Best Practices Tracker Tool Instructions

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1 Introduction

In order for a Plan of Action (POA) to achieve the intended goal of improvement (remediation) or reinforcement of a target outcome, the best practices must be consistently incorporated into clinicians' practice. The Best Practices Tracker Tool facilitates the process of monitoring by tracking and trending audit data on whether the best practices are being implemented. Home health agencies (HHAs) are encouraged to share their monitoring results with their QIO coordinator who can provide assistance with evaluating and/or modifying the POA.

This tool is available at http://www.obqi.org. The tool is designed to accommodate up to six best practices for one target outcome. Agencies monitoring more than one target outcome will need to track the best practices for each outcome in a separate file.

Two sets of instructions are included in this manual. The Quick Reference instructions may be most useful for those who are proficient with Excel. Detailed instructions are provided for others who are less familiar with Excel but are comfortable with the basic Excel functions (i.e., opening files, entering data, copying, pasting, printing, saving, etc.). For those who need extra help with Excel, a Beginner's Guide to Excel is available at http://www.obqi.org or at http://www.csun.edu/itr/guides/excel/2000/beg.html.

2 Quick Reference

This section contains brief instructions on using the Best Practices Tracker Tool and is intended for those who are fairly proficient with Excel.

ALERT: Before you begin working with the Tracker Tool for the first time, open EXCEL. From the toolbar at the top, select Tools, then Macro, then Security. Make sure that the **Medium** button is selected. Next, from the toolbar at the top, select Tools, then Options. Click on the Edit tab. Turn off the "Enable AutoComplete for cell values" option (NOTE: You may want to turn this option back on after you've finished working with the tracker tool). Close Excel.

1. Open the tool and click on "**Enable Macros**".

2. Save a working copy of the tool for your data. You will use your saved copy each time you perform an audit.

3. Type your agency name into cell **B1**.

4. Type your target outcome into cell **B2**. (Or, you can copy it from the list of the outcomes in the "Outcome List" worksheet.)

5. Type your audit date into cell **B3**. Enter this date using the mm/dd/yy format.

6. Type the reviewer name into cell **B4** (optional).

7. Type your POA date into cell **F1**.

8. Type the beginning date of your audit period into cell **F2**.

9. Type the ending date of your audit period into cell **F3**.

10. Type in your best practices from your POA (as many as six), beginning with cell **D6** (through **I6**).

11. Enter your chart audit data, with one record per row, beginning with cell **A7**: Patient ID (column A), Last Name (column B), First Name (column C), and whether each best practice was present, absent, or not applicable (columns D through I). Valid values for columns D through I are:

    Present: x, X, y, or Y
    Absent: o, O, 0 (zero), n, or N
    Not applicable: -, na, n/a, N/A. or NA (NOTE: If you use the "-" symbol, use the Tab key to move your cursor.)

12. **Do NOT use the Finish button until you have entered all data for the audit.** You may want to save your data periodically by clicking on the Save icon.

13. **After** you've entered all your data (be sure to press Enter after the final cell), click on the Finish button. (Your data will be saved to another worksheet that is labeled with the date of your audit, summarized, and placed on a trend line.)

14. Go to the Summary tab and/or the Trend tab to view and/or print your results.

15. Save and close your file.

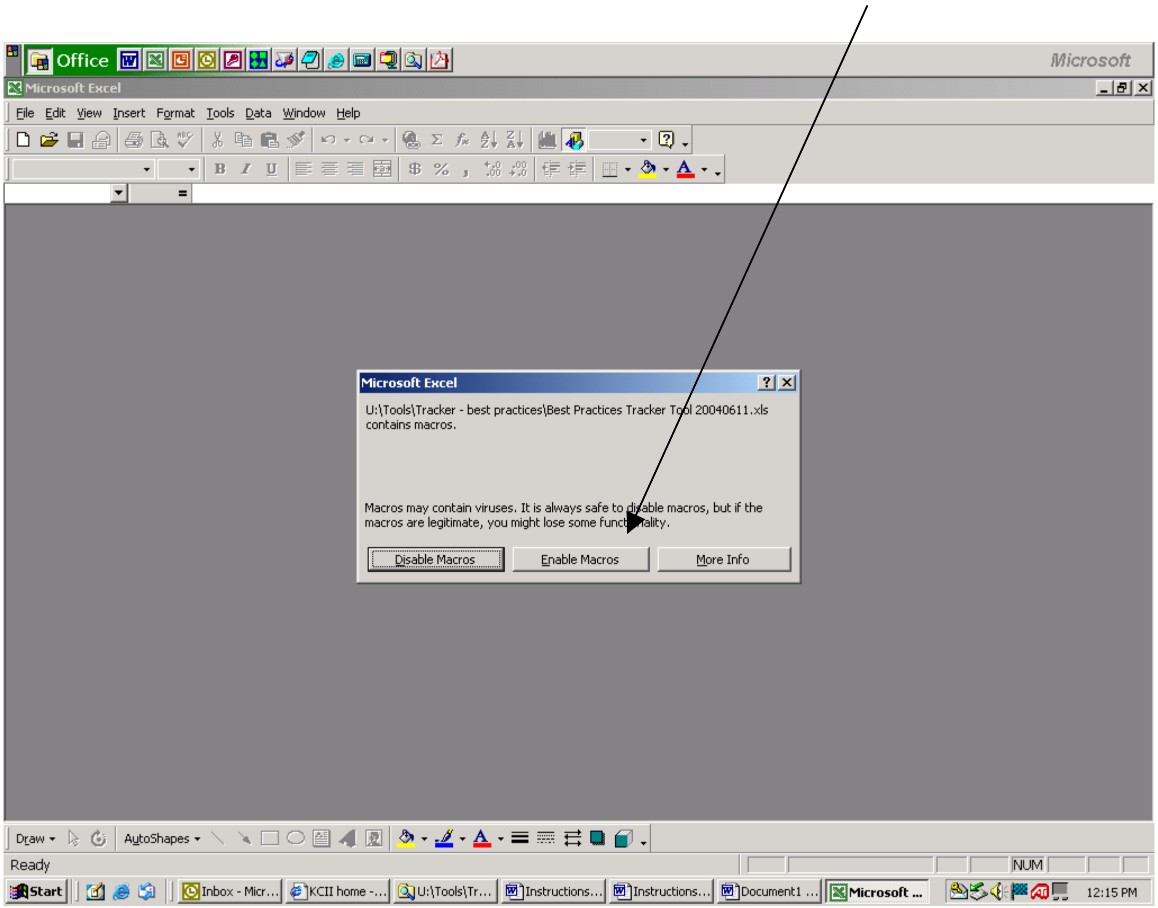
16. To enter data at subsequent audits:
    Open the file that you are using to track your best practices.
    Repeat the data entry process.
    Click on the Finish button.
    Go to the Summary tab and/or the Trend tab to view and/or print your results.
    Save and close your file.

3 Detailed instructions

This section contains detailed instructions on using the Best Practices Tracker Tool and is intended for those who are not completely comfortable working with Excel.

ALERT: Before you begin working with the Tracker Tool for the first time, open EXCEL. From the toolbar at the top, select Tools, then Macro, then Security. Make sure that the **Medium** button is selected. Next, from the toolbar at the top, select Tools, then Options. Click on the Edit tab. Turn off the "Enable AutoComplete for cell values" option (NOTE: You may want to turn this option back on after you've finished working with the tracker tool). Close Excel.

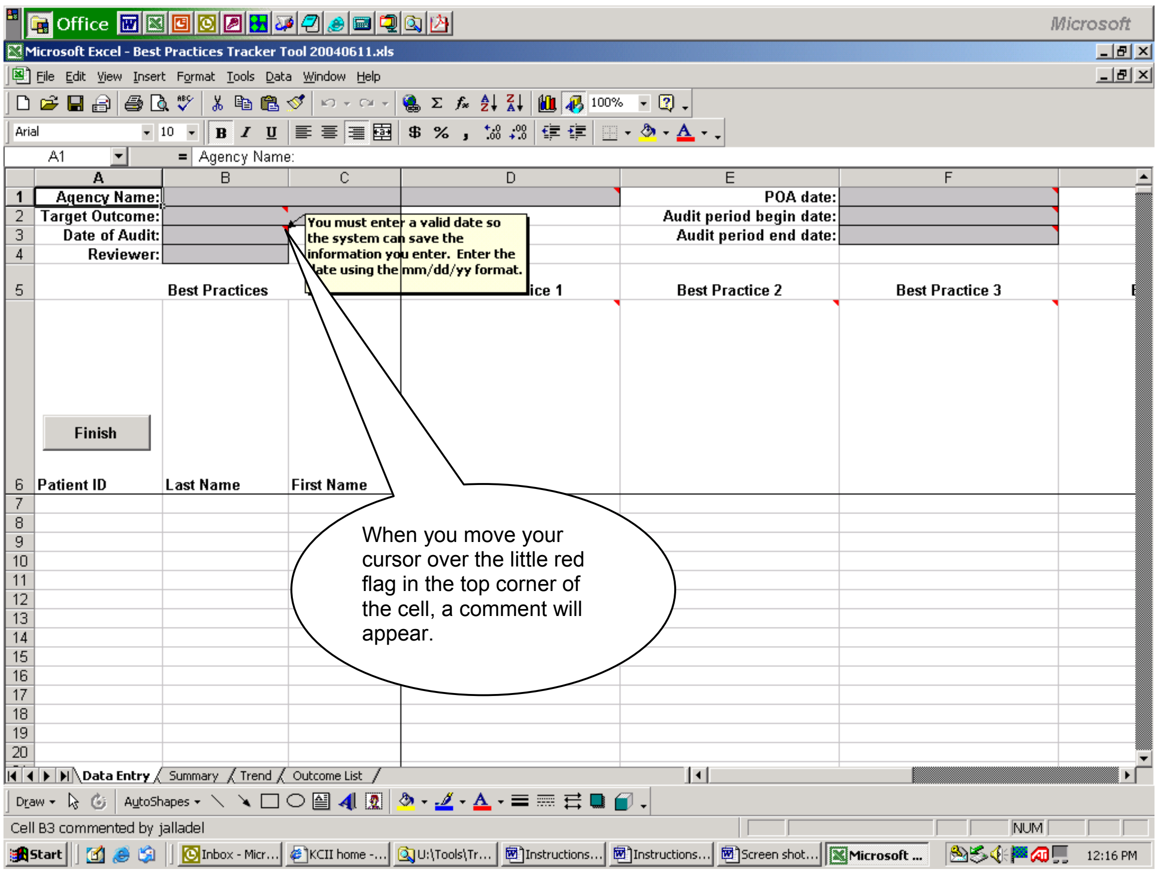
To open the Best Practices Tracker tool, double click on the Excel file that contains the tool. A dialog box will appear, and you should click on "Enable Macros."



Alert: Before entering any data into the Best Practices Tracker Tool, you should first save a working copy of the tool. You will use this copy to enter best practices data at different time points throughout your monitoring period.

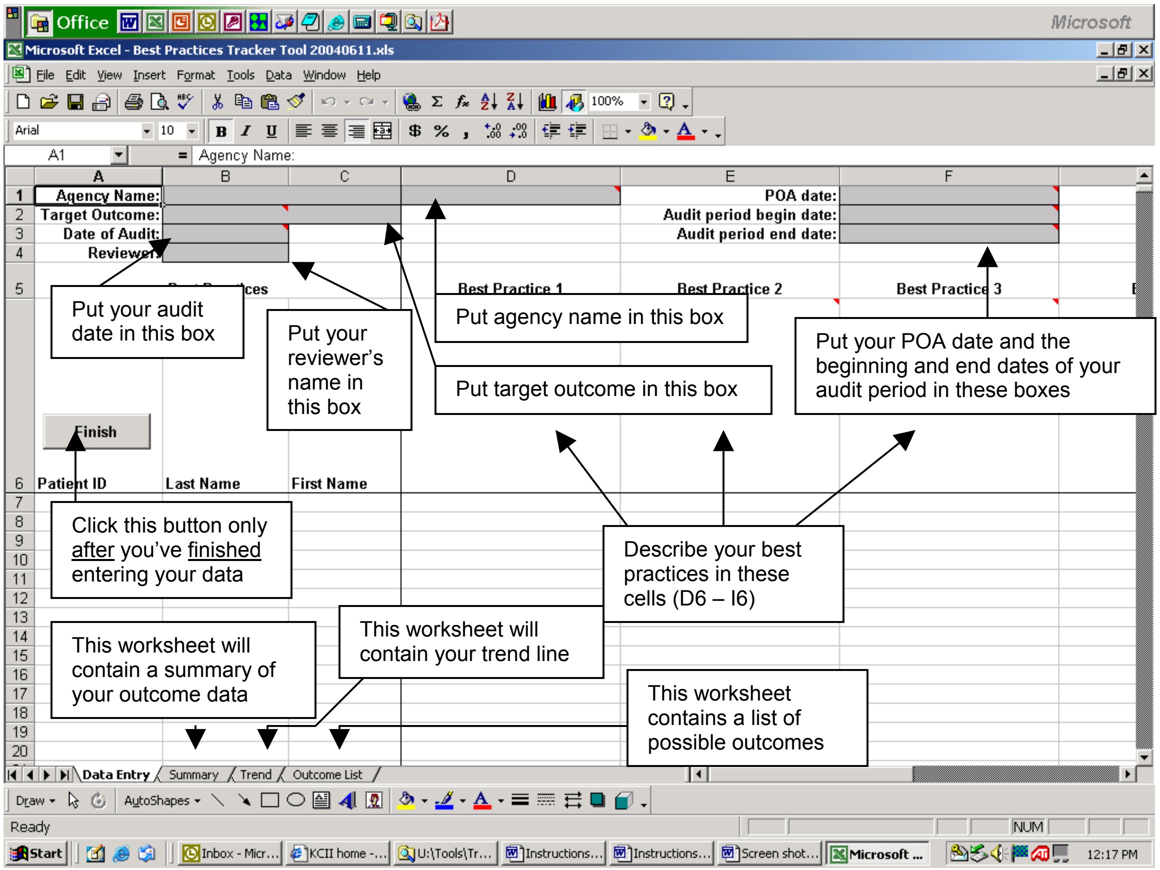
To save your working copy, click on **File**, then **Save As**, then choose the directory and name the file in which you will enter your data. **Do not click on the Save icon as it will overwrite your Tracker Tool template.**

NOTE: Cells that have a little red flag in the top corner contain helpful instructions. Move your cursor over the red flag to view the instructions.



If you would like to view all the comments on the Data Entry worksheet at one time, from the toolbar at the top, select View, then Comments. To hide the comments, select View, and de-select Comments.

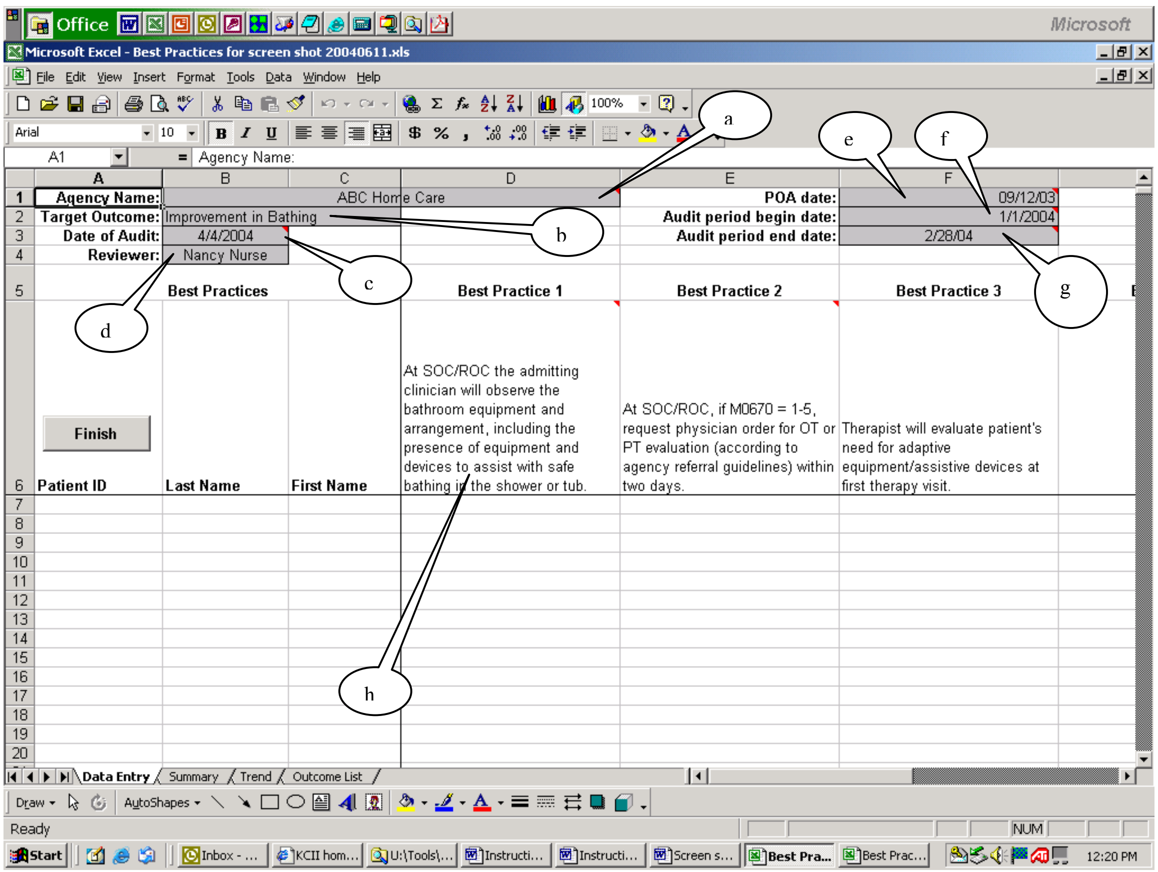
When you first open the Best Practices Tracker, you will be in the "**Data Entry**" worksheet. Use this sheet to enter your best practices data.



You can move to different worksheets by clicking on the tabs at the bottom of the workbook. The tab for the active worksheet will be in bold font.

Once you have saved a working copy of the Tracker Tool, fill in the shaded cells on the "Data Entry" worksheet.

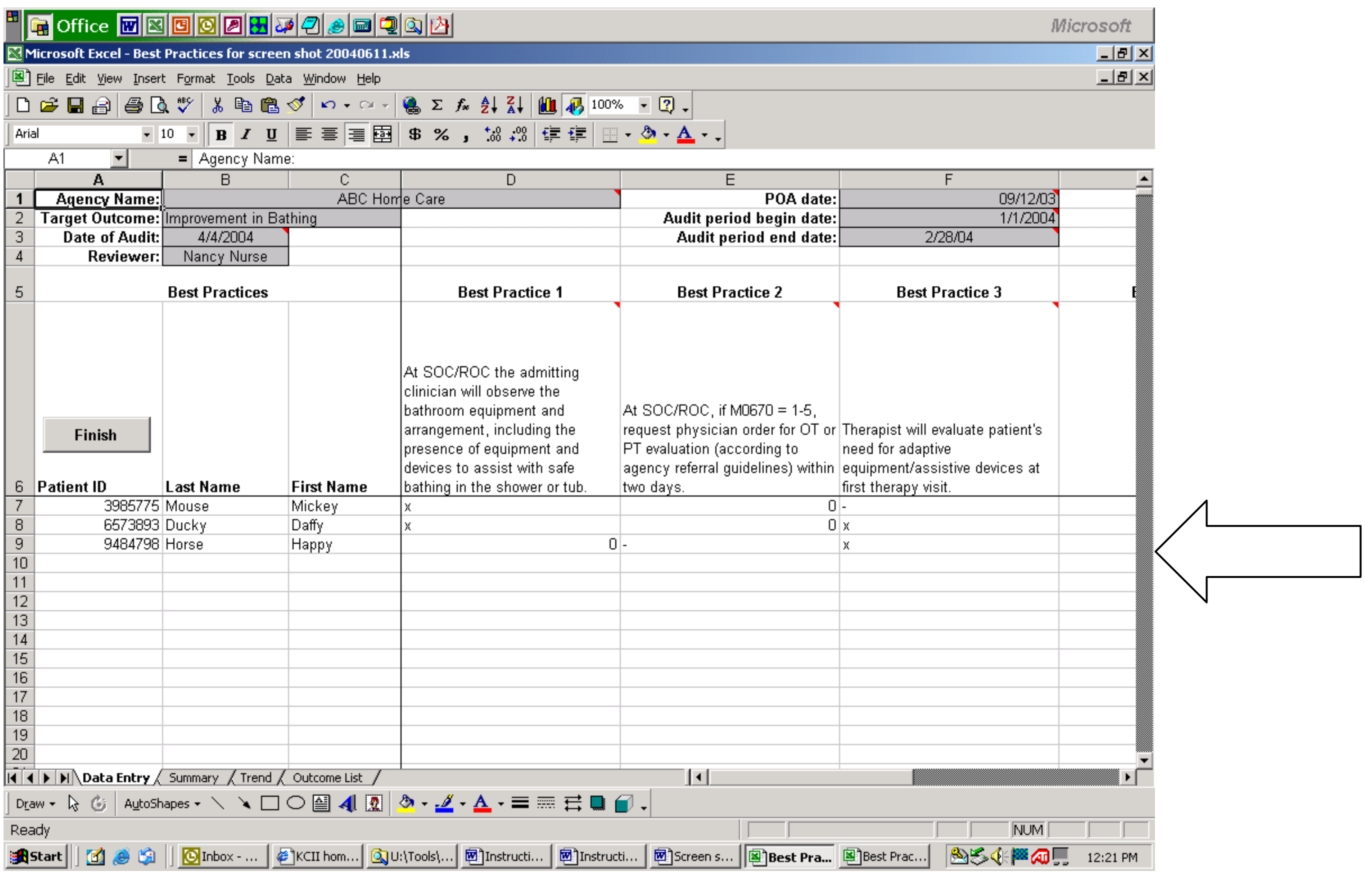
a. Type the agency name in the first shaded box at the top of the page (cell **B1**). Press **Enter**.
b. Type in Target Outcome (cell **B2**). Press **Enter**. (Or, you may want to copy the outcome name from the "Outcome List" worksheet.)
c. Type in the Date of Audit (cell **B3**). Enter this date using the mm/dd/yy format (e.g., 06/09/03). Press **Enter**.
d. Type in Reviewer Name (cell **B4**). Press **Enter**.
e. Type your POA date (cell **F1**). Press **Enter**.
f. Type the beginning date of your audit period (cell **F2**). Press **Enter**.
g. Type the ending date of your audit period (cell **F3**). Press **Enter**.
h. Type in your Best Practices, beginning with cell **D6** and continuing across the sheet up through cell **I6**. The tool is designed to let you enter a total of six best practices. To get to cell **D6**, point your cursor on the cell and click. Use your Tab key or cursor to move from one best practice cell to the next.



Enter the chart audit data with one record per row.
- Beginning with cell **A7**, enter the patient ID.
- Proceed to cells **B7** and **C7** and enter the patient's last name and first name.
- Enter the audit results for the patient under each best practice (columns D through I).
  - Indicate whether each Best Practice is present, absent, or not applicable according to the symbols below. **If you choose to use the '-' symbol, do not move from cell to cell with the arrows keys; instead use the Tab key or move the cursor.**

Valid values for these cells are:

Present = x, X, y, or Y
Absent = o, O, 0 (zero), N, or n
Not applicable = -, na, n/a, N/A, or NA

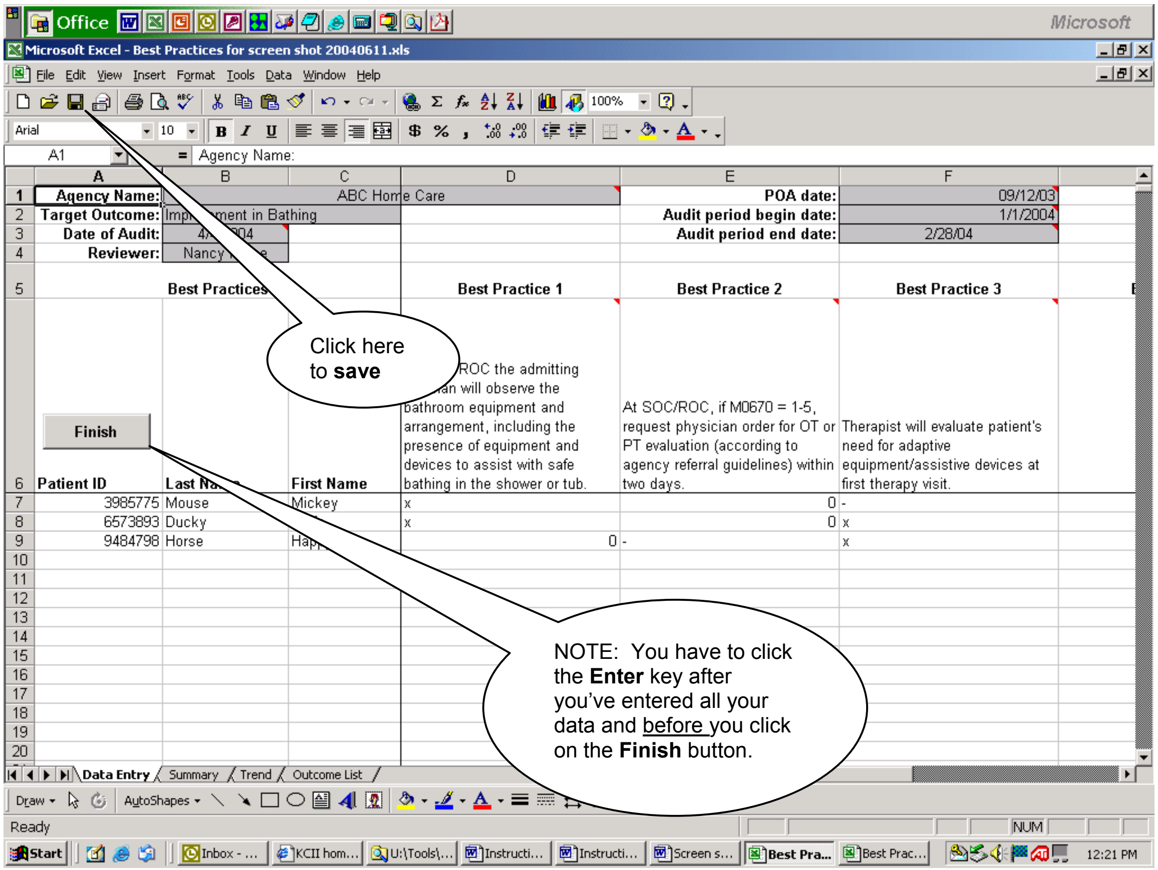


Alert: Do <u>NOT</u> click on the Finish button until you have entered all the data for the audit.

Continue adding data for patient records, starting a new row for each record. NOTE: You may wish to save your data periodically - do this by clicking on the Save icon.

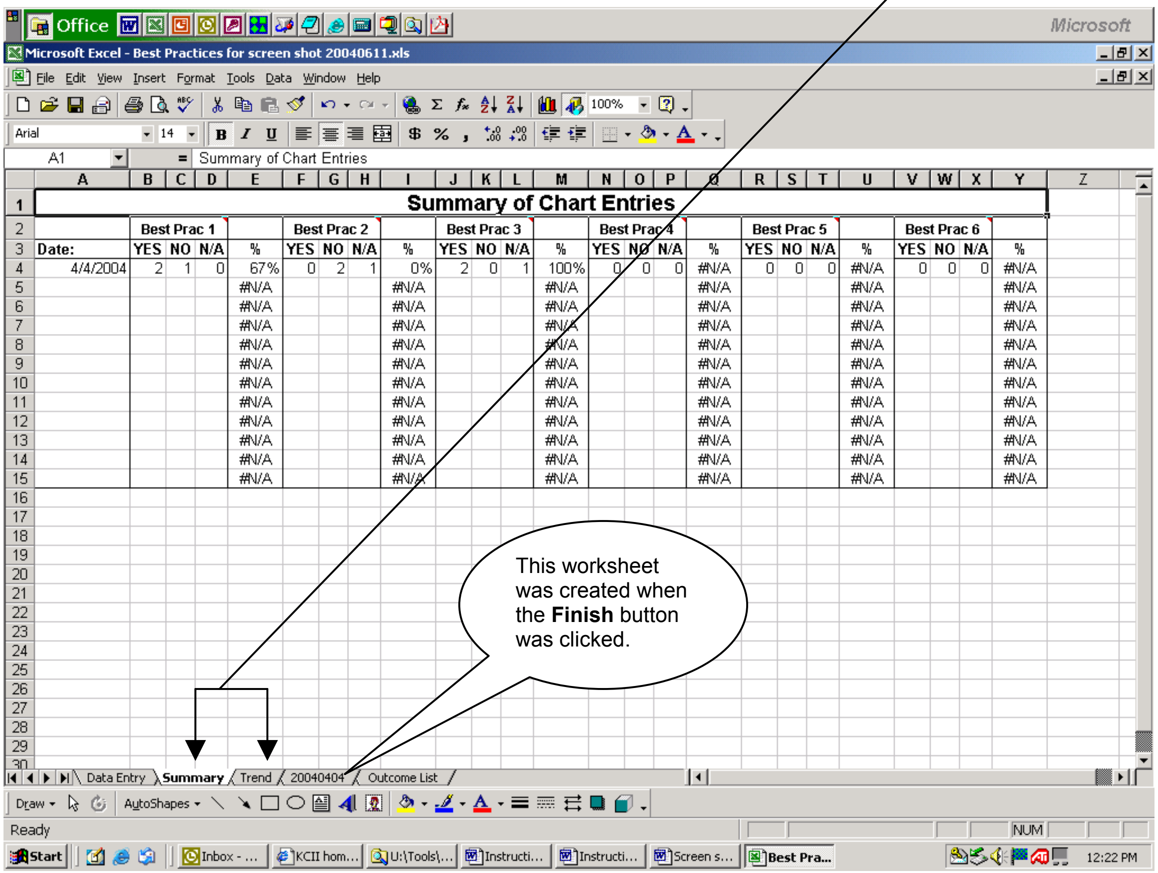
After you enter the final cell of data, press **Enter**.

Click on the **Finish** button.



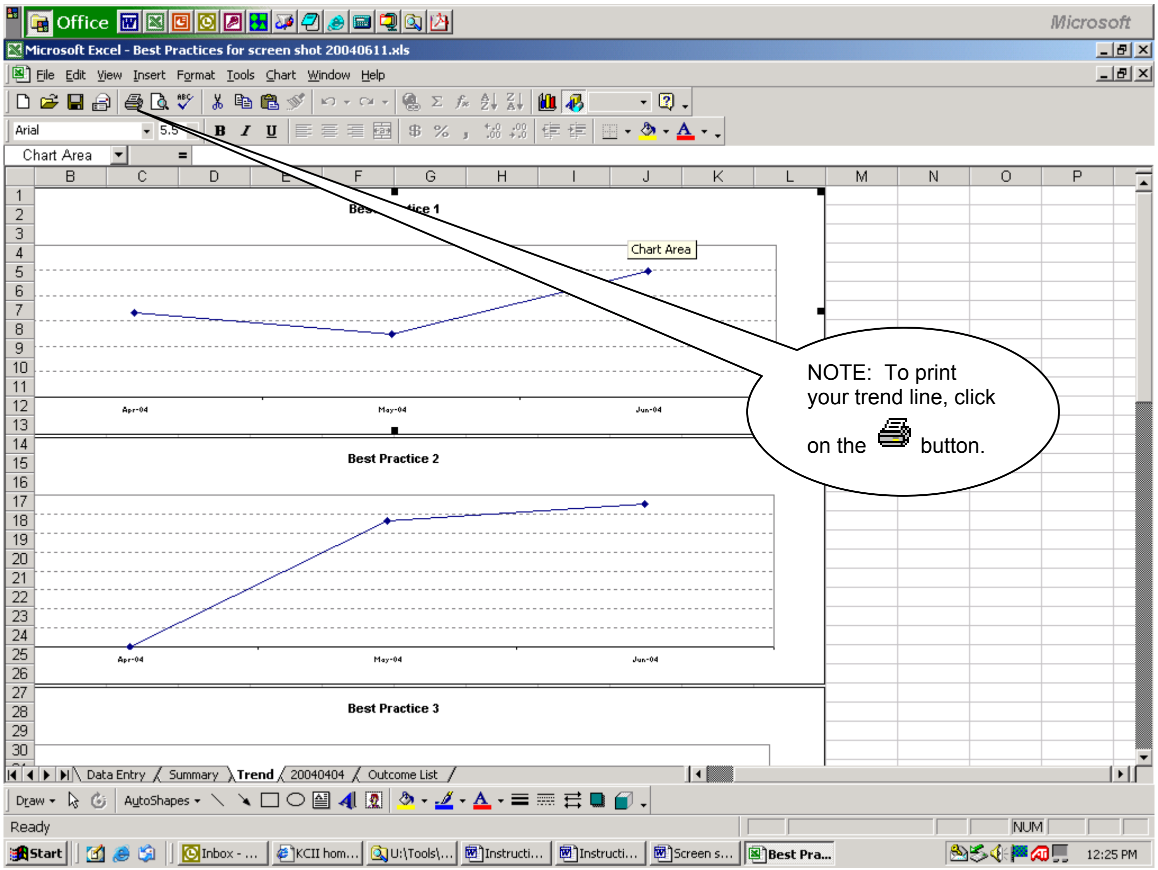
After you click the **Finish** button, the tool will summarize the data, fill in the data point on the trend line, clear the data entry worksheet, and save the data to another worksheet (this worksheet will be labeled with the date of your audit on a new tab at the bottom of the workbook).

To view your best practices results, click on the tabs labeled **Summary** and **Trend** at the bottom of the workbook.



To print your summary or trend lines, click on either the Summary tab or the Trend tab. You may first want to check the print layout. To do this, click on the **Print Preview** button. If the layout looks okay, go ahead and click on the **Print** button. If you want to change the layout, click on the **Setup** button and make your changes.

Trend Chart



Alert: Be sure to save your copy of your file before closing!

When additional data audits are performed, you should open your copy of the Tracker Tool and enter your most recent audit data.

Share your monitoring results with your QIO coordinator who can provide assistance with evaluating and/or modifying your POA.

4 Troubleshooting

This section describes some of the problems you may encounter as you use the Outcome Tracker Tool and offers potential solutions for these problems. If you identify a ***program error***, contact the HH QIOSC @ obqihelp@dfmc.org.

Problem: Nothing happens when the **Finish** button is pressed.
Solution: Press **Enter**. This will ensure that your cursor is not on the last cell of data. Press the Finish button again.

Problem: The Finish button gets little boxes around it when pressed.
Solution: Your computer may set to high security mode when opening files containing macros. Close your copy of the tool. Open Excel. From the toolbar at the top, select Tools, then Macro, then Security. Make sure that the **Medium** button is selected. Open the tracker tool again.

Problem: Run time error 1004 occurs with a message saying that the system cannot rename a sheet to the same name as another sheet.
Solution: First, click the **End** button to get back to the Data Entry sheet. The problem is that you have entered an audit date that was the same as an audit date entered earlier. Rather than try to fix the errors on the Summary and Trend worksheets, it is best to close your copy of the tool without saving and try entering your data again, this time making sure not to repeat an audit date.

Problem: You clicked the **Finish** button before completing your data entry or before realizing that some of the data or dates were entered incorrectly.
Solution: Unfortunately, it is problematic to try to fix data entry problems after clicking the **Finish** button. The best solution is to close your copy of the tool without saving and try entering your data again.

Problem: ####s show up in the Tally Sheet or Summary worksheets.
Solution: Your column is probably not wide enough to display the data. Highlight the column. From the toolbar at the top, select Format, then Column, then Autofit Selection.

Problem: When you begin entering data into a cell, the program will automatically insert text. Example: type "o" and "Outcome" is inserted.
Solution: The AutoComplete function is enabled. To disable this function, select Tools, then Options from the toolbar at the top. Click on the Edit tab. Turn off the "Enable AutoComplete for cell values" option (NOTE: You may want to turn this option back on after you've finished working with the tracker tool).