QI TeamSpace

A web-based solution for managing quality improvement projects
QI TeamSpace

- First iteration developed by Ursa Logic
- Re-developed with CHIPRA funding by Sean Upton, working with UPIQ
- Has been used by over 90 projects in 9 states
- Recently updated to Plone 5, the latest version of its web platform
- Project of the University of Utah’s Department of Pediatrics
QI TeamSpace

- Exists as a web site that can be customized/branded for each project
- No technical expertise needed, though training is important and ongoing support is provided
QI TeamSpace

• Multiple project levels are possible, allowing for sub-projects
• Within projects, participant rosters are developed with teams (usually at the practice level)
• Each user is assigned a role (manager, data entry, view only) that determines privileges and access
Welcome to the Milestones 2018 Project

This demo project is ready for you to see the QI TeamSpace experience!

Welcome to the project!
We have many helpful things here.

Shared team resources

- Call for participants!
  - by Sean Upton — last modified Sep 21, 2017 11:19 AM
  Calling all collaborators! Find out how much you can really improve, and measure it too!

- Milestones 2018 Weblog
  - by Sean Upton — last modified Sep 21, 2017 02:53 PM
  Project weblog and news

- Welcome to the Milestones 2018 Project
  - by admin — last modified Sep 21, 2017 02:50 PM
  This demo project is ready for you to see the QI TeamSpace experience!

- Project-wide performance
  - by Sean Upton — last modified Sep 21, 2017 02:43 PM
  Mean project participant performance on measures over time.

- Mountain clinic
  - by admin — last modified Sep 21, 2017 02:36 PM

- Form library
  - by admin — last modified Sep 21, 2017 01:52 PM
Primary Components

• Content management and resource sharing (with teams, project, public)
  – Web pages
  – Files (Word, pdf, Excel), viewable online
  – Recorded webinars, videos
  – Blog/news feed
  – Calendar events
  – Discussion board planned

• Roster provides email lists for sending notices, reminders, resources
Shared resources

- **Webinars**
  - by [Sean Upton](mailto:sean.upton@qiteamspace.com)
  - last modified Sep 21, 2017 02:11 PM

- **Documents**
  - by [Sean Upton](mailto:sean.upton@qiteamspace.com)
  - last modified Sep 21, 2017 11:06 AM

- **Presentations**
  - by [Sean Upton](mailto:sean.upton@qiteamspace.com)
  - last modified Sep 21, 2017 11:10 AM

Slide decks from project presentations are kept here.

- **Project images**
  - by [Sean Upton](mailto:sean.upton@qiteamspace.com)
  - last modified Sep 21, 2017 11:20 AM

Publicly visible folder of images used by this project.
Webinars

QI Fundamentals

Quality Improvement
Practice-based improvement in Healthcare: The Fundamentals

Diane Liu, MD
University of Utah, Department of Pediatrics
Assistant Professor, Division General Pediatrics
Director, Utah Pediatric Partnership to Improve Healthcare Quality

March 2017

What is Asthma?

Khalid Safi, MBBS

Dr. Safi received his medical degree from Jordan University of Science and Technology Faculty of Medicine, completed Pediatric Residency at University of Jordan and again at Children's Hospital of Michigan. He completed his Pediatric Pulmonary Fellowship at University of Michigan, and his Sleep Medicine Fellowship at Medical College of Wisconsin. Dr. Safi is board-certified in Pediatrics and in Pediatric Pulmonary and is board eligible Sleep Medicine.

Dr. Safi is currently an Assistant Professor of Pediatric Pulmonology at the University of Utah and is in the Division of Pulmonary and Sleep Medicine at Primary Children’s Hospital. Dr. Safi's clinical interests include general pulmonology, pediatric sleep medicine, asthma, cystic fibrosis, and long-term ventilation support.
Documents

- School medication form
  - by admin — last modified Sep 21, 2017 11:04 AM

- Asthma Action Plan Form
  - by Sean Upton — last modified Sep 21, 2017 11:06 AM
Asthma Action Plan Form

Milestones 2018
Shared resources
Documents
Webinars
Presentations
Project images
Milestones 2018
Weblog
ACME Healthcare
Project-wide performance
# Asthma Action Plan

### Medication Authorization & Self-Administration Form

In accordance with UCA 53A-11-602  
Utah Department of Health/Utah State Office of Education

## STUDENT INFORMATION

<table>
<thead>
<tr>
<th>Field</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student:</td>
<td></td>
</tr>
<tr>
<td>DOB:</td>
<td></td>
</tr>
<tr>
<td>School:</td>
<td></td>
</tr>
<tr>
<td>Grade:</td>
<td></td>
</tr>
<tr>
<td>Parent:</td>
<td></td>
</tr>
<tr>
<td>Phone:</td>
<td></td>
</tr>
<tr>
<td>Email:</td>
<td></td>
</tr>
<tr>
<td>Physician:</td>
<td></td>
</tr>
<tr>
<td>Phone:</td>
<td></td>
</tr>
<tr>
<td>Fax or email:</td>
<td></td>
</tr>
<tr>
<td>School Nurse:</td>
<td></td>
</tr>
<tr>
<td>School Phone:</td>
<td></td>
</tr>
<tr>
<td>Fax or email:</td>
<td></td>
</tr>
</tbody>
</table>

### History of anaphylaxis where epinephrine was used?
- [ ] Yes (please also complete IHP104.1 form)—allergy to:
- [ ] No

## PHYSICIAN TO COMPLETE

### Green Zone: Doing Great!

**Student has ALL of these:**
- Breathing is easy
- No cough or wheeze
- Can sleep all night
- Able to work and play normally

**Controller (preventive) medications taken at home:**

<table>
<thead>
<tr>
<th>Medication:</th>
<th>Dose:</th>
<th>When:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Asthma triggers include:**
- [ ] Dust
- [ ] Pet dander
- [ ] Colds
- [ ] Tobacco smoke
- [ ] Mold
- [ ] Exercise
- [ ] Strong odors
- [ ] Pollen
- [ ] Inversions
- [ ] Other: __________

**Take quick-relief medication (see medication order in Yellow Zone):**
- [ ] Before exercise/exposure to a trigger
- [ ] Other: __________

### Yellow Zone: Caution!

**Student has ANY of these:**
- Coughing or wheezing
- Tight chest
- Shortness of breath
- Waking up at night

**Quick-relief medication with spacer (if available):**

<table>
<thead>
<tr>
<th>Medication:</th>
<th>Dose:</th>
<th>Interval</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Possible side effects:**

- [ ] Parent should contact Healthcare Provider below if 1) quick-relief medication is needed more often than every 4 hours, or needed every 4 hours for more than a day or 2) there is no improvement after taking medication.

## Red Zone: Emergency!

- [ ]
Milestones 2018 Weblog


Hello


Milestone 2018 kickoff

Kickoff info for our project and its participants!

Read More...

Important Dates

Remember these dates!

Read More...

First learning session retrospective

Here is what we learned from our first learning session.

Read More...
Manage workgroup roles for this project

*Milestones 2018 (Project)*

There are 10 workgroup members for this project.

Workgroup members have assigned at minimum the "Project Viewers" group assignment.

To remove a user or send password email, click the lock icon (🔒) in the Project Viewers column to unlock the user for password reset or removal from project and/or site. To get more information about a user, click on the info icon (ⓘ) next to the user.

<table>
<thead>
<tr>
<th>User name, email</th>
<th>Project Viewers</th>
<th>Form entry</th>
<th>Project Contributors</th>
<th>Project managers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chuck Form 😋</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>⚪️ <a href="mailto:chuck.norlin@gmail.com">chuck.norlin@gmail.com</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chuck Norlin 😋</td>
<td>✔</td>
<td></td>
<td></td>
<td>☑️</td>
</tr>
<tr>
<td>⚪️ <a href="mailto:chuck.norlin@hsc.utah.edu">chuck.norlin@hsc.utah.edu</a></td>
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<tr>
<td>Chris Robinson 😋</td>
<td>✔</td>
<td></td>
<td></td>
<td>☑️</td>
</tr>
<tr>
<td>⚪️ <a href="mailto:grobinsonmba@outlook.com">grobinsonmba@outlook.com</a></td>
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<tr>
<td>Sean Developer 😋</td>
<td>✔</td>
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<tr>
<td>⚪️ <a href="mailto:developer@upiq.org">developer@upiq.org</a></td>
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<tr>
<td>Marie Curie 😋</td>
<td>✔</td>
<td></td>
<td></td>
<td>☑️</td>
</tr>
<tr>
<td>⚪️ <a href="mailto:testuser1@upiq.org">testuser1@upiq.org</a></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>George Boole 😋</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>⚪️ <a href="mailto:testuser2@upiq.org">testuser2@upiq.org</a></td>
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<tr>
<td>Gregor Mendel 😋</td>
<td>✔</td>
<td></td>
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</tr>
<tr>
<td>⚪️ <a href="mailto:testuser3@upiq.org">testuser3@upiq.org</a></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Ada Lovelace 😋</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>⚪️ <a href="mailto:testuser4@upiq.org">testuser4@upiq.org</a></td>
<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>
Primary Components

- Measure definition/construction
- Measure library
  - Measures can be re-used, modified for new projects
### % of ICS prescribed for persistent asthma pts

**Measure summary**
- **Kind of value:** Percentage of total or selected records (ratio multiplied by 100.0)

**Measure calculation and record filters**
- **Numerator type:** Value computed by a filter of records
- **Denominator type:** Value computed by a filter of records

**NUMERATOR**

<table>
<thead>
<tr>
<th>Field</th>
<th>Comparison operation</th>
<th>Query value</th>
</tr>
</thead>
<tbody>
<tr>
<td>ICS prescribed for persistent asthma pts?</td>
<td>=</td>
<td>is equal to</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Yes</td>
</tr>
</tbody>
</table>

**DENOMINATOR**

<table>
<thead>
<tr>
<th>Field</th>
<th>Comparison operation</th>
<th>Query value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Severity documentation</td>
<td></td>
<td>includes any of</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Mild persistent</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Moderate persistent</td>
</tr>
<tr>
<td></td>
<td></td>
<td>- Severe persistent</td>
</tr>
</tbody>
</table>

**Measure display and value adjustment**
- **Digits after decimal:** 1
- **Rounding:** No rounding – do not modify value
- **Constant multiplier:** 100.0

### Add comment

You can add a comment by filling out the form below. Plain text formatting.

**Comment**
% of ICS prescribed for persistent asthma pts

Define the query criteria for your measure below:

Add filters, choose fields, and select a comparison and value for each query.

**Numerator**

<table>
<thead>
<tr>
<th>Add field</th>
<th>Field</th>
<th>Comparison</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ICS prescribed for persistent asthma pts?</td>
<td>= is equal to</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Add another filter group

**Denominator**

<table>
<thead>
<tr>
<th>Add field</th>
<th>Field</th>
<th>Comparison</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Severity documentation</td>
<td>* includes any of</td>
<td>Intermittent</td>
</tr>
</tbody>
</table>

Add another filter group

✓ Save criteria for all filters
Primary Components

• Data collection system
  – Build online data collection forms
    ✦ Chart review data
    ✦ Aggregate data (numerators & denominators)
    ✦ Qualitative data (survey-like questions)
  – Track data submission and completeness
  – Form library enables re-use & repurposing
Primary Components

• Data collection system (cont.)
  – Constrain data entry by type
    ✳ Date or Date/Time
    ✳ Yes/No
    ✳ Multiple choice (single or multiple selections)
    ✳ Integer or floating point decimal
    ✳ Text
    ✳ Computed (from entries in other fields)
    ✳ Email address or URL
  – Supports skip patterns
Add new field

Title

Short Name Used for programmatic access to the field.

Help Text Shows up in the form as help text for the field.

Field type

Text line (String)

Check this box if you want this field to be required.

Required field Check this box if you want this field to be required.

Add
Form overview / preview

Date of Visit

Enter date...

Age

Type of Visit

- Asthma - Primary Dx
- Asthma - Secondary Dx

Pt was on asthma meds at the time of visit Was pt on asthma meds prior to this visit

- yes
- no

Severity documentation

- Intermittent
- Mild persistent
- Moderate persistent
- Severe persistent
- Asthma unspec.
- Not documented

Control documentation Assessment of control only on pts who are on asthma meds prior to this visit

- Well controlled
- Not well controlled
- Very poorly controlled
- Not documented
- N/A
Assessment

Plan - Do - Study - Act

Feedback

Rating (1-10) Enter a rating between 1 and 10; higher numbers reflect a greater confidence in how well your team is reaching goals for this period.

0

Number of meetings?


Number of huddles?


Progress factors What were the factors that contributed toward your team's progress?


Follow ups What will you do differently next time to improve your score?


Plan Discussion items – what is the issue?
Primary Components

- Data reporting system
  - Run charts and bar charts automatically generated, includes multi-line charts
  - Configurable appearance (colors, shapes, goals)
  - Small multiples or full display
  - Annotatable reports; print-friendly
  - Data traceable to sources; notes displayed on click of data point
  - Can export to CSV/Excel
Project-wide performance

Mean project participant performance on measures over time.

Layout: Compact | Standard
Project-wide performance

Mean project participant performance on measures over time.

Layout: Standard | Compact

% of Severity Documented

<table>
<thead>
<tr>
<th></th>
<th>Jan 2018</th>
<th>Feb 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project mean (all clinics)</td>
<td>60.0</td>
<td>100.0</td>
</tr>
</tbody>
</table>
% of control levels assessed with standardized tools

- ACME Health: 100.0
- ACME South Clinic: 50.0
- ACME North Clinic: 0.0

Jan 2018

Feb 2018

ACME Health: 50.0
ACME South Clinic: 50.0
ACME North Clinic: 50.0

Manage this chart:
- Add a data series bound to a measure
- Add static time-series data (CSV)
- Edit chart information, goal, styles
- Re-order, remove, or rename data series
- Edit X-axis label settings

Current chart data:
- ACME Health
- ACME South Clinic
- ACME North Clinic
Views differ by user type

- Manager view allows access to all information and ability to edit screens, reports, etc.
- Data entry and View only users see less complexity – only what they’ve been given privileges to see
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We have many helpful things here.

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Project News

Project Documents

Project Measures

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- Shared resources
  - by admin — last modified Sep 21, 2017 11:19 AM

- ACME Healthcare
  - by admin — last modified Sep 21, 2017 12:31 PM
ACME Healthcare

ACME Healthcare Composite Report

Report on ACME North and South, and average ACME Health performance vs project average(s).

Layout: Compact | Standard
Asthma Chart Review Forms

Quick links to recently applicable forms can be found below.

Unsubmitted past forms

No forms match this criteria.

Upcoming forms

- March 2018 - all providers
- April 2018 - all providers
- May 2018 - all providers
- June 2018 - all providers
- July 2018 - all providers
- August 2018 - all providers
- September 2018 - all providers
- October 2018 - all providers
- November 2018 - all providers
- December 2018 - all providers

Submitted recently

- Baseline - all providers
- February 2018 - all providers

Other information about this form series:

Series title: Asthma Chart Review Forms

This is a form series defined for the period of 2018-01-01 to 2018-12-31.
# Asthma Chart Review Forms: March 2018 - all providers

This form's reporting period is dated **2018-03-01 to 2018-03-31.**

## 1. **Date of Visit**

**Age**  

**Type of Visit**
- Asthma - Primary Dx
- Asthma - Secondary Dx

**Pt was on asthma meds at the time of visit**
- [ ] yes
- [ ] no

**Severity documentation**
- [ ] Intermittent
- [ ] Mild persistent
- [ ] Moderate persistent
- [ ] Severe persistent
- [ ] Asthma unspec.
- [ ] Not documented

**Control documentation (N/A)**
- Assessment of control only on pts who are on asthma meds prior to this visit
- [ ] Well controlled
- [ ] Not well controlled
- [ ] Very poorly controlled
- [ ] Not documented
- [ ] N/A

**Was a standardized control assessment tool used?**
- [ ] ACT or GINA
- [ ] yes
- [ ] no

**ICS prescribed for persistent asthma pts? (N/A)**
- [ ] yes
- [ ] no

**Current AAP on file**
- Date on AAP must be within the last 12 months
- [ ] yes
- [ ] no

**Did pt receive Flu Vaccine within the past 12 months?**
- [ ] yes
- [ ] no

**Was correct device use assessed?**
- [ ] yes
- [ ] no

## Process changes or notes

Enter any notes pertaining to this period.

## Save form as draft  Save and submit form
Questions, suggestions, critique are welcome

chuck.norlin@hsc.utah.edu