SHAPE Dashboard
User Guide

Prepared for

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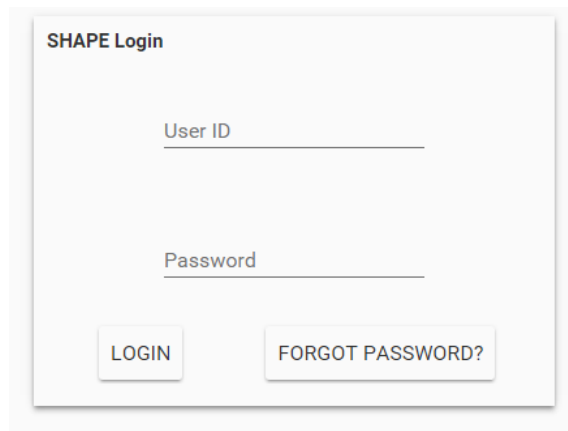
Logging In

To access the SHAPE User Dashboard, navigate your internet browser to:
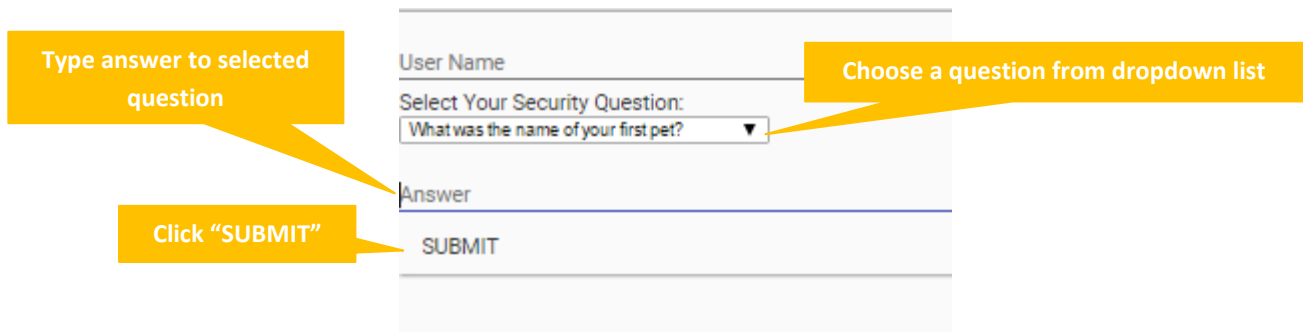
https://shape.ehealthconnecticut.org

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

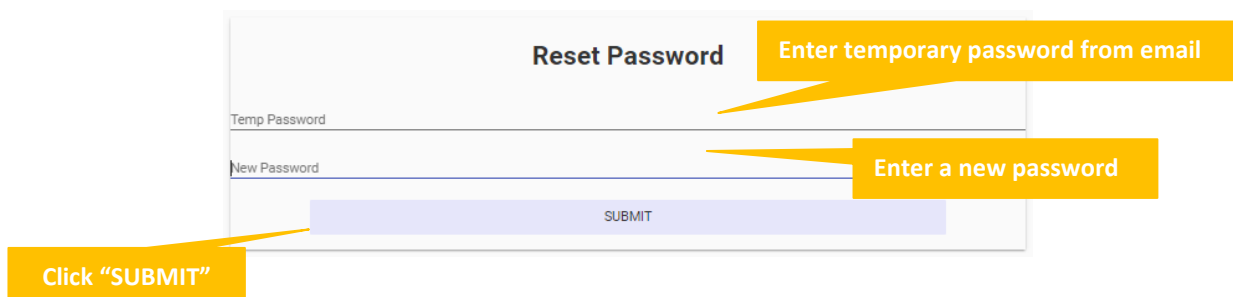If you have forgotten your password, click the "FORGOT PASSWORD?" button. Select and answer a security question. You will be emailed a temporary password. Log in using the temporary password. Upon logging in, you will be prompted to enter a new password.

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

LOGOUT		🏠 ADMIN PANEL ACCOUNT
	Organization: Select Organization ▼	
Measure Input	Past Measure Reports	Organization Profile
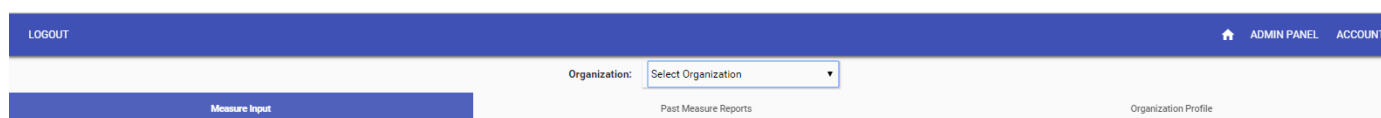
Components of the Dashboard:

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.
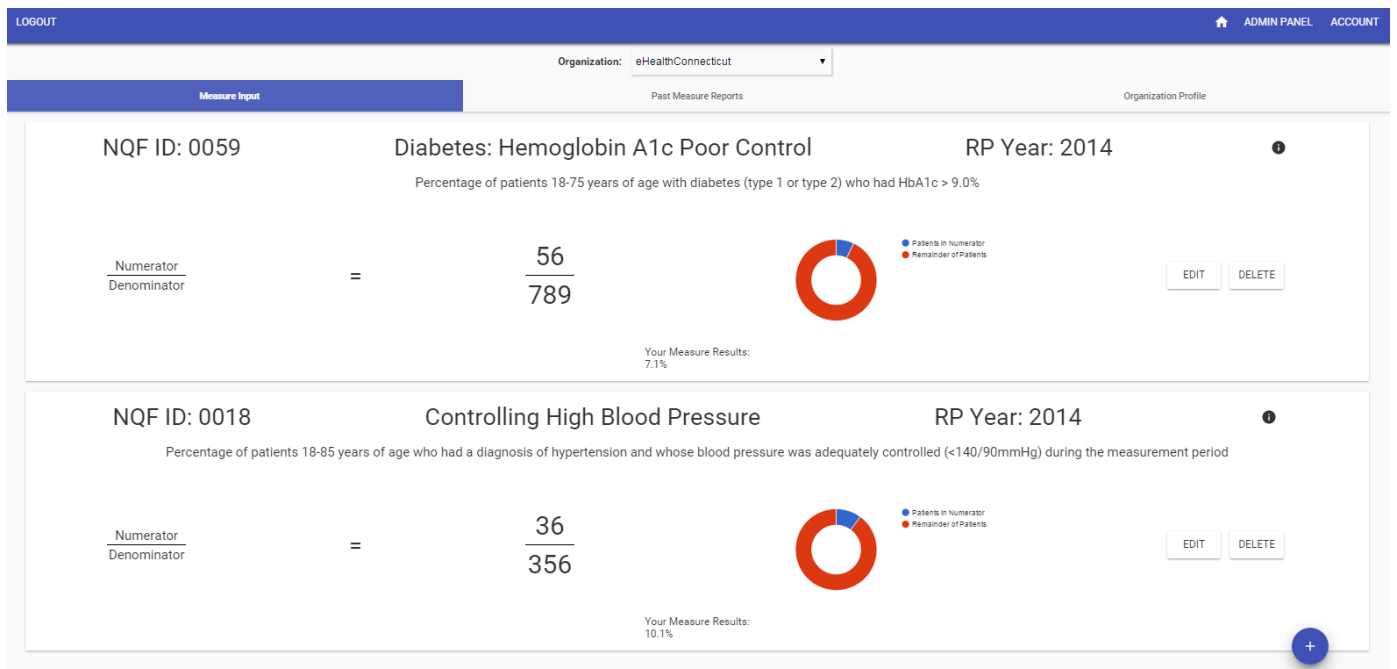
This screen displays a visual representation of an organization's results in the most recent reporting period for two Clinical Quality Measures: NQF 0018 Controlling High Blood Pressure and NQF 0059 Diabetes: HbA1c Poor Control. It also allows users to enter the current reporting period results for the 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 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.
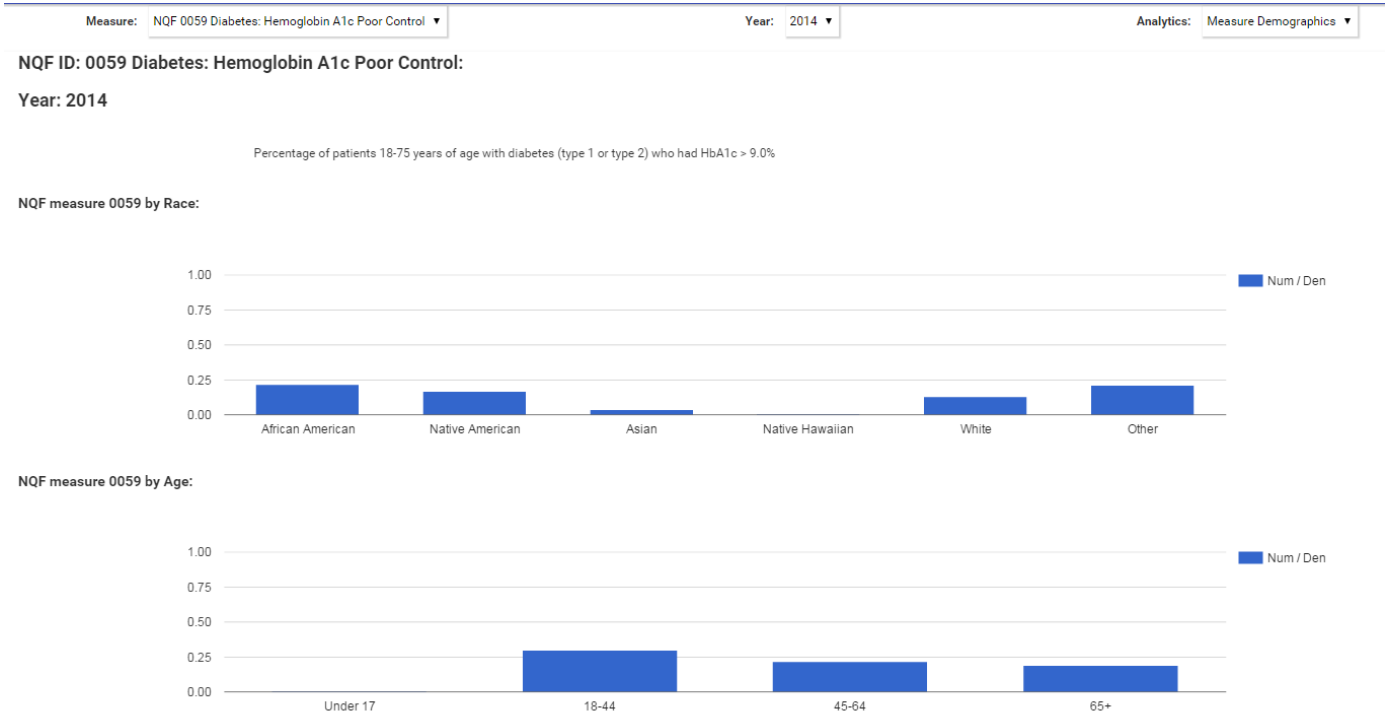
List View: First, select a CQM and year from the corresponding drop down lists. From the Analytics drop down list, select "List View". This view displays the results of the selected CQM from the chosen year. Results are displayed in a pie chart similarly to the Measure Input Page.
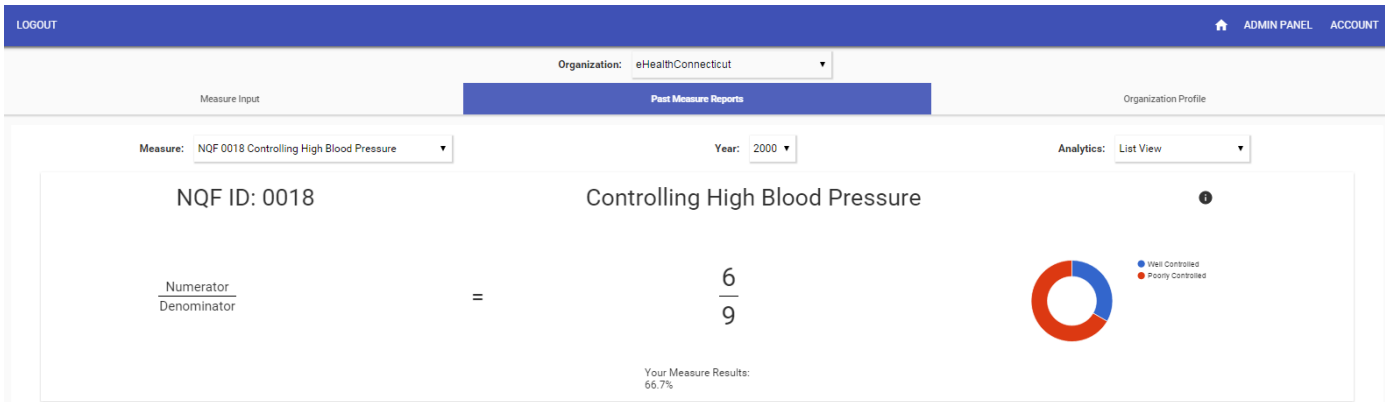
Measure Trend: From the Analytics drop down menu select "Aggregate Comparison". This view allows the user to compare CQM results from their organization to the aggregate results of all organizations participating in the SHAPE project in a given year. The results are displayed in a bar graph. Hover over each individual bar to display the precise percentage.
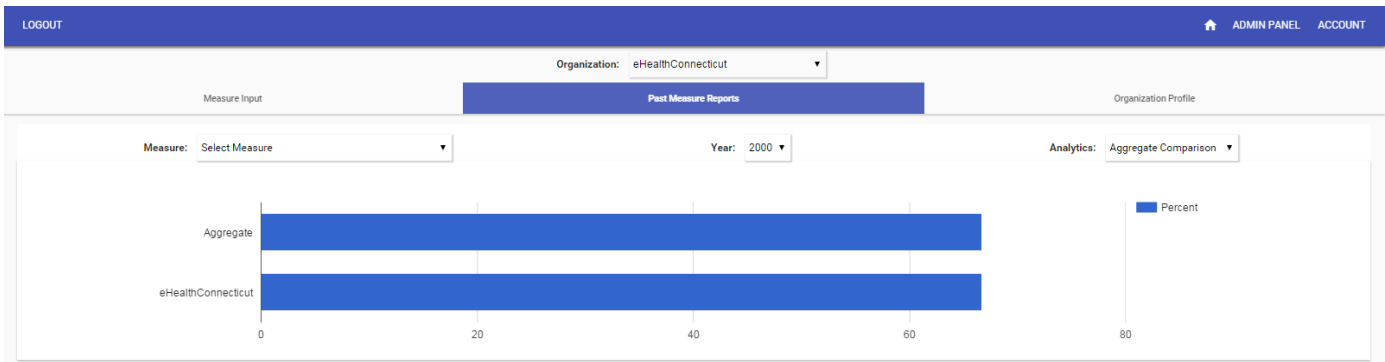
Measure Demographics: From the Analytics drop down menu, select "Measure Demographics". This view allows you to view demographic breakdown by race, age, ethnicity, and sex of the selected CQM, year and organization. Results are displayed in a bar graph. Scroll down to view the remaining demographic categories.

| Measure: | NQF 0059 Diabetes: Hemoglobin A1c Poor Control ▾ | Year: | 2014 ▾ | Analytics: | Measure Demographics ▾ |

NQF ID: 0059 Diabetes: Hemoglobin A1c Poor Control:

Year: 2014

Percentage of patients 18-75 years of age with diabetes (type 1 or type 2) who had HbA1c > 9.0%

NQF measure 0059 by Race:

NQF measure 0059 by Age:

Organization Profile

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

Organization Profile Page

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.

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.

Admin Panel Page

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:

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.

Account

The Account page allows you to edit your login information.

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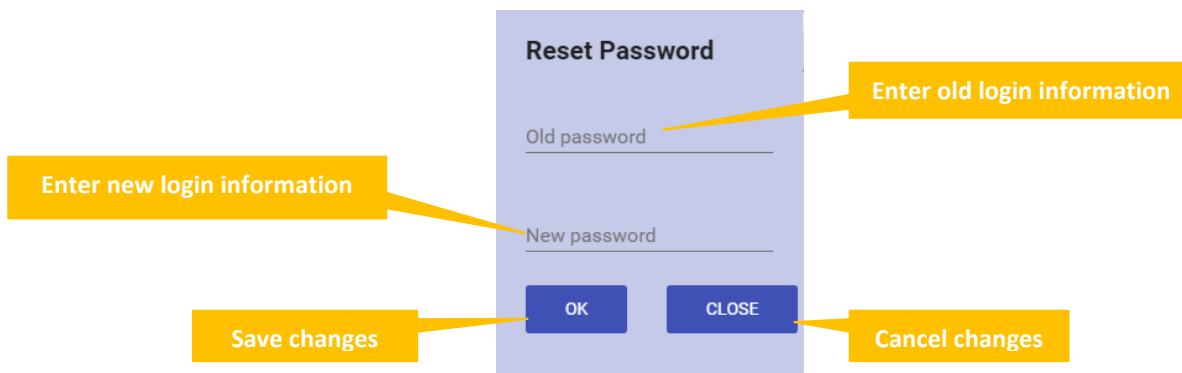
To access the Account Page, select "ACCOUNT" from the header panel at the top of the screen.

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