

## Get a leg up with UBT Tracker



UBT Tracker is a powerful tool that can speed your team's progress and help it vault into high performance. How? It collects in one place all the important information about your unit-based team—who's on it, what you're working on, what metrics you're using, what tests of change you've tried and how well those tests of change worked—freeing you and your team up to concentrate on achieving your performance improvement goals. UBT Tracker also makes reporting on your team's progress a simple matter.

By creating a real-time database of UBT information, UBT Tracker makes it easy to spread successful practices. This is why the 2010 National Agreement requires that it be updated regularly. It lets you see what other teams are working on and what's worked for them—information you can use to jumpstart your team's work or solve a tough obstacle. (And, of course, the information you've entered can help those teams succeed, too!)

UBT Tracker highlights accomplishments for leaders at all levels, and helps us all achieve our shared vision: Creating a high-performing Kaiser Permanente that delivers on the promise of the Value Compass and is the model for the future of health care in the United States.

## MAKE IT A DATE! 10 WAYS TO MAKE TRACKER A REGULAR HABIT

Having a hard time incorporating UBT Tracker into your team's workflow? Here are some techniques that other frontline teams are using.

### INVITE TRACKER TO YOUR UBT MEETINGS

- Set aside time during your regular UBT meeting to update Tracker data.
- To be sure you set aside that time, make "update Tracker" a standing UBT meeting agenda item.
- Keep Tracker open during meetings and refer to it to see what other teams are doing when faced with similar issues.

### SET TRACKER PRIORITIES

- Note weekly, monthly or quarterly deadlines for updating Tracker on your team's master calendar.
- Focus on keeping key entries up to date: Performance Improvement Projects (PIPs), Tests of Change, Results and Learnings/Successful Practices.
- Once a month, take a few minutes to search Tracker to see what similar teams in your region are doing.

### GET TEAM MEMBERS INVOLVED

- Assign team members to gather data for specific entries.
- Bring Tracker reports to team huddles so team members can understand the data, interpret it and respond.
- Use Tracker entries to build storyboards for UBT fairs, training sessions and other displays.

### KEEP IT SIMPLE

- Download a copy of the UBT Tracker Guide and keep it in your team binder for quick reference:  
[LMPpartnership.org/tools/ubt-tracker-user-guide](http://LMPpartnership.org/tools/ubt-tracker-user-guide).


Questions? Email [UBTtracker@kp.org](mailto:UBTtracker@kp.org).



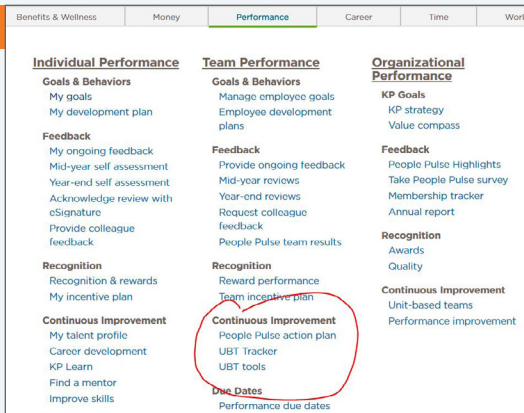
# Signing On to UBT Tracker

- Navigate to MyHR from your region’s home page (or go to [insidekp.kp.org/myhr](https://insidekp.kp.org/myhr)) and click on **SIGN ON**. (see figure A)
  - Enter your **NUID** and **password** at the prompts.
  - From the **PERFORMANCE** tab, look for the heading Team Performance, then the sub-heading Continuous Improvement. The link to UBT Tracker is there. (see figure B1)
- Alternatively, click on the **WORK@KP** tab. Under the Labor & LMP heading, you will see a link to UBT Tracker. (see figure B2)

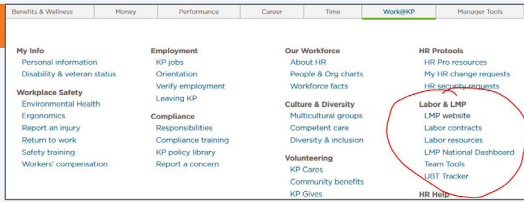
**FIGURE A**



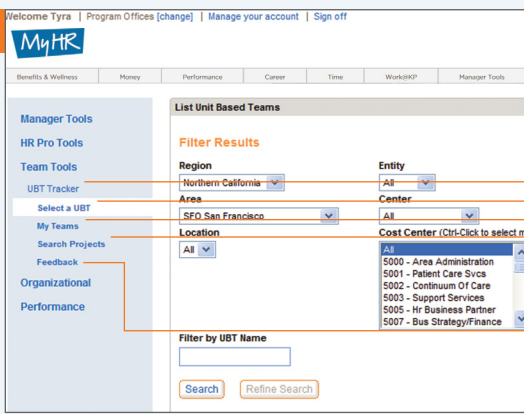
**FIGURE B1**



**FIGURE B2**



**FIGURE C**



**You now can get anywhere you want to go in Tracker from the left-hand panel.** (see figure C)

**UBT TRACKER** This page has overview information about Tracker and a link for downloading the full instruction guide to UBT Tracker.

**SELECT A UBT** This page lets you find a UBT by name, if you know it—or lets you set search for UBTs by various attributes, including medical center area, entity (Kaiser Foundation hospitals, health plan, medical group or “all”) and cost center.

**MY TEAMS** This brings up a list of teams that you belong to or that you’ve told Tracker you’re interested in following (because they’re working on projects similar to yours, for example). From here you can dive in and look more closely at each team’s Performance Improvement Projects or other details about the team’s makeup.

**SEARCH PROJECTS** Here you can set parameters to find projects with characteristics you’re interested in. You can search by the project’s focus area, for example—Revenue Capture, No Harm and Patient Satisfaction are some of the choices—or by its metric, by whether or not the project’s target has been met, and much more. This is a powerful way to find other teams’ successful practices and adapt them for your UBT—and lets others benefit from the good work your team is doing.

**FEEDBACK** Questions or comments about how Tracker works? Go to this page to send an email to its developers.

## Help UBT Tracker be all it can be

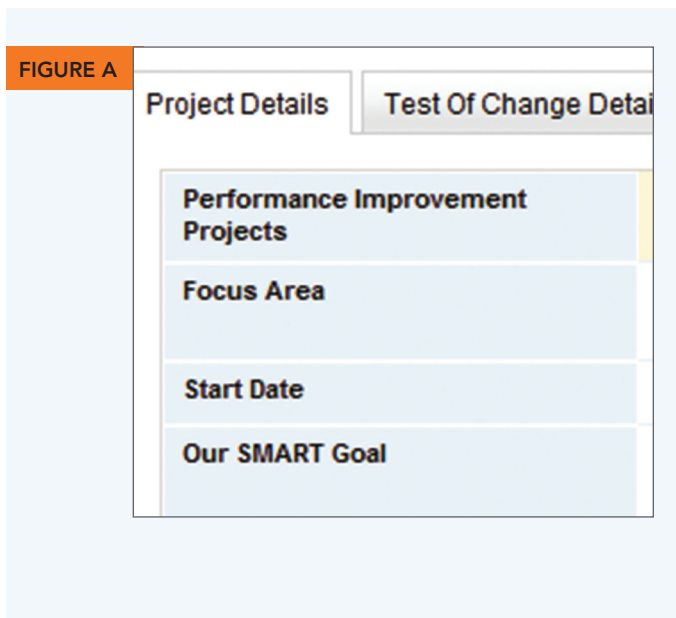


### Tips for entering good descriptions and other information

The UBT Tracker is designed to make it simple to share successful practices, supporting teams as they use the plan, do, study, act (PDSA) steps of the Rapid Improvement Model. But to do that, it needs good information. That's where you come in. Use the guidelines on this tip sheet to be sure you're helping all of us make the most of UBT Tracker.

### How SMART can you be?

When you're entering a performance improvement project in UBT Tracker on the **PROJECT DETAILS** page, be sure your SMART goal is addressing these five points. Is your goal: *(see figure A)*



**Specific.** Be clear about what you want to improve. Define your scope of work.

**Measureable.** How will you track improvements? If you don't have baseline numbers, that first thing you need to do is establish them. Be sure to record your baseline and target numbers.

**Attainable.** What is your current performance? Do you really think you can attain the goal in the time frame stated? Be ambitious, but make the goal achievable.

**Realistic/Relevant.** Is this something the team can directly affect? Does it have a bearing on the main work of the department?

**Time-bound.** Be sure to include when the improvement will be made by.

How you achieved your goal is what you'll record under **TEST OF CHANGE DETAILS**.

### What's a good SMART goal look like?

Poorly written	SMART
We will reduce wait times.	We will reduce wait times from 25 minutes in Q2 to 15 minutes by Q4.
Every employee will introduce him- or herself to every patient they assist.	We will improve the response to Question M on the XYZ survey, on staff courtesy and friendliness, from 75% in Q1 to 90% by Q2.
We'll start rounding.	The department manager and charge nurses will round every day beginning April 1; other team members will round at least once a week beginning May 1.

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).



FIGURE B

Project Details	Test Of Change Details	Test Data
Performance Improvement Projects	Imaging Aide ca	
Focus Area	Employee Well-E Safety)	
Start Date	9-15-2009	
Our SMART Goal	To enhance the Goal is to have	
Performance Metric	Team Functionin team.)	
Data Source for Metric	People Pulse	
Results	Target Met	
Describe Results	As of 10/16/01 f other two IAs w End of 2010-thr	
Using RIM / PDSA?	Y	
Learnings or Successful Practices		

### Describing your results

One of the most important fields is the **DESCRIBE RESULTS** area (under the Project Details tab). Key tips: *(see figure B)*

- Never delete previously entered performance data (even if it's not so flattering!). There's great value in being able to see results over time.
- Include your baseline (starting) measurement, with date; add updated metrics, with date, as you get them.

Poorly written Results	Great entry
The target has been met & we'll continue to demonstrate to our customers great courtesy & helpfulness towards their needs.	We wanted 90% of our patients to be satisfied with their primary care visit. Our baseline performance is 75% (Q2-10).  We gave our members a survey to determine how many are satisfied with their primary care visits. 100 members filled out the survey and 80 of them reported being satisfied. That means that 80 percent satisfied. (Q3-10)

Another key area is the **LEARNING OR SUCCESSFUL PRACTICES** field. Key tips:

- Provide a date with each update.
- Identify a procedure or tool that's given the best results. (Start a sentence, "The most successful thing we've tested is...")
- Identify a procedure/tool that's helped overcome an obstacle. (Start a sentence, "The biggest barrier we've encountered was X and we overcame it by...")

Poorly written Learning/Successful Practices	Great entry
We've gone from the lower third on Staff Courtesy and Helpfulness to the upper third at year-end, then back down to middle third in Q1 2011.	The most successful thing we've tested is coordinating among caregivers with personal and responsive service. The biggest barrier we've found is determining when the survey would be conducted and by whom. This was resolved by educating MAs about survey impact on patients and MAs agreeing to add survey to their workflow (6/15/11).

### Describing your Test of Change

Help others avoid reinventing the wheel! Key tips for the **TEST OF CHANGE DETAILS** tab:

- In the Test of Change field, write a sentence that begins, "We tested [X] to see whether it would increase/reduce/change [Y]..."
- In the Outcome field, write a sentence that begins, "This test succeeded/failed because..." Write a second sentence that begins, "Next time we might try..." (When you start your test, before you have any results, write "no outcome.")
- Be sure to select a rating from the drop-down menu.

	Poorly written	Great entry
Test of Change	Decreased wait time by 10% Increased efficiency by changing new filing system Increased emphasis on customer service	We tested whether having everyone introduce themselves by name to each patient would improve our MPS scores.
Outcome	MPS score increased from 65.4% to 65.8% Decreased patient complaints	This test partially succeeded because MPS scores increased from 65.4% in Nov. 2010 to 65.8% in Jan. 2011.

## Performance Improvement Projects v. Test of Change

### What's the difference? What goes where?

UBT Tracker lets you keep track of your team's performance improvement projects and is especially helpful for teams working with the plan, do, study, act cycles of the Rapid Improvement Model (RIM).

**FIGURE A**

Project Details	Test Of Change Details	Test Data
Performance Improvement Projects	Achieve same day	
Focus Area	Patient Satisfaction	
Start Date	2-1-2011	
Our SMART Goal	Achieve same day	
Performance Metric	Other	
Data Source for Metric	Other	
Results	Results not Available	

The **PERFORMANCE IMPROVEMENT PROJECTS** (PIP) page gives you an overview of a team and its projects as well as providing a way to see the highlights of each project. Each project—for example, improving the percentage of hypertensive patients whose blood pressure is under control—may have many tests of change associated with it. You get to the **TEST OF CHANGE DETAILS** page from the PIP page.

A Test of Change page has a much narrower focus than the PIP page: It's where you record the information about a single test of change—for example, putting yellow stickies on an exam room door to remind everyone the patient there needs a second blood pressure check before leaving.

You'll have successes and failures along the way—and documenting *all* of these in individual test of change records will help you keep track of your work and will help other teams learn from your flops as well as your successes.

### Performance Improvement Projects page

Navigate to your team's PIP page from **MY TEAMS** in the left-hand panel. When you're adding a Performance Improvement Project (*this has to be done by a team co-lead or his/her proxy*), you'll supply basic information about the project from the **PROJECT DETAILS** tab, including: (*see figure A*)

- Giving it a name
- Selecting its focus area from the drop-down menu
- Describing your SMART goal (specific, measurable, attainable, relevant/realistic, and time-bound).

### Test of Change page

Access the Test of Change information from midway down the PIP screen. Look for the tab that says **TEST OF CHANGE DETAILS**. When you click on this tab, you'll be on the screen where you will record information about an individual test of change—what did your team try, and how well did it work?

Right next to the **TEST OF CHANGE DETAILS** tab is a **TEST DATA** tab. This is where you record the *data* about a particular test of change. Filling out information here will allow you to create run charts that show the effect your test of change is having in helping you achieve your goal.

### Update frequently

You'll want to update the PIP page and the Test of Change pages frequently until your project is successful. What were the results of your first test? How did your tenth turn out? What did you do that was successful? What failed? The more information you fill out, the more helpful UBT Tracker will be for you and for others.



## “Is the change an improvement?”

*The Test Data tool makes it easy to determine the effect of your tests of change*

### Step one: How are you going to measure your outcome?

Many useful measures are expressed as percentages: How many *parts* of a *whole*—what percentage?—had the desired outcome? For example, how many patients got a needed second blood pressure test? Written as a fraction, it looks like this:  $\frac{\text{\# of patients rechecked}}{\text{\# of patients needing recheck}} = \% \text{ of patients rechecked.}$  In other words,  $\frac{\text{parts}}{\text{whole}} = \text{desired outcome.}$

### Step two: Label your information!

To record this data in Tracker, you need to identify what your project’s “part” is and label it (the numerator, the fraction’s top number); what your “whole” is and label that (the denominator, the fraction’s bottom number); and provide a label for your desired outcome (the “calculated value” in Tracker).

- Create a new project or open an existing one.
- Scroll to the bottom of the project record, to where it says **SET UP CHART LABELS** (see figure B)
- Enter the labels for the numerator, denominator and calculated outcome.

**FIGURE B**

Set Up Chart Labels	
Numerator Label (Top)	Denominator Label (Bottom)
Calculated Value Label (Top/Bottom)	Additional Variable Label

ignore unless working with a UBT consultant or an improvement adviser

Now, when you add a Test of Change, you will have fields under the **TEST DATA** tab for entering the information your team collects.

**For example,** to track how many patients got a needed second blood pressure test, you need to know how many got the second test (the part, or numerator), and how many should have gotten the test (the whole, or denominator). The numerator’s label in Tracker might be “# of patients rechecked.” The denominator’s label might be “# of patients w/elevated BP.” The “calculated value” might be labeled “% patients rechecked.”

### Step three: Steppin’ out with Tests of Change

To create a Test of Change record, click on the **TEST OF CHANGE DETAILS** tab and describe your test: Maybe your team has decided to put a yellow sticky on the door of the exam room where a patient needs a second blood pressure check. Collect each day’s results and enter them in Tracker by clicking on the **TEST DATA** tab. Use the fields to add information about the date(s) the test was done and the shift (if applicable), and add the values for the numerator and denominator for that day.

**For example,** on 3/17/2011, your team used the yellow stickies as planned and 72 patients (the part) out of 100 (the whole) received a needed second blood pressure check; 72 is entered in the field you labeled “# of patients rechecked”; 100 in the field “# of patients w/elevated BP” field. The system calculates that 72% of patients were rechecked.

**Note:** If your test involves a simple count, enter the count in the numerator field and the number “1” in the denominator field.

For step-by-step instructions, see section 15 of the UBT Tracker User Guide; see section 16 to find out how to create run chart with your Test Data. Download the guide at [LMPartnership.org/tools/UBT-Tracker-User-Guide](http://LMPartnership.org/tools/UBT-Tracker-User-Guide).

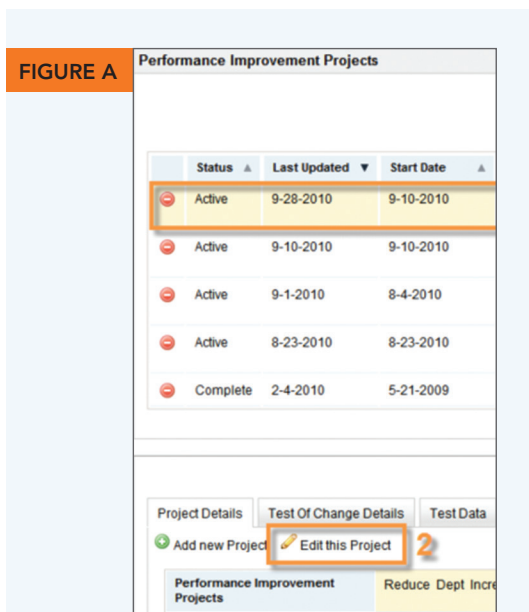
**Questions? Email** [UBTtracker@kp.org](mailto:UBTtracker@kp.org).

### Old information is so ... yesterday



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

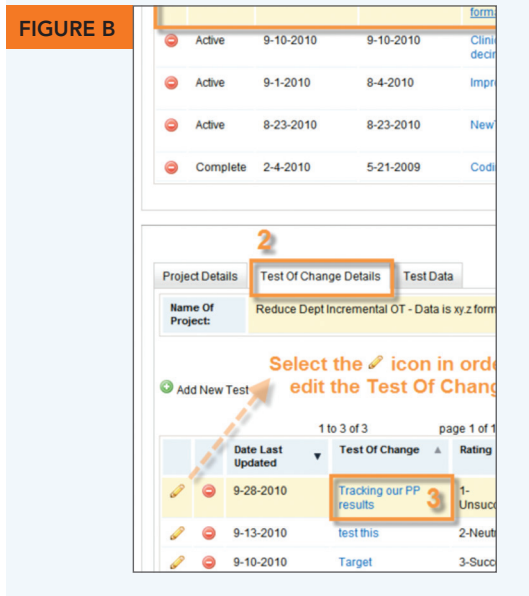
One of the things making UBT Tracker such a powerful tool is that it can give a picture of where teams are at in very-nearly real time—if teams keep their information up-to-date. It's not hard! In particular, you'll want to stay on top of the information in the **PROJECT DETAILS** and the **TEST OF CHANGE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

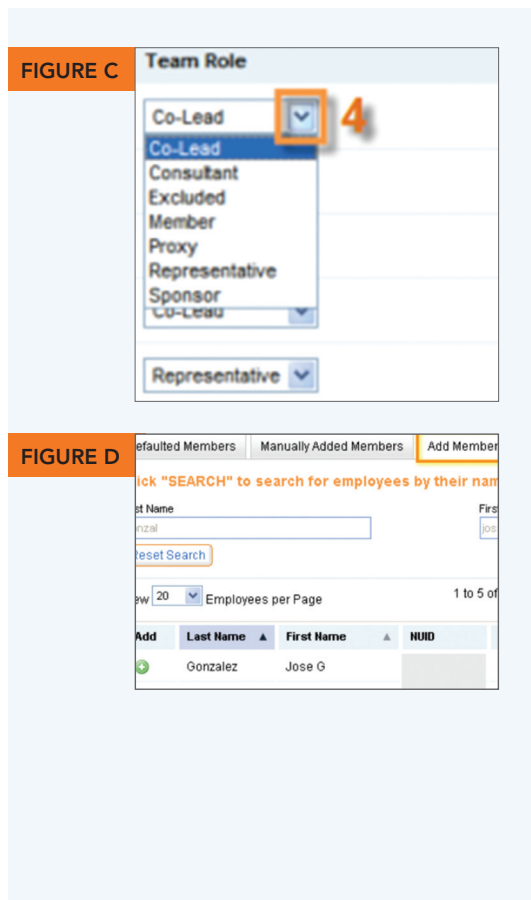
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**Questions? Email [UBTtracker@kp.org](mailto:UBTtracker@kp.org).**



## 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)



### Tracker reporting tools: *What's available?*



Part of the power of UBT Tracker is the ability to view and/or extract just the information and data you want. You can choose from pre-formatted reports with basic team information, generate run charts on Tests of Change, or opt to extract raw data in Comma Separated Value (CSV) files, which can then be worked with in programs like Excel, Access or Statit.

#### Preformatted reports

The primary difference between the Team Summary and the Team Detail reports is the amount of detail you get about the team's performance improvement projects.

*(see figures A and B)*

TEAM SUMMARY	TEAM DETAIL
name of team	name of team
location	location
number of teams	number of teams
team ranking	team ranking
team leadership	team leadership
one-line summary of each performance improvement project	all data from the Project Details tab

#### Test of Change run charts

Teams that make use of the **TEST DATA** tool can generate simple run charts that show how their tests of change are impacting their outcomes. *(see figure I on reverse)*

#### Raw data extracts

Using this option, you can develop a variety of different reports, including:

- the details of performance improvement projects,
- tests of change,
- basic information about unit-based teams, including whether the teams are using huddles, what their ranking is on the Path to Performance and who their sponsors are, and
- how many employees in a given area are in UBTs.

FIGURE A

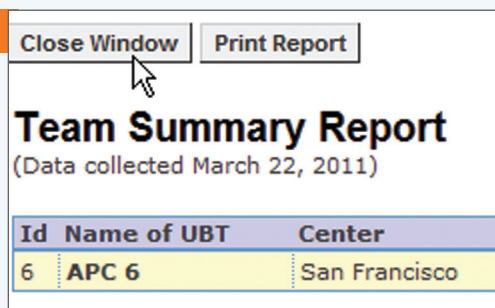


FIGURE B

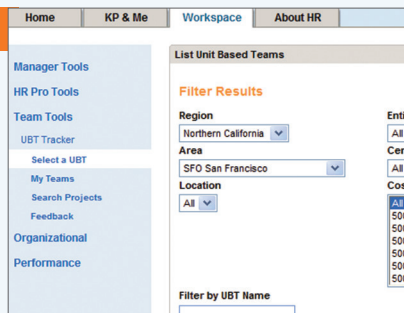


See reverse for instructions on how to get these reports. More information is also available in the UBT Tracker User Guide, which can be downloaded at [LMPpartnership.org/tools/ubt-tracker-user-guide](http://LMPpartnership.org/tools/ubt-tracker-user-guide).

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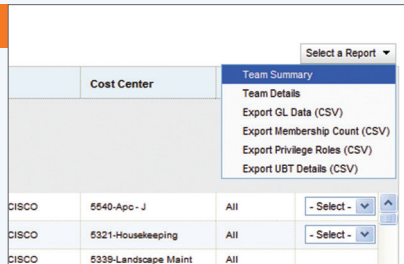
FIGURE C



### How do you get a report on multiple teams or projects?

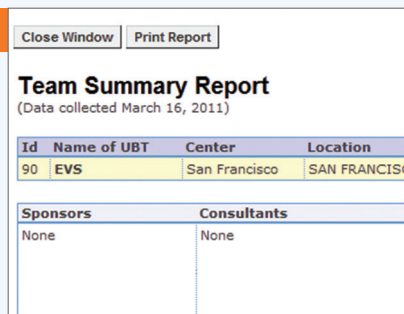
1. Get a list of the teams you're interested in by using the filters on the **SELECT A UBT** or **SEARCH PROJECTS** pages, or go to your **MY TEAMS** page. (see figure C)
2. From the **SELECT A REPORT** tab on the right-hand side of the screen, choose what you want from the drop-down menu. (Two CSV extracts, Membership Counts and Privilege Roles, can only be accessed from the **SELECT A UBT** screen.) (see figure D)

FIGURE D



- If you choose one of the preformatted reports, it will appear immediately; you can print it out by clicking on the print button in the upper left of the screen. (see figure E)
- If you choose a CSV report, a dialogue box appears and you can then save the file to your hard drive. (see figure F)

FIGURE E



### How do you get individual team/project reports or test of change run charts?

Navigate to the **PERFORMANCE IMPROVEMENT PROJECT** page by clicking on the team name (from the **SELECT A UBT** or **MY TEAMS** pages) or on a project name (from the **SEARCH PROJECTS** page).

1. Look on the right-hand side of the screen for the **TEAM REPORTS AND EXPORTS** or **PROJECT REPORTS AND EXPORTS** buttons. From their respective drop-downs, select which preformatted report or CSV data export you want. (see figure G)
2. To get a test of change run chart: Use the **PROJECT REPORTS AND EXPORTS** drop-down and choose the **TEST DATA CHARTS** option. (see figures H and I)

FIGURE F

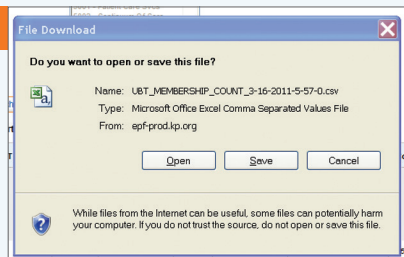


FIGURE G

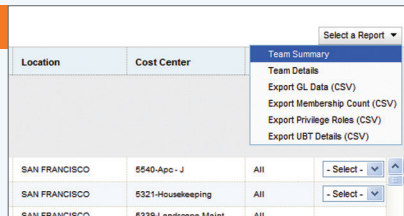


FIGURE H

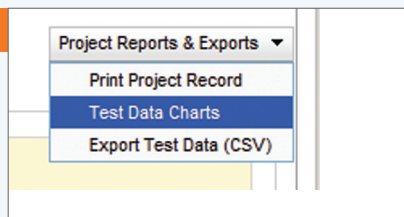


FIGURE I

