Action OI Training

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Action OI (Solucient) Uses & Benefits

- Operational benchmarking program

  - Compare financial and operational data
    - Volumes, Productivity, Skill Mix, Labor, Supplies etc.
  - Target areas for cost control, performance improvement, budgeting, and best practices
    - Assist in the budgeting and FTE approval process
    - In Nursing, it's used as a basis for the Staffing Plan
  - Compare department and facility practices to efficient practices at similar facilities
    - Recognize trends and opportunity savings
  - Direct networking opportunities with members
    - Compare Upstate to other hospitals to improve performance

Action OI Inputs & Outputs

- Data is submitted based on calendar year (CY)
  - Quarterly basis (the first Thursday of March, June, September, & December)
  - There is a 3-month reporting lag for the collection process

Inputs:

**General Ledger
Data Uploaded**

Source: Accounting

Expenses

**Payroll/Non Payroll
Uploaded**

Source:
Accounting/Budget

*Worked & Paid Hours,
Labor Expense*

**Departmental Data
Keyed In**

Source: Department
Contacts, Business Objects,
Budgeting

Department Specific Stats

Action OI Data Sources and Validation

- **Facility & financial information**

Financial Statements

Financials report by Accounting

- **Expenses**

General Ledger

Financials report by Accounting

- **Patient days, discharges & transfers**
- **Procedures, APCs, etc**

Statistics

Monthly financial report by Budget
Business Objects Report Extracts
Stats reported by the department

- **Worked Hours, Paid Hours, OT Hours by job code**

Payroll System

Payroll report by Accounting / Budget

- **Characteristics (Y/N questions, operational differences; used to develop compare groups)**
- **Normalization surveys (to have the apples-to apples comparison)**
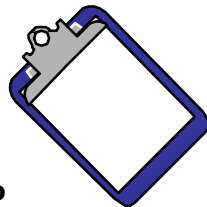
Individual Department Executive Administrators or Managers

Data Processing

Data stored in Operational Data Warehouse

Data Integrity Reviews to Approve Data for Comparisons

Calculate Indicators and Apply Allocations

Breadth and Depth of Data

- Custom Compare Group (currently 44 hospitals):
  - Major Teaching Hospital
  - Level 1 Trauma Center
  - Medicare CMI > 1.65
  - EPIC EMR Hospitals

- Departmental information collected:
  - Patient days, admissions, discharges, and transfers
  - Beds, patient exam spaces, and operating rooms
  - Hours of operation, patient visits, and procedures performed
  - APC Relative Weight, Professional Work RVUs, Pharmacy Intensity Score, and Billed Time Units

- Measures produced:
  - Raw data- department operating stats & facility information
  - Performance drivers- workload/service intensity, staff configuration
  - Scores- labor productivity ratios, cost ratios

Report Distribution

- Officer Quarterly Benchmark Reports
  - Custom Summary Batch
  - Improvement Opportunity Analysis
  - Snapshot report

- Custom Summary Batch Report to Managers (FTE Opportunity Report; sorted 2 ways)

- Departmental Reports uploaded to Self-Serve quarterly- email sent to managers/administrators/officers when completed

- Reports available via Self-Serve:
  - Key Performance Indicator- *provides key performance indicators intended for top-level review of individual department performance relative to compare group*
  - Trend and Compare Group- *shows trended department data versus three percentiles for up to five compare groups for elements and indicators*

- Additional reports are available upon request, Laura Carroll in Fiscal Services can assist

Accessing Department Reports in Self-Serve

1. Log on to Self Serve
2. Click "hamburger menu" (upper left corner)
3. Click "Reports" from the list
4. Click "Reports Main Menu" (down arrow)
5. From the list, choose Solucient Benchmark Reports
6. Once inside this folder, 3 types of reports appear:
   - Graphs
   - Key Performance Indicator (KPI; short report)
   - Trend and Compare Group (TCG; longer report)
- Click "Output" on the right side – a list of all reports will appear
- Find your report – use "Cntrl F" to search by name, account # etc

Requesting Access to Department Reports in Self-Serve
(if you don't find the folder using the slide above)

1. Log on to Self Serve
2. Locate the Quick Links box in the bottom right hand corner of your Self Serve homepage
3. Click "IMT Account Request Form(s)"
4. Once in E-Forms Manager, scroll down and "Self-Serve Account Request Form"
5. The form will say "This request is on behalf of Myself" – click Next Step
6. Verify the information is correct on the page and click Next
7. For Request Type, click "Reports"
8. 2 Text boxes will open – In the Report Folder box type "Solucient Benchmark Reports" (this is the folder you are requesting access to. In the Report Name box type "all reports" (that way you get access to any report inside this folder
9. Click Next and this will submit the request to your Director for approval and once approved it will go to IMT to give you access to the folder
10. You will receive and email from IMT when access has been given

11. Any questions – just call me!

Custom Summary Batch (FTE Opportunity Report)

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Upstate University Hospital

Custom Summary Batch - Sorted by Officer

Quarterly Period - Q3 2020

50th Percentile Opportunity

1 **2** **4** **5** **6**

Please note: Areas with an **UNFAVORABLE** OPPORTUNITY of 5 FTEs or greater are highlighted in RED; areas with a FAVORABLE OPPORTUNITY of 5 FTEs or greater are indicated in GREEN

Department	UH Cost Center	Measure	Host Value Q3 2020 (a)	Q3 25th Percentile	Q3 50th Percentile	Q3 75th Percentile	Q3 Gap % Fav/(Unfav)	50% FTE Oppt Q3 2020 Fav/(Unfav) [c]	Paid FTE Q3 2020 Normalized [d]	Paid FTE Q3 2020 Actual	50% FTE Oppt Q2 2020 Fav/(Unfav) [c]	PCC 4-Quarter Average 50% FTE Oppt [e]
35130500, Neurosurgery 9G	35130500	Hours Worked per Equivalent Patient Day	12.27	11.20	12.19	14.02	-1%	(0.3)	43.6	44.6	7.3	1.4
35134100, Pediatric Surgery Center Clinic	35134100	Hours Worked per APC Relative Weight	1.18	0.81	1.17	2.22	-1%	(0.0)	3.2	7.4	0.4	(0.1)
34164600, Transitional Care Unit-CG	34164600	Hours Worked per Equivalent Patient Day	10.36	b	b	b	0%	-	31.5	31.2	0.0	0.0
34164000, INTENSIVE CARE-CG; 34168602, ON-CALL ICU	34164000; 34168602	Hours Worked per Equivalent Patient Day	22.13	20.46	22.13	25.19	0%	0.0	35.7	36.5	(0.8)	(0.5)
34138800, ICU-Pediatrics 12F	34138800	Hours Worked per Equivalent Patient Day	25.27	21.21	25.27	28.52	0%	0.0	45.6	46.8	(6.1)	1.2
35169800 Social Work CG	35169800	Hours Worked per Case	2.50	2.05	2.52	3.51	1%	0.1	7.9	7.9	1.4	1.1
35135402 Care	35135402	Hours Worked per APC Relative Weight	0.67	0.63	0.92	1.80	38%	0.2	0.5	2.0	0.0	(0.0)
34137800, Medicine-Cardiology 8G	34137800	Hours Worked per Equivalent Patient Day	12.17	11.36	12.26	14.16	1%	0.3	39.4	40.5	0.0	(0.6)

Upstate University Hospital Standard Compare Group: Major Teaching; Medicare CMI >1.65; Level 1 Trauma Center; EPIC Hospital

Custom Summary Batch
(FTE Opportunity Report)

Upstate wants to be at the 50th percentile or better

1 Measure: Labor Productivity Ratio - presents calculated ratios of worked hours divided by a workload volume – "standard measure"

2 Host Value – Upstate data

3 Percentiles - Aggregated compare group data and the targets (25th, 50th, 75th)

4 Gap % - measure of the amount of change needed to meet the target benchmark

5 50th %ile FTE Opportunity - potential labor FTE savings if changes are made to improve department performance and achieve 50th percentile target (+ favorable, - unfavorable)

6 PCC 4-Quarter Average 50th %ile FTE Opportunity– the average of the the last 4 quarters FTE opportunity (to smooth out quarterly ups and downs)

Department Report Analysis Tips

- Review Trend & Compare Report
  - Review additional reports providing additional & underlying measures to see how the department compares
- Evaluate Sample Size
  - Measure with fewer than 7 in the sample size indicate the need to review new compare group options
- Identify characteristics the department has answered differently than the compare group
  - Review characteristic responses which can highlight reasons why a significant opportunity has been calculated; this can be due to operational differences (Side by Side or Custom Comparison report can be used)
- Utilize the ODB list servers
  - Send inquiries to other hospitals for further analysis using the list server, or contact 'Better Performer' hospitals for in-depth investigations

Thank you!