

DRIVING **CHANGE2023**  
THE URGENT CARE CONVENTION

**UCA** URGENT CARE  
ASSOCIATION®

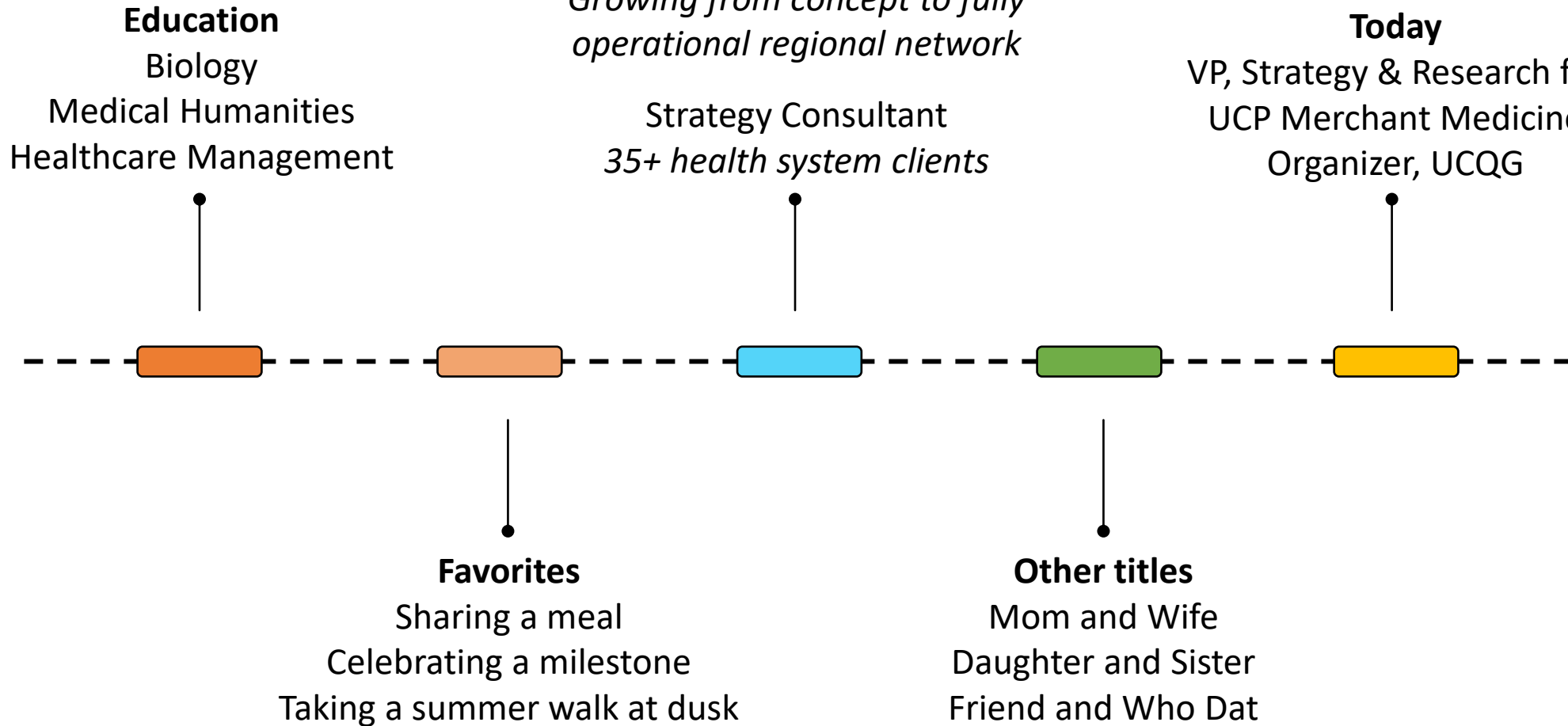


COLLEGE OF  
URGENT CARE  
MEDICINE

# Track Operating Performance through Reporting and Dashboards

Leah Broussard  
UCP Merchant Medicine

# About me



# Goals for Today

1. Identify your key stakeholders, your business objectives, and the value/benefit of using data products to drive results.
2. Consider the benefits of aligning your organization's internal metrics to external benchmarks.
3. Design a plan that prioritizes your business objectives and allows you to incrementally grow your data sophistication.

# Introduction – Ask your neighbor!

Are you collecting data to evaluate your UC operation?

What business objectives are you most closely tracking?

How is your organization using reports and dashboards to track performance?



# Session Agenda

1. Outlining Case Studies
2. Designing for Informed Decision-Making
  - Supporting Stakeholders
  - Measuring Business Objectives
  - Answering *Why* with Data
3. Unlocking Answers in Data Products
  - Collecting Data
  - Defining and Refining Metrics that Matter
  - Create Data Visualizations for Trends and Benchmark Comparison
4. Measuring and Comparing Performance
  - Focusing on Known Business Problems
  - A Quick Look at Other Business Objectives
5. Implementing a Plan
  - Designing a deployment project scope and timeline

# Outlining Case Studies

# Real-world Case Study | “Inefficient Ike”

## High volume, low energy, losing money

### Symptoms

- > Busy site
- > Revenue seems decent
- > Expenses are near other hospital departments
- > Losing money

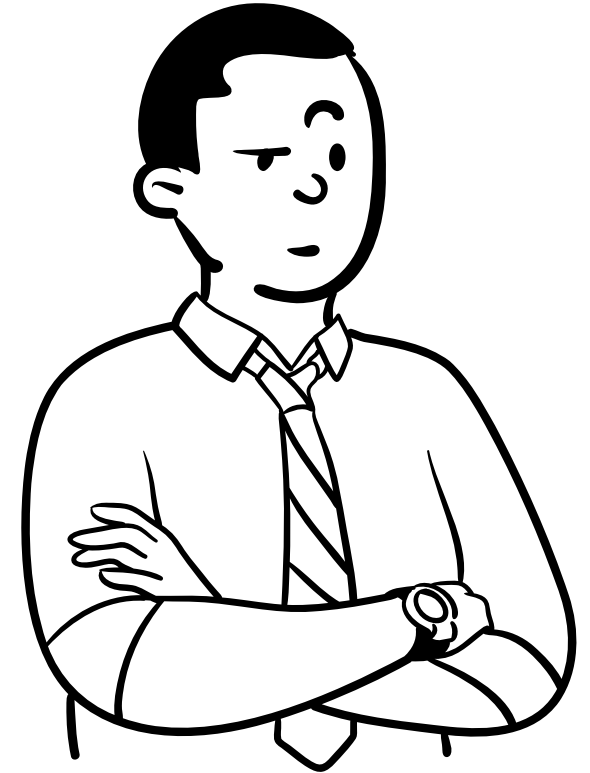


# Real-world Case Study | “Stagnant Stan”

High volume, high energy, break even

## Symptoms

- > Busy site
- > Revenue reported as a broad range
- > Expenses seem well-controlled
- > Breaking even



# Real-world Case Study | “*Dynamic Dawn*”

## Low volume, high energy, losing money

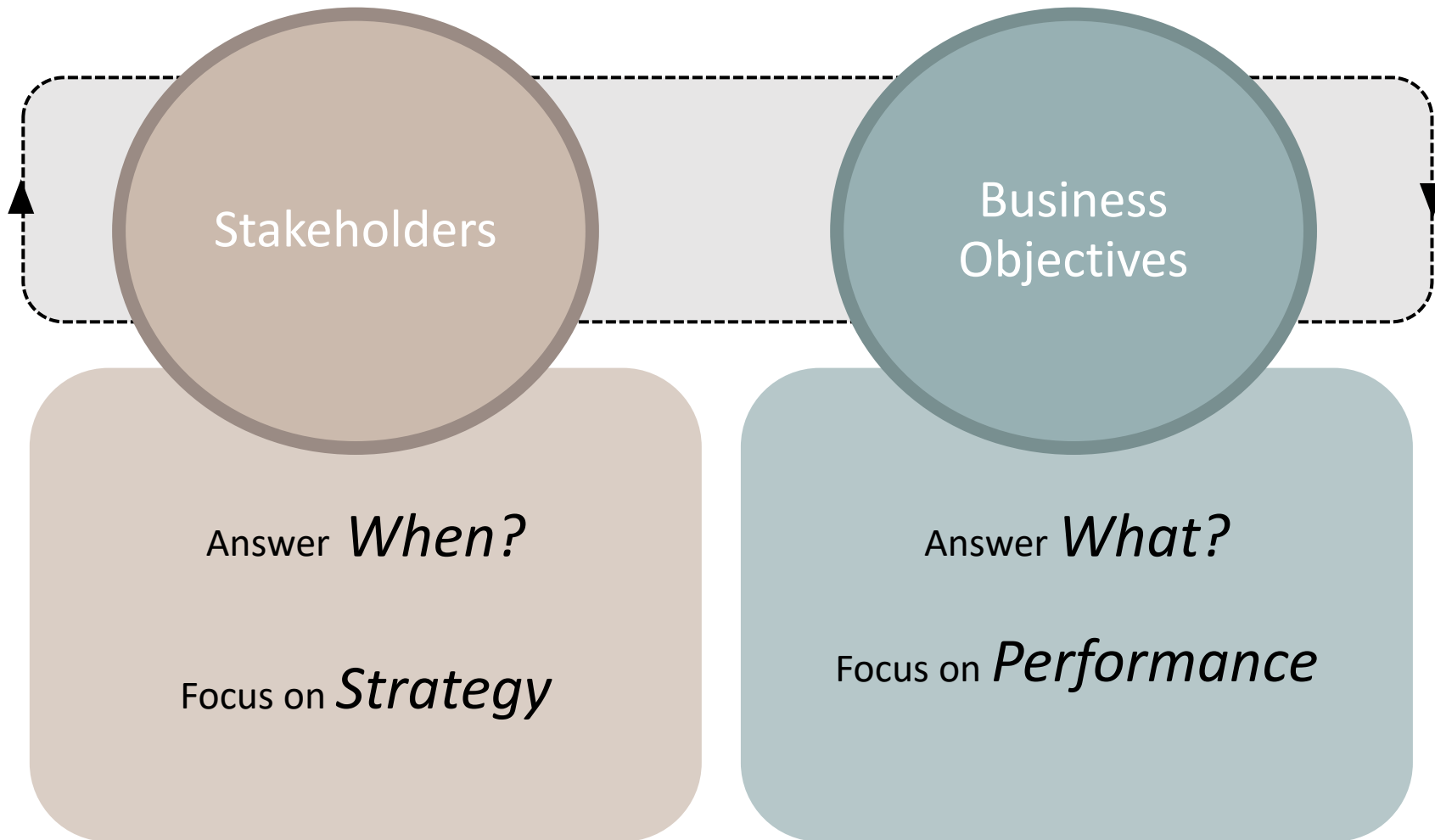
### Symptoms

- > Excess volume capacity to fill
- > Revenue seems strong
- > Expenses seem well-controlled
- > No profit

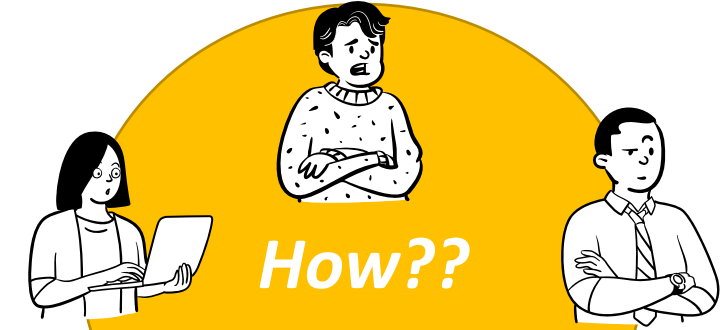
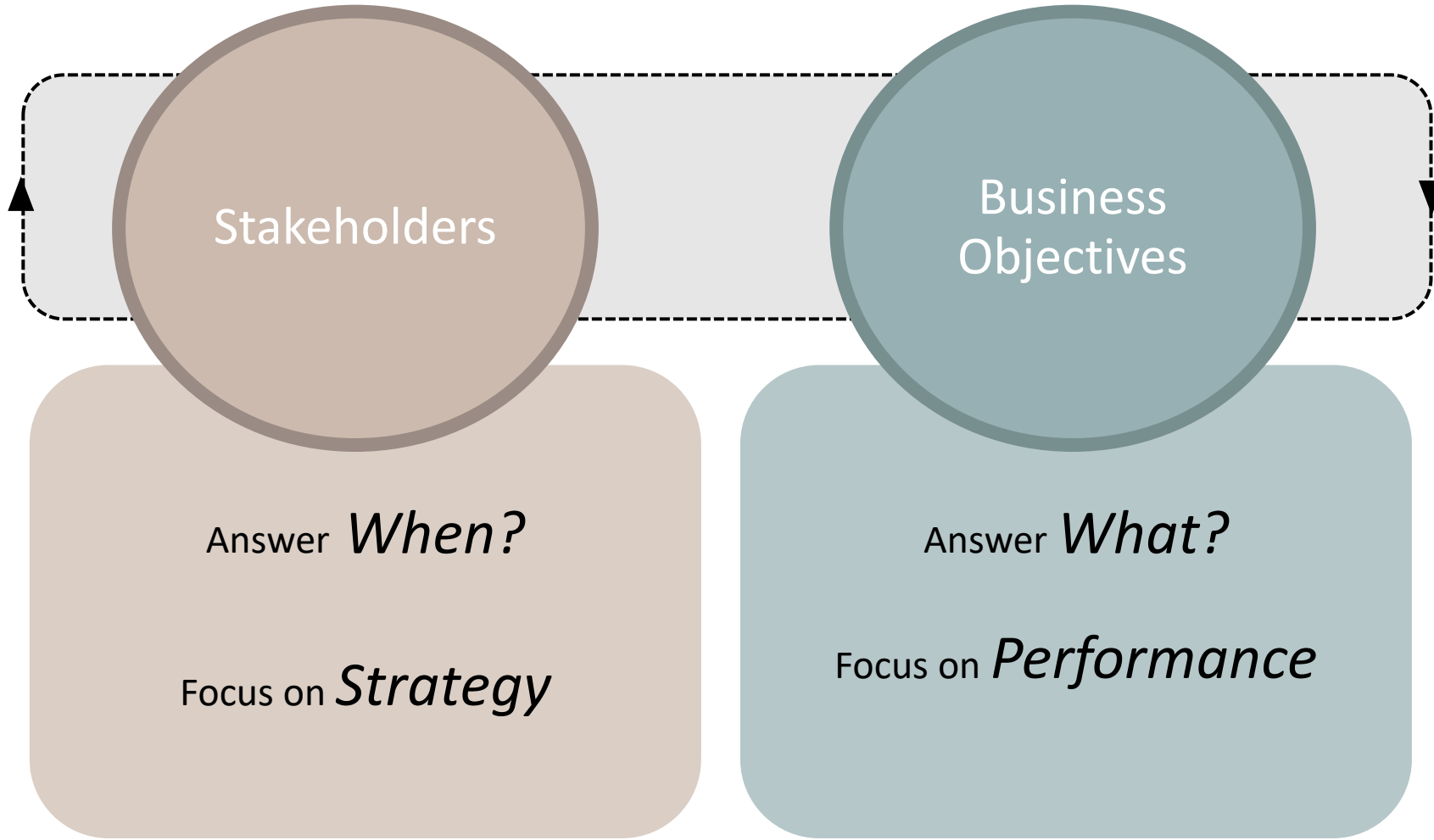


# Designing for Informed Decision-Making

# Intuitive Decision-Making | The Basics

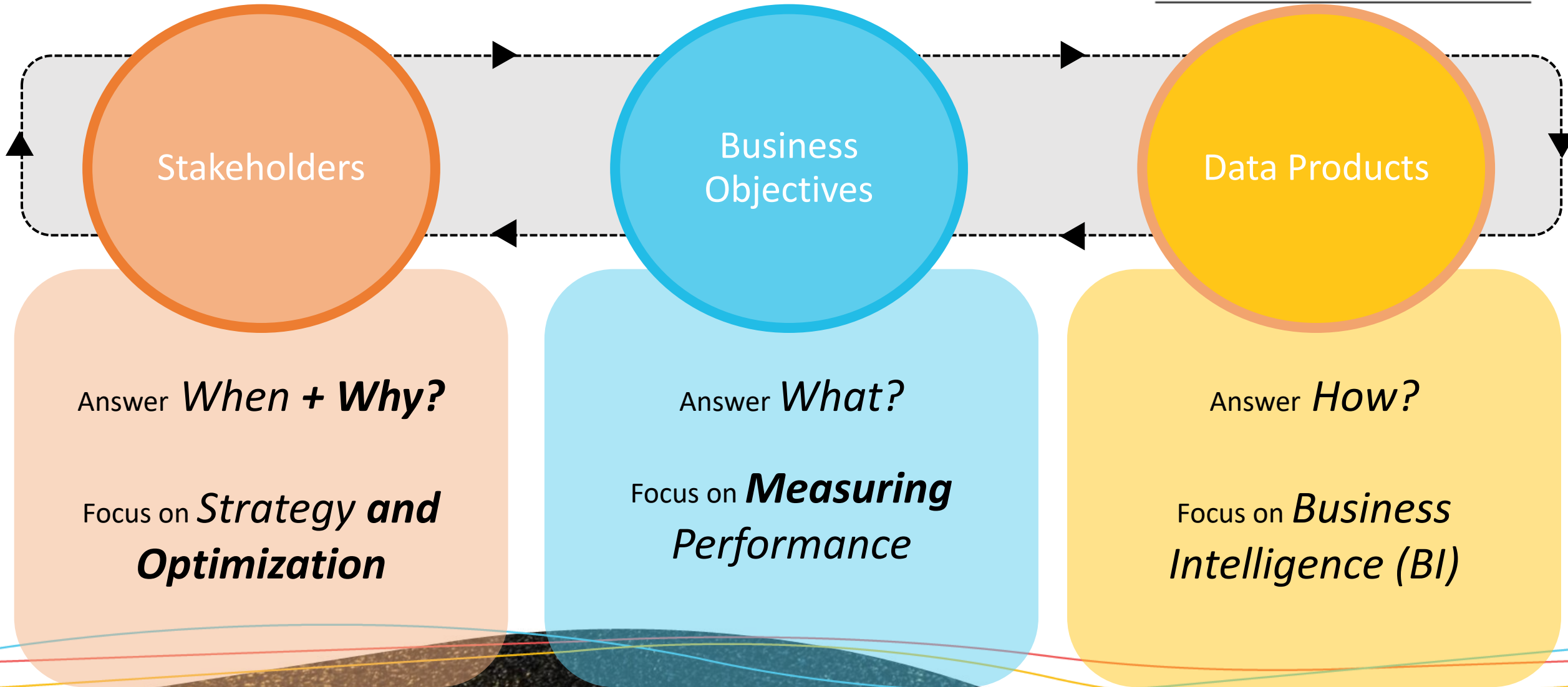


# Intuitive Decision-Making | What's Missing?

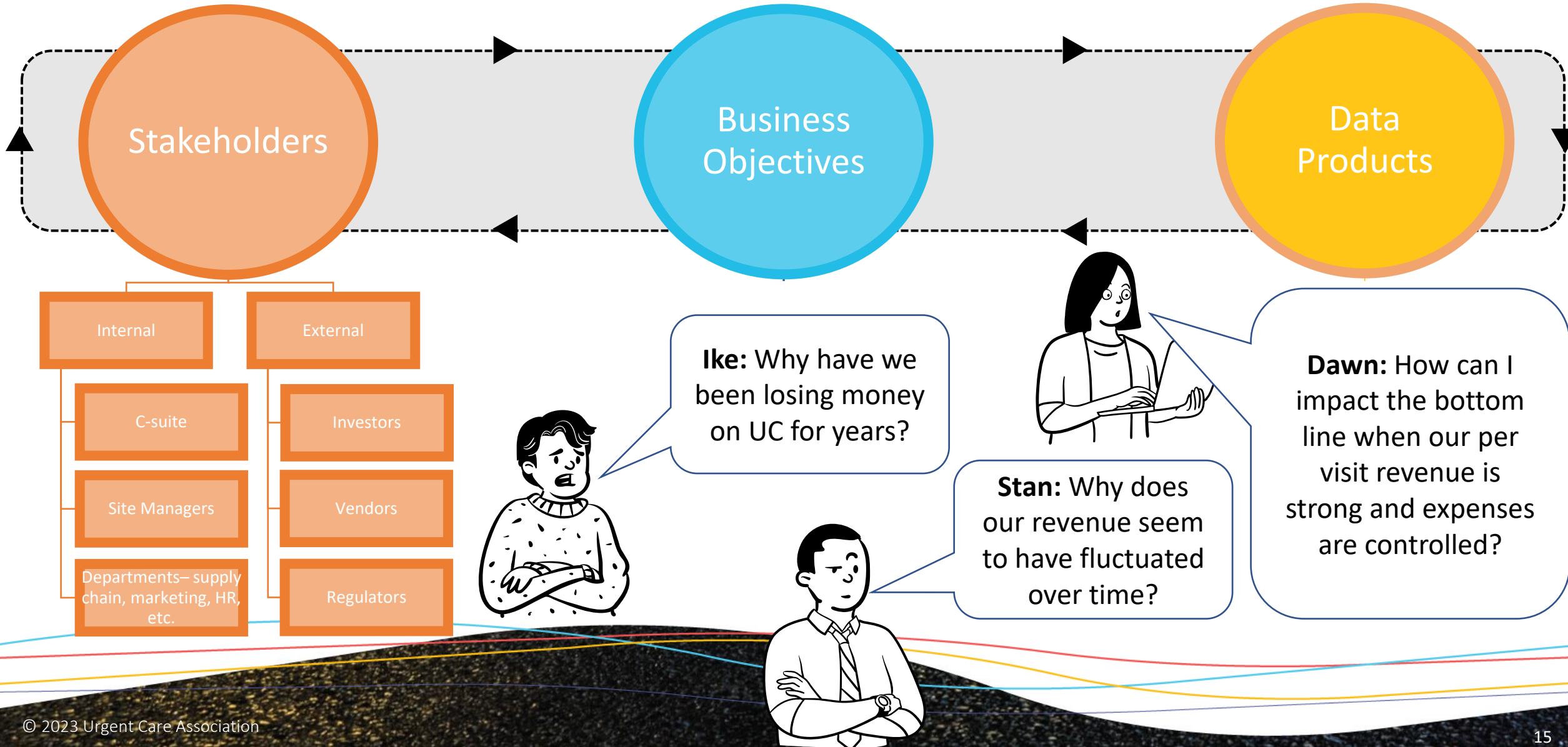


- How does our revenue and expense compare to others in the industry?
- How engaged are our team members?
- How satisfied are patients with our organization?

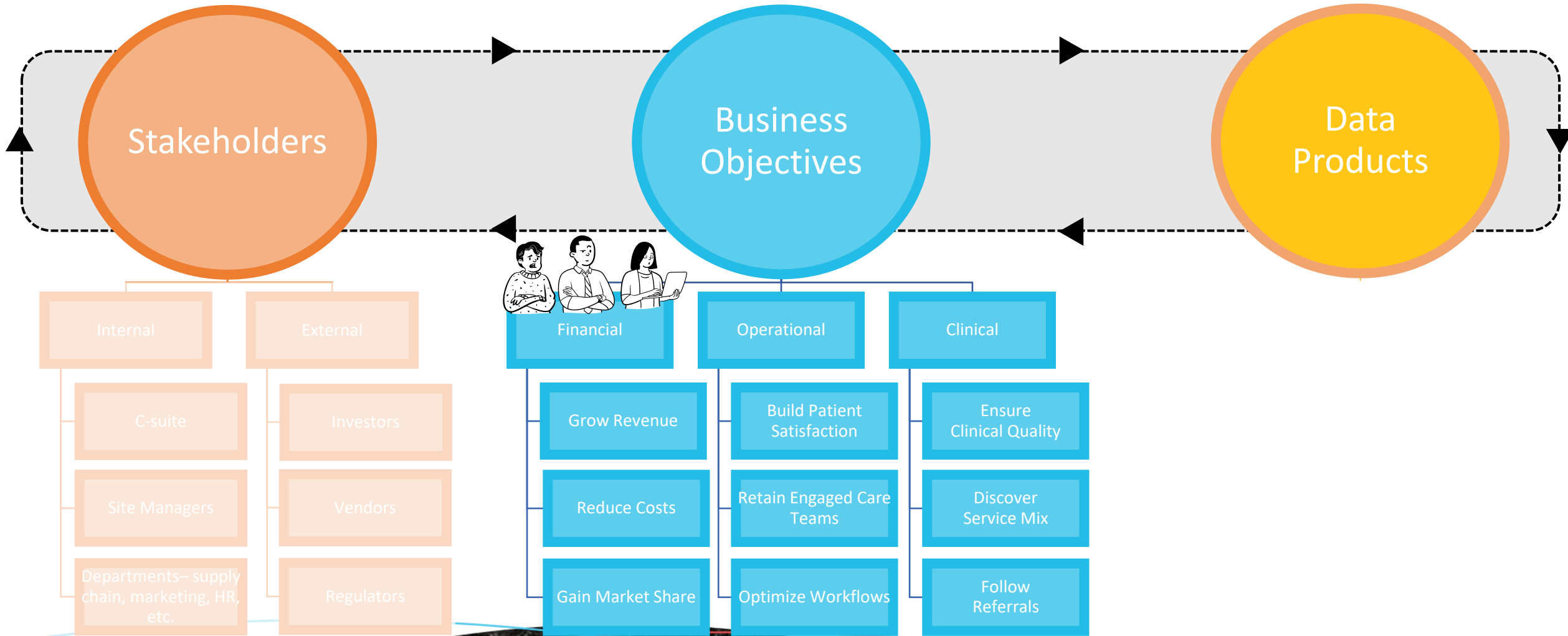
# Informed Decision-Making | How data changes things



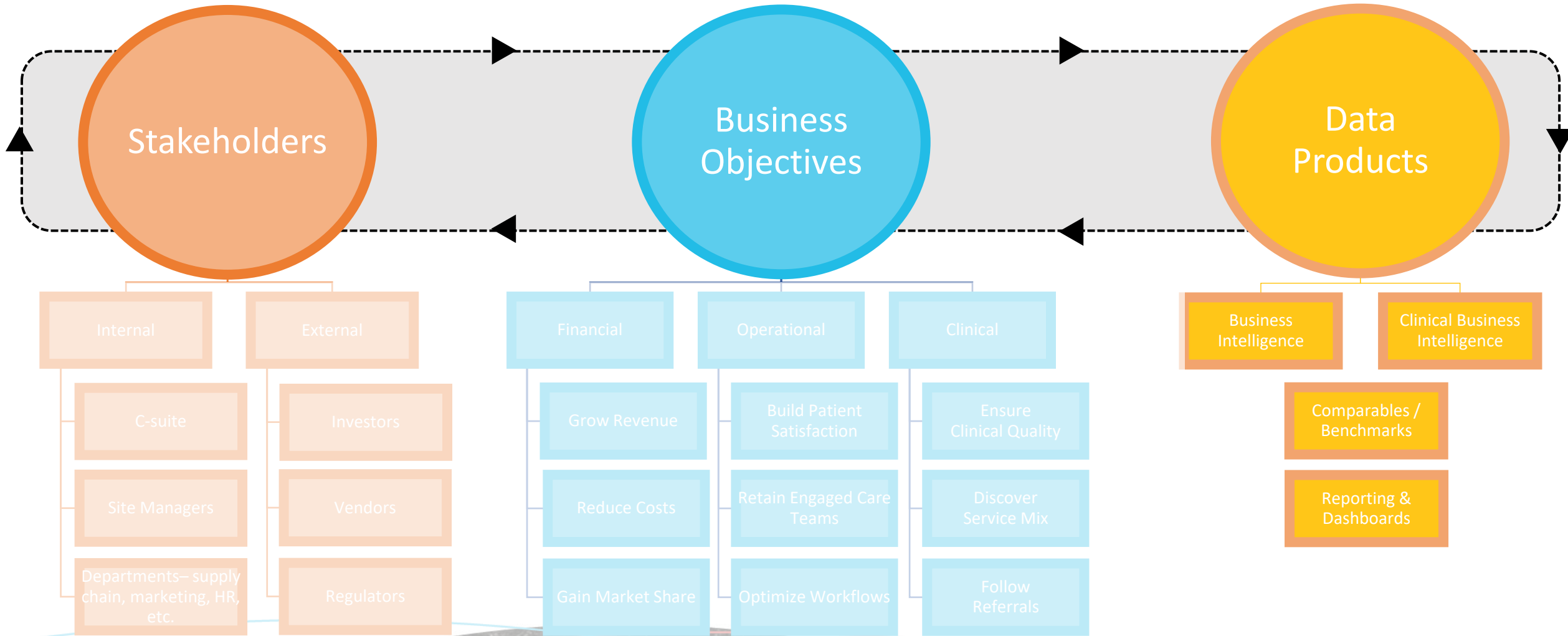
# Informed Decision-Making | Likely Stakeholders



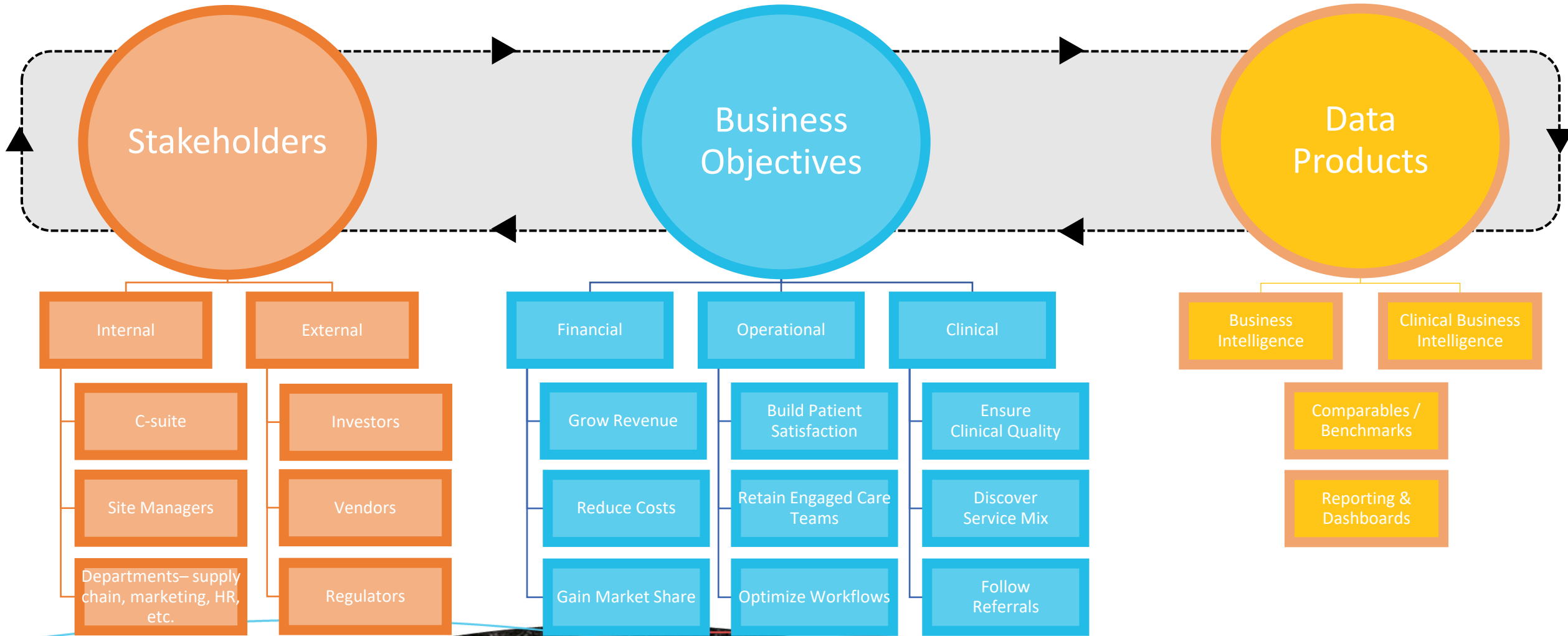
# Informed Decision-Making | Common Business Objectives



# Informed Decision-Making | Data, BI, and reporting



# Informed Decision-Making | Fully-Branched Mind Map



Take 5 minutes to discuss in a group of 5.

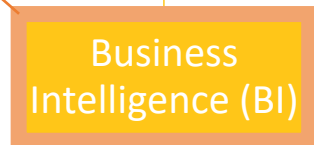
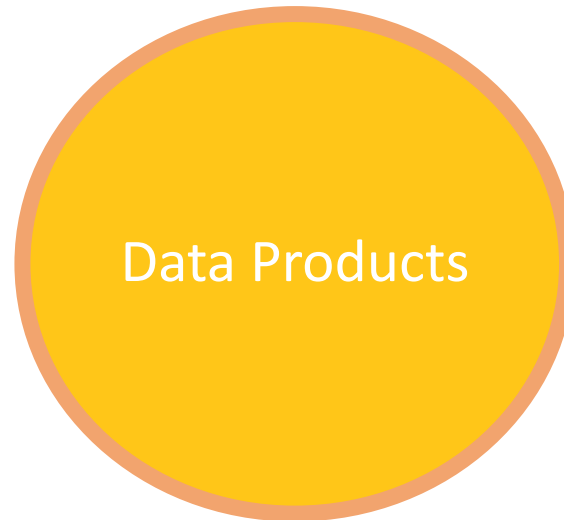
(1) If there was one question you could have answered that would revolutionize your company, what would it be?

(2) Where are you in terms of integrating Data Products in decision-making?

# Unlocking Answers in Data Products

# Data Products | Definitions

Tools, technologies, and processes used to collect, prepare, analyze, and report business performance data

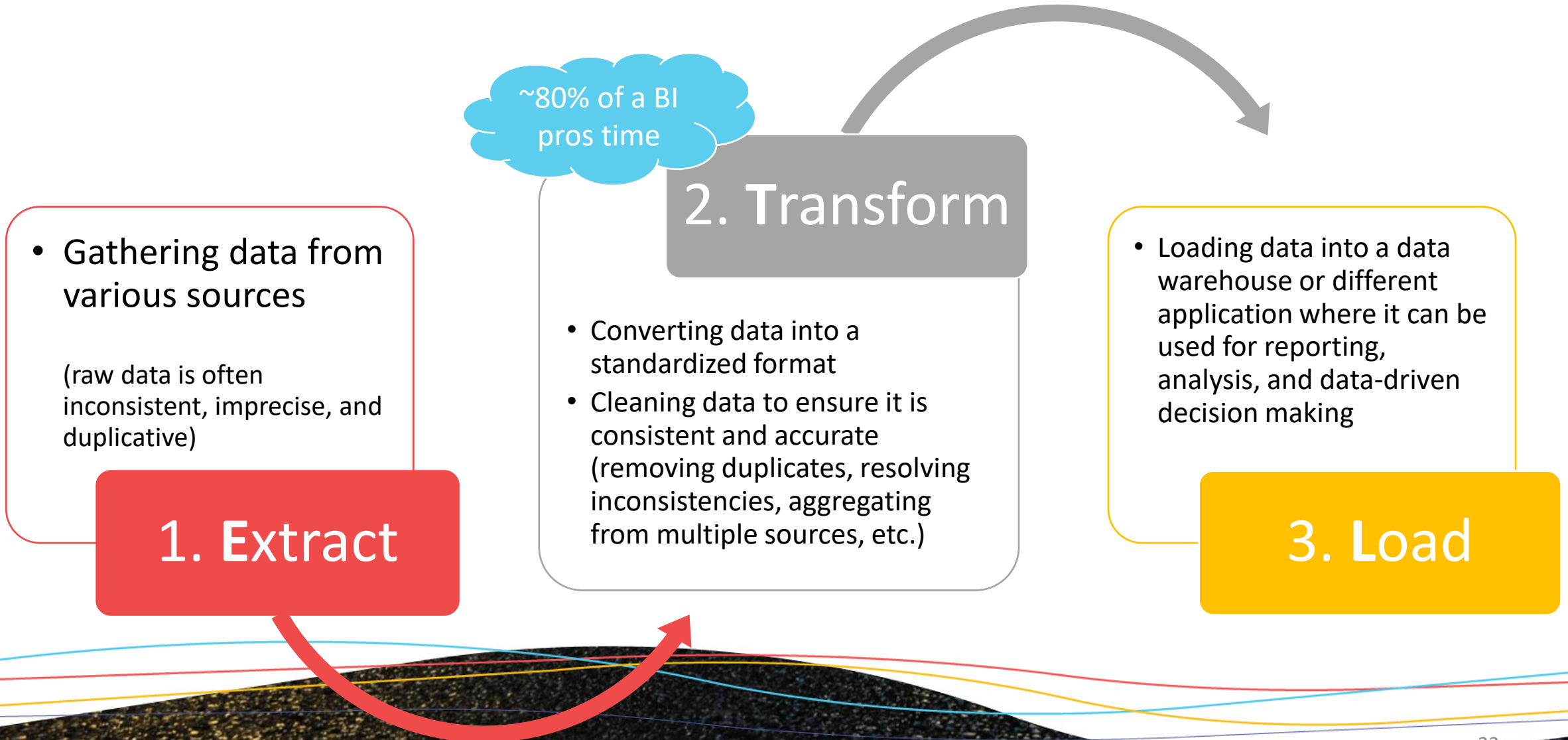


Analysis of healthcare data that may include visit records, diagnoses, treatments, outcomes, etc. to improve patient care and optimize healthcare operations

External sources used to gauge performance alongside industry peers and averages



Presentation of findings and visualizations of data to identify strengths, weaknesses, opportunities, trends, and patterns



# Extract | Common Data Collection Sources



Medical Record



Surveys



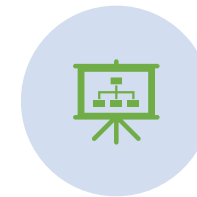
Financial Reports



Human Resource  
Reports



GIS / Market  
Analytics



Industry  
Benchmarking

# Extract | Case Study Data



**Inefficient Ike's Data:** Disparate data sources for financial statements and volume, fully consolidated across all sites in the network



**Stagnant Stan's Data:** No single source of truth, data disagreed from financial statements to full general ledger extract to EMR-based visits and financial statement visits; more than 80 distinct files



**Dynamic Dawn's Data:** Well-organized by site, by period in a roll-up alongside visit counts

# Transform | Common Data Fixes

Once you've gotten to know the data...

- What do the columns and rows look like?
- How are they labeled?
- What kind of information do they contain?
- How does the information in one data source relate to another source?

Then, transform the data for analysis...



A word cloud of data transformation techniques. The words are arranged in a roughly circular pattern and include: splitting, integration, summarization, format, joining, cleansing, bucketing, validation, filtering, aggregating, binning, revision, and deduplication. The colors range from light blue to yellow.

# Load | Some Data Tools

Microsoft  
Power BI

Tableau

Excel

Exploratory

Google  
Charts

Health  
Catalyst

...

# Load | Build Data Metrics

Choosing data metrics can be a complex task. As you get started, be sure to:

## 1. Correlate to business objectives.

*What are the key areas that need to be monitored and improved? What are the desired outcomes?*

## 2. Align with stakeholders.

*Which stakeholders will be using the data, and what information is most relevant to their needs?*

## 3. Review existing data products.

*Is available data accurate, consistent, and trackable over time? What data is missing? Can new data be collected?*

*What industry benchmarks and best practices can help ensure you monitor the right metrics and can also provide a guide to compare against?*

## 4. Evaluate the impact of the data.

*What insights can be gained from the data and how can it be used to improve outcomes and optimize operations?*

# Load | Design Data Visualizations

**Purpose of a visualization:** provide a clear and accurate representation of data that makes it easy for the audience to understand the takeaway

**Types of visualizations:** charts, maps, matrices, tables, etc.

**Use of visualizations:** reports and dashboards with visualizations can be shared among healthcare stakeholders, enabling more informed decision-making and improved collaboration

# Measuring and Comparing Performance

# Real-world Financial | Inefficient Ike

*Too many fixed costs*



Above benchmark volume (UCA: 15K)  
Consistent daily operation equal to industry best practice

Revenue per visit slightly below benchmark  
UCA: \$137 Example: \$130 Difference: \$(7) *below*  
 $$(7) * 20,689 = \underline{\$(144,823)}$  in 2022

Expense per visit far above industry benchmark  
UCA: \$126 Example: \$189 Difference: \$63 *above*  
 $$(63) * 20,689 = \underline{\$(1,303,407)}$  in 2022

		2022
		Real-world Health System UC
<b>P&amp;L</b>		
Visits, per site		20,689
Days, operating		365
Visits per Day		57
<b>Accounts</b>		
Operating Revenue	\$	2,684,000
Operating Expense	\$	(3,917,000)
<b>EBIDA</b>	<b>Net Operating Income (Loss)</b>	<b>\$ (1,233,000)</b>
	Operating Margin %	-46%
<b>Per Visit</b>		
Net Revenue per Visit	\$	129.73
Total Expense per Visit	\$	(189.33)
Net Operating Income per Visit	\$	<b>(59.60)</b>
	Operating Margin %	-46%
<b>Per Day</b>		
Net Revenue per Day	\$	7,353
Total Expense per Day	\$	(10,732)
Net Operating Income per Day	\$	<b>(3,378)</b>
	Operating Margin %	-46%

# Real-world Financial | *Stagnant Stan*



	2022 Real-world Health System UC	2019 UCA
Visits, per site	16,916	15,038
Days, operating	365	363
Visits per Day	46	41
<b>Accounts</b>		
Operating Revenue	\$ 1,656,922	\$ 2,060,206
<b>Expense</b>		
Operating Expense	\$ (1,626,674)	\$ (1,895,390)
<b>EBIDA</b>	<b>Net Operating Income (Loss)</b>	
	\$ 30,248	\$ 164,816
Operating Margin %	2%	8%
<small>EBITDA (n=107) 55.1% report 0-10% 21.5% report 11-20%</small>		
<b>Per Visit</b>		
Net Revenue per Visit	\$ 97.95	\$ 137.00
Total Expense per Visit	\$ (96.16)	\$ (126.04)
Net Operating Income per Visit	\$ 1.79	\$ 10.96
	2%	8%
<b>Per Day</b>		
Net Revenue per Day	\$ 4,540	\$ 5,675
Total Expense per Day	\$ (4,457)	\$ (5,221)
Net Operating Income per Day	\$ 83	\$ 454
	2%	8%

Above benchmark volume (UCA: 15K)  
Consistent daily operation equal to industry best practice

Revenue per visit slightly below benchmark  
UCA: \$137 Example: \$98 Difference: \$(39) *below (unfavorable)*  
\$(39) \* 16,916 = \$(659,724) in 2022

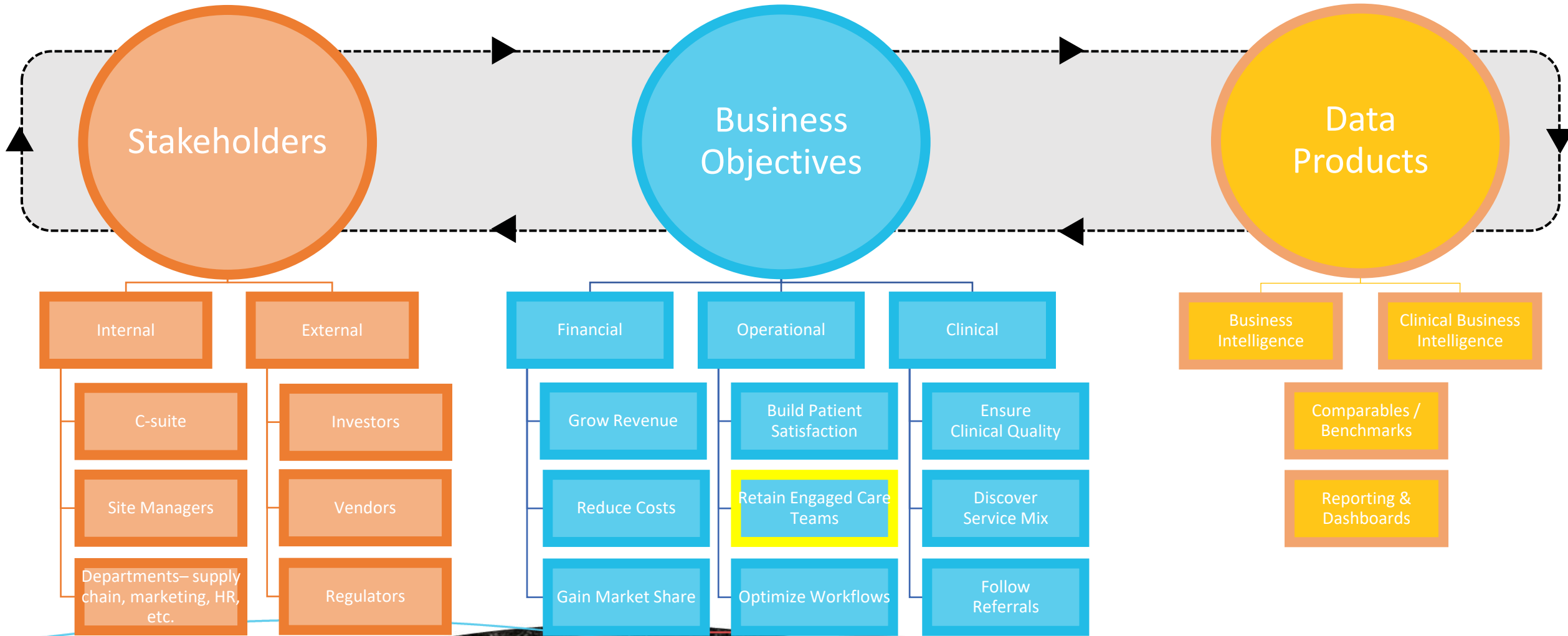
Expense per **visit** favorable to industry benchmark  
UCA: \$126 Example: \$96 Difference: \$30 *(favorable)*  
~~\$30 \* 16,916 = \$507,480 in 2022~~

Expenses are mostly fixed by day versus variable by visit.  
The gain is nearest \$278K by performing favorably against benchmark.

Expense per **day** favorable to industry benchmark  
UCA: \$(5,221) Example: \$(4,457) Difference: \$764 *(favorable)*  
\$764 \* 365 = \$278,860 in 2022

# Quick Sample of Other Business Objectives

# Retain Engaged Care Teams



# Team Engagement | Survey Design

## eNPS

Scale: 0 to 10 rating

Q1: How likely are you to recommend [Organization] Urgent Care as a place to work to a friend or colleague?

Q2: What is the primary reason for your rating?

9, 10 = promoters

7, 8 = passive

0-6 = detractors

eNPS

= % promoters - % detractors

Range: -100 to +100

Goal: company-dependent; according to Comparably, a score of 61 is Top 30% and 67 is Top 25% of other U.S. companies with 51-200 employees. A 2020/21 aggregate of 97 UC sites nationwide showed eNPS of 46.

## Team Engagement

Scale: 1 to 5 point rating, Disagree <-----> Agree

Components:

1. We work well as a team.
2. We provide excellent, relational care.
3. I feel empowered to craft positive CX.
4. My manager provides regular feedback.
5. Our manager is a present team member.
6. My training allows for exceptional CX.
7. I have expertise performing clinical tasks. (Note: this is aggregate of Clinical Expertise)

Range: 1.00 to 5.00

Goal: upward trend, current target 4.00+ avg. (80%)

## Clinical Expertise

Scale: 1 to 5 point rating Basic Knowledge <----> Expert

Components:

Provider - lac repair, I&D, digital blocks, ortho glass splinting, ear lavage, foreign body removal, nail trephination and nail removal, Steri-Strips/ Dermabond

RT – XR-upper/lower extremities, chest, spine and pelvis; technical proficiency with equipment

All CCs – med admin (state-dependent), emergency procedures, proc. prep/dressing/wound care, ref. lab processes, POCT, quality control

Range: 1.00 to 5.00

Goal: upward trend, current target 4.00+ avg. (80%)

## Operational Proficiency

Scale: yes / no

Q: Would you like additional training in any of these areas?

Components:

1. registration
2. flag system
3. scripting
4. discharge process
5. PPM (if applicable)
6. Insurance (CCs)
7. Other (free text response)

% Operational Proficiency

= 100% - % requests for additional training across all components

Range: 0% to 100%

Goal: upward trend, current target 80%+ avg.

# Team Engagement | Survey Design





## Quarterly Team Survey Summary

**Report slicer**

**Role**

- Clin Concierge
- Provider
- Rad Tech

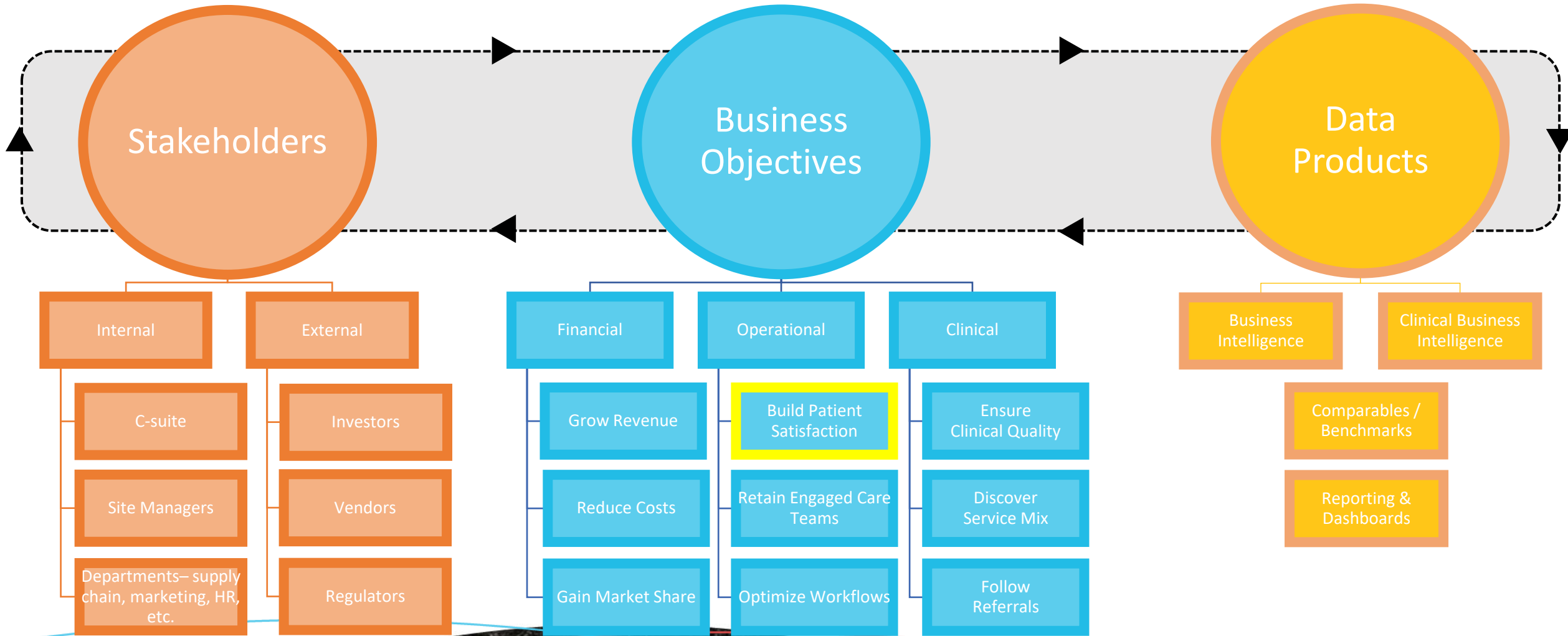
**Trend Axis**

-  Below goal, downward trend
-  Above goal, downward trend
-  Below goal, upward trend
-  Above goal, upward trend

**Note:** Shading for 'below goal' or 'above goal' represents the current quarter, as indicated in enterprise-level box [20YY Q#]. If trend axis does not display, data from prior quarter is either identical or unreported.

Enterprise-level	Employee Net Promoter Score	Team Engagement	Clinical Expertise	Operational Proficiency
	49! Goal: 61 (-18.93%) 2022 Q3	4.67✓ Goal: 4.00 (+16.76%) 2022 Q3	4.48✓ Goal: 4.00 (+11.96%) 2022 Q3	97%✓ Goal: 80% (+21.34%) 2022 Q3
Site 01	60! (-1.64%)	4.77✓ (+19.17%)	4.87✓ (+21.76%)	93%✓ (+16.67%)
Site 02	67✓ (+9.29%)	4.83✓ (+20.83%)	4.19✓ (+4.81%)	94%✓ (+18.06%)
Site 03	67✓ (+9.29%)	4.72✓ (+18.06%)	5.00✓ (+25%)	94%✓ (+18.06%)
Site 04	25! (-59.02%)	4.31✓ (+7.81%)	3.72! (-6.94%)	100%✓ (+25%)
Site 05	60! (-1.64%)	4.50✓ (+12.5%)	4.32✓ (+8.1%)	100%✓ (+25%)
Site 06	-60! (-198.36%)	3.80! (-5%)	4.72✓ (+18.06%)	93%✓ (+16.67%)
Site 07	-60! (-198.36%)	4.79✓ (+19.79%)	4.36✓ (+8.97%)	100%✓ (+25%)
Site 08	75✓ (+22.95%)	4.67✓ (+16.67%)	4.85✓ (+21.15%)	96%✓ (+19.79%)
Site 09	100✓ (+63.93%)	4.71✓ (+17.71%)	4.47✓ (+11.81%)	100%✓ (+25%)
Site 10	88✓ (+43.44%)	4.90✓ (+22.4%)	4.47✓ (+11.79%)	96%✓ (+19.79%)

# Build Patient Satisfaction



# Patient Satisfaction | Net Promoter Score (NPS)

**Operator Urgent Care**  
75  
 Net Promoter Score (NPS)

Benchmark

Source: Net Promoter Score (NPS)

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2022 UCA | 76

**Operator Urgent Care**  
38  
 Door-to-Door Time (min)

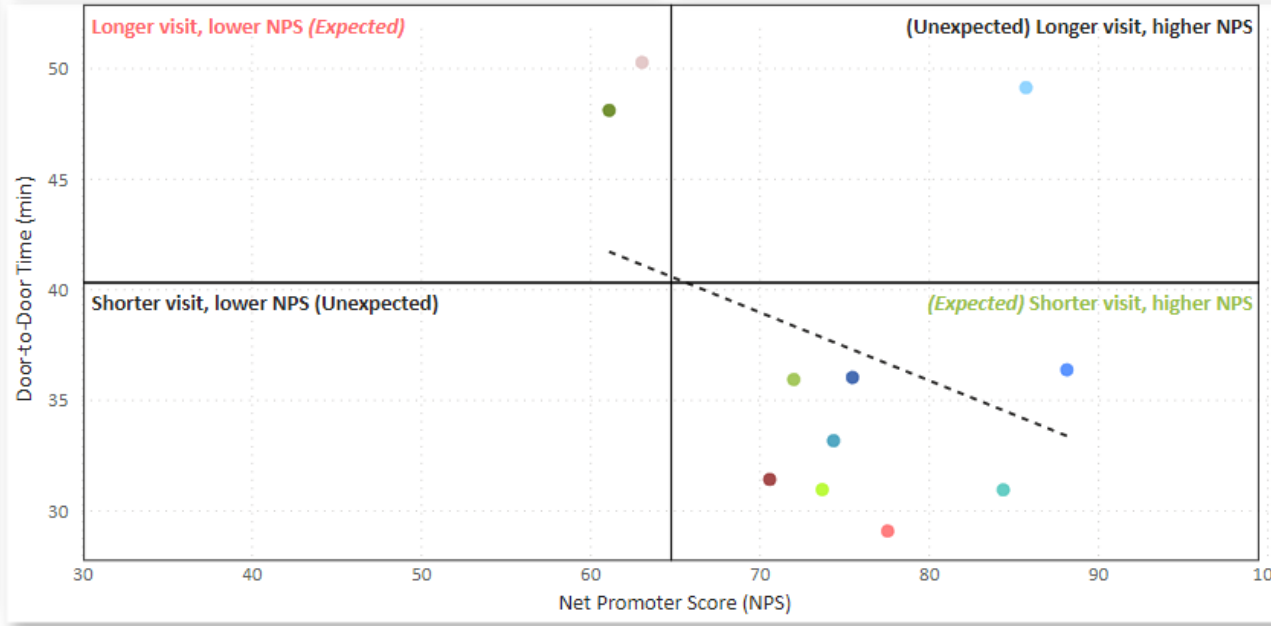
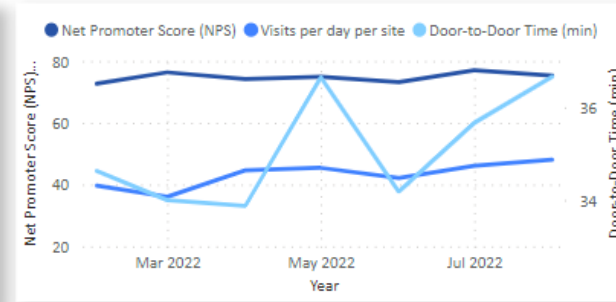
Benchmark

Source: Door-to-Door Time (min)

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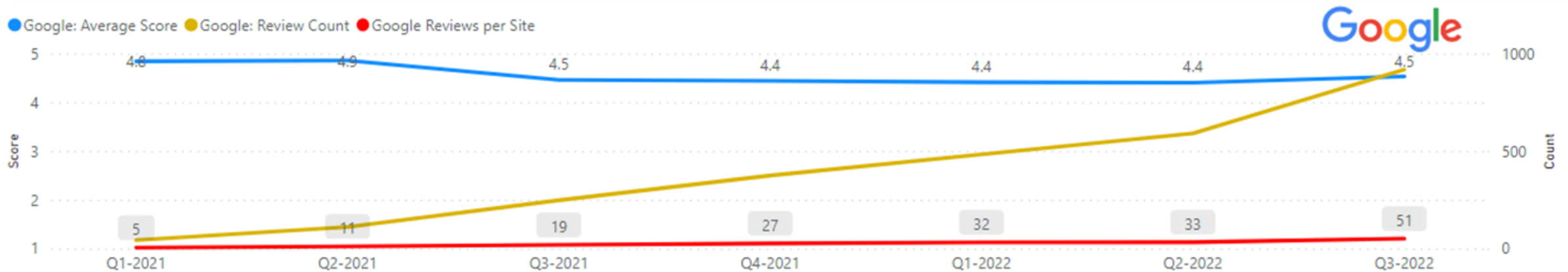
2019 UCA | 58

Quarter	Net Promoter Score (NPS)	Door-to-Door Time (min)	Visits per day per site
Qtr 1	74	42	40.9
Qtr 2	74	35	46.2
Qtr 3	76	36	51.0
<b>Total</b>	<b>75</b>	<b>38</b>	<b>45.4</b>

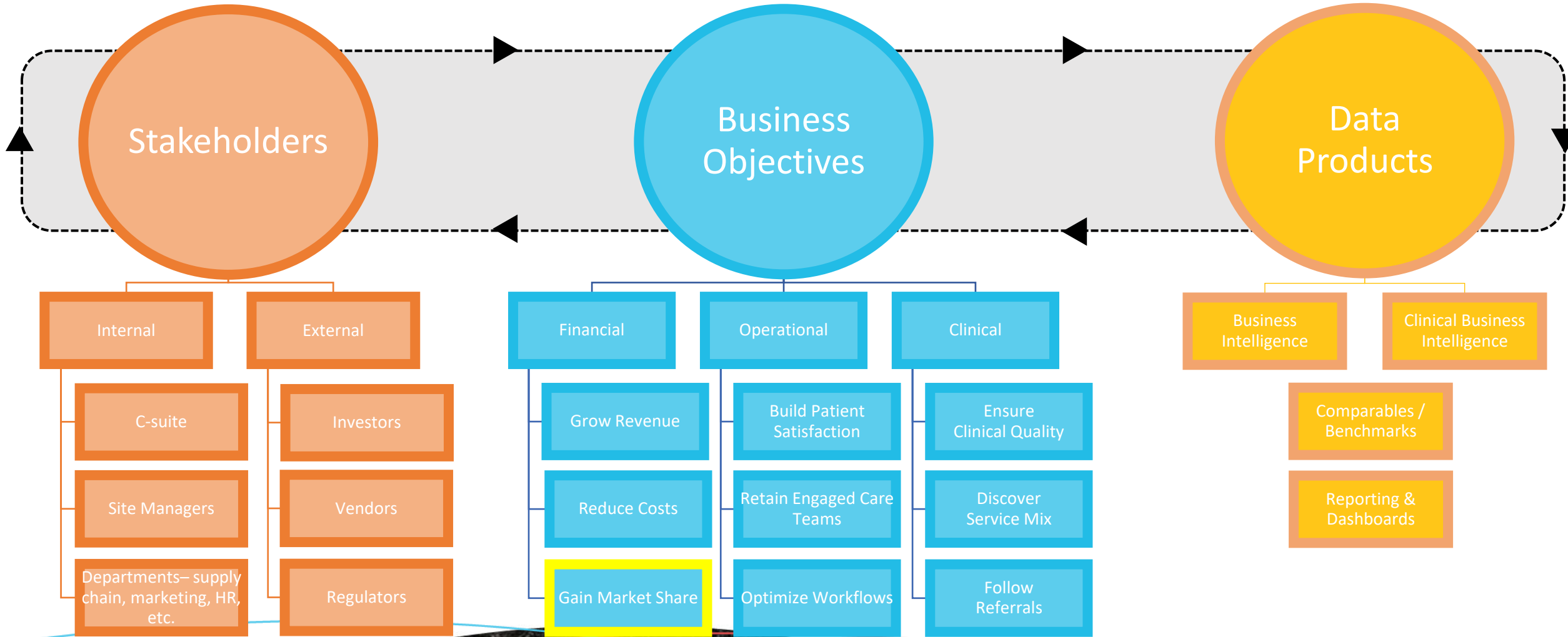


# Patient Satisfaction | Online Reviews

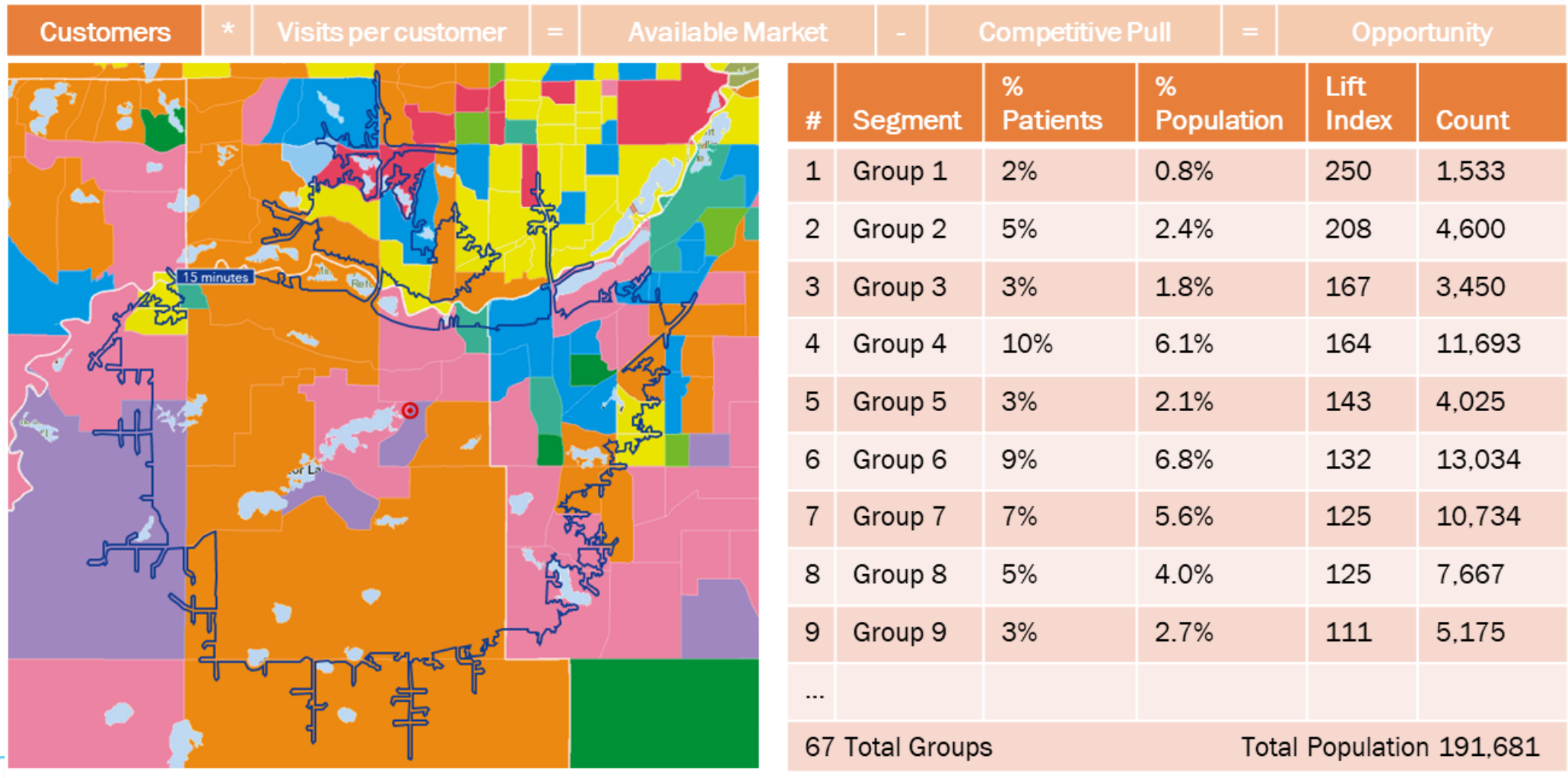
	Q1-2021	Q2-2021	Q3-2021	Q4-2021	Q1-2022	Q2-2022	Q3-2022													Total
	Site 1	Site 2	Site 3	Site 4	Site 5	Site 6	Site 7	Site 8	Site 9	Site 10	Site 11	Site 12	Site 13	Site 14	Site 15	Site 16	Site 17	Site 18		
Google: Review Count	62	22	35	38	39	69	35	87	50	31	108	74	63	42	19	80	34	30	918	
Google: Average Score	4.4	5.0	4.8	4.7	4.5	4.7	4.5	4.3	4.0	4.5	4.5	4.2	4.9	4.4	4.7	4.5	4.2	4.8	4.5	



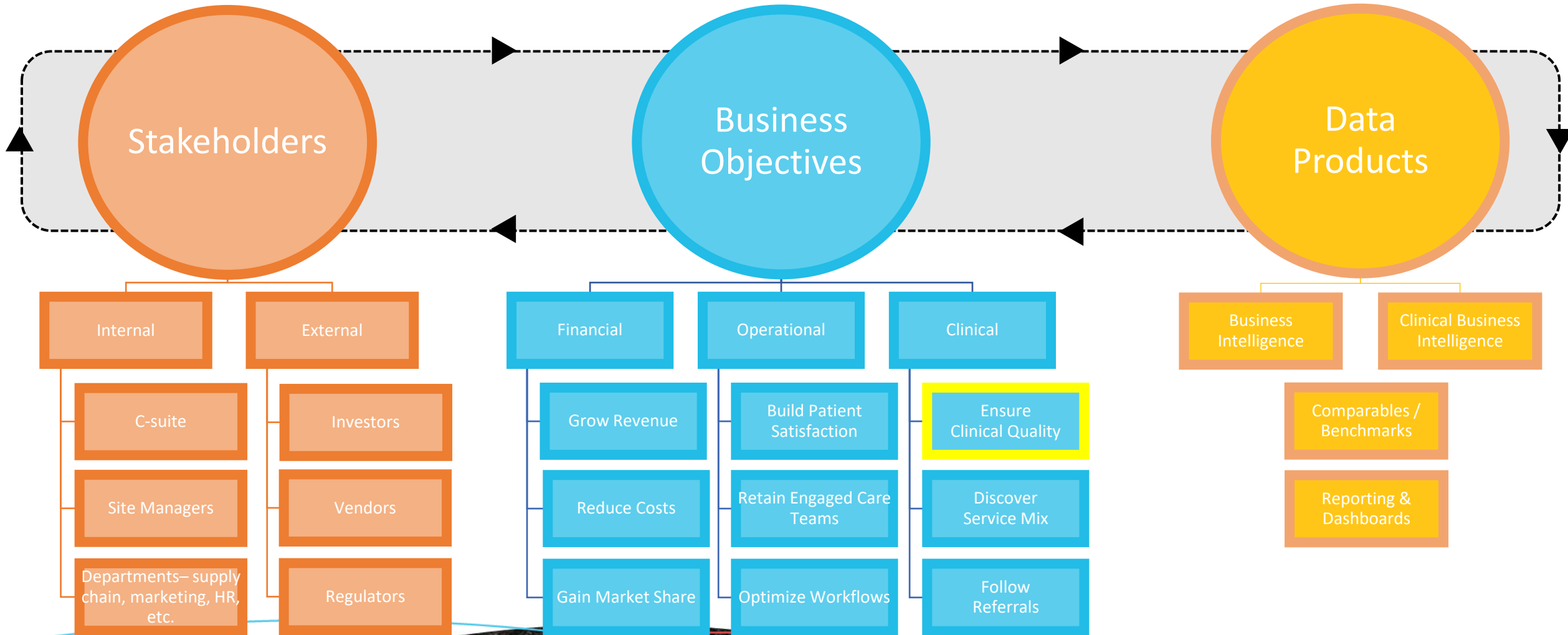
# Gain Market Share



# Market Opportunity | Customers and Competition



# Ensure Clinical Quality



# Clinical Quality | Aggregating Benchmarks

7

Organizations

172

UC sites

2.13M

Visits

Source: UCQG, Phase 2 report, 12-month period, site-level aggregated data

# UCQG Phase 2 Metrics

#	Metric	Domain
1	Visits by service, provider type, hr.	Patient Experience
2	Net Promoter Score + response rate	
3	Provider approval rating	
4	Door-to-door time in minutes	

# UCQG Phase 2 Metrics

#	Metric	Domain
5	Urgent care visits prescribed ABX	Clinical Care
6	Urgent care visits prescribed opioid	
7	Transfers to the Emergency Department	
8	E/M Coding Distribution	
9	Visits with referrals and/or reporting to Primary Care	

# UCQG Phase 2 Metrics

#	Metric	Domain
10	Employee Net Promoter Score and Engagement Strategies	Culture

# Implementing a Plan

# Change Doesn't Happen Overnight

According to contributing organizations in the *2022 Data and AI Leadership Executive Survey, The Quest to Achieve Data-Driven Leadership: A Progress Report on the State of Corporate Data Initiatives* by NewVantage Partners a Wavestone company:



## Begin by Prioritizing Objectives and Setting Key Data Results

### **Objectives** should be:

1. Communicated clearly and simply → In a sentence, what do we want to achieve?
2. Actionable by the team

### **Key Data Results** should:


1. Define the metrics and deliverables required to achieve the objective
2. Be measurable and quantifiable with a comparable and/or grading methodology

# Design a Project Plan | A few ideas...

Stakeholder Priority: When?	Business Objectives: What?	Key Results via Data Products: How?
1	Operate a profitable business.	<ul style="list-style-type: none"> <li>- Define your payor mix as a % of visits and compare to underlying market.</li> <li>- Compare your contracted rates to market and industry benchmarks.</li> <li>- Compare your expenses to market and industry benchmarks.</li> <li>- Compare your provider productivity to market and industry benchmarks.</li> <li>- Define your service mix as a % of visits and compare to industry.</li> <li>- Compare your coding averages to industry benchmarks.</li> </ul>
2	Retain engaged care teams.	<ul style="list-style-type: none"> <li>- Measure your employee net promoter score and compare to benchmarks.</li> <li>- Measure Team Engagement (teamwork, management, empowerment).</li> <li>- Measure Clinical Expertise to gauge comfort level with required clinical tasks.</li> <li>- Measure Operational Proficiency to gauge success of training with required administrative and operational tasks.</li> </ul>
3	Build patient satisfaction.	<ul style="list-style-type: none"> <li>- Compare your net promoter score (NPS) to industry benchmarks.</li> <li>- Compare your online reviews (Google, Yelp) to market competitors.</li> <li>- Compare your door-to-door time to market and industry benchmarks.</li> <li>- Establish a simple to understand scope of service.</li> <li>- Orchestrate visit from start to finish, including referral integration for patients.</li> </ul>
4	Ensure clinical quality.	<ul style="list-style-type: none"> <li>- Secure industry benchmark data.</li> <li>- Join a collaborative, like Urgent Care Quality Group (UCQG) to share ideas, challenges, and data with peers to advance clinical quality benchmarking.</li> </ul>
5	You Decide!	

Take 10 minutes to discuss in a group of 5.

- (1) What business objectives will you tackle next?
- (2) What key results allow you to measure results?
- (3) How can data inform this work?

- 
- Invest in data product sophistication to support stakeholder informed decision-making
  - Consider data aggregation partnership with colleagues
  - Prioritize business objectives and set key data results

DRIVING **CHANGE2023**