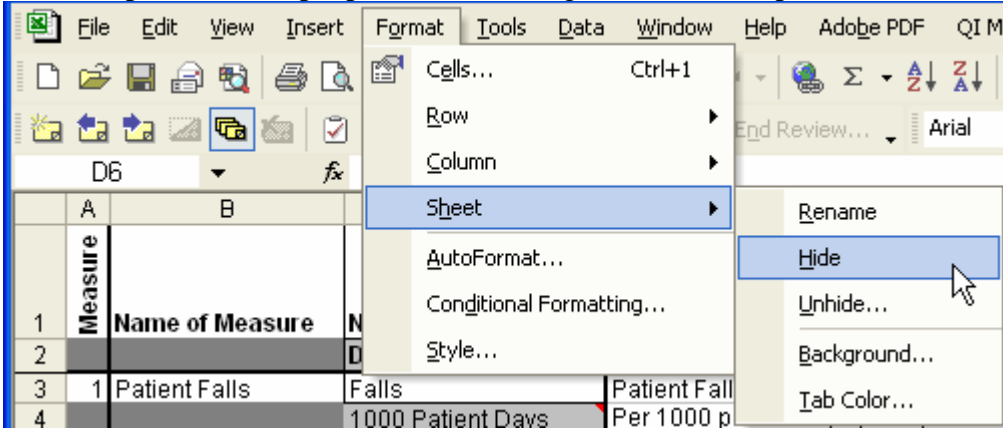
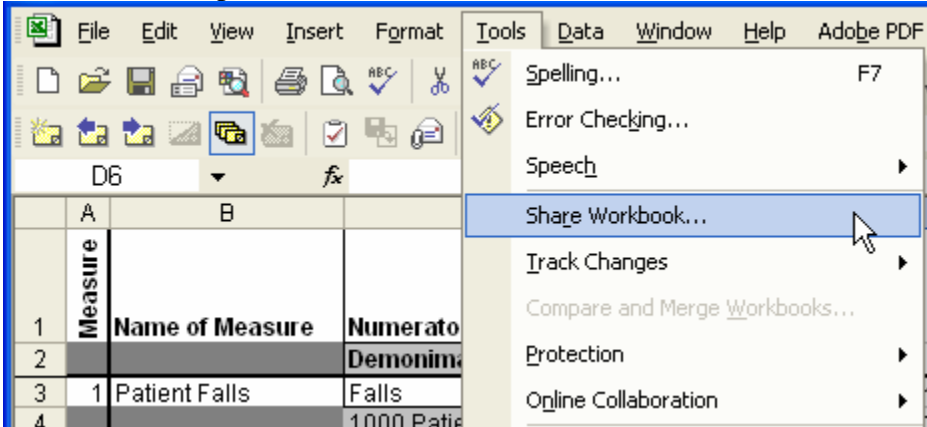
Your dashboard and scorecard system is almost ready to go. Here are some refinements:

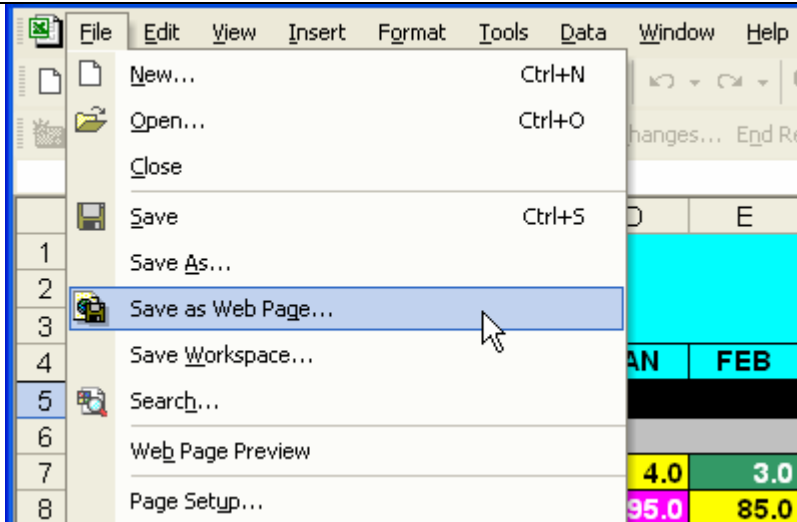
Step	Action
1	<p>The following sheets have been “protected” to prevent changes to formulas in certain cells:</p> <ul style="list-style-type: none"> • Scorecard • Data Entry Sheet • Describe Your Measures <p>To make changes, simply select the worksheet and click on Tools-Protection-Unprotect Sheet:</p>
2	<p>If you don't need two years worth of data, you can:</p> <ol style="list-style-type: none"> 1. Unprotect the scorecard and data entry sheets. 2. Delete unnecessary columns from each sheet (e.g., second year). <p>Restore protection on these two sheets.</p>

3	<p>If you don't need all of the measures, you can delete the unnecessary ones:</p> <ol style="list-style-type: none"> 1. Unprotect the scorecard and data entry sheets. 2. Delete unnecessary charts from the dashboard charts sheet 3. Delete unnecessary rows from scorecard and data entry sheets. 4. Restore protection on these two sheets.
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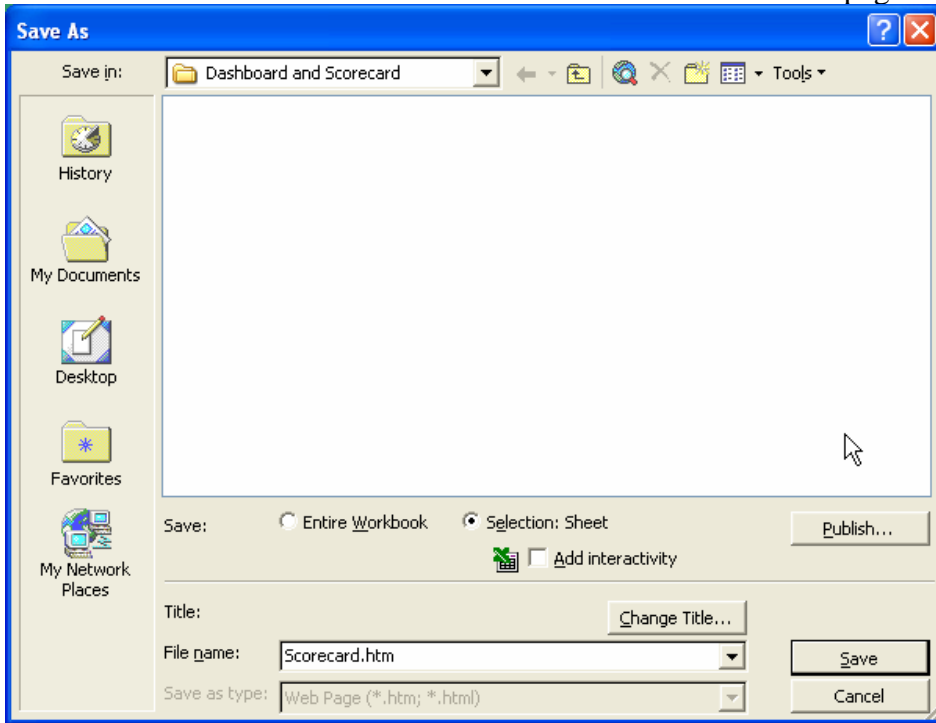
Finishing Touches

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

Step	Action
1	<p>Select the "Define 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	<p>You can save the scorecard as a webpage:</p> <ol style="list-style-type: none"> 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 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 or knowwareman@mindspring.com**

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