PRACTICE USER GUIDE

For Practice Performance Registry

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Welcome, Practice User. This Guide will help you login and navigate the Practice Performance Reports through the DARTNet Registry website.

1 SHAREPOINT ENVIRONMENT ACCESS

The DARTNet Institute Practice Performance Reports are hosted in a SharePoint 2013 server. To access the site, follow these steps:

1. Navigate to DARTNet SharePoint Site https://sharepoint.dartnet.info
2. Enter your credentials when prompted:
   a. Username will be DARTNET\<firstname>.<lastname>, for example DARTNET\Jane.Smith
   b. You will be assigned a password for initial login by your Practice’s Super User.
   c. If you forget your password, please ask your Super User to reset your password.

3. When you have successfully logged in, you will see the main DARTNet Members landing page. These are the sections that you will have access to view:
   a. Documents – contains user guides and documents to help you navigate the Registry and DARTNet site.
   b. Performance Reports – reports by organization and patient to benchmark organizations against one another that are in the aggregate DARTNet Registry dataset.
   c. Change your Password – allows you to change your password

4. To change your Password, Choose “Change your Password” from the options on the left hand menu. This is optional.
   a. Follow the requirements and create a new password.
   b. Click “Change Password”

You now should be ready to view your organization and practice’s reports.

2 OPENING / VIEWING REPORTS

To open and view the performance reports:

1. Click the “Performance Reports” link in the left-hand navigation. This will open a document library with several report type options.
2. Click on the report type that you want to view. There are four (4) Report Types available for you to view:
a. **Care Sites / Patient Groups** – Percent of patients meeting selected criteria, shown at the clinical level. If your site is part of an organization with multiple sites you will be able to view each Care site’s results individually. Report will display the percent compliant for chosen metric by clinical condition.

b. **Organizations / Patient Groups** – Percent of patients meeting selected criteria, shown at the organizational level. Report will display the percent compliant for chosen metric by clinical condition.

c. **Organizations / Practice Groups** – Percent of patients meeting selected criteria, shown at the organizational level. Report will display the percent compliant for chosen metric by practice group.

d. **Organizations / Specialty** – Percent of patients meeting selected criteria shown at the Organizational level and grouped by Organizational Attributes (Specialty, Network membership, Clinician Count, etc).

e. **Coming Soon - Organizations / Time Periods** – Percent of patients meeting selected criteria, shown at the organizational level. Report will display the percent compliant for chosen metric by time period.

3. The report will open and present various filters to apply. These reports use a feature called “Power View” that allows you to interact with the data.

4. **To View Report Larger**: Choose “Full Screen Mode” in upper left hand corner. Press “ESC” to exit Full-Screen mode.

5. **To leave a report**: Back click out of the report from your internet navigation pane at top of screen. Choose another report to view.

### 3 Practice Performance Reports – Creating a Report

This section shows some options for creating and navigating the reports. All reports have the same general functionality so the steps shown here will help you navigate through any report that you open.

Here are basic steps to creating a performance report:

1. Choose a Category: There are currently four categories to choose from. This list will grow as DARTNet adds more metrics to the Performance Reports.

2. Choose a Phenotype: There are different phenotypes available depending on which category you choose.
   - Example – Prevention Services category will have phenotypes based on age and gender
   - Example – Diabetes category will have phenotypes based on Diagnosis of Diabetes

3. Choose a Cohort: The cohort is determined by patient encounters. Choose the cohort that you would like represented in your denominator (patient subset that a metric is measured against)

4. Choose a Metric: Only certain metrics will be available depending on the Category and Phenotype that you choose.
   - Example – For Prevention Services (category) for Women 50-64 yrs old (phenotype) you will be able to choose metrics for: Alcohol Screening, Breast Ca Screening, etc (see red box below). The metrics will change as you choose different phenotypes.
You can view the filters in the pane on the right hand side of the report screen. You can leave the filter pane visible or hide it.

4 Practice Performance Reports — Functionality and Filters

Once you have created a report to view you can change the filters within the view.

1. Changing the metric within a category / phenotype – to change a metric you can choose from the different metric tabs within a specific category / phenotype.
   - Example – Category: Preventive Services; Phenotype: Women 50-64
   - In this example you can choose from many metrics (see next two images below)
2. Changing the Denominator (Patient grouping) that a metric is running against – this will involve changing either the cohort or the phenotype.
   - Example – Category: Preventive Services; Metric: Influenza Immunization
   - Change the cohort to view a different report based on patient encounters within a period of time.
     - Example – change denominator from pts seen 1x in 12 mos to those seen 1x in 24 mos
   - Change the Phenotype to view a different clinical condition group;
     - Example – change denominator from pts age 50-90 to Age 64-90.

3. Change the filter in any graph or chart on the report by clicking the “filter” icon in the top right hand corner or the specific section that you are looking at. You may have to hover in the chart that you are looking at to see the filter icon. Once you click this, a filter pane will open on the Right side of the page and you can change the filters for that specific chart.
a. Filter changes can include: Calendar Quarter, Metric, Percent at goal, Organization or Phenotype.

4. Managing the “Filters” panel on the right hand side of the screen.
   a. To Clear a filter you will click the icon that looks like an eraser. This will clear out the filter section that you are in. In the example below, if I cleared the filter, the Preventive Services filter would be cleared and applied to all associated report views.
   b. To Pin a filter you will click the icon that looks like a push pin. This will apply the filter that you have selected to all of the views within the report.
c. To choose items within a filter you will click the check box next to the item that you would like to view. Sometimes you will want to click multiple items. To do this you can simply click the check boxes for multiple items within the filter.

i. Example – To choose four more than one Calendar Quarter to view. This example shows the choice to view data from the four quarters in 2013.

You should now be able to create a Performance Report based on the metrics / views that you wish to look at.

5 Practice Performance Reports – Your Practice Data by Organization

Once you have a report set up with the data that you are interested in viewing, you can view your individual practice performance against that of the other Organizations that are using the Registry.

How to filter your Organization’s data:

1. Find the “Find you organization below” box and identify where your organization is ranked for the specific report that you created.
   • The Top Five Performing Organizations per metric will be displayed with their practice name. After that all others will be represented numerically. If your practice is not in the Top Five for a metric you will be able to identify your organization by name. However, only Users from that organization will be able to see the Organization name.
   • NOTE: anytime you change any of the filters the ranked data will change
2. Once you have determined your Rank, click on your column in the report and you will be able to view average trending over time for your individual organization.

3. Sort tables, matrices, bar and column charts ascending or descending on either Metric Name or Numeric Value.
   - Example – Percent at Goal in the Organizations box can be sorted ascending or descending by clicking the arrow at the top of the column.
If your Organization has more than one location or Care Site then you can use the Report titled Organization / Care site and view reports at the Care site level.

To see all Care Sites within your Organization, follow these steps:

1. First, determine the filters that you would like to see for Category, Phenotype, Cohort and Calendar Quarter in the Filter pane on the right. See steps above in “Practice Performance Reports – Creating a Report” section for instructions on creating a report based on the information that you would like to view.
2. To view Care Sites within an organization against ALL other Care sites in the Registry, follow these steps:
   a. Choose your Organization from the “Organization” list on the right side of the bar graph.
   b. Once Organization is chosen, only those Care Sites within that Organization will be highlighted but they will still be displayed with ALL other Care Sites in the Registry to compare against.
3. To view Care Sites for your Organization ONLY, follow these steps:
   a. Click the grey box icon in the bottom left hand corner of your screen. (See screen shot below)
   b. Choose the second pane from the bottom of the screen to open up a view of only your organization’s Care Sites.
This view will show you how your Care Sites benchmark against each other for the metric chosen on the first pane.

7 PRACTICE PERFORMANCE REPORTS — YOUR PRACTICE DATA BY ORGANIZATIONAL ATTRIBUTES (SPECIALTY-SPECIFIC REPORTS)

Once practice-specific attributes have been added to your Care Site (see Super User Guide for instructions on how to complete this step) you can use the Report titled Organization Specialties to view reports grouped by Organizational Attributes such as Specialty, Network Membership, Clinician Count, Clinic Type, and Clinic Setting. The goal of this report is to offer a report where Organizations can benchmark / compare their data against others that are like themselves.

For example, the Specialty: Primary Care attribute grouping will allow Primary Care providers to benchmark against one another instead of against all Organizations in the Registry dataset.

To view Organization Specialties Reports, follow the steps below:
1. Determine the filters that you would like to use to build your report. Use the same functionality steps that you learned in “Section 3: Creating a Report” of this Guide with regards to Choosing Category, Phenotype, Cohort and Metric.

2. Choose practice-specific attribute(s): Attributes can be selected using the Characteristic Display filter pane on the right. The available attribute categories include: clinic type, clinic setting, clinician count, network, and specialty.
   - NOTE: your practice data will only be available to view under attributes that have been added to your Care Site prior to opening the report. If you wish to be added to an attribute group, ask your Super User (the person who set up your Account) to set this up for you.

3. Once an attribute is chosen only Organizational Care Sites that have selected that specific attribute will be displayed.
Filtering your Organization’s data within the report:

1. Find your practice’s rank in the far left panel of the report.
   - As mentioned before only the Top Five Performing Organizations per metric will be displayed with their practice name. All others will be represented numerically. If your practice is not in the Top Five for a metric you will be able to identify your organization by name. However, only Users from that organization will be able to see the Organization name.
   - NOTE: changes to the filters will also change rankings

2. Once you have determined your Rank, use the percentile to click on your corresponding bar in the bar graph to the right. By selecting your bar from the bar graph you will be able to view average trending over time for your individual organization for the chosen metric.

3. From here you can click through other metrics within the chosen Phenotype and see your results.

8 REPORT METRICS

1. You can find the Report metrics in the Documents folder on the main landing page in Sharepoint. This page will give you detailed information about all of the possible metrics that are used in the Performance Reports.

9 PRINT YOUR REPORT

Here is how to print a report.

1. Click “File” in the upper left hand corner of the Report viewer screen for the report that you would like to print.
2. To Print your report – Choose “Print”. When you choose this option your normal print screen should appear with choices of printers to print to. Click print once all of your personal printing preferences are chosen.

10 LOGGING OUT

To log out of the performance reports you need to exit from the browser exit (usually an “X”) found at the top right hand of the internet browser window. Do not exit from the tab that you have open as this will not complete the log out.

11 DEFINITIONS

1. Category – general condition groups to make Phenotype and Cohort choices from (i.e. DM, HTN, Prevention)
2. Phenotype – a specific clinical condition patient group (i.e. Women age 50-64; Pts with Type I or II DM)
3. Cohort – subset of patients that meet a certain criteria (i.e. pts within a phenotype that have at least “1 visit in the prior 12 mos”)
4. Metric – measurement on which patients are achieving or not achieving a goal (i.e. “Mammography performed in previous 24 mos”; patients within the selected phenotype will either achieve or not achieve this metric)
5. Patient Group – group of patients within the practice that meet denominator (phenotype)
6. Practice Group – practices can be grouped by their characteristic (i.e. small practice, large practice, etc) and you will be able to view report results next to other practices that have the same characteristics as yours practice.
7. Time Period – refers to quarterly data that is pulled. Can drill down a metric by compliance during a certain quarter.