Dashboard Best Practices

- Define dashboard goals and expected outcomes with input from your intended audience(s), e.g., attending physicians, residents, mid-level providers, C-suite, and physician management. This can be accomplished by meeting with various groups and providing ideas for discussion.
- Determine key elements to report on the dashboard. Agree to track no more than three to five key elements for the dashboard and review what you should be tracking with the various audiences to an agreed-upon basis. Data elements may change as improvement is seen on individual reporting elements.
- Customize the dashboard for various audiences, e.g., C-suite, physicians groups, HIM committee, Med-Exec committee, quality Improvement committee, etc. Each group will have different requirements.
- Keep it simple yet concise. Too much data becomes confusing, visually distracting and overwhelming, and you lose your audience.
- Get buy-in from your audience on how often they want the data, how feedback will be provided to clinicians, and how the data will be used for ongoing process improvement. Do not gather and report data that is useless and time consuming.
- Keep the information in a spreadsheet that can easily be shown in various reporting methodologies, e.g., graphs, charts, etc.
- Determine who will monitor and manage the data, e.g., Documentation/Transcription manager, HIM, etc.
- See examples of what to track: Types of errors (critical vs. noncritical), number of documents reviewed by an individual clinician or provider groups (attending physicians, residents, mid-level providers, nurses, etc.). Other ideas may include a specific element requested to be tracked, recurring template or system errors, and front-end errors vs. back-end/traditional transcription errors (failure to edit by clinician).
- As you develop and continuously refine the process, keep in mind: Who is responsible for collecting the data? What does your organization want to see from the data? How will the data be reported? And most importantly, what is being done with the data in your organization. Make it meaningful to process improvement.

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