

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

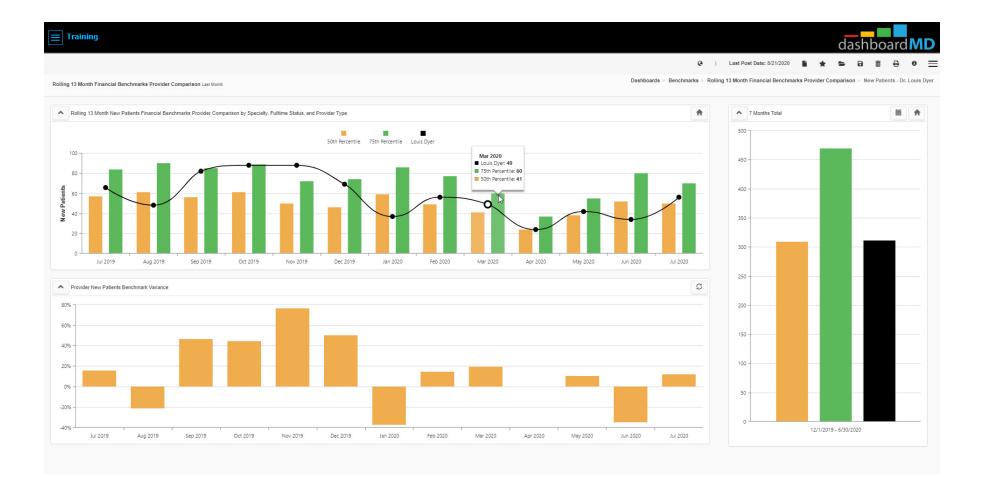
Analyze

Repeat

BPM – Executive Scorecard Dashboards

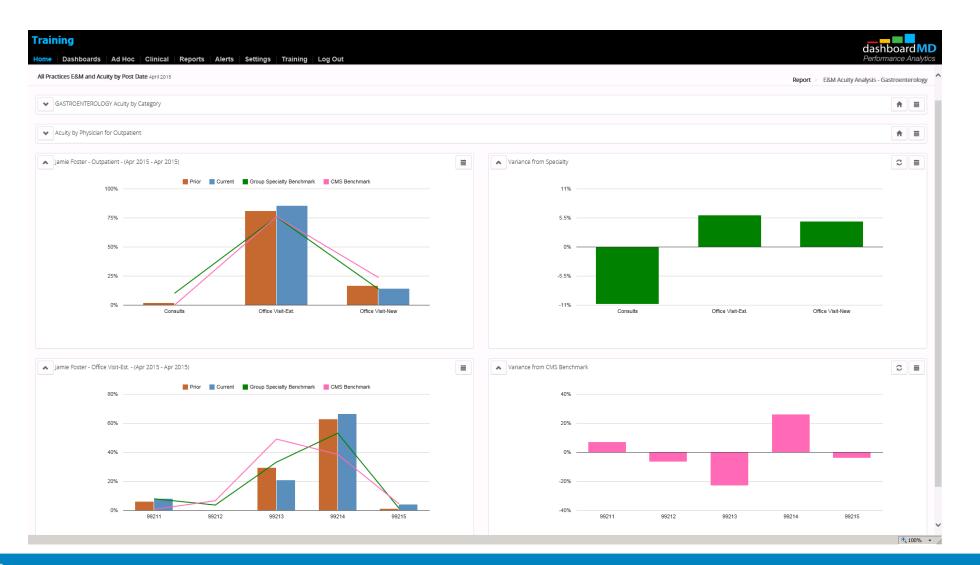
ne Dashboards Ad Hoc C	linical Re	ports Popula	tion Health Ale	erts Settings	Training Supp	oort Log Out	dashboard Performance A Last Processed Date: 01/21/2016 🗅 ☆ 臼 智 🍵
actice Scorecard for Service Location - A	ll Facilities by P	ost Date October 20	015				Report > Practice Admin S
 Practice Scorecard 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?

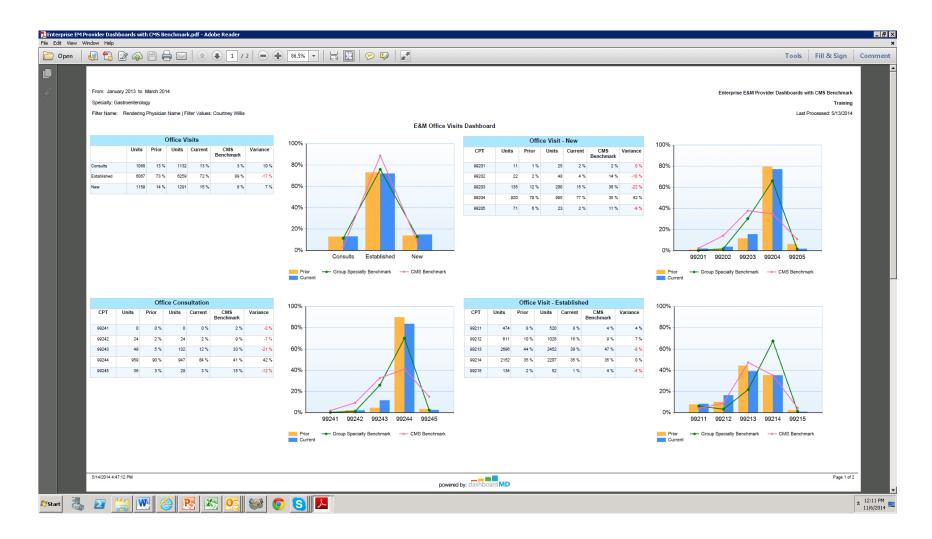


Email Report – Provider Performance

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	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 %					

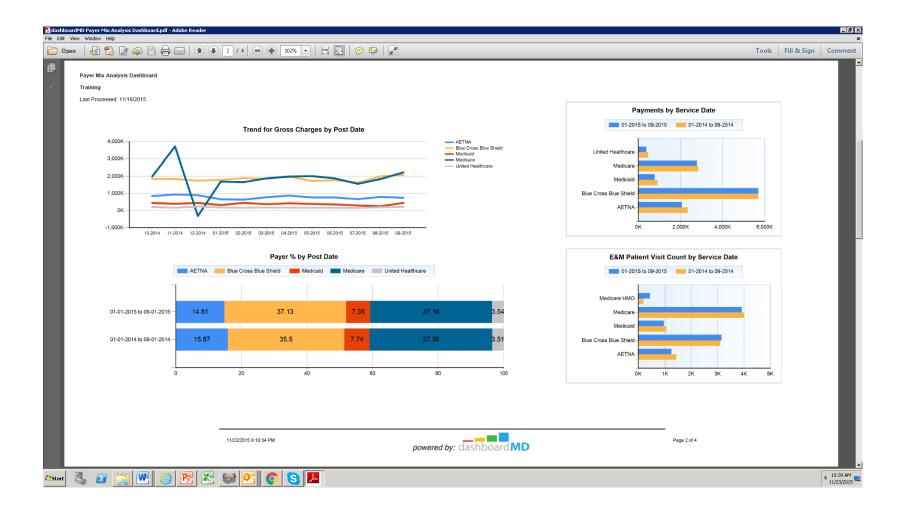


Email Report – E&M Provider Dashboards





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

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Analyze results and Improve the plan

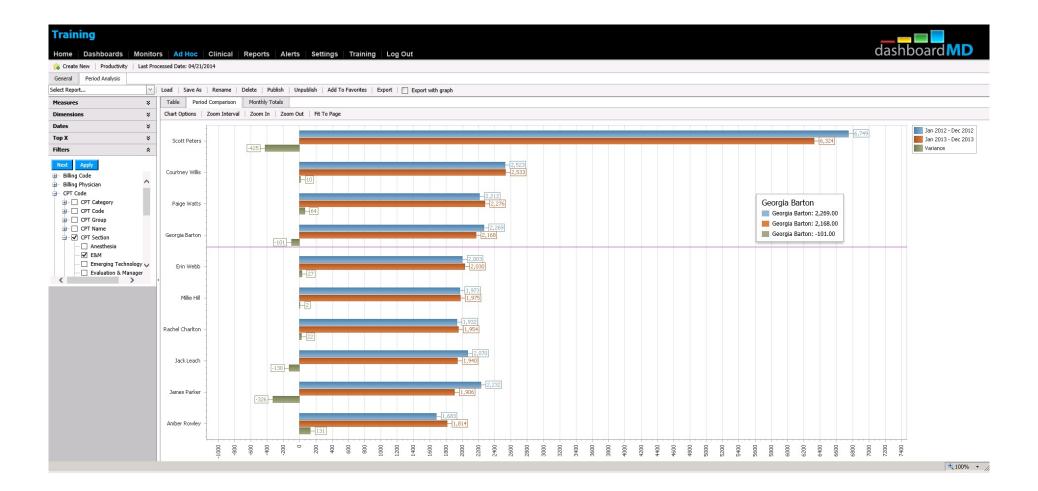
Communicate results with the Stakeholders

Ad Hoc Analysis

Where are the new patients coming from?

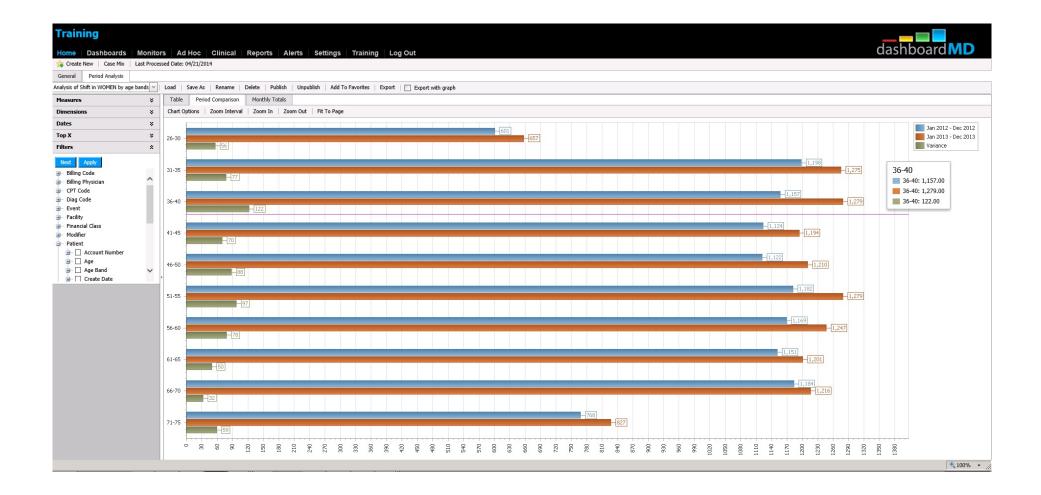
Are my top referral sources shifting?

Ad Hoc Analysis – New Patients by Top Referring Physician YoY





Ad Hoc Analysis – Shifts in New Patients by Age Band





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Objective

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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.

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