



## Overview and Instructions

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### Welcome to the Advancing Excellence Person Centered Care Tracking Tool!

Use this tool to log results from your residents' Preference Satisfaction Interviews and record how their subsequent care plans address those preferences. This Tool will create graphic displays indicating opportunities to fulfill residents' preferences, evaluate patterns within neighborhoods, and calculate an overall Preference Congruence Quality Indicator and the percent of care conferences with key participants. Enter these summary indicators on the Advancing Excellence in America's Nursing Homes website to view trend graphs of your progress over time.

Please contact the [Advancing Excellence Help Desk](#) if you have any questions or would like support getting started with this tool.

**Thank you for participating in this important project!**

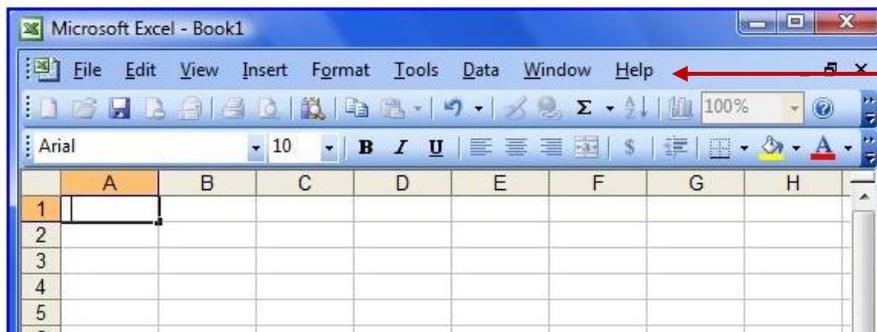
Advancing Excellence Campaign Help Desk  
[help@nhqualitycampaign.org](mailto:help@nhqualitycampaign.org)



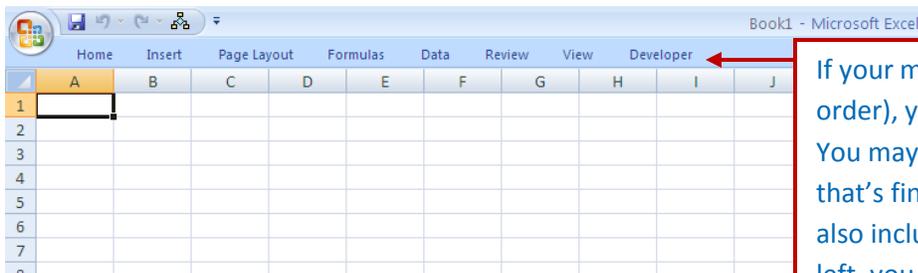
This material was prepared by CFMC, the Medicare Quality Improvement Organization for Colorado, under contract with the Centers for Medicare & Medicaid Services (CMS), an agency of the U.S. Department of Health and Human Services. The contents presented do not necessarily reflect CMS policy. PM-4020-054 CO 2013

## GETTING STARTED

**COMPATIBILITY CHECK** This tool works with Excel 2007 and higher.



Check the order of options along the top menu bar. If it looks like this, you are probably using Excel 2003. The PCC Tracking Tool **will not** work properly on your software.



If your menu bar has these options (in this order), you are probably using Excel 2007. You may not see the "Developer" option – that's fine. If your options look like this, but also include "File" as your first option on the left, you are probably using Excel 2010. The PCC Tracking Tool is **compatible** with your software.

**INSTRUCTIONS** ([QuickLinks](#)) You may wish to print these instructions for easy reference as you access the [AE\\_PersonCenteredCareTrackingTool](#).

**Open** the [AE\\_PersonCenteredCareTrackingTool](#) from the website.

You may be prompted for a username and password. This is not necessary. Simply click 'Cancel' once or twice until the file opens.

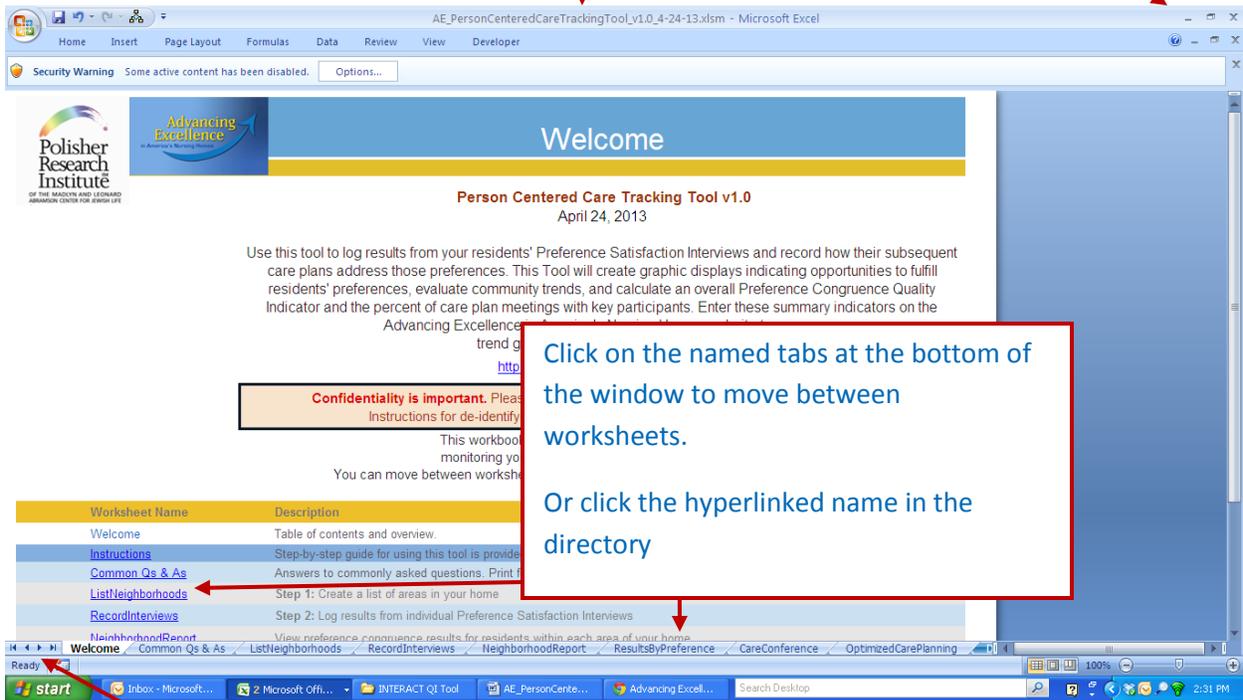
**Save** the file to a location on your computer. It is important to begin by saving the Excel file to your computer. When you use the Tracking Tool, you are not entering data on the website, but into an Excel file that 'lives' on your computer. At the end of the month you will submit a few summary numbers to the Advancing Excellence website.

**Return** to the website EACH MONTH to get a fresh copy of the tool. This will ensure that you get any messages we may have for you and that you are always using the most recent version of the tool.

**Excel vocabulary** [QuickLinks] The file named 'AE\_PersonCenteredCareTrackingTool' is an Excel **workbook**. Within the **workbook** are **worksheets**. Worksheets are accessed by clicking the tabs that appear at the bottom of your Excel window.

Note: If you can't see the tabs at the bottom of the Excel window, make sure your window is maximized.

If that doesn't work, or you can't see the upper right corner, double click the title bar.



Sometimes there are so many worksheets in your workbook that you can't see them all. Use the scroll bar on the LEFT side of the window to see all tabs.

This workbook contains macros (small programs that make complicated things easy).

You will need to **enable macros** for this workbook to function properly. [\[QuickLinks\]](#)

AE\_PersonCenteredCareTrackingTool\_v1.0\_4-24-13.xlsm - Microsoft Excel

Home Insert Page Layout Formulas Data Review View Developer

Security Warning Some active content has been disabled. Options...

Polisher Research Institute  
Advancing Excellence  
In America's Nursing Homes

# Welcome

## Person Centered Care Tracking Tool v1.0

April 24, 2013

Use this tool to log results from your residents' Preference Satisfaction Interviews and record how their subsequent care plans address those preferences. This Tool will create graphic displays indicating opportunities to fulfill residents' preferences, evaluate community trends, and calculate an overall Preference Congruence Quality Indicator and the percent of care plan meetings with key participants. Enter these summary indicators on the Advancing Excellence in America's Nursing Homes website to access trend graphs of your progress over time.  
<http://www.NHQualityCampaign.org>

**Confidentiality is important.** Please do not transmit this form with resident-identifying information. Instructions for de-identifying this tool are provided in the Common Qs & As tab.

This workbook contains ten [10] worksheets to assist in monitoring your progress toward person centered care. You can move between worksheets by clicking the tabs at the bottom of your Excel window.

Worksheet Name	Description
Welcome	Table of contents and overview.
Instructions	Step-by-step guide for using this tool is provided in a separate Word document. Print for easy reference.

Step 1: Click here for your options

AE\_PersonCenteredCareTrackingTool\_v1.0\_4-24-13.xlsm - Microsoft Excel

Home Insert Page Layout Formulas Data Review View Developer

Security Warning Some active content has been disabled. Options...

Polisher Research Institute  
Advancing Excellence  
In America's Nursing Homes

# Welcome

Use this tool to log results from your residents' Preference Satisfaction Interviews and record how their subsequent care plans address those preferences. This Tool will create graphic displays indicating opportunities to fulfill residents' preferences, evaluate community trends, and calculate an overall Preference Congruence Quality Indicator and the percent of care plan meetings with key participants. Enter these summary indicators on the Advancing Excellence in America's Nursing Homes website to access trend graphs of your progress over time.

**Confidentiality is important.** Please do not transmit this form with resident-identifying information. Instructions for de-identifying this tool are provided in the Common Qs & As tab.

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Worksheet Name	Description
Welcome	Table of contents and overview.
Instructions	Step-by-step guide for using this tool is provided in a separate Word document. Print for easy reference.
Common Qs & As	Answers to commonly asked questions. Print for easy reference.
ListNeighborhoods	Step 1: Create a list of areas in your home
RecordInterviews	Step 2: Log results from individual Preference Satisfaction Interviews

Microsoft Office Security Options

**Security Alert - Macros & ActiveX**

Macros and one or more ActiveX controls have been disabled. This active content might contain viruses or other security hazards. Do not enable this content unless you trust the source of this file.

**Warning: It is not possible to determine that this content came from a trustworthy source. You should leave this content disabled unless the content provides critical functionality and you trust its source.**

File Path: C:\...Files\Content.Outlook\8AMMWR4W\1\_AE\_PCCTrackingTool\_v1.10.xlsm

Help protect me from unknown content (recommended)

Enable this content

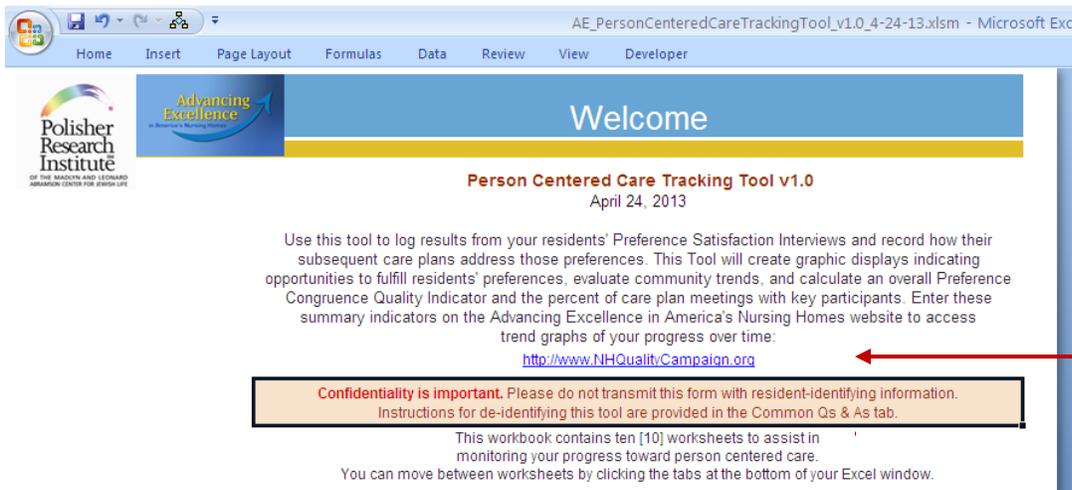
Open the Trust Center

OK Cancel

Step 2: If you would like to enable macros and use this workbook, select "Enable the content" and then click "OK."

If you have difficulty enabling the macros or your system requires a security certificate, please contact the [AE HelpDesk](#).

**Welcome** [QuickLinks](#) This page gives you an overview of the tool. Note the version number and date – occasionally updates are posted to the website. **Please download a new copy of the workbook each month.** You may access the website by clicking the website address on this page. The table of contents indicates that there are 2 informational worksheets (Welcome, Common Qs&As); The “Instructions” hyperlink will take you to the document you are reading now. There are 4 data entry worksheets: 2 record information from your Resident Preference Interviews. Two are for documenting participation in care conferences and care planning processes. Additional sheets include reports of resident preference congruence by neighborhood, and by preference item. An archive of all interview results is in the AllResidentInterviewResults tab. The DataforWebsiteEntry tab contains your calculated outcome measures for the month.



Website address.  
Click here to go to the AE homepage.

Worksheet Name	Description
Welcome	Table of contents and overview.
Instructions	Step-by-step guide for using this tool is provided in a separate document.
Common Qs & As	Answers to commonly asked questions. Print for easy reference.
ListNeighborhoods	Step 1: Create a list of areas in your home
RecordInterviews	Step 2: Log results from individual Preference Satisfaction Interviews
NeighborhoodReport	View preference congruence results for residents within each area of your home
ResultsByPreference	Evaluate preference congruence for your home overall
CareConference	Step 3: Record key participants at each care conference
OptimizedCarePlanning	Step 4: Track elements associated with optimized care
Data for Website Entry	Step 5: Summary information to track your progress. Enter data for website entry
AllResidentInterviewResults	This spreadsheet contains the detail for each Preference Interview

Welcome and Common Qs&As are information sheets.

Instructions links to this document.

Data entry on 4 sheets: ListNeighborhoods, RecordInterviews, CareConference, and OptimizeCarePlanning.



Click on the named tabs to move between worksheets.

Your results are summarized in a several ways to support investigating patterns to support your quality improvement efforts.

Data for Website Entry contains several summary numbers to enter and track on the AE website.

## Instructions [\[QuickLinks\]](#)

This tab links to a copy of the instructions you are reading now, so they are handy at all times.

## Common Qs&As [\[QuickLinks\]](#)

Please take a moment to review the content of this page for future reference. This sheet contains important information about how to use the tool. It also includes some more advanced [Tips and Tricks](#) for using the tool, sections on [Troubleshooting](#) and [About Data for Website Entry](#). Hyperlinks at the top of the page make it easy to jump to topics of interest.

## GETTING STARTED WITH DATA ENTRY

### Maximizing Your Screen Space [\[QuickLinks\]](#)

Go to **ListNeighborhoods**. There are several things you can do to make the most screen space possible:

The image shows a screenshot of the Microsoft Excel interface with several red callout boxes providing instructions on how to maximize screen space. The spreadsheet is titled 'List Neighborhoods' and shows a grid with column headers (D, E, F, G, H, I) and row headers (4, 5, 6, 7, 8, 9, 10, 11, 12, 13, 15, 16, 17, 18). The ribbon is visible at the top, and the zoom level is set to 90%.

**If you can see the formula bar, click 'View' and uncheck 'Formula Bar'**  
This is the formula bar.

**If you can see column and row headers, click 'View' and uncheck 'Headings.'**  
These are column headings (letters).  
These are row headings (numbers).

**Make sure your window is maximized.**

**If you have a wide ribbon of menu options visible, as shown here, place your cursor in the top row, right click, and click 'Minimize the Ribbon.'**

**Set your zoom to a smaller percent. 80% often works well. Use the slider bar to increase or decrease your zoom.**

## ListNeighborhoods [\[QuickLinks\]](#)

The screenshot shows the 'List Neighborhoods' tool interface. At the top, there is a navigation bar with 'Home', 'Insert', 'Page Layout', 'Formulas', 'Data', 'Review', 'View', and 'Developer'. Below this is the 'Polisher Research Institute' logo and the title 'List Neighborhoods'. The main content area contains 'Step 1' instructions: 'A Enter the month and year for this reporting period.' and 'B In the column below, type or paste the names of the Households, Neighborhoods or Groups in your home.' Below the instructions is a form with 'MONTH' set to 'April' and 'YEAR' set to '2013'. A dropdown menu for the year is open, showing options from 2013 to 2020. Below the year dropdown is a table with columns for 'households, neighborhoods or groups' and rows labeled 'a1' through 'a12'. The first three rows contain 'Peach Tree', 'Oak Lane', and 'Cherry Blossom'. Three red callout boxes provide instructions: 'On screen instructions.' points to the title bar; 'Step 1A: Customize your workbook by selecting the month and year for the data you will record. Click on the arrow for a dropdown list.' points to the year dropdown; 'Step 1B: List the names of households, neighborhoods, or other groups or areas you would like to track.' points to the table rows. A 'Tip' box states: 'Tip: Entering household names will allow you to organize your resident information by household, a process that optimizes sharing information with staff.'

On screen instructions.

**Step 1**  
A Enter the month and year for this reporting period.  
B In the column below, type or paste the names of the Households, Neighborhoods or Groups in your home.

You may add to this list at any time.

MONTH	April
YEAR	2013
	households, neighborhoods or groups
a1	Peach Tree
a2	Oak Lane
a3	Cherry Blossom
a4	
a5	
a6	
a7	
a8	
a9	
a10	
a11	
a12	

**Step 1A:** Customize your workbook by selecting the month and year for the data you will record. Click on the arrow for a dropdown list.

**Step 1B:** List the names of households, neighborhoods, or other groups or areas you would like to track.

**Tip:** Entering household names will allow you to organize your resident information by household, a process that optimizes sharing information with staff.

[Get the Interview and Instructions](#)

**Record Interviews** [\[QuickLinks\]](#)

This sheet is a data entry form for you to record the results of resident interviews you have **already** completed. The Interview of Resident Preferences builds on data you are already collecting for MDS 3.0 Section F. Section F allows you to establish what is **Important** to a resident. The interview adds a second set of questions to learn the resident's **Satisfaction** with choices and activities important to the resident. The [Interview and Instructions](#) for the interview are available on the Improve page of the Advancing Excellence Website.

The screenshot shows the 'Record Interviews' form with the following data:

Resident Name	Sally Jones
Identifier	m108
Resident's Household, Neighborhood or Group Name	Peach Tree
Date of Interview (mm-dd-yyyy)	04/22/2013
Stay Type	LONG STAY
Indicate Primary Respondent	RESIDENT

Interview Recorded At: 04/30/2013 14:22

How important is it to you to ...	Resident Response Importance	Resident Response Satisfaction	Priority
A choose what clothes you wear?	1	As 2	YELLOW
B take care of your personal belongings?		Bs	
C choose between a tub bath, shower, bed bath, or sponge bath?		Cs	
D have snacks available between meals?		Ds	
E choose your own bedtime?		Es	
F have your family or a close friend involved in discussion about your care?		Fs	

**Step 1:** Type in resident's name and identifier if you choose. The remaining fields will give you options to select from when you click the cell.

**Step 2:** Enter the numeric response codes from the completed interview in the spaces provided.

The screenshot shows the 'Record Interviews' form with the following data:

Resident Name	Sally Jones
Identifier	m108
Resident's Household, Neighborhood or Group Name	Peach Tree
Date of Interview (mm-dd-yyyy)	04/22/2013
Stay Type	LONG STAY
Indicate Primary Respondent	RESIDENT

Interview Recorded At: 04/30/2013 14:26

How important is it to you to ...	Resident Response Importance	Resident Response Satisfaction	Priority
A choose what clothes you wear?	1	As 2	
B take care of your personal belongings?	3	Bs 2	
C choose between a tub bath, shower, bed bath, or sponge bath?	2	Cs 1	
D have snacks available between meals?	1	Ds 3	
E choose your own bedtime?	5	Es 1	
F have your family or a close friend involved in discussion about your care?		Fs	
G be able to use the phone in private?		Gs	
H have a place to lock your things to keep them safe?		Hs	

As you enter interview responses, a Priority indicator is created for you. The priority is based on the congruence (match) between the Importance and Satisfaction responses.

**Note:** Only items that a resident indicates are at least 'Somewhat important' are given a priority indicator. All items with a response 'Important but can't do or No choice' will be flagged for follow-up.

AE\_PersonCenteredCareTrackingTool\_v1.1.4-30

Home Insert Page Layout Formulas Data Review View Developer

F	have your family or a close friend involved in discussion about your care?	2	Fs	1	GREEN
G	be able to use the phone in private?	2	Gs	3	RED
H	have a place to lock your things to keep them safe?	3	Hs	1	

**F0500 Interview for Activity Preferences**

1 Very Important  
2 Somewhat Important  
3 Not Very Important  
4 Not Important At All  
5 Important, But Can't Do or No Choice  
9 No Response or Non-Responsive

1 Mostly or Completely Satisfied  
2 A Little or Somewhat Satisfied  
3 Not Satisfied At All  
9 Not Applicable

How important is it to you to...		Resident Response Importance		Resident Response Satisfaction	Priority
A	have books, newspapers, and magazines to read?	1	As	1	GREEN
B	listen to music you like?	1	Bs	3	RED
C	be around animals such as pets?	3	Cs	2	
D	keep up with the news?	2	Ds	2	YELLOW
E	do things with groups of people?	1	Es	2	YELLOW
F	do your favorite activities?	5	Fs	1	GRAY
G	go outside to get fresh air when the weather is good?	1	Gs	3	RED
H	participate in religious services or practices?	2	Hs	1	GREEN

1. Click on PRINT FORM to print out a copy of the individual responses.  
2. When you click the RECORD DATA button below, your information will be recorded, this form will be cleared, and you will be able to enter information for another resident.

**PLEASE NOTE:** This form will be cleared once the RECORD DATA button has been clicked.

PRINT FORM      RECORD DATA      CLEAR FORM

Welcome Common Qs & As ListNeighborhoods **RecordInterviews** NeighborhoodReport ResultsByPref

**TIP:** Once you have entered all responses for a resident's interview, PRINT the form to check for errors and to allow staff to see at a glance that resident's level of preference congruence.

**AFTER** you have printed the form and checked that your data entry is correct, you click the RECORD button. This will record your data on the AllResidentInterviewResults tab.  
**IMPORTANT:** Once you have recorded the interview, it cannot be changed or deleted.

Use the **CLEAR FORM** button to view an empty form so you may enter interview responses for another resident.

**TIP:** If you get pulled away from the computer prior to completing your data entry for an individual's form, save the workbook (the Excel file) and it will hold your place on the Data Entry Form, even if you close the workbook. Remember, once you RECORD the data, it cannot be changed.

Where do the recorded interviews go?

**AllResidentsInterviewResults**[\[QuickLinks\]](#)

When you click the RECORD button on the RecordInterviews tab, the information for that resident is written to the AllResidentsInterviewResults spreadsheet, the last tab of the workbook. This sheet is the holding place for the interviews you record for the month.

Resident Name	Identifier	Household	Date	Stay Type	Clothes		Belongings			Bath		Snacks		Bedtime		Family involved		Phone		Lock Belongings		Read	
					F0400 A	F0400 AAS	F0400 B	F0400 BBS	F0400 C	F0400 CCS	F0400 D	F0400 DDS	F0400 E	F0400 EES	F0400 F	F0400 FFS	F0400 G	F0400 GGS	F0400 H	F0400 HHS	F0500 A	F0500 AAS	F0500 B
JONATHAN SMITH	105	OAK	04/24/2013	LONG STAY	1	3	3	2	2	2	1	3	2	1	3	1	4	1	2	1	5	2	2
JANE DOE	116	OAK	04/20/2013	LONG STAY	1	2	2	1	3	2	1	2	2	1	3	1	1	1	1	1	3	3	1
CYNTHIA GOLDBERG	125	OAK	04/19/2013	LONG STAY	2	2	1	1	2	1	1	2	1	1	3	1	2	1	1	1	1	3	2
ROBERT JONES	118	OAK	02/18/2013	LONG STAY	1	2	2	1	1	1	1	2	2	1	2	1	2	1	1	1	1	2	1
MARY CAMPBELL	110	OAK	04/24/2013	LONG STAY	1	3	1	1	1	1	2	3	1	1	1	1	1	1	1	1	2	1	1
SUSAN STONE	121	OAK	04/21/2013	LONG STAY	1	2	1	1	2	1	1	1	1	1	1	1	2	1	1	1	1	1	2
DAVID FREEMAN	210	SPRUCE	04/18/2013	SHORT STAY	1	2	2	1	1	3	1	1	1	1	2	1	1	1	1	1	2	1	1
KELLY GREEN	216	SPRUCE	04/20/2013	SHORT STAY	1	3	2	1	1	2	2	1	1	1	2	1	1	1	5	1	1	1	2
MICHAEL SANDMAN	231	SPRUCE	04/21/2013	SHORT STAY	1	2	1	2	1	2	2	1	2	3	1	1	1	1	2	1	1	1	2
JOSEPH WONG	217	SPRUCE	04/12/2013	SHORT STAY	1	3	3	1	1	2	1	1	2	1	1	2	1	1	1	1	2	1	1
CHRISTIAN TAYLOR	210	SPRUCE	04/02/2013	SHORT STAY	2	3	1	2	1	2	2	1	1	1	3	1	1	1	1	2	1	1	1
SARAH MARTIN	221	SPRUCE	04/11/2013	SHORT STAY	1	2	1	1	1	2	2	1	1	1	1	1	1	1	1	2	3	1	1

**NOTE:** The AllResidentsInterviewResults sheet is “read only.” Use it to view data you have already entered using the RecordInterviews tab.

**Incorrectly entered resident information cannot be changed or removed from the spreadsheet.**

In the event of incorrect data, you may re-enter the resident’s interview (using the RecordInterviews tab), and view it correctly in the updated instance. While you may use the last column ‘Date Recorded’ to identify the most recent entry for a resident, the incorrect data entry will also be included in all reports and calculations.

## How do we use our Interview Results? [\[QuickLinks\]](#)

### Getting the most from your individual Resident Preference Interviews

#### 1. Individualized care planning [\[QuickLinks\]](#)

- a) As you prepare for your care conferences each month, review your resident's Interview results.
- b) The interview questions simply highlight areas where there is preference congruence (matched, or satisfied) or incongruence (unsatisfied).
  - ⇒ Frequently further discussion will be beneficial to understanding a resident's priorities and how to best satisfy their preferences. For example, if there is poor preference congruence with reading books and magazines, make sure the preferred materials are readily available (for example, local news or international? Novels or non-fiction? Sports magazines or nature?) If they are available, explore possible barriers. For example, perhaps the resident requires large font reading materials.
  - ⇒ [Additional conversation prompts](#) have been provided to help continue the conversation. Several prompts are provided for each of the specific preference areas.
  - ⇒ Some [great ideas](#) for enhancing opportunities and overcoming barriers have also been collected for you.
- c) Bring the interview, congruence results, and any notes from additional conversations to the care conference and use these to guide your care conference and plan. Record details from the conference and planning on your **CareConference** and **OptimizedCarePlanning** worksheets (discussed below).

#### 2. Neighborhood evaluation [\[QuickLinks\]](#)

It can also be helpful to approach quality improvement on a neighborhood level, especially when you have consistent assignment of staff and other organizational features in place that allow you to address priorities at an organizational or systems level. As a practical matter, a quality improvement project is often most successful when it starts small and is 'owned' by a small group directly involved in the care of the residents. This approach gives staff the autonomy and control to make changes rapidly and responsively. Likewise, it is most meaningful for staff to be able to view results that are directly applicable to their area. The **ByNeighborhood** report (discussed below) makes it easy to see congruence scores for the groups of residents you defined in the ListNeighborhoods sheet.

#### 3. Patterns in congruence by preference item

Quality improvement is best achieved by looking for patterns that provide the opportunity to make a change at the system or process level so that the impact is broad and lasting. Your **ResultsByPreference** sheet provides aggregate results for individual preference items to facilitate targeting such patterns. For example, the kinds of changes needed to bring about an overall improvement in resident satisfaction with bathing choices may be quite different than those needed to satisfy access to certain kinds of reading material.

The **NeighborhoodReport** [\[QuickLinks\]](#) report makes it easy to see congruence scores for the groups of residents you defined in the ListNeighborhoods sheet. Refer to the [neighborhood evaluation](#) section above for a discussion of how viewing resident congruence scores by groups can be helpful.

Simply select the group you wish to view from the drop down box.

Then, click the UPDATE REPORT button to refresh the page.

Click on UPDATE FORM button each time the Household / Neighborhood / Group name is changed or additional interview results have been recorded.

Click on PRINT REPORT button to print formatted report.

Choose Group  
On the drop-down list, choose which Household, Neighborhood or Group name of your Home to sort data. Select "ALL" to view all of the residents of the Home.

		14	16	13	14	15
Count of "Very Important" and "Somewhat Important"		14	16	13	14	15
% of "Very Important" and "Somewhat Important"		71.4%	56.3%	53.8%	64.3%	60.0%
% of "Very Important" and "Somewhat Important" and "A Little or Somewhat Satisfied"	13.3%	14.3%	31.3%	30.8%	28.6%	26.7%
% of "Very Important" and "Somewhat Important" and "Not at All Satisfied"	13.3%	7.1%	12.9%	7.7%	7.1%	13.3%
% of Important, but Can't Do - No Ch		7.1%		7.7%		

Resident Name	DAVID FREEMAN	KELLY GREEN	MICHAEL SANDMAN	JOSEPH WONG	CHRISTIAN TAYLOR	SARAH MARTIN
Identifier	210	216	231	217	210	221
Date	04/18/2013	04/20/2013	04/21/2013	04/22/2013	04/02/2013	04/11/2013
Stay Type	SHORT STAY	SHORT STAY	SHORT STAY	SHORT STAY	SHORT STAY	SHORT STAY

	DAVID FREEMAN	KELLY GREEN	MICHAEL SANDMAN	JOSEPH WONG	CHRISTIAN TAYLOR	SARAH MARTIN
A choose what clothes you wear?	YELLOW	RED	YELLOW	RED	RED	YELLOW
B take care of your personal belongings?	GREEN	GREEN	YELLOW	YELLOW	YELLOW	GREEN
C choose between a tub bath, shower, bed bath, or sponge bath?	RED	YELLOW	YELLOW	YELLOW	YELLOW	YELLOW
D have snacks available between meals?	GREEN	GREEN	GREEN	GREEN	GREEN	GREEN
E choose your own bedtime?	GREEN	GREEN	RED	GREEN	GREEN	GREEN
F have your family or a close friend involved in discussion about your	GREEN	GREEN	GREEN	YELLOW		GREEN

The PRINT REPORT button sends this page to your default printer.

At a glance, you will see the preference congruence information for all the residents in your group. Items that are **RED** are your highest priority for action. **YELLOW** areas should also be explored to understand the resident's preference and satisfaction, so that adjustments can be made. **GREEN** areas show a good match between resident preferences and their satisfaction; continue monitoring to ensure ongoing preference satisfaction.

## Where should we start?

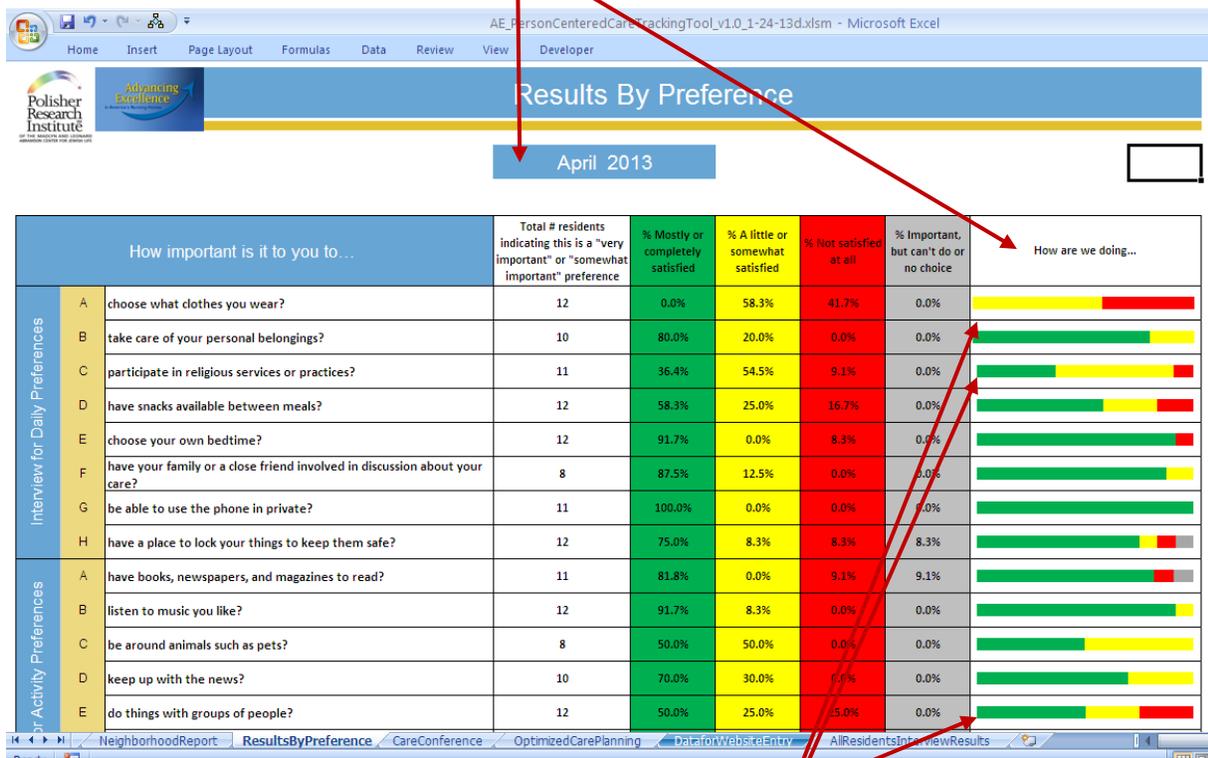
### Prioritizing your work [\[QuickLinks\]](#)

As part of each care conference this month, you'll create an individualized care plan that addresses the resident's preferences and any gaps in their congruence scores (any red or yellow items they have).

It's difficult to work on everything at once, and successful quality improvement projects prioritize areas to target. The **ResultsByPreference** report provides an easy way to prioritize your efforts. At the beginning, you may want to select the item or items with the most red. In fact, there is not much difference between red and yellow, so you could also choose to work on items with the least green.

Prioritize areas for process-level improvement:

- ❖ Those with the highest percentage of red responses.
- ❖ Those with the least amount of green responses.
- ❖ Among those, you may also want to consider the number of residents for whom that activity is important.



Sometimes priority areas involve different staff, programming and processes. This may make it easy to work with several areas at once.

In this example, we may choose to begin by addressing clothing choice and opportunities residents have participate in religious services/practices and do things with groups of people.

## Care Conference [QuickLinks](#)

Record priority attendees at your care conferences this month.

Record Resident's name, Stay Type and Date of Care Conference

Step 3:  
A Record priority attendees at each care conference this month.

April 2013

Priority Attendees								
Resident Name	Stay Type <small>Long Stay/Short Stay</small>	Date Care Conference Occurred <small>MM/DD/YY</small>	Did the Resident Attend?	Did Resident's Family Member and/or Friend Attend?	Did Resident's CNA/Direct Care Staff Member Attend?	If Priority Attendees were Not Present, were the reasons explored?	Notes	
r-1 Jonathan Smith	Long Stay	04/02/13	Yes	Yes, in person	Not available-Not working	Yes	CNA Sophia is on vacation	
r0 Jane Doe	Long Stay	04/11/13	Yes	Yes, in person	Yes			
r1 Cynthia Goldberg	Long Stay	04/12/13	Time conflicted with a preferred activity	Yes, by phone	Not available-Working, no coverage	No		
r2 Robert Jones	Long Stay	04/12/13	Yes	Yes, in person	Yes			
r3 Mary Campbell	Long Stay	04/13/13	Resident refused	Unable to contact	Not available-Working, no coverage	No		
r4 Susan Stone	Long Stay	04/15/13	Yes	Yes, in person	Yes			
r5 David Freeman	Short Stay	04/15/13	Yes	Yes, by phone	Yes			
r6 Kelly Green	Short Stay	04/18/13	Yes	Yes, in person	Yes			
r7 Michael Sandman	Short Stay	04/19/13	Yes	Yes, in person	Not available-Not working	Yes	good meeting - resident very active	
r8 Joseph Wong	Short Stay	04/20/13	Yes	Unable to contact	Not available-Not working	Yes		
r9 Christian Taylor	Short Stay	04/23/13	Location/physical barriers	None per resident request	Yes			
r10 Sarah Martin	Short Stay	04/24/13	Yes	Yes, in person	Not available-Not working	Yes		
r11								
r12								
r13								
r14								
r15								
r16								
r17								
r18								
r19								
r20								
r21								
r22								
r23								
r24								

Use dropdown lists to indicate whether each person attended, and if not, why not.

If one or more of the priority attendees was not present, a root cause analysis is suggested. Space is provided to make notes.

## OptimizedCarePlanning [\[QuickLinks\]](#)

This worksheet is not required for calculating outcomes, but is provided for your record-keeping and tracking to guide an optimized care planning process and ensure that information from Resident Preference Interviews is incorporated into care plans.

**Step 4:**  
This optional worksheet is provided for you to track key elements in optimized care planning.

This Resident			Optimized Team				Interview
Resident Name	Stay Type	Date Care Conference Occurred	Name of CNA/Direct Care Staff Member Attending	Did the Resident Choose the Staff Member listed in the Previous Column?	Is this the same Direct Care Staff Member Present as Previous Care Conference?	Was the Resident Preference Satisfaction Interview completed PRIOR to meeting?	Were the Preferences For example preference
Jonathan Smith	Long Stay	04/02/13	Mary Seacote	No	Caregiver no longer employed here	Yes	
Jane Doe	Long Stay	04/11/13	Florence Nightengale	Yes	Not available: Not working	No	
Cynthia Goldberg	Long Stay	04/12/13	Hazel W. Johnson-Brown	N/A: Caregiver did not attend	Resident preferred different caregiver attend	Yes	
Robert Jones	Long Stay	04/12/13					
Mary Campbell	Long Stay	04/13/13					
Susan Stone	Long Stay	04/15/13					
David Freeman	Short Stay	04/15/13					
Kelly Green	Short Stay	04/18/13					
Michael Sandman	Short Stay	04/19/13					
Joseph Wong	Short Stay	04/20/13					
Christian Taylor	Short Stay	04/23/13					
Sarah Martin	Short Stay	04/24/13					

Pre-populated from your CareConference tab.

Advance practice for including direct care staff in care conferences.

Optimized Care Planning sheet, continued

**Step 4:**  
This optional worksheet is provided for you to track key elements in optimized care planning.

This Resident			Tools & Resources	ACP Resources	Outcomes
Resident Name	Stay Type	Date Care Conference Occurred	Was the Care Plan Written in the Resident's Voice? For example, using "I" statements?*	Is the Resident's Advance Care Plan Accessible AND Current?	Were Solutions Agreed Upon to Address ALL Gaps Between Resident Preferences and Care?*
Jonathan Smith	Long Stay	04/02/13	Yes	No	Yes
Jane Doe	Long Stay	04/11/13	No	Yes	Yes
Cynthia Goldberg	Long Stay	04/12/13	Yes	Yes	Yes
Robert Jones	Long Stay	04/12/13			
Mary Campbell	Long Stay	04/13/13			
Susan Stone	Long Stay	04/15/13			
David Freeman	Short Stay	04/15/13			
Kelly Green	Short Stay	04/18/13			
Michael Sandman	Short Stay	04/19/13			
Joseph Wong	Short Stay	04/20/13			
Christian Taylor	Short Stay	04/23/13			
Sarah Martin	Short Stay	04/24/13			

\*Use this space to note strategies and ideas to address opportunities to meet resident preferences and to optimize the care plan and care conference.

Hyperlinks at the top of columns connect you with additional resources.

Use these fields to document best practices in care planning, including resident direction and integration of Preference Interview results in the care plan.

## How are we doing overall?

### Data for Website Entry [\[QuickLinks\]](#)

Your overall preference congruence is the percent of items for which residents reported both 'Very Important' or 'Somewhat Important' AND 'Mostly or Very Satisfied.'

This worksheet is set to print on a single page for an easy monthly snapshot.

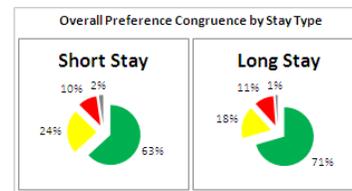
Entering the data on the AE website fulfills 'participation' requirements AND gives you access to real-time trend graphs.



- Final Steps:
- Print this page.
  - Go to The Campaign website: <https://www.nhqualitycampaign.org>
  - Log-in with your username and password.
  - Select "Enter My Data."
  - Under Person Centered Care, click "Submit Data" and enter the numbers below in the corresponding fields.
  - Click "Submit" and check the screen for the confirmation message.

Thank You!

March 2013		
Preference Congruence	Short Stay	Long Stay
Number of Residents Tracked this Month	6	6
Percent of Resident Preferences "Very Important" or "Somewhat Important" AND "Mostly or Very Satisfied"	63%	71%
Care Planning	Short Stay	Long Stay
Number of Residents Tracked this Month	6	6
Percent of Care Conferences with Resident Participating	83%	67%
Percent of Care Conferences with Resident's Family/Friends Participating	50%	83%
Percent of Care Conferences with Resident's Primary Caregiver Participating	50%	33%



Three measures track the percent of care conferences in which priority attendees participated.

The pie charts display your community's preference congruence. The goal is to increase the overall amount of **GREEN**, while simultaneously reducing the amount of **YELLOW** and **RED**.

## How Can I see my progress over time and compared to others?

Each month go to the AE website, log in, and enter the 10 numbers from your DataforWebsiteEntry page. This step will take just a few minutes. Instructions are provided on this tab of your workbook. Your results will be displayed real-time (immediately) on a trend graph. When data submissions are sufficient to ensure anonymity, comparison data will also be made available.

**Your dedication to Preference Satisfaction highlights your organization's commitment to person-centered care!**

**Congratulations and keep up the great work!**