

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

CT DPH SHAPE Grant



Welcome to the CT DPH SHAPE Grant Dashboard!

The Shape Dashboard was developed by eHealthConnecticut in conjunction with the Connecticut Department of Public Health as part of the SHAPE grant (State Public Health Actions to Prevent and Control Diabetes, Heart Disease, Obesity and Associated Risk Factors and Promote School Health-1305), through funding from the Centers for Disease Control and Prevention.

The goal of the SHAPE project is to leverage healthcare providers' health information technology to develop processes to improve hypertension and diabetes awareness and management among their patient populations.

Through this quality measure dashboard, healthcare providers can collect and report aggregate data for NQF 0018: Controlling High Blood Pressure, and NQF 0059: Diabetes: Hemoglobin A1c Poor Control.


Login to SHAPE Dashboard

User ID

Password

LOGIN

[FORGOT PASSWORD?](#) [VIEW SHAPE USER GUIDE](#)

Contact Us!

Forgot Password

If you have forgotten your password, click the “FORGOT PASSWORD?” button. Enter your User ID, select your security question from the dropdown menu, and type the answer to your security question. You will receive a temporary password via email. Log in using the temporary password. Upon logging in, you will be prompted to enter a new password.

Enter your user name

Type answer to selected question

Choose a question from dropdown list

Click “SUBMIT”

User Name

Select Your Security Question:

What was the name of your first pet?


Answer

SUBMIT

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. **Help**- Allows user to access the user guide or email a member of the SHAPE team with questions
4. **My Account** – Directs user to Account Settings where user can change login information or log out of the system. Refer to the Account section of this User Guide to learn more about functions of this section.
5. **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.
6. **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.
7. **Organization Profile** – Navigates to the Organization Profile screen where users can view and edit information about their organization. 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 and view CQM data for their organization.

CT DPH SHAPE GrantHOMEADMIN PANELHELPMY ACCOUNT

Organization: Test Organization

Measure InputPast Measure ReportsOrganization Profile

NQF ID: 59Diabetes: Hemoglobin A1c Poor ControlRP Year: 2016

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


Numerator

Denominator

=

45

98



Patients in Numerator

Remainder of Patients

EDITDELETE

Your Measure Results:
45.9%

+

This screen displays a visual representation of an organization's results from 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 add new results for the measures, or edit data for the most recent entry.

- 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

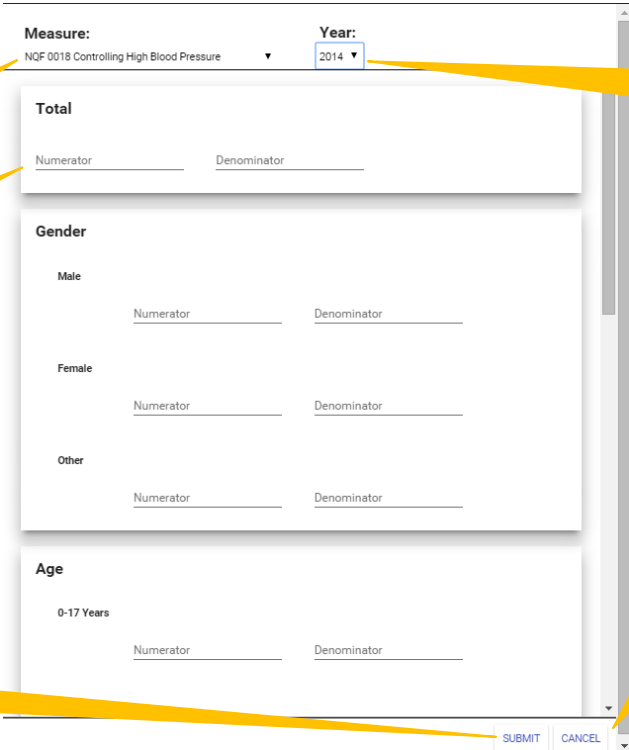
- Displayed as a fraction: the numerator (number of patients with adequately controlled blood pressure) and denominator (number of patients with hypertension)
- Displayed as a pie graph: blue represents the percentage of patients in the numerator (well controlled blood pressure) and red represents the 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.



The screenshot shows a data entry form for Clinical Quality Measures. At the top, there are dropdown menus for 'Measure:' (set to 'NQF 0018 Controlling High Blood Pressure') and 'Year:' (set to '2014'). Below these are sections for 'Total', 'Gender' (with sub-sections for Male, Female, and Other), and 'Age' (with a sub-section for '0-17 Years'). Each section contains input fields for 'Numerator' and 'Denominator'. At the bottom right, there are 'SUBMIT' and 'CANCEL' buttons.

Yellow callout boxes provide instructions:

- Select measure from dropdown:** Points to the 'Measure:' dropdown menu.
- Select reporting year from dropdown:** Points to the 'Year:' dropdown menu.
- Type data directly into fields:** Points to the 'Numerator' and 'Denominator' input fields in the 'Total' section.
- Click "SUBMIT" to save entries:** Points to the 'SUBMIT' button.
- 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

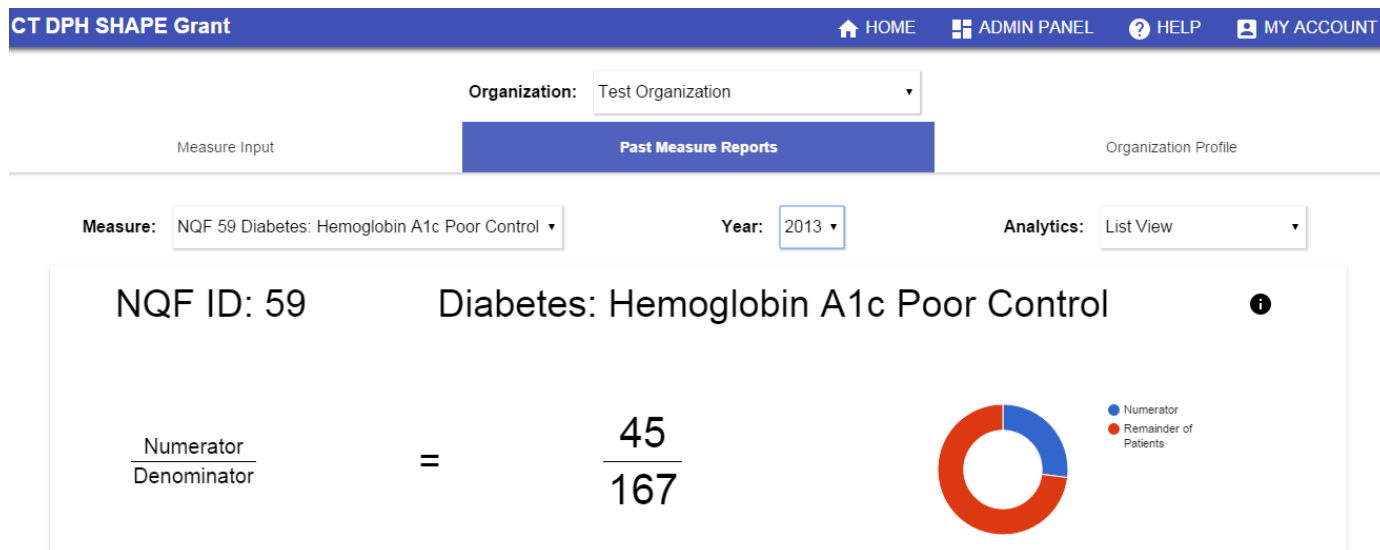
- Aggregate: the numerator/denominator represents total number of patients with poor controlled diabetes hemoglobin A1c > 9.0%)/the number of patients diagnosed with diabetes
- Gender: the males (or females) with poor controlled diabetes/the males (or females) with diagnosed diabetes
- Age: of the 18-44 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.

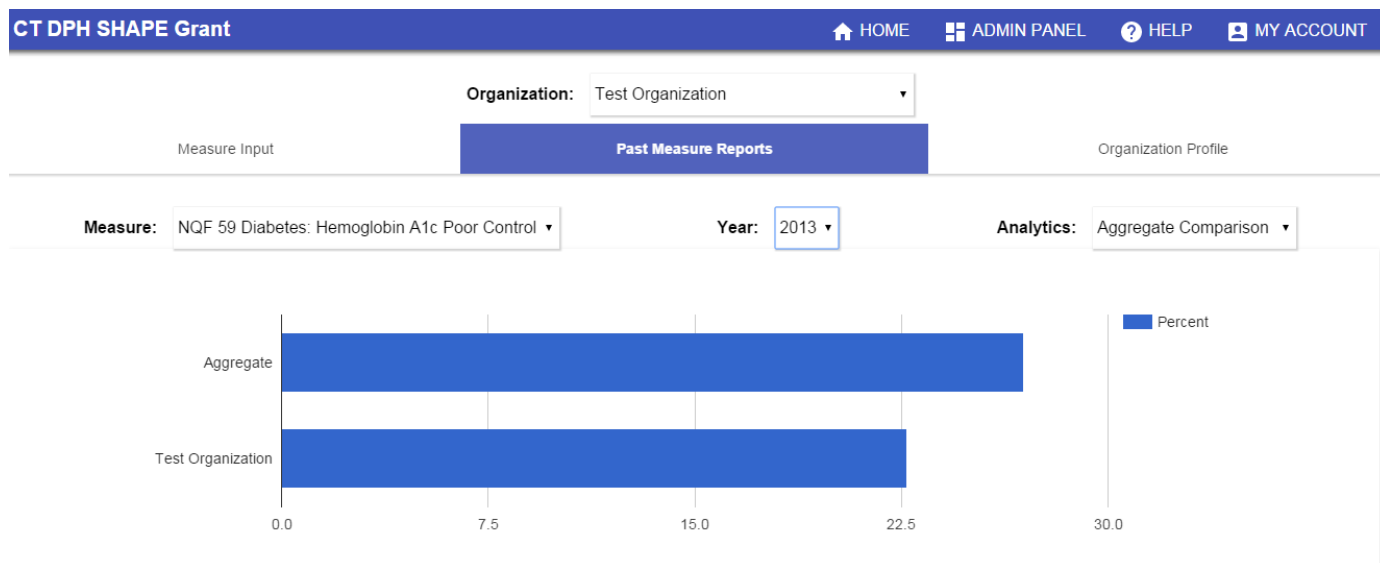
Past Measure Reports

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.

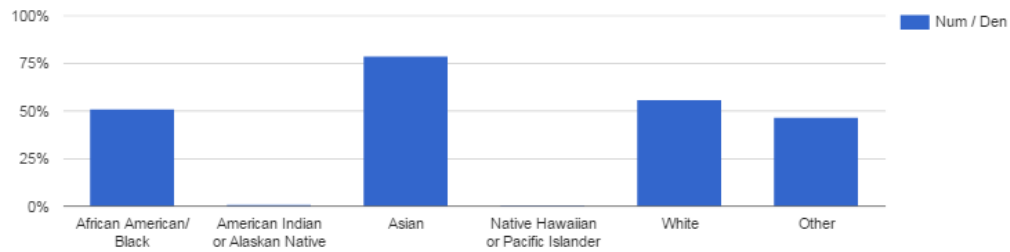


Aggregate Comparison: From the Analytics drop down menu select “Aggregate Comparison”. This view allows the user to compare CQM results from their organization to the aggregate results of all organizations participating in the SHAPE project in a given year. The results are displayed in a bar graph. Hover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

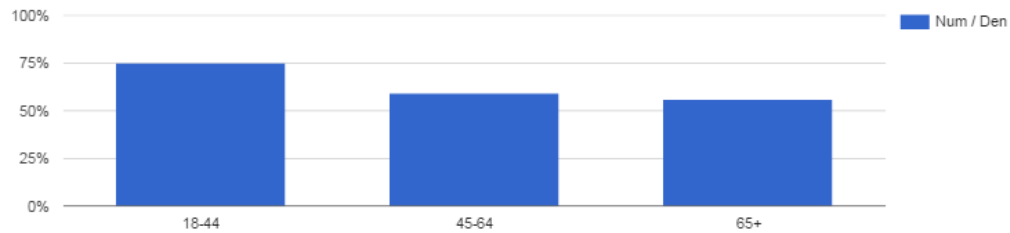


Measure Demographics: From the Analytics drop down menu, select “Measure Demographics”. This view allows you to view demographic breakdown by race, age, ethnicity, and sex of the selected CQM, year and organization. Results are displayed in a bar graph. Scroll down to view the remaining demographic categories.

NQF measure 18 by Race:



NQF measure 18 by Age:



Organization Profile

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

Test Organization

Address:
10 Columbus Blvd
Hartford CT 06106
860-335-2102

Primary Contact:
Julia
Tester
jmoore@smopartners.com

Operational Information

Which best describes your organization? Please select 1:

- ☐ Primary Care Practice
☒ Ambulatory Clinic
☐ FQHC or FQHC look-a-like
☐ HMO
☐ Community Health Center
☐ ACO
☐ Multi-Specialty Practice
☐ PCMH
☐ Practice Consortium
☐ Other
- Check all the applicable staff for your organization: Check all that apply
- ☒ Physicians
☐ Medical Assistants
☒ Nurse Practitioners
☐ Residents
☒ RNs
☐ Interns
☐ LPNs
☐ Community Health Workers
☐ Physician Assistants
☐ Trained in motivational interviewing

Payer Mix:

Medicare 40 % Medicaid 0 % HMO 10 % PPO 12 % Uninsured/Self-Pay 3 %

Private Insurance 35 %

What EHR System does your organization use?

Vendor: NextGen

Product: Ambulatory

Version:

Completed 2014 CEHRT Upgrade? ☒ Yes ☐ No

Do you have a patient portal? ☒ Yes ☐ No

Patient Population

Patient Volume

100 Patients 200 Visits per Year

Patient Counts

25 Patients with a Diagnosis of Hypertension 12 Patients with a Diagnosis of Diabetes 8 Patients with Pre-Diabetes

3 Patients with High BP but no Diagnosis of Hypertension

Demographic Information

Gender

50 Male 50 Female

Age

10 17 & Under 20 18-44 Years 30 45-64 Years 40 65 & Over

Ethnicity

50 Hispanic/Latino 50 Not Hispanic/Latino

Race

20 African American/Black 10 American Indian or Alaska Native 20 Asian 10 Native Hawaiian or Pacific Islander 20 White

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 the organization’s contact information, and details about the organization and 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, or check the appropriate checkboxes and radio buttons. When all values have been entered, click the “SAVE” button. To cancel without saving changes, click the “CANCEL” button rather than “SAVE” after editing.

Admin Panel

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

Admin Panel Page

CTDPH SHAPE Grant				
			HOME	ADMIN PANEL
			HELP	MY ACCOUNT
ADMIN PANEL				
USER		PROVIDER	ORGANIZATION	MEASURE
<input type="text" value="Search"/>				ADD MEASURE
Selection	NQF ID	Name	Description	
<input checked="" type="checkbox"/>	18	Controlling High Blood Pressure	Percentage of patients 18-85 years of age who had a diagnosis of hypertension and whose blood pressure was adequately controlled (<140/90 mmHg) during the measurement period	EDIT
<input checked="" type="checkbox"/>	59	Diabetes: Hemoglobin A1c Poor Control	Percentage of patients 18-75 years of age with diabetes (type 1 or type 2) who had HbA1c > 9.0%	EDIT

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:

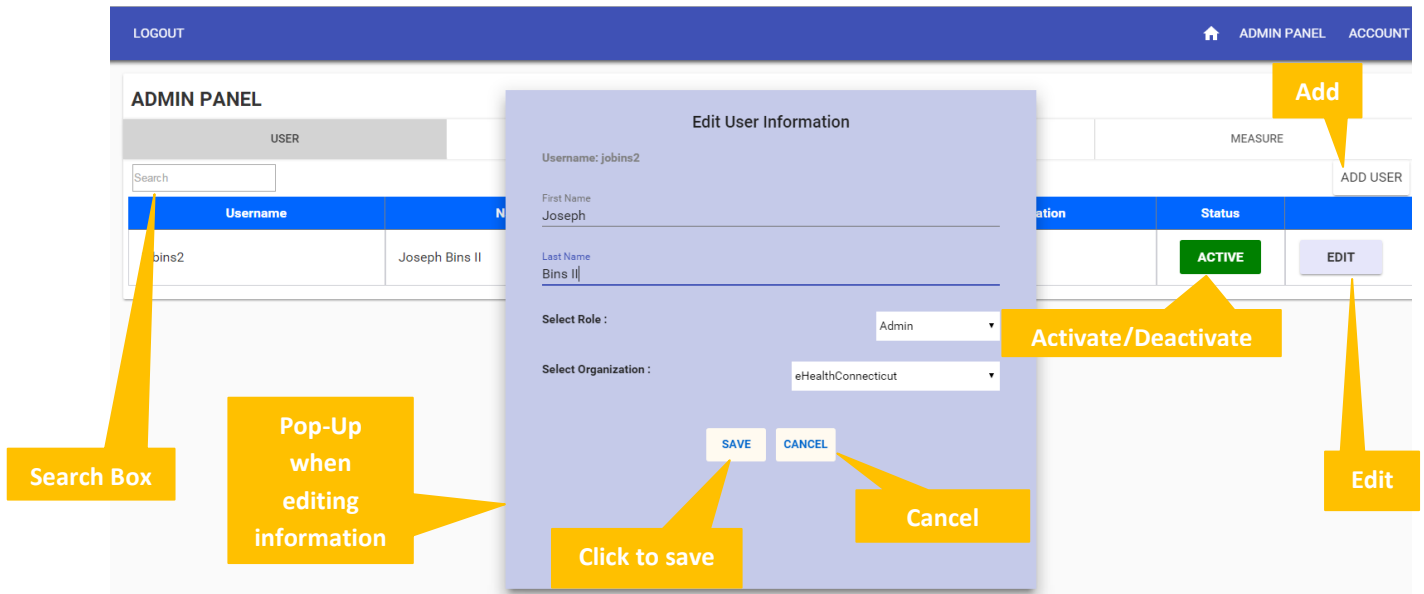
USER	PROVIDER	ORGANIZATION	MEASURE
------	----------	--------------	---------

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.

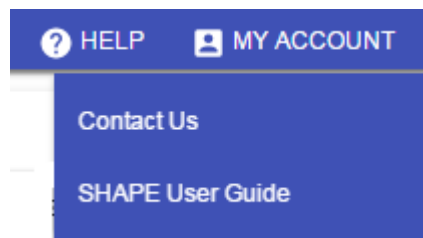
- **Edit-** Click the “EDIT” button next to the item from the list you wish to change. A pop-up box will appear. Highlight or delete the text currently in the field and replace with the new text. Click the “SAVE” button to save your changes in the table, or click the “CANCEL” button to cancel changes 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.



Help

The Help menu allows you to contact a member of the SHAPE team with questions, or view the system user guide.

Help Menu

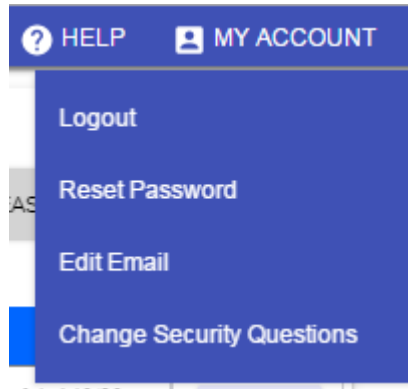


To access the help menu, select “HELP” from the header panel at the top of the screen. A dropdown menu will appear. Select either “Contact Us” to compose an email to the SHAPE team, or “SHAPE User Guide” to view the system user guide in a separate tab.

My Account

The My Account menu allows you to edit your login information or log out of the system.

My Account Menu



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

To log out, simply click “Logout” and you will be logged out from the system.

To change your password, email address, or security questions, follow the steps outlined below:

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 at least 6 characters total)
4. Click the “OK” button to save changes, or click the “CLOSE” button to return to the previous settings without changing

A screenshot of a 'Reset Password' popup form. The title 'Reset Password' is at the top. Below it are two input fields: 'Old password' and 'New password'. A note below the fields states: 'Password must contain at least: 6 characters, an uppercase letter, a lowercase letter, and a number.' At the bottom right are two buttons: 'SAVE' and 'CLOSE'.

Dashboard User Roles

Access	System Admin	DPH User	Org. Admin	Org. User
View all organizations	x	x		
View all organizations' measure data	x	x		
View own organization	x	x	x	x
View own organization measure data	x	x	x	x
Edit all organization's measure data	x			
Edit all organizations	x			
Edit all users	x			
Edit own organization	x		x	x
Edit own organization measure data	x		x	x
Edit own organization users	x		x	
Add organizations	x			
Add any organization's users	x			
Add any organization's measure data	x			
Add own organization users	x		x	
Add own organization measure data	x		x	x

Description of Roles:

System Admin: Highest level of access, can view and edit all organizations. *i.e. eHealthConnecticut, DPH Project Manager*

DPH User: Can view all organizations, but may not edit data. *i.e. DPH Project Staff*

Org. Admin: Highest level of access within a participating organization. Can view, add, and edit information, measures, and users for their own organization. *i.e. CEO of a participating organization*

Org. User: Mid-level access within a participating organization. Can edit and view measures for their own organization. *i.e. IT personal of a participating organization*

For any questions not answered by the user guide, please contact Julia Moore by email at jmoore@smcpartners.com