

# Dashboard eases performance analysis and prep

## Anne Ford

**March 2017**—Crystal Sands, MBA, MT(ASCP)SM, manager of quality, regulatory, and safety at NorDx Laboratories in Scarborough, Me., has a new favorite product, and she's not shy about saying so. "Oh my gosh, I'll be playing with it for a long time," she says. "Every time I use it, I find different ways to slice and dice."



Sands

She's not talking about the Ronco Veg-o-Matic. The object of her enthusiasm—the CAP's new Performance Analytics Dashboard—is much more useful than that. No, you can't julienne potatoes with it, but you can do darn near anything else, at least anything pertaining to Web-based reporting for CAP proficiency testing and accreditation performance.

Introduced in July, the dashboard is designed to let users perform data analysis—that's where the "slice and dice" comes in—as well as benchmark their laboratories against CAP-wide performance, prepare for accreditation inspections, identify systemwide issues, and benchmark the performance of a single laboratory against its entire system. The dashboard is updated daily and free to all CAP Surveys and Laboratory Accreditation Program participants.

"I love it, and I don't get to say that very often," says user Nancy MacKenzie, MT(ASCP), quality and education coordinator in the laboratory compliance department at BayCare Health System, Tampa Bay, Fla.

Before she started using the dashboard, MacKenzie tracked proficiency testing stats manually—no simple task given that BayCare has 16 CAP numbers. "So I would have to go to each account number and pull up its evaluation reports or its analyte scorecard and review the most recent results that had been posted by CAP," she says. "I had to do it manually for each of the numbers in order to get it done in a timely way, because we are required to look for trends with our PT results in order to identify any issues with any of our analytes as soon as we can. I did it weekly, and it was very time-consuming."

And those stats weren't up to date. "We were using the [now defunct] CAP Links reports, which were organized by quarter. For example, the data for January, February, and March would be released in April," she points out. "As great as those reports were, they were not timely at all."

Now, using a separate CAP number that encompasses all of BayCare, she can see systemwide, near-real-time results on the dashboard instead. "They're all in one place for me to review," she says, "and they've already been sorted and flagged. You don't have to look at each single page of each Survey, because there are tiles on the dashboard to tell you immediately if you have any 'unsatisfactories' or 'unsuccessfulls' or 'repeat unsuccessfulls.' Certainly we do review all results, but if your immediate concern is whether you have anything unsatisfactory, etc., you can see that in about 10 seconds."

Sands, too, finds that the dashboard makes it easy to spot and follow up on troublesome results. "If I notice a score that is not acceptable, which to our leadership and managers is less than 100 percent, I usually am able to contact the manager and say, 'Are you aware of this?' And those kinds of things jump right out at you," she says. "I

personally don't take it all the way to the investigation piece, but at least I'm able to say to the managers, 'Oops, you need to take a look at this.'" The dashboard also provides them with a worksheet so they can document their findings.

In addition, Sands is a fan of a dashboard feature called "manage lab reporting groups."

"This allows me to view our complete system, 12 labs, on a single Performance Analytics Dashboard. I am also able to create and modify laboratory subgroups, such as by region or size, for reporting dashboard performance analytics." They are just beginning to explore this feature, Sands says. "But our regional operations managers may be interested in seeing a report, for proficiency testing and accreditation results, just featuring the labs for which they are responsible."

At BayCare, MacKenzie has found the dashboard extremely useful on the accreditation side as well, a particularly welcome fact given BayCare's size. "Because we are so large geographically, we have chosen to be organized as two separate systems for our CAP accreditation, so each year one of our two systems is being inspected. And then every year we are required to go on an inspection, so there's always a whole lot happening with mock inspections and then the CAP readiness window and the actual window in which we're being inspected."

Now, BayCare's facility managers can use the dashboard to find out which Surveys received unacceptable results and to see, in MacKenzie's words, that "the proper paperwork has been filled out, the investigation has been done, and the information has been saved where our process says to save it. It's really helped with making sure we've followed the right processes and procedures."

Meanwhile, Sands values the dashboard's ability to provide both site-specific and systemwide accreditation findings. "As with most systems, when there's one big team here, they're divided up, so they treat each one as a separate entity when they're inspecting," she says. "It isn't until you look at the findings that you can say, 'Oh, this is a common thread; this is something that needs to be addressed throughout the system.' This lets us do that." She was preparing in January for an inspection in the coming months. "And I expect to use the dashboard even more when we go to finalize the next accreditation result," Sands says.

As MacKenzie continues to use the dashboard, she is especially thankful for the extra time it has given her. The dashboard has freed up time for her, the lab's safety coordinator, to travel to locations to perform safety assessments. "That's something I imagine everyone in a system struggles with, physically getting out to all the locations and being familiar enough with them to assist during an inspection, so you can know where every fire extinguisher is in each of 12 hospitals," she says. MacKenzie estimates that overall, the dashboard has saved her six to eight hours a month: "It's really hard in our business to get that kind of uninterrupted time, where you can focus."

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*Anne Ford is a writer in Evanston, Ill. For questions about the dashboard, or to suggest dashboard improvements, call the CAP customer contact center at 800-323-4040. For more information, search "dashboard" at [www.cap.org](http://www.cap.org).*