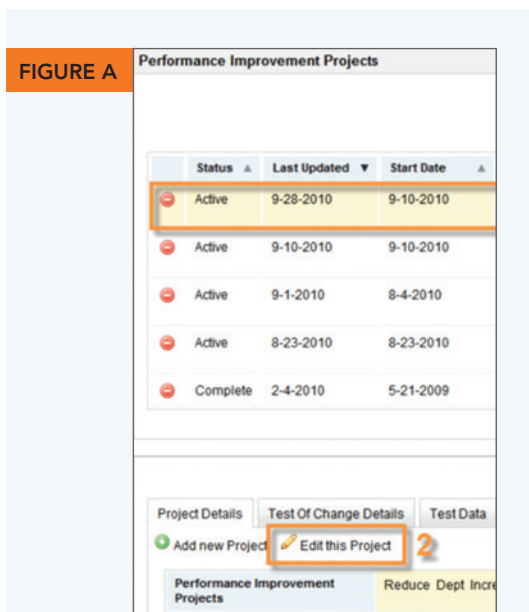


### Old information is so ... yesterday

#### Keeping your team's projects in UBT Tracker up to date

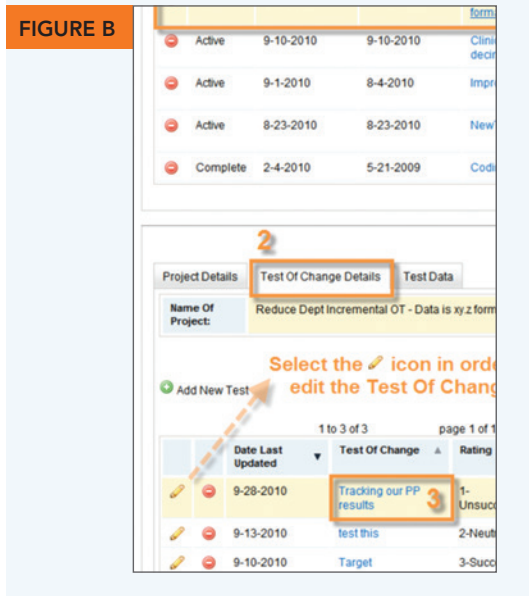
One of the things making UBT Tracker such a powerful tool is that it can give a picture of where teams are at in very-nearly real time—if teams keep their information up-to-date. It's not hard! In particular, you'll want to stay on top of the information in the **PROJECT DETAILS** and the **TEST OF CHANGE DETAILS** tabs.




#### Update your team's Performance Improvement Project information (see figure A)

Once you've entered a project, the most important things to update are the **DESCRIBE RESULTS** and **LEARNINGS OR SUCCESSFUL PRACTICES** fields. To add new information, navigate to the Performance Improvement Project page, and click on the project you want to update. Click on **EDIT THIS PROJECT** and supply the new information (remember, don't delete previously entered data—that data is part of how you track the success of your work over time).

Don't forget to click on **RESULTS** and update the overall status of your project from the drop-down choices. Before leaving the page, hit **SAVE**, or if you realize you don't need to make any changes, hit **CANCEL**.



#### Update your team's Test of Change information (see figure B)

From the Performance Improvement Project page, click first on the name of the project you want to update; then click on the **TEST OF CHANGE DETAILS** tab; then click on the name of the test of change (which is in blue). Select the  icon to make changes to the test of change. Click **SAVE** on when you're done, or **CANCEL** if no changes were needed.

#### Short on time for Tracker updates? Clone yourself today!

Did you know you can virtually clone yourself in Tracker so other team members can share—or take over—the responsibility for keeping the Project Details and Test of Change records (and everything else, too) up to date?

Follow the steps for assigning a role on the reverse side of this sheet and choose Proxy for those team members who will share Tracker duties. This gives those members the same rights in Tracker as a co-lead: They will be able to edit all the information about a team except the team rating.

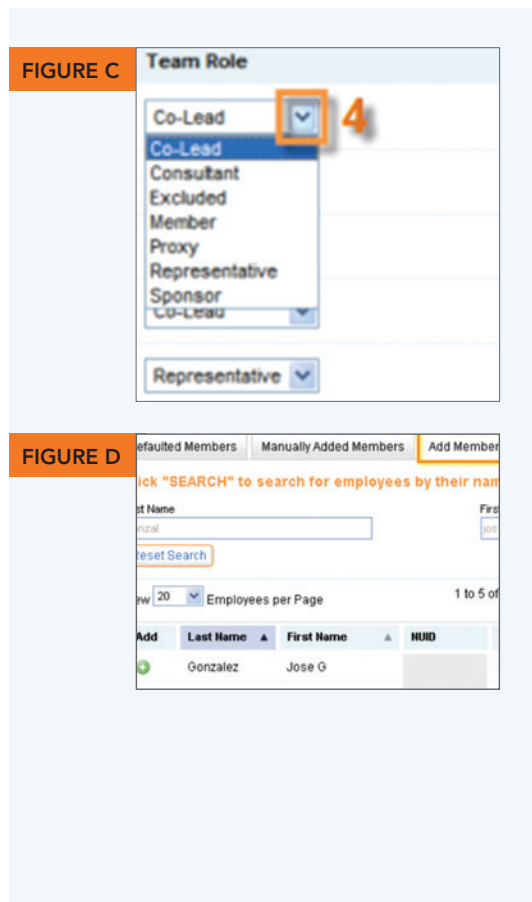
For step-by-step instructions, download the UBT Tracker User Guide at [LMPPartnership.org/tools/ubt-tracker-user-guide](http://LMPPartnership.org/tools/ubt-tracker-user-guide).  
**Questions? Email [UBTtracker@kp.org](mailto:UBTtracker@kp.org).**



## It's not a team without members

### *How to manage your team membership in UBT Tracker*

Once your UBT profile has been created by a Tracker administrator, it's up to the co-leads to keep the membership information up to date. Some things that you'll want to do are assign roles and add physicians, co-leads and sponsors.



### Assigning roles

Locate your team on the **MY TEAMS** page. Click on **SELECT** (in the View Details column on the right-hand side of the screen) and choose **MEMBERS** from the drop-down. This brings up a screen that shows you, first, all the General Ledger (GL) strings that are associated with this team; then a summary of the team membership; and then all the team members. Scroll down to this last box. When you click on the team role in the right-most column, a drop-down appears and you can assign a role to that individual. The choices are: (see figure C)

- Co-lead. For the team's co-leads.
- Consultant. For the team's UBT consultants.
- Excluded. For removing employees in the GL string who are not members of the UBT.
- Member. For everyone on the team who does not have another role.
- Proxy. For team members who will help keep the team's UBT Tracker information up to date.
- Representative. For team members who have taken on representative duties (on larger teams that use a representative model).
- Sponsor. For the higher-level managers and union leaders who are working to support the team.

### Adding physicians, sponsors and consultants

It's important to be sure everyone who's working with your team is listed with it in Tracker—remember, to be ranked Level 4 or 5, a team has to have sponsors! Your team will have been automatically populated with the non-physician members who are associated with your department's cost centers. You may need to add members from other cost centers to your team—especially consultants, sponsors and, in every region except Southern California (where physicians are automatically included), physicians. To add them:

Navigate to the **UBT DETAILS** page and click **ADD MEMBERS**. Enter the first and last name of the person in the respective fields (a few letters of each name will usually suffice) and hit **SEARCH**. Click the **+** icon next to the person's name. Then click on the **MANUALLY ADDED MEMBERS** tab and find the person's name and assign a role. (see figure D)