C-Secure® Scorecard Balanced Performance Management System:

User's Guide

Introduction

The *C-Secure® SCORECARD* Balanced Performance Management System provides management with a holistic view of actual and desired results from four different key performance indicators or Perspective groups:

1. Financial
2. Customer Service
3. Internal/operations
4. Learning/growth

Each of these Perspectives or key performance indicators ("KPIs") has specific Themes or Objectives which are derived from the organization's strategic plan. Each Objective, in turn, has one or more Measures which are managed through the *C-Secure® SCORECARD*.

The *C-Secure® SCORECARD* Balanced Performance Management System (or simply "Scorecard") provides just-in-time performance feedback about those key performance indicators ("KPIs") or "Perspectives" which have been determined to be central to the work for which each *C-Secure® SCORECARD* user is responsible.

This document guides users through the application, demonstrating how to view your Scorecards and use related tools.

The *C-Secure® SCORECARD* Balanced Performance Management System:

1. Brings together data from multiple sources
2. Transforms that data into information
3. Presents the results in role-based Scorecards for individual review
4. Provides management at different levels with an organizational Scorecard (combining the Scorecards for all department members or constituent units) for strategic decision making

C-Secure® SCORECARD users receive access to information based on their areas of responsibility.

This User's Guide presents *C-Secure® SCORECARD* use from the viewpoint of an individual Scorecard user, including additional features available to management at different levels.

For this demonstration, you will view Scorecards for Doctor 1 (Dr. 1), who is in Family Practice. A brief explanation of the Scorecard views for Dr. 1's immediate supervisor within Family Practice is presented at the conclusion.

How Do I Log in?

On your desktop, click the **C-Secure** icon [CSecure] to open your Internet browser displaying the C-Secure login screen:
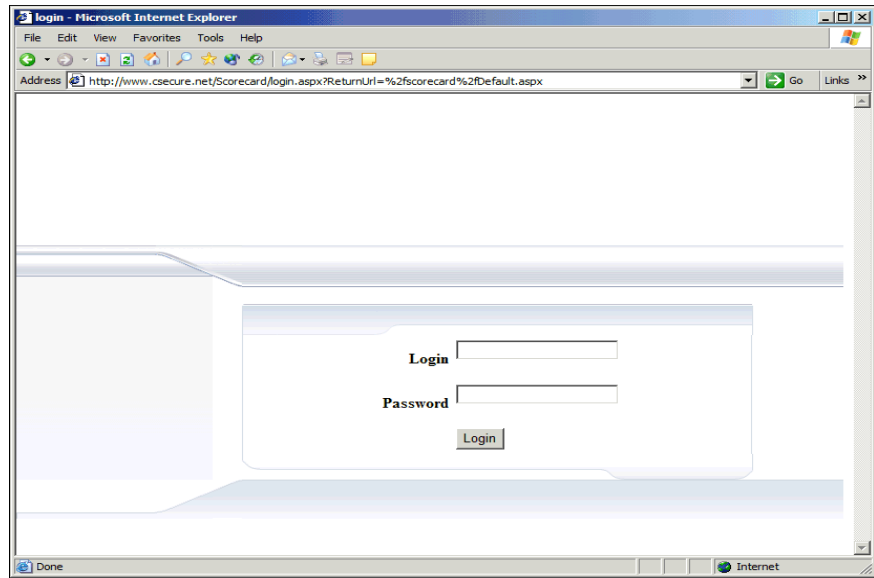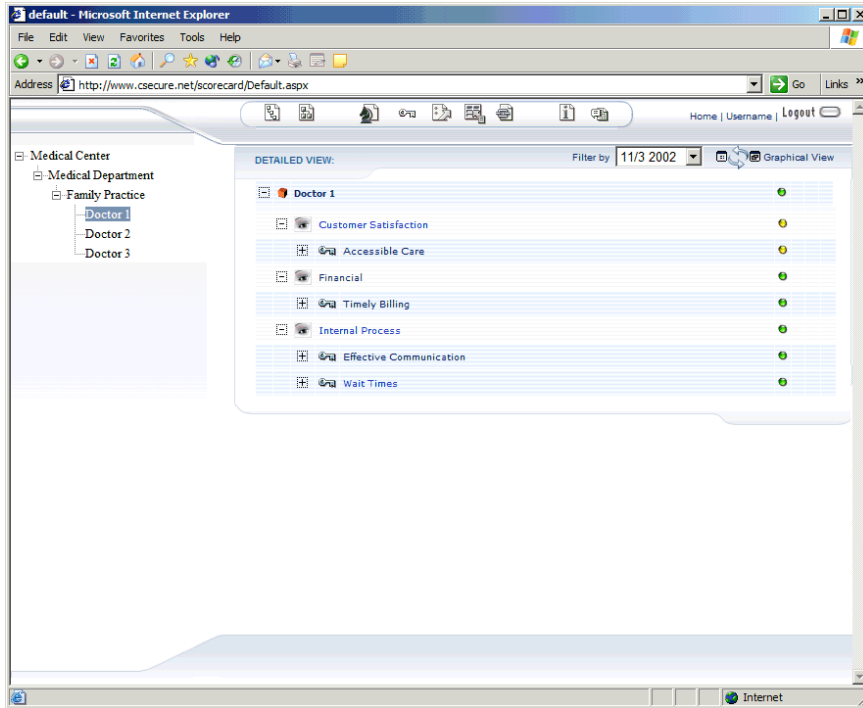

In the **Login** field, type the user name you receive.

In the **Password** field, type the password you receive. (You will be asked to change your password later.)

Click **Login** [Login] .

The **Detailed View** of your Scorecard appears:

(For this demonstration, "you" are **Dr. 1**.)

What Information Does the Detailed View Display?

Organizational Tree

In Dr. 1's Scorecard above, the left hand column displays the organizational structure for Dr. 1. The **Medical Center** contains various Medical Departments, including **Family Practice** in which Dr. 1 serves. As you logged in as Dr. 1, only Dr. 1's department appears:
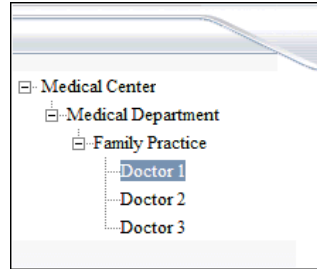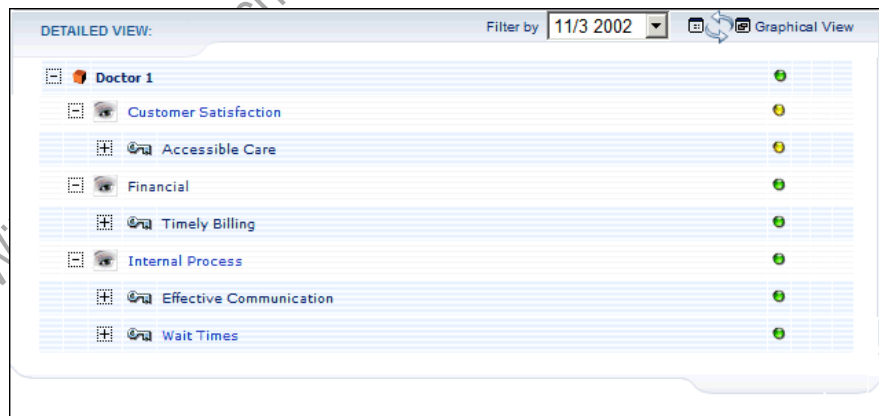
Detailed View List

The list occupying the center of the screen presents the Perspectives (indicated with the eye symbol [icon]) and the key Objectives (indicated with the key symbol [icon]) that have been determined to apply to Dr. 1. Beneath each Objective are the Measures (indicated with the document symbol [icon]) which lead to or result from meeting the Objective.

At Medical Center, Scorecards for Family Practice physicians map to **Customer Satisfaction**, **Financial** and **Internal Process** KPIs:

- The Objective for **Customer Satisfaction** is **Accessible Care**.
- The Objective for **Financial** is **Timely Billing**.
- The Objectives for **Internal Process** are **Effective Communication** and **Wait Times**:

You can view the Measures that have been selected for each Objective. Click the **Plus [+]** sign next to an Objective and its Measures appear beneath it. For example, click the **Plus [+]** next to **Timely Billing** and **Days Medical Record Inquiry** appears:

(If you click directly on the Objective, rather than the **Plus [+]**, information about the Objective appears. To return from the information about the Objective back to the **Detailed View**, you can use the Back button on your browser, and then click the **Plus [+]** to view the Measure.)

The green, yellow or red indicators to the right of each line indicate the current measured level of performance for that component. Dr. 1 is doing well (green) overall (the top line). Dr. 1 is at or above targeted performance (green) for every Objective and Measure except for **Customer Satisfaction/ Accessible Care,** where yellow indicates some improvement is needed. A red indicator would indicate an area where more significant improvement is required.

To understand this "yellow" need for improvement, click the **Plus [+]** next to **Accessible Care**. The Measure for this Objective appears: **Access to Care at Discharge**. Medical Center attempts to facilitate discharge before 10:00 AM; Dr. 1's accessibility during the morning hours makes the discharge procedure smoother, resulting in higher customer satisfaction.

The **Filter by** field indicates the date when this Scorecard was calculated. Most individual Scorecards are recalculated each week. You can select a previous week to view an earlier Scorecard.
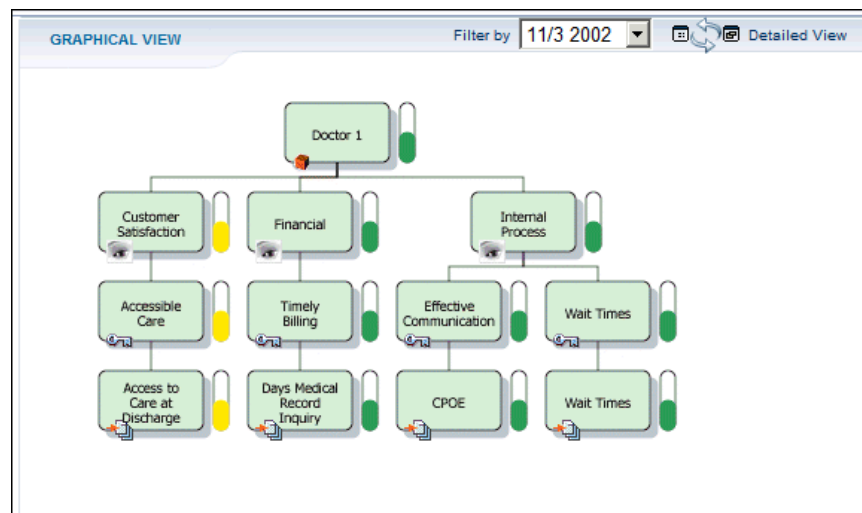
What Information Does the Graphical View Display?

The **Graphical View** displays all of the Perspectives (or KPIs), Objectives and Measures in a hierarchical flow chart format.

To display the **Graphical View**, on the upper right hand corner of the

Detailed View, click [Graphical View]. The **Graphical View** appears:

To the right of each KPI, Objective and Measure, a green, yellow or red thermometer indicates Dr. 1's level of performance for the date indicated.

In the **Filter by** field, you can select a different date to view the performance for that date.

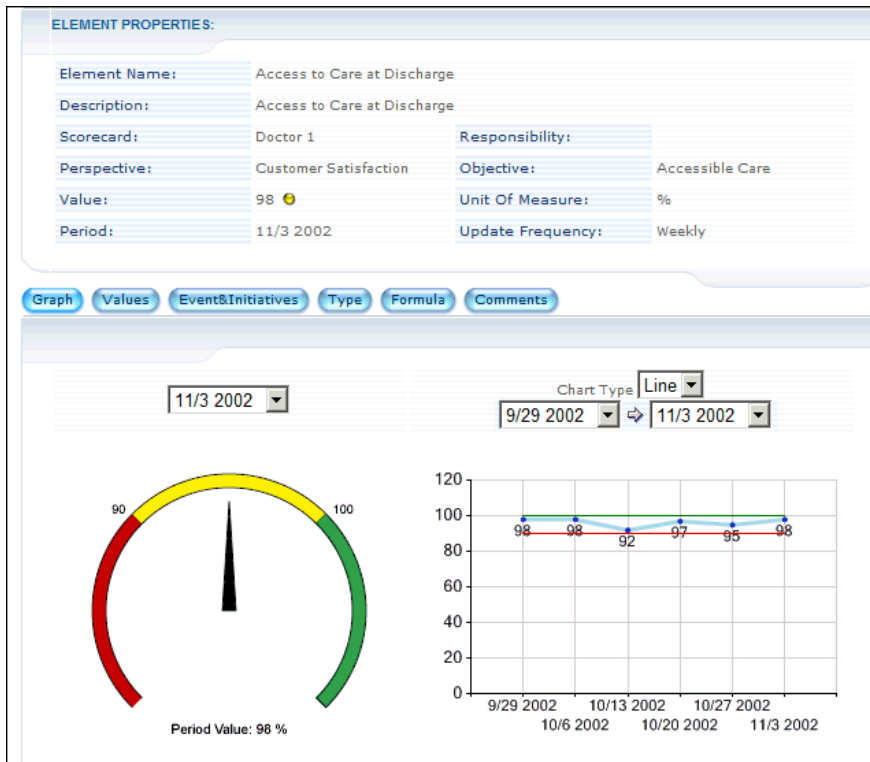To return to the **Detailed View**, click [Detailed View] .

What Information Does the Scorecard View Display?

You can view your composite Scorecard or the component Scorecard for any KPI, Objective or Measure that appears in your **Detailed View** or your **Graphical View**.

On either the **Detailed View** or the **Graphical View**, a date field indicates the date for the Scorecard that will appear. You can change the date before you request the Scorecard or after on the Scorecard itself.

From the **Detailed View**, click any line and its Scorecard appears. From the **Graphical view**, click any flow chart shape and its Scorecard appears.

The following displays Dr. 1's Scorecard for **Accessible Care at Discharge**, on November 3, 2002:

Element Properties

The top section of the scorecard displays the **Element Properties**. The **Element Properties** remain the same for each Scorecard, regardless of the date selected.

ELEMENT PROPERTIES:

Element Name:	Access to Care at Discharge		
Description:	Access to Care at Discharge		
Scorecard:	Doctor 1	Responsibility:	
Perspective:	Customer Satisfaction	Objective:	Accessible Care
Value:	98 😐	Unit Of Measure:	%
Period:	11/3 2002	Update Frequency:	Weekly

Element Name: Access to Care at Discharge

> Indicates the person's name or department's name for a composite Scorecard or name of the KPI, Objective or Measure for a component Scorecard

Description: Dr. 1

> Can be used to provide additional information about the **Element Name**

Perspective: Customer Satisfaction

> The KPI for this Objective or Measure.

Scorecard: Doctor 1

> Person or department for whom this Scorecard has been calculated

Value: 98 (yellow)

> Overall **current** score for this Scorecard. regardless of the date for the data that displays below. If the Scorecard for the most recent date displays, then the **Value** is the same as the number that appears prominently in the Dashboard view "thermometer" below.

Period: 11/3/2002

> The date for which this Scorecard was calculated

Responsibility:

The appropriate individual by name or role

Objective: Accessible Care

The Objective for the current Measure

Unit of Measure   **%**

Indicates a percentage

Update Frequency   Weekly

Most individual Scorecards are calculated weekly. Departmental
Scorecards may be calculated monthly or quarterly.

Dashboard View

The "Dashboard" or the bottom of the Scorecard beneath the **Element
Properties** displays a graphical representation of the current score for the
selected KPI, Objective or Measure. The numeric value appears in a red/
yellow/green "thermometer" chart.

The date field indicates the date for the value displayed. You can select a
different date, and the displayed value changes accordingly.

The chart in the lower right of the browser displays the last several values for
this Scorecard as a line graph. The line graph contains two horizontal guide
lines: the green line indicates the threshold for a score that rates as "green."
The red line indicates the boundary of a score that rates as "red." The area
between the red and green lines indicates "yellow" scores.

In the example below, Dr. 1's scores have been consistently within the "yellow" range, needing some improvement.
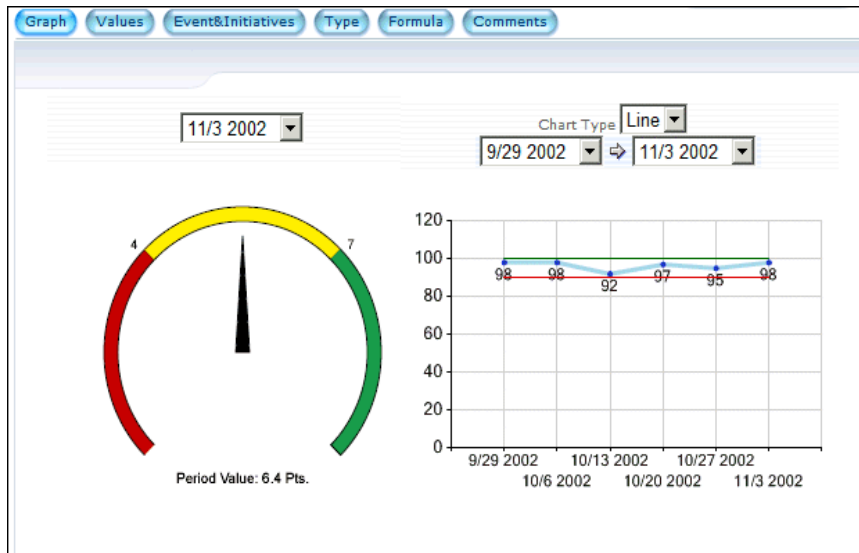
You can select a different range of dates to display on this chart. You can also toggle between a line graph and a bar graph. The bar graph maintains the same red and green lines displayed in the line graph:
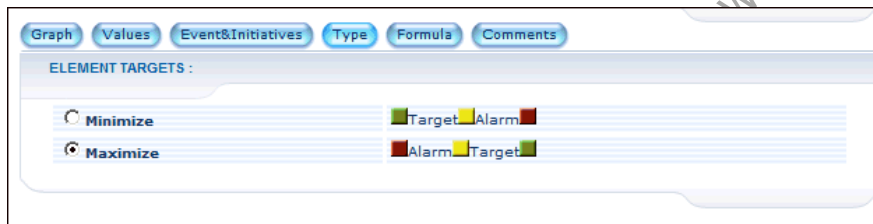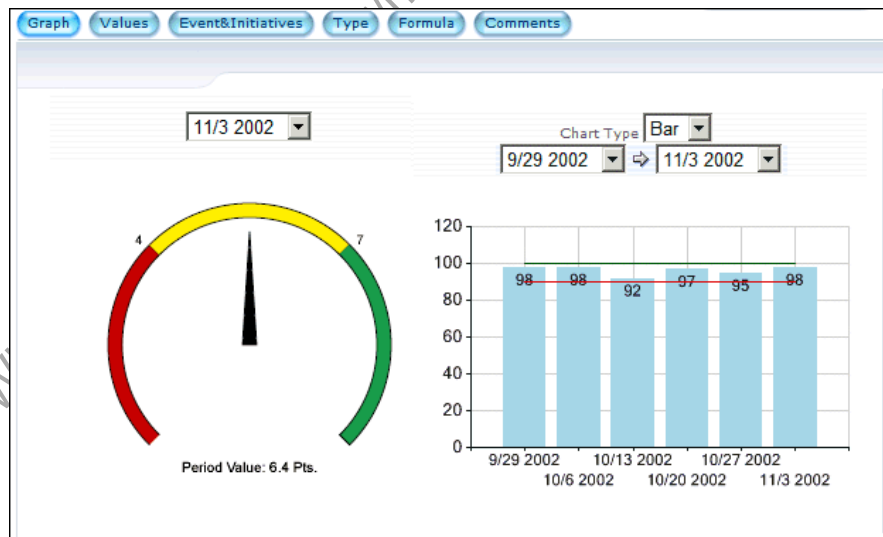
You can also view these Values in tabular form. Click **Value** Values and the tabular format appears. In the tabular display, the numerical values indicated by the red and green lines are specified in the **Alarm** and **Target** columns.

In this example, Dr. 1's target (green) score is 100%; his alarm level (red) is below 90%:

| Graph | Values | Event&Initiatives | Type | Formula | Comments |

ELEMENT VALUES

9/29 2002 ⇨ 11/3 2002	Actual	Alarm	Target
9/29 2002	98	90	100
10/6 2002	98	90	100
10/13 2002	92	90	100
10/20 2002	97	90	100
10/27 2002	95	90	100
11/3 2002	98	90	100

Some Scorecard Objectives seek to "minimize" an event. In such a case, the lower the value, the better, and the green line is beneath the red. For any Scorecard you view, you can determine whether the current score should be "maximized" or "minimized:" Click **Type** Type . The maximum/minimum indicator appears:

| Graph | Values | Event&Initiatives | Type | Formula | Comments |

ELEMENT TARGETS :

○ **Minimize**   ■Target■Alarm■
● **Maximize**   ■Alarm■Target■

How Do I View a Composite Scorecard?

Up to now, you have been looking at your Scorecard for a single component, Access to Care at Discharge. You can also view your composite Scorecard, integrating all four KPIs, their Objectives and Measures.

To view a component Scorecard, your browser must display either the initial **Detailed View** (see page 4) or the **Graphical View** (page 7).

To return to the **Detailed View**, click **Show Detailed View** . (This button is located at the very top of your browser window; it is the first button on the left of the toolbar.)
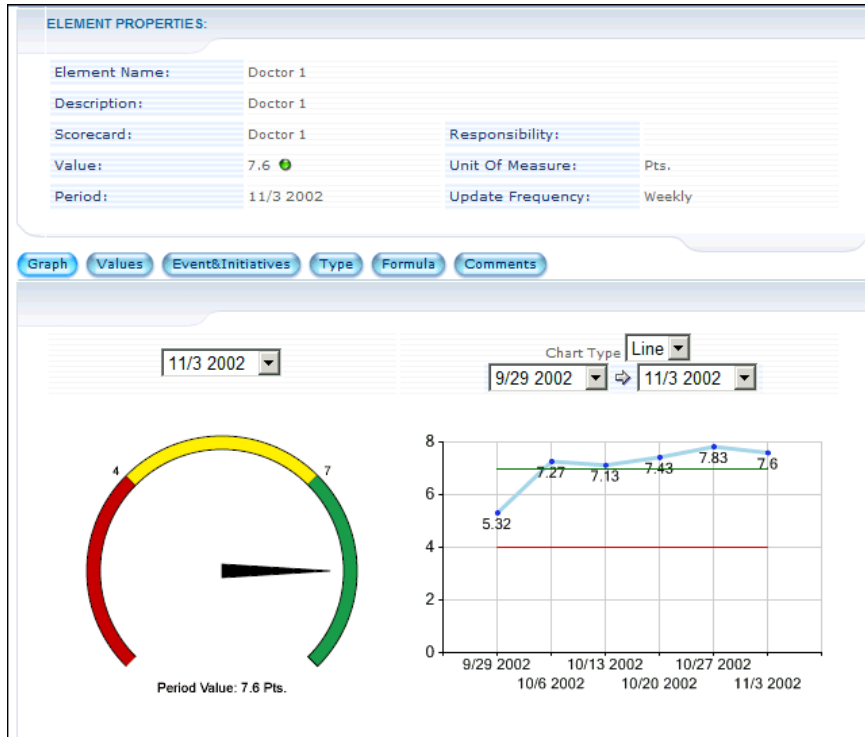
To return to the **Graphical View**, click **Show Graphical View** . (This button is located at the very top of your browser window; it is the second button from the left.)

To view a composite Scorecard for Dr. 1:

- On the **Detailed View**, click the line that reads **Dr. 1**.
- On the **Graphical View**, click the **Dr. 1** element.

The composite Scorecard appears.**:**

This Scorecard is very similar to the previous, component Scorecard in the type of data it displays. However, it integrates that data for all of the elements of Dr. 1's performance, whereas the component Scorecard calculates its values based on one element.

In the Element Properties area, the Perspective and Objective fields do not appear. The **Unit of Measure** is Points (**Pts**) on a 1-10 scale, with over seven indicating good and under four indicating significant improvement is needed.

In this Dashboard area, Dr. 1's overall scores have been in the "green" range. This represents an improvement that has been sustained: six Scorecards back, Dr. 1's was in the "yellow" range.

What Do I Do If Special Circumstances Affect My Scorecard?

Sometimes special circumstances can skew your Scorecard value. You can document those special circumstances and convey them to management by attaching a comment to your Scorecard. Management can also add comments to document or communicate information to you. All comments that have been made to you or from you are listed on the **Comments** screen.

To add a comment or view previous comments, click **Comments** [Comments] . The **Comments** screen appears:
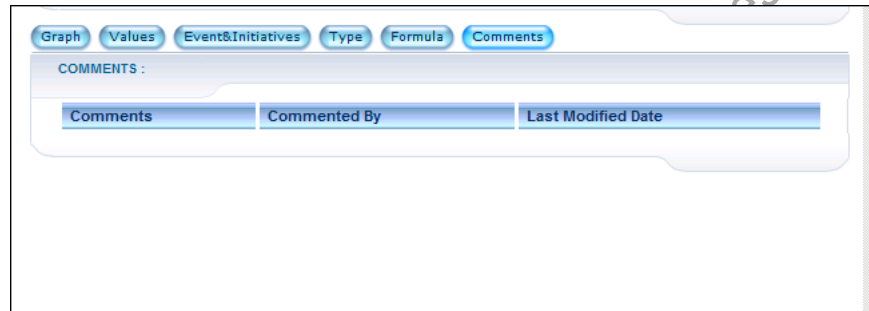
Click on any Comment line to view that comment.

[The tool to add a comment will be added shortly.]

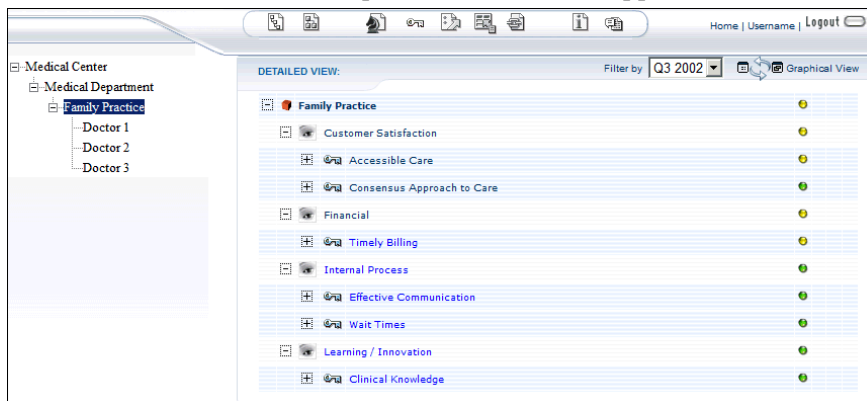## *How Do I View a Composite Scorecard for My Whole Department?*

If you supervise a department, then in addition to viewing your own Scorecard, you can view the composite Scorecard for your whole department. Just as *your* composite Scorecard is calculated from the Scorecards of its elements, so the *departmental* Scorecard is calculated from the Scorecards of its physicians.

Dashboard View

To view the Scorecard for your department, on the organizational tree (on the far left hand side of your browser), click your department name:
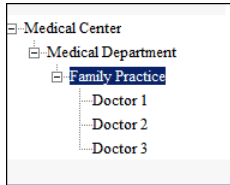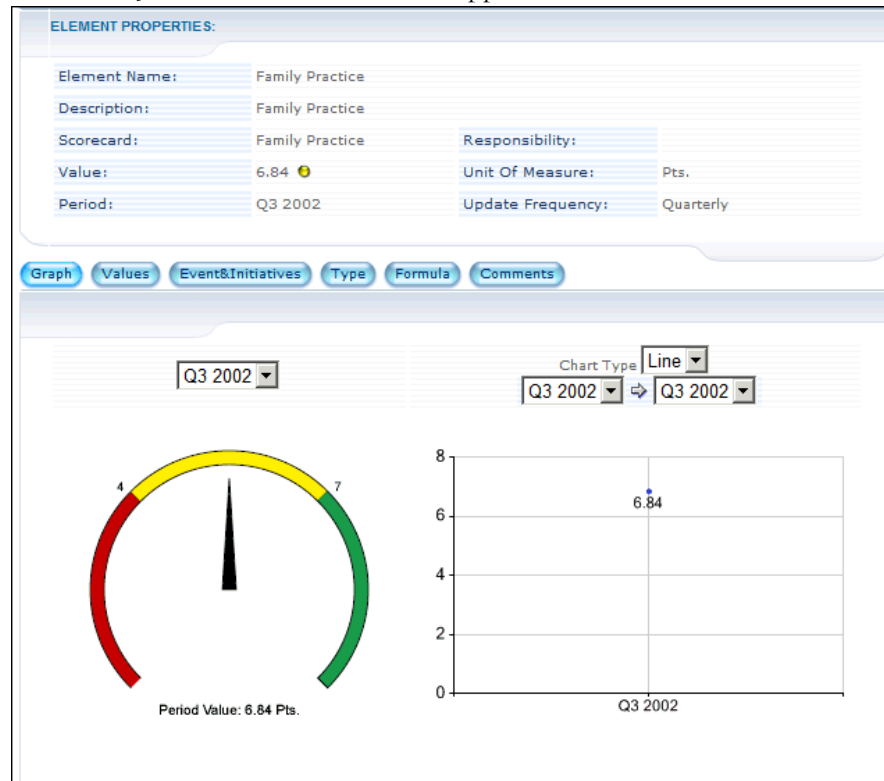

The **Detailed View** for the departmental Scorecard appears:

To view the overall Scorecard for your department, beneath **Detailed View**, click **Family Practice**. The Scorecard appears:

The constituent elements of this display are virtually identical to the individual Scorecard. This departmental Scorecard is calculated quarterly. (Only one quarter appears in this example.)

The **Unit of Measure** is Points (**Pts**) on a 1-10 scale, with over seven indicating "good" and under four indicating "significant improvement is needed."

You can also view the Scorecard for your department's individual Key Performance Indicators, individual Objectives, and individual Measures. To view a Scorecard for one of these elements, click on the department name on the organizational tree. The **Detailed View** for the department returns.

Click any line. The Scorecard for that element appears.

In addition, higher levels of management have access to Scorecards that integrate the Scorecard values of all medical departments. To access a Scorecard for all Medical Departments, an administrator clicks **Medical Department**.

How Can I Tell How a Composite Scorecard is Calculated?

A Scorecard may result from a calculation of component Scorecards for KPIs, Objectives or Measures. The Scorecard may be a simple average of several component scores or some values may be weighted more heavily than others.

The Family Practice department's overall Scorecard is calculated from four values, one for each of the four Objectives listed in the **Detailed View** (see page 16), and all have been weighted equally.

To view the manner in which the overall Scorecard is calculated from those components, open the composite Scorecard.

Click **Formula** `Formula` . The component calculation for that Scorecard appears.

For example, click **Formula** on the overall composite Scorecard for the Family Practice department shown in the previous illustration. The following appears:
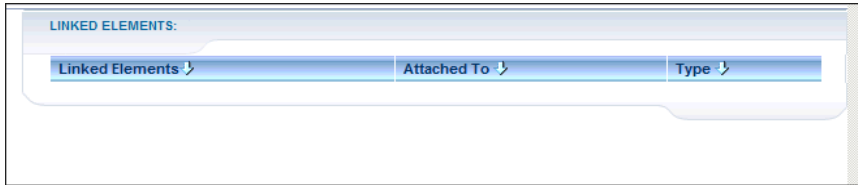

The lower half of the screen lists the four elements that are calculated to arrive at the composite Scorecard Value. The right hand column indicates that each element is given an equal weight (**1**) and the individual scores are averaged. In some Scorecards, one element might have a higher priority or impact on the key Objective it is linked to, and the calculation is adjusted accordingly. These weights are applied to the 1-10 point scale, where seven or above is "green" and four or below is "red."

How Do I View Documentation Linked to Scorecard Setup?

This application includes a document library that management can use to post the original determination and justification for Scorecard setup. You can view documents that have been placed in this repository.

To view documents associated with a particular Scorecard, first open that

Scorecard, and then click **Show Linked Items** [icon] . (This is the third

button from the right on the right on the toolbar at the top of the browser
window.) The list of **Linked Elements** to the current Scorecard appears:

LINKED ELEMENTS:

Linked Elements	Attached To	Type