

# Collecting and Using Data

## Why Do It?

Developing systems for collecting and using data is essential for quality improvement. Experts encourage clinics to start small and grow this capability over time. This includes the selection and use of measures and working within existing data systems to produce valid, reliable and actionable reports. Data may also be used to manage patient populations, such as in the case of registry systems to track patients with certain conditions or in risk stratification. There are different types of data, including clinical, operational, access and demographic, and each provides important information for making decisions and improving quality. Once data reports are generated, leaders can look for strategies to share the evidence and build a culture of transparency. See the tip sheets on *Quality Improvement*, on *Culture & Change Management*, and on *Leadership* for more ideas to get started. The [Institute website](#) includes additional resources, including webinars such as “[Using Data in Quality Improvement](#)”, “[Using Quality Reports to Improve Health Care](#)” and “[Engage, Collect, Partner: How to Use Patient Experience of Care Surveys in Your Practice](#)”.

## Where to Start

**1. Choose the EHR system that works best for your clinic.** There are many models and it can be difficult to find the optimal choice. If you are part of a larger network, you may choose to select a system that is interoperable with other hospitals and specialists within your system. If you participate in a learning collaborative, they may also provide you with examples. Whatever EHR you choose, it should facilitate the following:

- a. Data collection and tracking for your clinic population, sub-populations, and individual patients.
- b. Improving the health of groups of patients with the same diagnosis or demographic.

**2. Start collecting and tracking data.** With access to high-level data points about the clinic’s population of patients, clinic leaders can more strategically make decisions, such as which services to provide or which staffing is most needed. Also see the tip sheet on *Comprehensive Care*.

- a. **Determine which measures to track.** Some clinics track as many elements as they feasibly can, while others only track the measures most meaningful for their patient population.
- b. **Standardize data entry practices** to ensure that all data is retrievable. Alternate input styles can prevent the system from picking up all relevant data, ultimately skewing results.
- c. **Analyze tracked data** to establish what measures require additional improvement efforts. Also see the tip sheet on *Quality Improvement*.

*PCPCH tip sheets were developed from the reported experiences of recognized PCPCH’s, by a Portland State University research team under contract with the Oregon Health Authority, 2016. These recommendations are not part of the official OHA technical assistance guide and are not a guarantee of program recognition. Access this Tip Sheet and other resources: <http://www.pccpi.org/search/resources>.*

3. To create a culture of transparency, it is imperative to **share your results** with clinic staff, patients, and outside organizations that you are a part of (also see the tip sheet on *Leadership*). Results should be used to create improvement projects and develop new workflow protocols.

- a. **Use friendly competition** among teams in order to keep staff engaged and normalize the experience of talking about performance.
- b. **Share performance highlights with** patients by creating and hanging posters in the lobby, or send out periodic updates via a patient portal or email listservs.
- c. **Don't be discouraged** with less than optimal results at first. PCPCH is about continuous improvement, and becoming aware of performance gaps is the first step in the process.

*“... one of the analyses we did...39% of those ER visits were due to falls. And that's when we rolled out the falls risk program...in the quarter after we started the falls risk, we only had 8 patients that had been admitted into the ER due to a falls injury. And the first quarter of this year, two and a half months into it, I only had one patient.”*

### Tips for Making the Most of Collecting and Using Data

- ❖ If possible, **hire IT staff** to assist with the fast-paced technological changes, or **shift a tech-savvy staff member's role** to one focusing on collecting and tracking data. Also see the tip sheet on *Recruitment & Retention*.
- ❖ **Use third-party data tools** to supplement or operate independently from the EHR. Basic Excel spreadsheets can simplify the data collection and tracking process.
- ❖ **Customize your EHR to focus staff attention.** For example, color-code patient records by assigned team or risk tier to help staff quickly process phone calls and appointments. Also see the tip sheet on *Team Based Care*.
- ❖ **Emphasize the importance of celebrating successes.** Gift cards, certificates of appreciation, and public recognition at meetings encourage staff improvement. See the tip sheet on *Culture and Change Management* for more ideas.