

Strategies for Effective Healthcare

Performance Management

"You can't manage what you don't measure"

- Robert Kaplan, Harvard Business School

Today's Agenda

- Company Overview
- Performance Management
- A Performance Improvement Framework
- How We Can Help
- Q and A



Who is DashboardMD?

Company Overview

14 Years in Business

- Over 1,200 Practices of all sizes and specialties
- Over 10,000 providers processing nightly

Client Mix – All Sizes and Specialties

- Single docs and small groups of 3 to 5 clinicians
- Medium and large sized practices with 10,20,30 or 50+
- RCM and Billing Services with 10, 20...90+ practices

Large Flagship Clients

- MS Group -19 Divisions and 200 providers
- RCM companies with over 160 practices 650 providers
- IHDN with over 510 providers
- IHDN with over 450 providers
- Large Academic Facilities with over 1000 providers

"You can't manage what you don't measure."

Robert Kaplan and David Norton The Balanced Scorecard

The Hawthorne Effect

Improving Behavior with Observation

The alteration of behavior by the subjects of a study in response to their awareness of being observed.

Hawthorne Works, Inc.

- Large producer of telephone equipment from the 1930s just outside of Chicago
- Owned by Western Digital now AT&T
- Studies regarding how changes in lighting would effect the productivity of workers

Objective

Plan

Measure

Monitor

Analyze

Repeat



Objective

What do we want to improve?

Clearly Define the Objective

Plan

Measure

Monitor

Analyze

Repeat

Objective

Plan

Measure

Monitor

Analyze

Repeat

Objective

Plan

How are we going to accomplish this improvement?

Identify and List out Action Items

Identify Stakeholders that can affect change

Measure

Monitor

Analyze

Repeat

Objective
Plan
Measure
Monitor
Analyze

Repeat

Objective

Plan

Measure

Monitor

How can we measure our starting point and future results?

Identify Key Performance Indicators, KPIs

Define Performance Goals

Internal and External Comparatives

Benchmarking Data

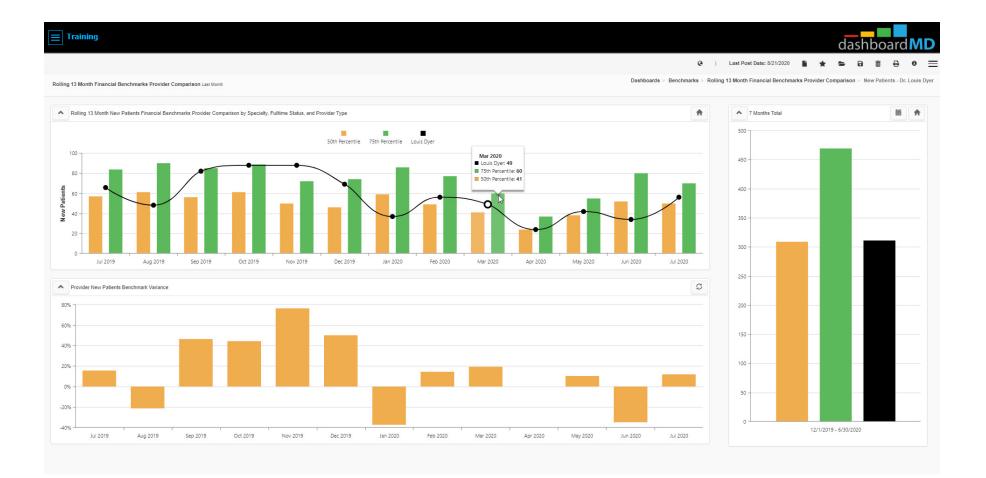
Analyze

Repeat

BPM – Executive Scorecard Dashboards

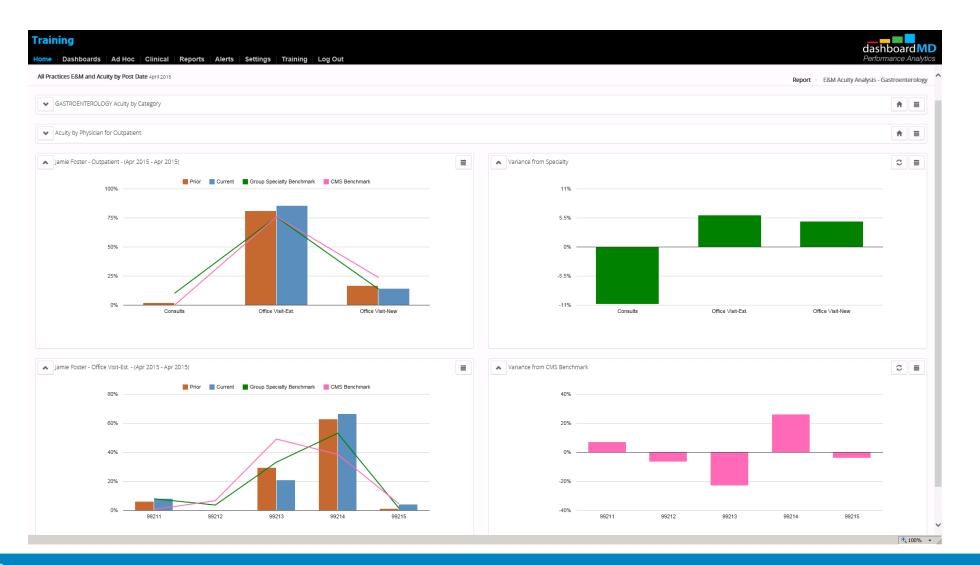
| ne Dashboards Ad Hoc C | linical Re | ports Popula | tion Health Ale | erts Settings | Training Supp | oort Log Out | dashboard Performance A Last Processed Date: 01/21/2016 🗅 ☆ 臼 智 🍵 |
|---|--------------------|---------------------|-----------------|---------------|----------------------------|----------------|---|
| actice Scorecard for Service Location - A | ll Facilities by P | ost Date October 20 | 015 | | | | Report > Practice Admin S |
| Practice Scorecard by Post Date | | | | | | ılı Q | Top 5 Financial Class Description by Gross Charges |
| KPI | ÷ | Value 🍦 | Target | % Target 🔺 | SparkLine | Trend | 200.000 |
| R Balance | | \$355,878 | \$250,000 | 58% | | t | |
| otal Adjustments | | \$163,055 | \$130,614 | 75% | \sim | t | 150,000 2015-01 FOHC MEDICAID: 181,122 |
| OS Cash Collected | | \$27,810 | \$30,896 | 90% | \checkmark | ÷ | Patient Responsibility: 87,745 Medicare HMO: 33,964 |
| ayments Per wRVU | | \$89 | \$98 | 91% | ~ | t | 100,000 BLUE SHIELD CLASS: 31,442 FOHC MEDICARE CLASS: 21,102 |
| RVUs per Day Worked | | 99 | 104 | 95% | \sim | → | |
| ayments Per Visit | | \$81 | \$83 | 98% | | → | |
| R Days - 3 Months | | 27 | 27 | 102% | | ÷ | |
| ew Patients % | | 5.36 % | 5.27 % | 102% | ~~/ | t | 2014-10 2014-11 2015-01 2015-02 2015-05 2015-05 2015-05 2015-05 2015-05 2015-06 |
| isits per Day Worked | | 102 | 100 | 102% | · | → | 2014-10 2014-12 2015-01 2015-02 2015-05 2015-05 2015-05 2015-06 2015-06 2015-06 2015-06 |
| /U Work Unit | | 3,058 | 2,972 | 103% | \searrow | → | |
| verage Daily Billings - 3 Months | | \$13,300 | \$12,666 | 105% | \sim | → | Top 5 CPT Code CPT Section by Gross Charges |
| | | \$379,695 | \$359,901 | 105% | $\searrow \longrightarrow$ | → | Jul 2014 - Sep 2014 Jul 2015 - Sep 2015 Variance |
| verage Days To Pay | | 24 | 25 | 106% | · | ÷ | E8M 7725,880 712,437 |
| verage Days To Post | | 3 | 3 | 107% | · | ÷ | -13,443 |
| atient Visit Count | | 3,164 | 2,878 | 110% | | → | Pathology & Laboratory 126,765 |
| umber of Patients Seen | | 2,501 | 2,238 | 112% | · | → | Unknown 125 920 |
| otal Cash Collections | | \$268,148 | \$236,856 | 113% | \sim | + | 1,448 |
| umber of New Patients Seen | | 134 | 117 | 114% | ~~/ | t | 118,853 Medicine 138,829 |
| verage Days To Bill | | 1 | 1 | 142% | · · · · · · | + | |

External Benchmarks Dashboards





BPM – Executive Scorecard Dashboards



Objective

Plan

Measure

Monitor

Keep you eyes on the Prize!

Regularly compare KPI results against goals and benchmarks

Communicate results with the stakeholders

Analyze

Repeat

Dashboard Reports

Help Visualize Performance

Is my payer mix shifting and how's it affecting me?

How do our E&M coding levels compare to national norms?

How much A/R is left to collect from last month?

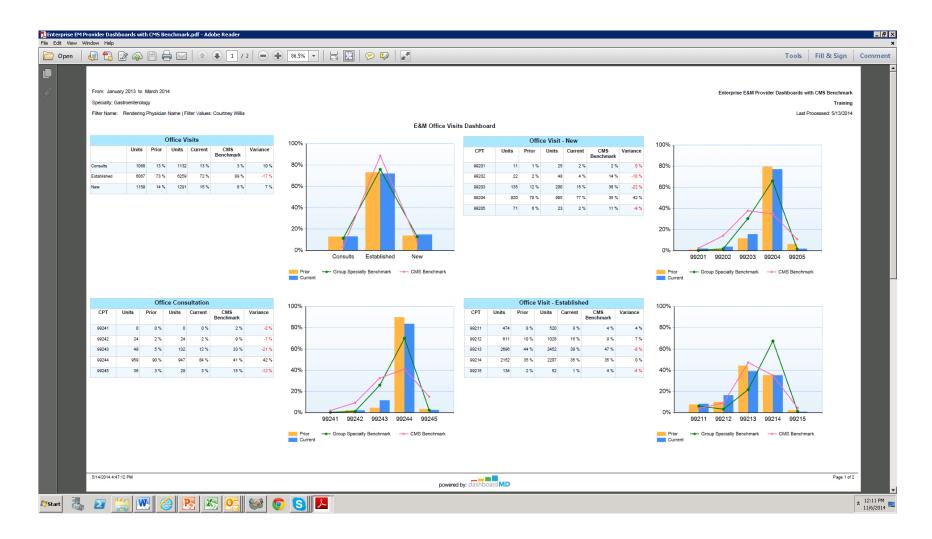


Email Report – Provider Performance

| rovider Perforr | | | Adobe Acro | bat Reader | DC | | | | | | | | | | |
|-----------------|-----------------------------|--------------------------|------------|------------|--------|------------------|--------------------|----------|---------------|-----------|-----------|---------------|-------|-----|---------|
| Edit View Wi | | Provider P | erform an. | × | | | | | | | | | | (?) | Sign Ir |
| | | 0 | (m) (J) | | 4 | ا ر ا | \ominus \oplus | 100% - | | 1 | Ø | 0 | | 0 | orgin i |
| | | 4 | 0.0 | , | - | | 00 | 10070 | | ĭ ↓ | 2 | ₽. | | | |
| | Financi | al Performa | ance | | | | | | | | | | | | |
| | КРІ | | | | | MTD | SMLY | Target | % Target | FYTD | PFYTD | FYTD Variance | Trend | | |
| | Gross Ch | narges | | | | \$60,173 | \$69,250 | \$61,005 | 99% 🤭 | \$424,570 | \$446,825 | (\$22,256) | → | | |
| | New Patients % | | | | 2.78 % | 2.12 % | 5.07 % | 60% 🧶 | 6.42 % | 6.21 % | 0.21 % | + | | | |
| | Number of New Patients Seen | | | | 8 | 6 | 9 | 89% 🧖 | 75 | 66 | 9 | + | | | |
| | Number of Patients Seen | | | | 288 | 283 | 279 | 103% 🧖 | 1,168 | 1,063 | 105 | + | | | |
| | Patient V | isit Count | | | | 351 | 453 | 376 | 93% 🧖 | 2,733 | 2,774 | -41 | + | | |
| | RVU Wo | rk Unit | | | | 430 | 544 | 442 | 97% 🧖 | 3,074 | 3,253 | -179 | → | | |
| | Total Cas | sh Collections | 5 | | | \$31,974 | \$26,788 | \$28,271 | 113% 🧖 | \$189,805 | \$205,331 | (\$15,526) | - | | |
| | Visits per | r Day Worked | | | | 18 | 19 | 17 | 106% 🧖 | 20 | 19 | 0 | → | | |
| | Access | | | | | | | | | | | | | | |
| | КРІ | | | | | MTD | SMLY | Target | % Target | FYTD | PFYTD | FYTD Variance | Trend | | |
| | Arrived C | ount | | | | 251 | 227 | 205 | 122% 🧖 | 1,346 | 1,410 | -64 | → | | |
| | Cancelle | d Count | | | | 32 | 33 | 21 | 48% 🧶 | 137 | 140 | -3 | → | | |
| | New Pati | ient Appointm | ent Visits | | | 20 | 29 | 22 | 91% ሻ | 142 | 158 | -16 | → | | |
| | Percent / | Arrived | | | | 88.69 % | 87.31 % | 83.00 % | 107% 🥙 | 90.76 % | 90.73 % | 0.03 % | → | | |
| | Quality | | | | | | | | | | | | | | |
| | Measure | | | | Denor | ninator | Numerator | Target | Percent Speci | alty Rate | | | Graph | | |
| | Complete | e Lipid Profile | and LDL-C | Control | | 109 | 86 | 45.00 | 78.90% | 79 % | 20 % 40 | 0 % 60 % 80 % | 100 % | | |
| | Controllir | ng High Blood | I Pressure | | | 835 | 498 | 58.00 | 59.64% | 60 % | - | | 100 % | | |
| | Complete (<100 mg | e Lipid Profile g/dL) | and LDL-C | Control | | 109 | 65 | 20.00 | 59.63% | 60 % | | 0 % 60 % 80 % | | | |
| | Adult Kid Manager | iney Disease: nent | Blood Pres | sure | | 22 | 13 | 40.12 | 59.09% | 59 % | | | | | |

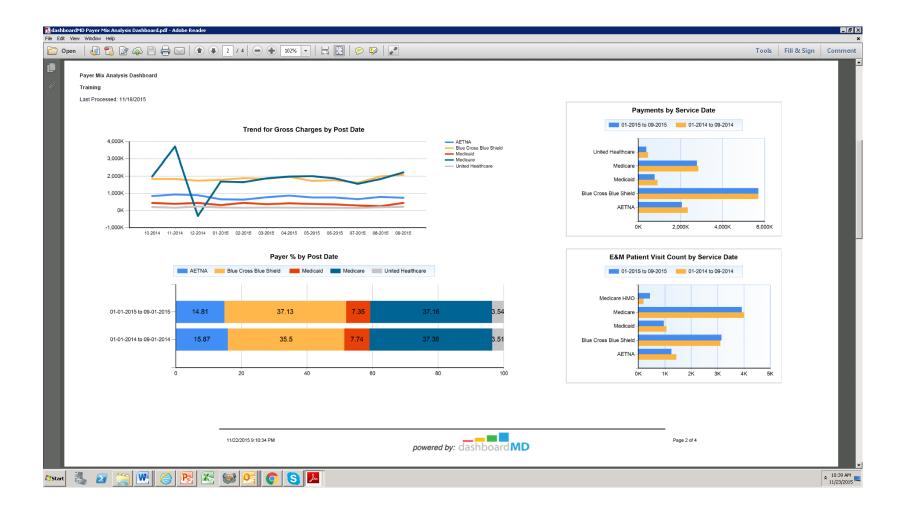


Email Report – E&M Provider Dashboards





Email – Payer Mix Dashboards





Email Report – Provider Productivity Dashboard

| | | • | 145% 🔻 📙 | | 🦻 🛃 🛛 | 8 | | | | | | | Tools | Fill |
|---|---------------------------------------|------------------|--------------------|-------------------|------------------|------------------|--------------------|-------------------|----------------|------------|----------------------|---------------------|-------------------|------|
| Practice: | | | | | | | | | | | | | | |
| Financial Class: | | | | | | | | | | | | | | |
| | 0-3 | 0 | 31-60 | | 61-90 | | 91-120 | | 121-150 | 15 | 1-180 | 180+ | | |
| | A/R | % | A/R | % | A/R | % | A/R | % A/ | R | % A/R | % | A/R | % | |
| Insurance | 258,74 | 6 5% | 3,099,455 | 60% | 610,683 | 12% | 114,975 | 2% 2 | 72,073 | 5% 247 | 632 5% | 574,363 | 11% | |
| Patient | 22,42 | 20 2% | 136,154 | 14% | 212,868 | 21% | 126,680 | 13% | 98,706 | 10% 84 | 300 8% | 320,710 | 32% | |
| Unapplied Credits | \$76,46 | 51 | | | | | | | | | | | | |
| | | | | | Ма | tched A/F | R Dollars | | | | | | | |
| 8,000,000 | | | | | | | | | | | _ | Balance | | |
| 0,000,000 | - | | | | | | | | | | | Non Contractu | | |
| 6,000,000 | | | | | | | | | | | | Contractual Ad | łj | |
| 4,000,000 | | | | | | | | | | | | Payment | | |
| | | | | | | | | | | | | | | |
| 2,000,000 | | | | | | | | | | | | | | |
| 0 | | | | | | | | | | | | | | |
| | 8 | 99 | 10. 17. | 12-: | 91 | 02-1 | <u>β</u> | 05- | 6 | 07-: | | | | |
| | 08-2015 | 09-2015 | 11-2015 10-2015 | 12-2015 | 01-2016 | 02-2016 | 04-2016 03-2016 | 05-2016 | 06-2016 | 07-2016 | | | | |
| | | | | | | | | | | | | | | |
| | | 015-08 | 2015-09 | 2015-10 | 2015-11 | 2015-12 | 2016-01 | 2016-02 | 2016- | | 2016-05 | 2016-06 | 2016-07 | |
| Charges by DOS | , | | | ,709,466 | 6,240,557 | 6,057,099 | 6,168,187 | 6,821,502 | 6,910,1 | | | 3,801,718 | 163,454 | |
| Payments by DOS | · · · · · · · · · · · · · · · · · · · | | | ,240,229 | 2,067,546 | 2,091,693 | 2,047,154 | 2,167,240 | 2,244,4 | | 1,759,457 | 499,190 | 14,236 | |
| Payments by DOS from I | | 1,431 | 71 | 0 | 318 | 0 | 0 | 0 | | 0 0 | - | 0 | 0 | |
| Total Payments First Pas | | | _, , | ,240,229 | 2,067,228 | 2,091,693 | 2,047,154 | 2,167,240 | 2,244,4 | | 1,759,457 | 499,190 | 14,236 | |
| Contractual Adj by DOS | | 88,378 0 | | ,297,058 | 4,060,688 | 3,879,824 0 | 3,901,643 0 | 4,218,543 | 4,348,7 | | 3,508,141 0 | 637,060 | 34,785 0 | |
| Non-Contractual Adj by E | | 37,799 | 0 | - | - | - | - | 0 | 212.6 | 0 0 | - | 0 | - | |
| Insurance Balance by DO Patient Balance by DOS | | 37,799 16,567 | 68,650 10,715 | 140,886 31,293 | 95,641 16,682 | 56,666 28,915 | 122,774 96,617 | 342,166 93,553 | 212,6 104,3 | | 1,264,147 202,767 | 2,595,046 70,423 | 104,118 10,315 | |
| AR Balance by DOS | | 54,366 | 79,365 | 172,179 | 16,662 | 28,915 | 219,390 | 93,553 435,719 | 316.9 | | | 2,665,469 | 10,315 | |
| AR balance by DOS | | 04,300 | 19,000 | 172,179 | 112,324 | 00,081 | 219,390 | 455,719 | 516,9 | 0/ 331,486 | 1,400,913 | 2,000,469 | 114,455 | |

Objective
Plan
Measure
Monitor
Analyze

Repeat

Objective

Plan

Measure

Monitor

Analyze

Analyze results and Improve the plan

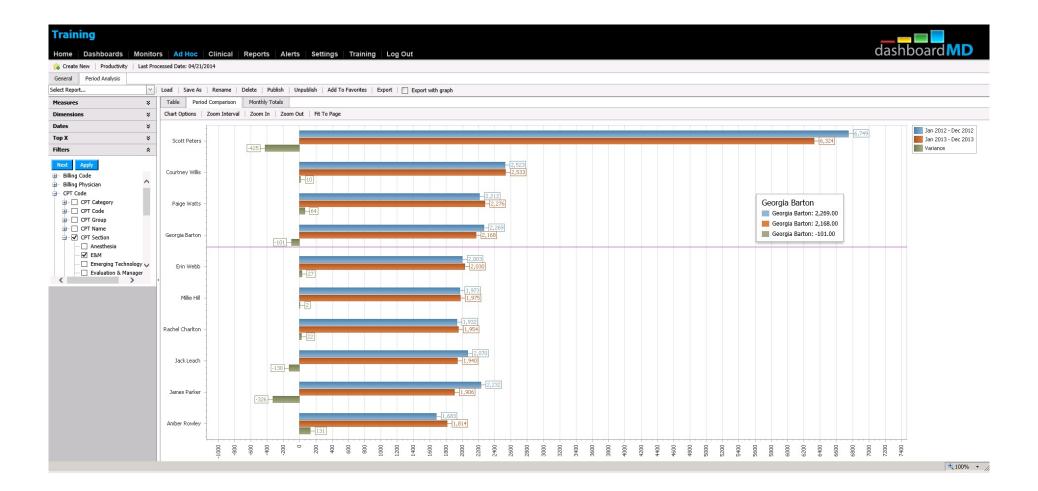
Communicate results with the Stakeholders

Ad Hoc Analysis

Where are the new patients coming from?

Are my top referral sources shifting?

Ad Hoc Analysis – New Patients by Top Referring Physician YoY





Ad Hoc Analysis – Shifts in New Patients by Age Band





Objective
 Plan
 Measure
 Monitor
 Analyze
 Repeat

Objective

Plan

Measure

Monitor

Analyze

Repeat

Very important step!

Build off of what you've learned and repeat.

Performance Management with Executive Dashboards

Which physicians are working harder?

Do we have a problem with "No Shows"?

How are we doing this month?



BPM – Productivity Dashboards

| ovider Performance Dashboard - Josh Harris Septembe | r 2017 | | | | | | Dashboards > Scorecards > Provider | Performance > Dr. Josh Harr | is - Performa |
|---|------------------|-----------|----------------|------------------------|-----------|----------|------------------------------------|-----------------------------|---------------|
| Financial Performance | | | | | | | | | di C |
| (PI 🔺 | September 2017 🍦 | SMLY 🔶 | Target | % Target 🔶 | YTD | PYTD | YTD Variance SparkLine | Tren | d |
| oss Charges | \$42,099 | \$7,363 | \$36,556 | 115% | \$331,157 | \$13,068 | \$318,089 | Ť | |
| mber of Patients Seen | 138 | 23 | 122 | 113% | 715 | 36 | 679 | Ť | |
| ient Visit Count | 138 | 23 | 123 | 112% | 1,127 | 39 | 1,088 | + | |
| U Work Unit | 272 | 47 | 235 | 116% | 2,127 | 86 | 2,042 | t | |
| al Cash Collections | \$19,924 | \$6,207 | \$17,974 | 111% | \$157,535 | \$6,422 | \$151,112 | + | |
| | | | | | | | | Previous | 1 Ne |
| Access | | | | | | | | di | <u>lad</u> |
| 1 | September 2017 崇 | SMLY 👙 | Target | % Target \Rightarrow | YTD | PYTD | YTD Variance SparkLine | Trend | |
| ived Count | 237 | 253 | 237 | 100% | 2,290 | 2,322 | -32 | + | |
| ncelled Count | 114 | 145 | 132 | 114% | 1,304 | 1,098 | 206 | + | |
| Show Count | 2 | 2 | 3 | 133% | 20 | 21 | -1 | → | |
| cent Arrived | 67.14 % | 63.25 % | 59.35 % | 114% | 63.36 % | 67.48 % | -4.12 % | → | |
| | | | | | | | | Previous | 1 Ne |
| | | | | | | | | | i |
| easure | \$ | Percent 🔻 | Target Graph | | | | Denominator benominator | tor 🔶 Specialty Rat | e 9 |
| mplete Lipid Profile And LDL-C Control | | 83% | 20% 0% 10% 20% | | 100% | | 103 | 91 | 8 |
| ntrolling High Blood Pressure | | 61% | 20% 0% 10% 20% | | 100% | | 787 | 482 | 6 |
| orectal Cancer Screening | | 34% | 20% 0% 10% 20% | | 100% | | 555 | 191 | 3 |
| | | | | | | | | | |



BPM – Scheduling Dashboards

| | | | | | | | Last Pr | rocessed Dat | te: 09/17/201 | 15 🗋 | ☆ ⊵ | > 🖺 | Ŵ |
|--|---|-----------------|--------------|-------------|-------------|---------------|-------------|----------------|---------------|-------------|-------------|-------------|---------|
| actices Scheduling by Appointment Date september 2015 | | | | | | | | | | | R | eport > / | ppointn |
| Current Appointment Status | Appointm | ent Summary | | | | | | | | | | | |
| No Show Cancelled Bumped Booked Arrived | | Oct 2014 | Nov 2014 | Dec 2014 | Jan 2015 | Feb 2015 | Mar 2015 | Apr 2015 | May 2015 | Jun 2015 | Jul 2015 | Aug 2015 | S 20 |
| 10,000 | Appointment Count | 11,479 | 8,962 | 9,837 | 10,154 | 9,980 | 11,361 | 10,706 | 9,561 | 9,968 | 9,987 | 10,118 | 8 |
| 7,500 | Arrived | 7,599 | 5,996 | 6,408 | 6,377 | 6,259 | 7,188 | 6,815 | 6,131 | 6,321 | 6,254 | 6,284 | 3 |
| 5,000 | Arrived % | 66 % | 67 % | 65 % | 63 % | 63 % | 63 % | 64 % | 64 % | 63 % | 63 % | 62.% | |
| 5,000 | Booked | - | - | - | - | - | - | - | - | - | - | - | 2 |
| 2,500 | Bumped | 786 | 583 | 707 | 636 | 696 | 912 | 818 | 662 | 766 | 717 | 828 | |
| | Cancelled | 2,208 | 1,700 | 2,027 | 2,384 | 2,200 | 2,367 | 2,163 | 1,962 | 1,977 | 2,133 | 2,191 | 1 |
| - 0ct 2014 Nor 2014 - Jan 2015 - Jan 2015 Jan 2015 - Jan 2015 May 2015 - Jul 2015 - Sep 2015 - Sep 2015 - Sep 2015 - Jul | No Show | 886 | 683 | 695 | 757 | 825 | 894 | 910 | 806 | 904 | 883 | 815 | |
| Oct Nov Jan Mar Apr Apr Aug Aug Sep | No Show % | 8 96 | 8 96 | 7 % | 7 % | 8 96 | 8 % | 8 % | 8 96 | 9 % | 9.96 | 8 % | |
| 5 Appointment Type Description by No Show | >>> >> >> >> >> >> >> >> >> >> >> >> >> | dering Dhysicia | in Full Name | by No Show | | | | | | 11 11 | R R | " | M |
| | | acting thysics | | oy no snon | | | | | | | | | n |
| | | | | | May 2 | 014 - Sep 201 | 4 May | / 2015 - Sep 2 | 2015 V | ariance | | 680 | |
| | | Kian Todd | | | | -299 | | | 381 | | | | |
| | 30 | Millie Hill | | | | | | | | 412 | 515 | | |
| | | | | | | -103 | | | | | 511 | | |
| | | Kiera Dodd | | | | 5 | | | | | 516 | | |
| | \langle | John Smith | | | | -38 | | 235 | | | | | |
| 2014-11 2015-01 2015-02 2015-03 2015-03 2015-05 2015-05 2015-05 2015-05 | 2015-08 | George Shah | | | | | | 254 | 91 | | | | |
| | | | | | | 37 | | | | | | | |

€ 100% -

If you don't know where you're going, you might wind up someplace else."

Yogi Berra





Q and **A**

Better Tools. Better Results. Best Practices.

Jose Valero President | DashboardMD jvalero@DashboardMD.com www.DashboardMD.com

Kaitlyn Houseman

Marketing | Revele sales@revelemd.com www.ReveleMD.com