



SHAPE Dashboard User Guide

Prepared for

Connecticut Department of Public Health.

410 Capitol Avenue
Hartford, CT 06134

Prepared by

eHealthConnecticut
1290 Silas Deane Highway
Wethersfield, CT 06109
Telephone 860-240-5617
Facsimile 860-278-2400



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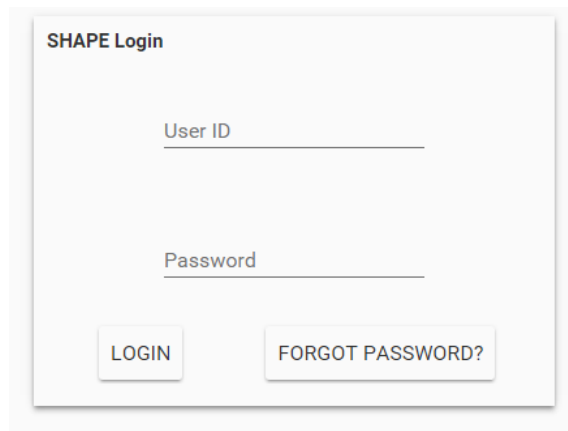
Logging In

To access the SHAPE User Dashboard, navigate your internet browser to:

<https://shape.ehealthconnecticut.org>

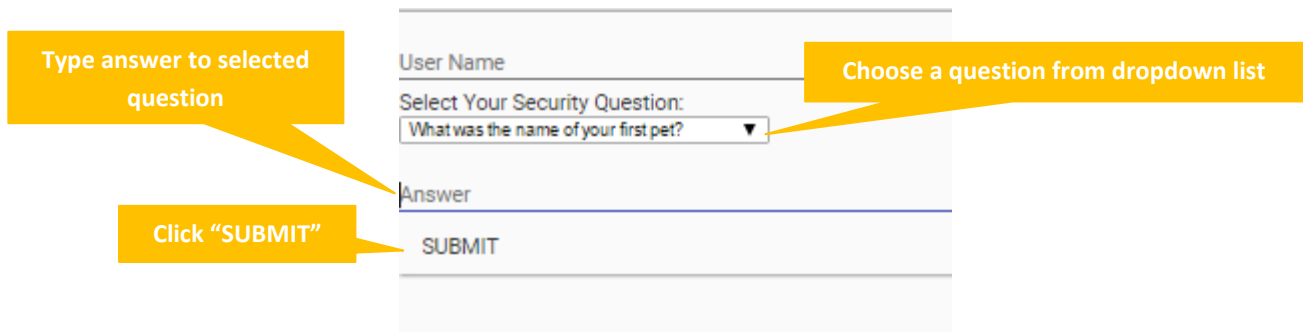
A login screen appears. Enter your User ID and Password and click the “LOGIN” button. This will bring you to the Home Page.

Login Screen

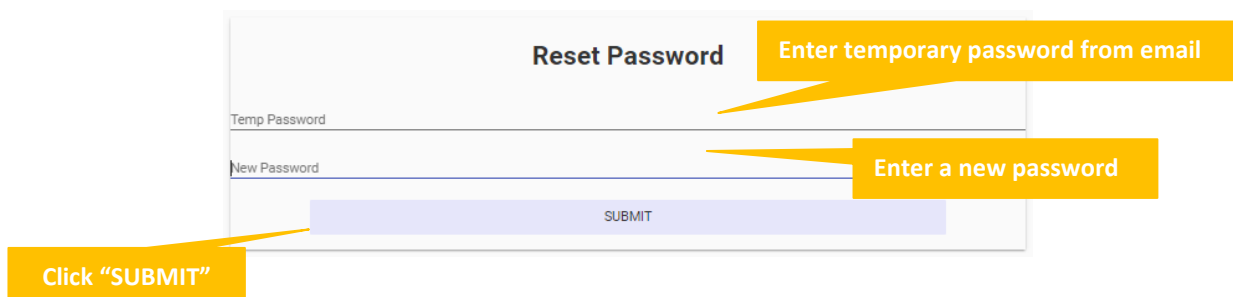


The login form is titled "SHAPE Login". It contains two input fields: "User ID" and "Password". Below these fields are two buttons: "LOGIN" and "FORGOT PASSWORD?".

If you have forgotten your password, click the “FORGOT PASSWORD?” button. Select and answer a security question. You will be emailed a temporary password. Log in using the temporary password. Upon logging in, you will be prompted to enter a new password.



This form is for selecting a security question and providing an answer. It includes a "User Name" field, a "Select Your Security Question:" dropdown menu (with "What was the name of your first pet?" selected), an "Answer" field, and a "SUBMIT" button. Yellow callout boxes provide instructions: "Type answer to selected question" points to the Answer field, "Click “SUBMIT”" points to the SUBMIT button, and "Choose a question from dropdown list" points to the dropdown menu.



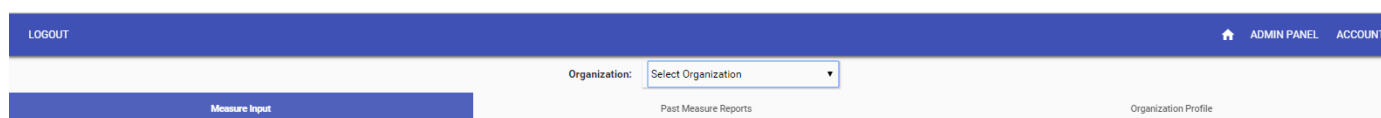
This form is titled "Reset Password". It contains two input fields: "Temp Password" and "New Password", followed by a "SUBMIT" button. Yellow callout boxes provide instructions: "Enter temporary password from email" points to the Temp Password field, "Enter a new password" points to the New Password field, and "Click “SUBMIT”" points to the SUBMIT button.

User Home Page

The SHAPE Dashboard screen consists of three major elements:

1. Header with Home button, Admin Panel button, Account button, and Logout button which remain on the screen regardless of where you navigate to in the system.
2. Navigation toolbar appearing only on the home screens. Navigate between the Measure Input screen, Past Measure Reports screen, and the Organization Profile Screen, from this toolbar. Administrative users may switch between organizations from this toolbar, SHAPE project participants only have access to their own organization.
3. Content area displaying detailed information based on the selected screen


Content Visible on Main SHAPE Dashboard Screens



Components of the Dashboard:

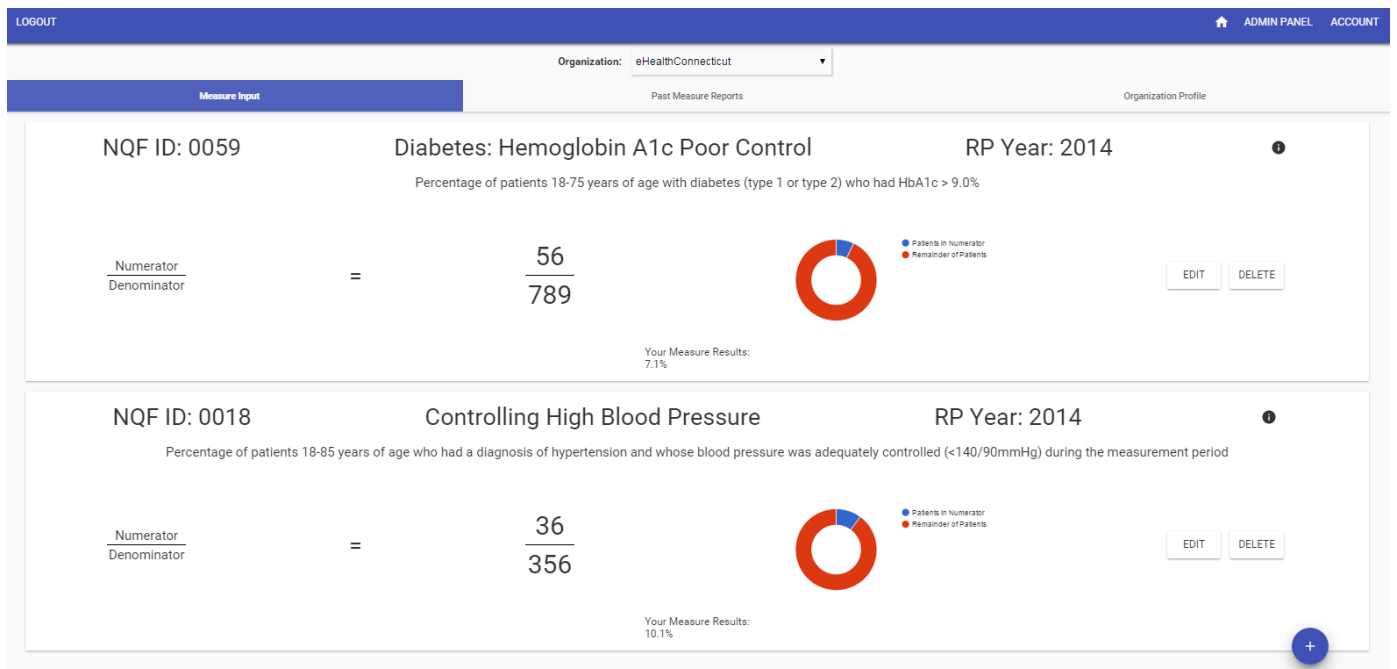
1. **Home** – system automatically navigates to the User Home Page upon logging into the SHAPE Dashboard. Click the house shaped icon on the top of the screen to navigate home.
2. **Admin Panel** –only displayed for administrative users who have the capability to add, delete, and modify certain system data and configuration. *Refer to the Admin Panel section of this User Guide to learn more about functions of this section.*
3. **Account** – directs user to Account Settings where user can change login information. *Refer to the Account section of this User Guide to learn more about functions of this section.*
4. **Measure Input** – navigates to the Measure Input screen where users can enter data on clinical quality measures. *Refer to Measure Input section of this User Guide to learn more about functions of this screen.*
5. **Past Measure Reports** – navigates to the Past Measure Reports screen where users can view reports from previous years in various forms. *Refer to the Past Measure Reports section of this User Guide to learn more about functions of this screen.*
6. **Organization Profile** – navigates to the Organization Profile screen where users can view and edit information about organizations' patient populations. *Refer to the Organization Profile section of this User Guide to learn more about using this screen.*

Note: User will find forms of help throughout the system including:



- **More Information:** indicated by  information icons near field names or screen titles. Click on the icon to learn more.
- **Data Validation:** System prevents user from entering incompatible text (e.g. entering letters when a numerical value is required).

Measure Input Page

The Measure Input Page allows users to enter CQM data for their organization and view the most recent data.



This screen displays a visual representation of an organization's results in the most recent reporting period for two Clinical Quality Measures: NQF 0018 Controlling High Blood Pressure and NQF 0059 Diabetes: HbA1c Poor Control. It also allows users to enter the current reporting period results for the measures.

- The box labeled NQF 0018 Controlling High Blood Pressure contains the current reporting period's measure results for each organization represented in three ways:
 - Click  to get the definition for the CQM NQF 0018 Controlling High Blood Pressure
 - Displayed as a fraction: the numerator (number of patients with adequately controlled blood pressure) and denominator (number of patients with hypertension)
 - Displayed as a pie graph: blue represents the percentage of patients in the numerator (well controlled blood pressure) and red represents the remaining percentage of patients (poorly controlled blood pressure)
 - Displayed as a percentage: of patients with hypertension the percentage of patients with adequately controlled blood pressure
- The box labeled NQF 0059 Diabetes: HbA1c Poor Control contains measure results for the organization represented three ways:
 - Click the  to get the definition for the CQM NQF 0059 Diabetes: HbA1c Poor Control
 - Displayed as a fraction: the numerator (number of patients with poorly controlled diabetes) and denominator (number of patients with diabetes)

- Displayed as a pie graph: blue represents the percentage of patients in the numerator (poorly controlled diabetes) and red represents the remaining percentage of patients (well controlled diabetes)
- Displayed as a percentage: of the patients with diabetes the percentage of patients with poorly controlled diabetes

To add CQM measure results for the current reporting period, select the blue “+” Button for each CQM.

The screenshot shows a web-based form for entering CQM data. At the top, there is a 'Measure:' dropdown menu currently set to 'NQF 0018 Controlling High Blood Pressure' and a 'Year:' dropdown menu set to '2014'. Below these are three main sections: 'Total', 'Gender', and 'Age'. Each section contains 'Numerator' and 'Denominator' input fields. The 'Gender' section is stratified by 'Male', 'Female', and 'Other'. The 'Age' section is stratified by '0-17 Years' and '18-44 Years'. At the bottom right, there are 'SUBMIT' and 'CANCEL' buttons. Five yellow callout boxes with arrows point to specific elements: 'Select measure from dropdown' points to the Measure dropdown; 'Type data directly into fields' points to the Numerator/Denominator input fields; 'Select reporting year from dropdown' points to the Year dropdown; 'Click "SUBMIT" to save entries' points to the SUBMIT button; and 'Click "CANCEL" to return to previous screen without saving' points to the CANCEL button.

The measure results for the CQM are calculated at both an aggregate level and stratified by demographics.

CQM NQF 0018 Controlling High Blood Pressure

- Aggregate: the numerator/denominator represents total number of patients with well controlled blood pressure (<140/90mmHg)/the number of patients diagnosed with hypertension
- Gender: of the males (or females) with hypertension how many males (or females) have controlled blood pressure
- Age: of the 18-44 years (or 45-64 years, 65-85 years) with hypertension how many 18-44 years (or 45-64 years, 65-85 years) have controlled high blood pressure
- Ethnicity: of the Hispanic/Latino (or Not Hispanic/Latino) with hypertension how many Hispanic/Latino (or Not Hispanic/Latino) have controlled high blood pressure
- Race: of the African American/Black (or American Indian or Alaska Native, Asian, Native Hawaiian or Pacific Islander, White, Other) with hypertension how many African American/Black (or American Indian or Alaska Native, Asian, Native Hawaiian or Pacific Islander, White, Other) have controlled high blood pressure

Once all fields are populated, click the “SUBMIT” button. Your screen will return to the measure input screen and the results will update.

CQM NQF 0059 Diabetes: HbA1c Poor Control

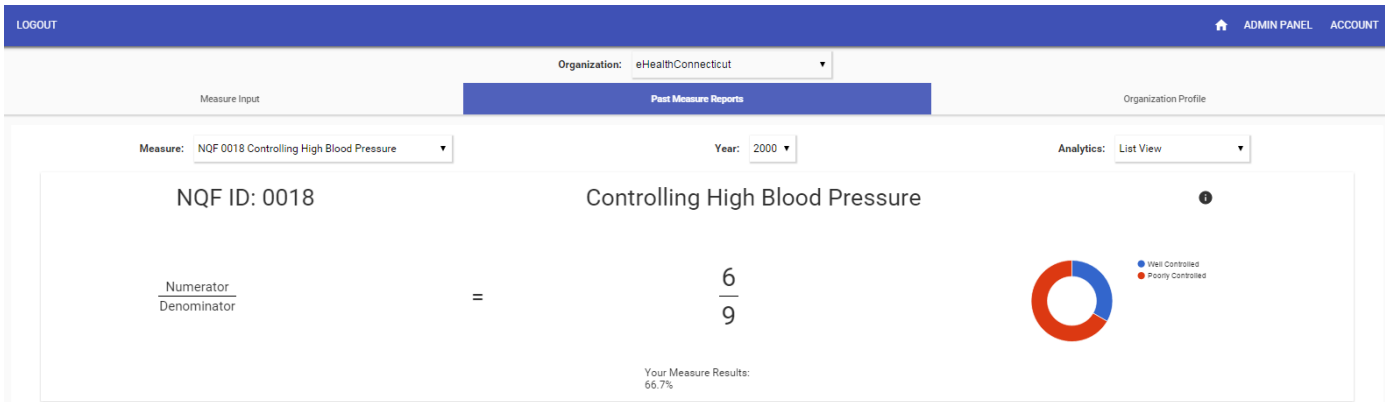
- Aggregate: the numerator/denominator represents total number of patients with poor controlled diabetes hemoglobin A1c > 9.0%)/the number of patients diagnosed with diabetes
- Gender: the males (or females) with poor controlled diabetes/the males (or females) with diagnosed diabetes
- Age: of the 18-44 years (or 45-64 years, 65-85 years) with poor controlled diabetes/ the 18-44 years (or 45-64 years, 65-85 years) with diagnosed diabetes
- Ethnicity: of the Hispanic/Latino (or Not Hispanic/Latino) with high blood pressure how many Hispanic/Latino (or Not Hispanic/Latino) have controlled high blood pressure
- Race: of the African American/Black (or American Indian or Alaska Native, Asian, Native Hawaiian or Pacific Islander, White, Other) with high blood pressure how many African American/Black (or American Indian or Alaska Native, Asian, Native Hawaiian or Pacific Islander, White, Other) have controlled high blood pressure

Once all fields are populated, click the “SUBMIT” button. Your screen will return to the measure input screen and the results will update. If you have made an error or need to update entries, click the “EDIT” button next to the measure you wish to edit. The entry box pop-up will reappear, re-enter the data and click the “SAVE” button to save changes.

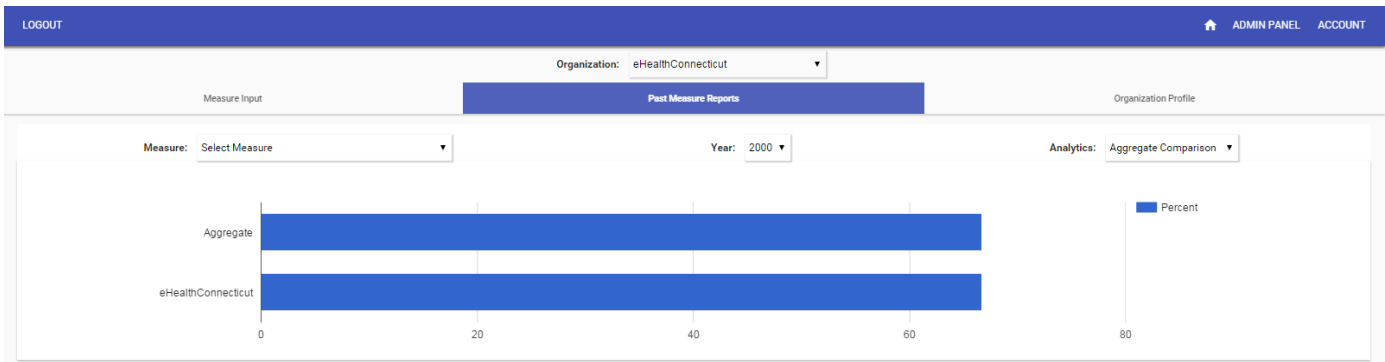
Past Measure Reports

The Past Measure Reports page allows the user to view CQM results from previous reporting periods in several different visual representations. Select a measure and year from the drop down lists at the top of the page. Then choose one of three ways to view the analytics: List View, Aggregate Comparison or Measure Demographics.

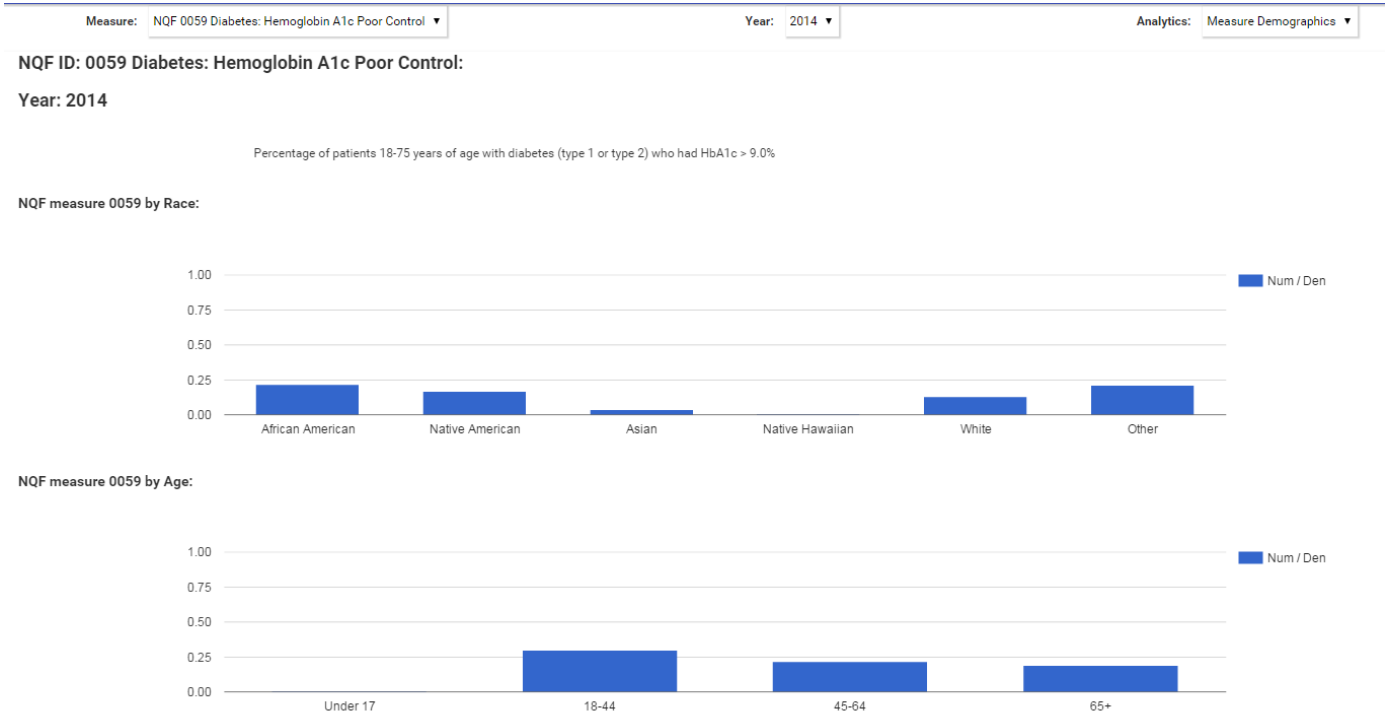
List View: First, select a CQM and year from the corresponding drop down lists. From the Analytics drop down list, select “List View”. This view displays the results of the selected CQM from the chosen year. Results are displayed in a pie chart similarly to the Measure Input Page.



Measure Trend: From the Analytics drop down menu select “Aggregate Comparison”. This view allows the user to compare CQM results from their organization to the aggregate results of all organizations participating in the SHAPE project in a given year. The results are displayed in a bar graph. Hover over each individual bar to display the precise percentage.



Measure Demographics: From the Analytics drop down menu, select “Measure Demographics”. This view allows you to view demographic breakdown by race, age, ethnicity, and sex of the selected CQM, year and organization. Results are displayed in a bar graph. Scroll down to view the remaining demographic categories.



Organization Profile

The Organization Profile Page allows users to add and view information about their organization’s patient population.

Organization Profile Page

Measure Input

Past Measure Reports

Organization Profile

eHealthConnecticut

Address:

10 Columbus Blvd

Hartford, CT 06103

860-240-5600

Primary Contact

Julia Moore

EHR Specialist

jmoore@smcpartners.com

Patient Population

Patient Volume

Patients

Visits per Year

Patient Counts

Patients with a Diagnosis of Hypertension

Patients with a Diagnosis of Diabetes

Patients with Pre-Diabetes

Patients with High BP but no Diagnosis of Hypertension

Demographic Information

Gender

455MaleFemaleOther

Age

17 & Under18-44 Years45-64 Years65 & Over

Ethnicity

Hispanic/LatinoNot Hispanic/Latino

Race

African American/BlackAmerican Indian or Alaska NativeAsianNative Hawaiian or Pacific Islander

WhiteOther

EDIT

CANCEL

The Organization Profile Page can be accessed by first navigating to the home screen, then selecting “Organization Profile” from the selection pane at the top of the screen.

Users will find each organization’s contact information, and details about the patient population including patient volume, patient counts, and demographic information.

To add or edit the patient population information, click the “EDIT” button and type the corresponding value in each subcategory. When all values have been entered, click the “SAVE” button. To cancel without saving changes, click the “CANCEL” button rather than “SAVE” after editing.

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Patient Population

Patient Volume

Patients

Visits per Year

Patient Counts

Patients with a Diagnosis of Hypertension

Patients with a Diagnosis of Diabetes

Patients with Pre-Diabetes

Patients with High BP but no Diagnosis of Hypertension

Demographic Information

Gender

455

Male

Female

Other

Age

17 & Under

18-44 Years

45-64 Years

65 & Over

Ethnicity

Hispanic/Latino

Not Hispanic/Latino

Race

African American/Black

American Indian or Alaska Native

Asian

Native Hawaiian or Pacific Islander

White

Other

SAVE

CANCEL

Click to save changes

Click to cancel changes

Type value directly in field to edit


Admin Panel

The Admin Panel page allows administrative users to configure custom settings for the system.

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Admin Panel Page

LOGOUT



ADMIN PANEL

ACCOUNT

ADMIN PANEL

USER	PROVIDER	ORGANIZATION	MEASURE		
<div><input type="text" value="Search"/></div>			<div>ADD USER</div>		
Username	Name	Role	Organization	Status	
jobins2	Joseph Bins II	ADMIN	eHealthConnecticut	<div>ACTIVE</div>	<div>EDIT</div>

To access the Admin Panel, Select “ADMIN PANEL” from the header panel at the top of the screen.

This section allows administrative users to configure the following information:

- **Users:** Username, Name, Role, Organization, Status
- **Providers:** Name, NPI, Organization, Status
- **Organizations:** Name, Address, Primary Contact, Primary Contact Phone, Primary Contact Role, Status
- **Measures:** NQF ID, Name, Description, Numerator Description, Denominator Description, Exclusions Description

Navigate between these categories by selecting from the panel at the top of the screen. The selected category will be highlighted in grey:

USER	PROVIDER	ORGANIZATION	MEASURE
------	----------	--------------	---------

Each category contains a table with columns listing the required information for each item.

The following functionalities are available to make changes to the table:

- **Add-** Click the button labeled “ADD USER” (or “ADD PROVIDER”, “ADD ORGANIZATION”, or “ADD MEASURE”, depending on the selected table). A pop-up box will appear. Enter text into each field. Click “SAVE” to add the new item to the table, or click “CANCEL” to return to the table without adding the new item.
- **Edit-** Click the “EDIT” button next to the item from the list you wish to change. A pop-up box will appear. Highlight or delete the text currently in the field and replace with the new text. Click the “SAVE” button to save your changes in the table, or click the “CANCEL” button to cancel changes and revert to the old text.
- **Activate-** When a new item is added to the list, it is automatically set as active, indicated by the green box labeled “ACTIVE” in the “Status” column. If an item needs to be de-activated, click the green box labeled “ACTIVE” next to the item to be deactivated, and it will become a red box labeled “INACTIVE”. To reverse and reactivate, simply click the red box and it will return to green.

- **Search**- Search from existing items in the table by typing search criteria in the Search box. This will narrow the results in the table solely to those matching the search criteria.

The screenshot displays an 'ADMIN PANEL' interface. At the top, there is a navigation bar with 'LOGOUT', 'ADMIN PANEL', and 'ACCOUNT' links. Below this, the 'ADMIN PANEL' section contains a 'USER' table and a 'MEASURE' table. A search box is located above the 'USER' table. A modal titled 'Edit User Information' is open, showing details for a user with the username 'jobins2'. The modal includes fields for 'First Name' (Joseph), 'Last Name' (Bins II), 'Select Role' (Admin), and 'Select Organization' (eHealthConnecticut). There are 'SAVE' and 'CANCEL' buttons at the bottom of the modal. A green 'ACTIVE' button and a grey 'EDIT' button are visible in the 'MEASURE' table. Yellow callout boxes highlight the 'Search Box', the 'Pop-Up when editing information' modal, the 'Add Button' (ADD USER), the 'Activate/Deactivate Button' (ACTIVE), and the 'Edit Button' (EDIT).

ADMIN PANEL

LOGOUT ADMIN PANEL ACCOUNT

USER

MEASURE

Search

Username

First Name

Last Name

Select Role :

Select Organization :

SAVE CANCEL

ACTIVE EDIT

ADD USER

Search Box

Pop-Up when editing information

Add Button

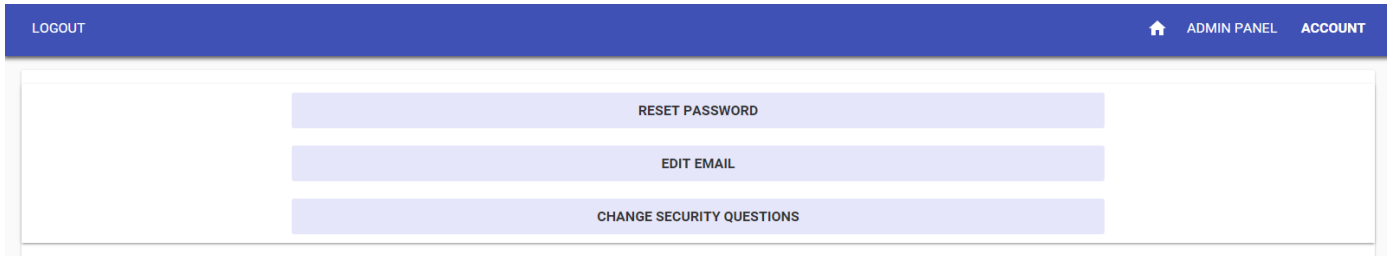
Edit Button

Activate/Deactivate Button

Account

The Account page allows you to edit your login information.

Account Page

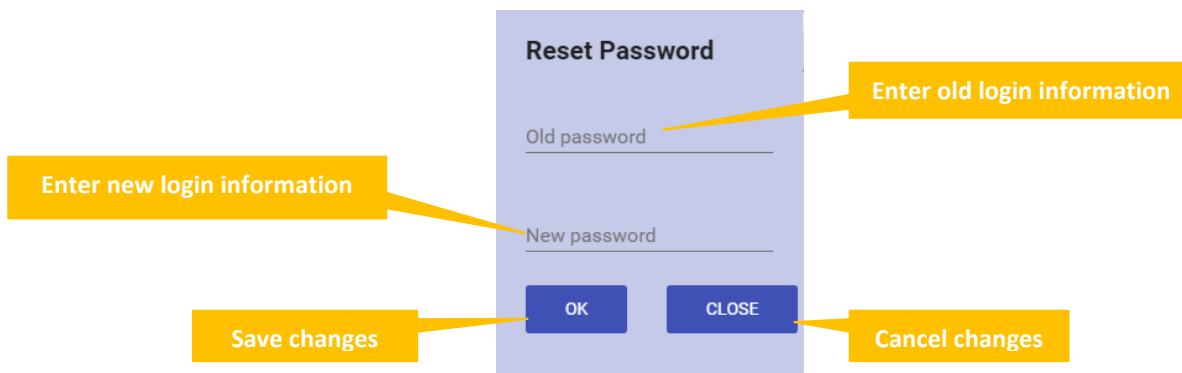


The screenshot shows the top of a web application. A dark blue header bar contains the text "LOGOUT" on the left and "ADMIN PANEL" and "ACCOUNT" on the right, with a home icon between them. Below the header is a white box containing three light blue buttons stacked vertically: "RESET PASSWORD", "EDIT EMAIL", and "CHANGE SECURITY QUESTIONS".

To access the Account Page, select “ACCOUNT” from the header panel at the top of the screen.

Here, you can change your password, email address, or security questions.

1. Select the item you wish to edit (reset password, edit email, or change security questions)
2. A popup box will appear
3. Enter the old login information, and the new login information in the corresponding lines of the popup box
 - a. (Passwords must contain at least 1 capital and 1 lowercase letter, one number, and 1 symbol)
4. Click the “OK” button to save changes, or click the “CLOSE” button to return to the previous settings without changing



The diagram shows a light blue rectangular popup box titled "Reset Password". Inside the box, there are two text input fields: "Old password" and "New password". Below these fields are two blue buttons: "OK" and "CLOSE". Four yellow callout boxes with arrows point to these elements: "Enter old login information" points to the "Old password" field, "Enter new login information" points to the "New password" field, "Save changes" points to the "OK" button, and "Cancel changes" points to the "CLOSE" button.