Developing a Tracking and Monitoring Dashboard

To develop a dashboard of key measures for patients using long-term opioid therapy, it is important for the opioid improvement team to consider:

1. What data to track
2. How to collect and store the data
3. How to see/retrieve the data for monitoring success, care gaps, high-risk patients, and clinical variation

What Data to Track

- The first step in identifying what data to track is to review potential data elements and whether they exist in a form that can be easily stored and pulled for monitoring. Complete the table in the resource *Data to Consider Tracking* to begin this process.
- Based on what you currently record in discrete fields, what is possible, and organizational priorities, what data can you start tracking right now? Make a list of one or two variables to prioritize tracking at first.
- Also create an ideal list that includes data not yet able to be tracked, but aspirational.
- For organizations with more resources, it might be possible to dive into the ideal list right away.

How to Collect and Store the Data

Investigate how the data you want to track are currently collected and stored. Consider:

- When the data are collected
- How data are collected
- Whether data are collected consistently
- Are the data in discrete fields? If not, can you create discrete fields?
- What needs to change
- How workflows can support doing this work well

Consider whether you want to collect and store data manually (e.g., Excel) or electronically based on your electronic health record system and its functionality. If you are planning to manually track data, consider modifying the *Tracking and Monitoring Example Spreadsheet* to include the prioritized variables.

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Whatever approach you choose, it is critical to create *workflows* that lay out who will update the data, when, and how.

How to See/Retrieve the Data for Monitoring Success, Care Gaps, High-Risk Patients, and Clinical Variation

- Start by developing an approach to pulling a report on your prioritized measures of success.
- Select the best possible approach to tracking and monitoring the prioritized measure of success and stick with it. It may not be perfect, but it is worth trying to regularly review and share data about patients using long-term opioid therapy as soon as possible to motivate and make improvements. Even if the measure is not 100% accurate, you will still be able to see the direction it is going over time.
- Continue improving the measurement and reporting approach if needed.
- Once you have identified a feasible way to monitor a prioritized measure of success, use that knowledge to:
    - Add other measures of success
    - Develop an approach to retrieving data to monitor care gaps and high risk-patients
    - Develop an approach to monitor data/measures by clinician so you can examine variation across providers
- Approaches used by other sites:
    - Using EHR-embedded dashboards
    - Querying the EHR, and putting the data into a report
    - Using proprietary software to pull reports from the EHR
    - Querying an external registry connected to the EHR
    - Querying an external manual registry (e.g., an Excel spreadsheet maintained by staff)
    - Pulling reports from the state prescription monitoring program database

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