



Learning Community Framework

Technology, Data Architecture & Performance Management

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Live Session:

Best Practices In KPI Dashboard Management

POLL #1

How many items do you think should be on a dashboard?

- A. 3 to 5
- B. 6 to 10
- C. Over 10
- D. As many as fit on one page

POLL #2

What is the most complex part of designing dashboards?

- A. Defining the data elements and assuring that they are valid, repeatable, and reliable?
- B. Getting leadership to agree on what should be measured?
- C. Getting users to access and use them once they are completed?

Dashboards Need: Data Owners & Data Stewards

Definitions

- Owners: define + accountable
- Stewards: manage + validate
- IT: infrastructure

North Carolina CCBHC Quality Bonus Measures

1

Time to Services (I-SERV)

2

Depression Remission at Six Months (DEP- REM-6)

3

Preventive Care and Screening: Unhealthy Alcohol Use:
Screening and Brief Counseling (ASC)-Screening and follow-up

4

Screening for Social Drivers of Health (SDOH)

5

Screening for Clinical Depression and Follow-Up Plan (CDF-AD
and CDF-CH)

How To Structure A Monitoring Dashboard

- Your job is to assist leadership in making decisions about the measures that are the most important:
- You need to limit the first dashboards to 3 to 5 measures
 - We recommend three dashboards to begin:
 - Finance
 - Clinical
 - Bonus measures
- Use red, yellow, green “stoplight” format to quickly visualize progress toward performance

Be Specific - Examples

Reporting Domain	Dashboard	Definition	Performance Parameters	Notes
PPS Budget	Finance	Actual PPS received compared to expected (budgeted PPS payment)	+/- \$10,000 (green) +/- \$25,000 (yellow) +/- More than \$26,000 (red)	This measures variance against expected
Alcohol Screening Measure	Quality Measures	Percentage of clients who received a positive result on the alcohol screen AND who had a documented follow-up brief intervention	95% or higher (green) 85% to 94% (yellow) < 93% (red)	Must look at all clients receiving the assessment instrument, then define the acceptable codes for the brief intervention. The timeliness calculation is “day of follow up appointment compared to initial screen date”. The assessment and score must be present in the data set.

Activity: Design A Data Dashboard

Clinical Dashboard

Reporting Domain	Definition	Performance Parameters	Notes
Notes Completed within 24 Hours			Date diff against initial appointment to “note created”
Time to Service - Crisis			Need to define begin time of service
Time to Service-Follow-up after Initial Assessment			Need a way to distinguish the follow-up service from the initial assessment
Presence of “Person Centered Treatment Plans”			Need to have a chart audit to assess “person centered”

Quality Dashboard

Reporting Domain	Definition	Performance Parameters	Notes
Alcohol Screening Measure			
Depression Remission			
SDOH Screening			
Depression Follow-up			
Time to Service (Crisis, Initial, and Follow-up)			

Finance Dashboard

Reporting Domain	Definition	Performance Parameters	Notes
PPS Budget to Actual			This measures variance against expected
Cost of providing services			Need audit accurate method
Expected bonus payment			

Reminder: Data Management Is Key

Validation Category	Field / Element	Validation Rule	Logic Type	Owner
Qualifying Service	Service Code	Must map to one of the 9 required CCBHC services	Mapping table	Finance
Staff Qualification	Provider Type	Must meet service level credential requirements	Crosswalk (staff → service)	Quality
Minimum Service Threshold	Duration / Units	Meets minimum threshold (e.g., 15 min, or state-defined)	Business rule	Data
Same Day Rule	Multiple Encounters	Only one PPS encounter per day unless exception applies	De-duplication + hierarchy logic	Data
Mode of Delivery	Telehealth Indicator	Must meet telehealth policy requirements	Conditional validation	Clinical
Care Coordination Inclusion	Non-visit services	Included/excluded per PPS rules	Inclusion logic	Data

Resources

Links to SDOH Screening Tool and Technical Specifications:

- <https://sirenetwork.ucsf.edu/tools-resources/resources/north-carolina-medicaid-screening-tool>
- <https://www.samhsa.gov/communities/certified-community-behavioral-health-clinics/guidance-and-webinars/quality-measures-disclaimers>

Q+A