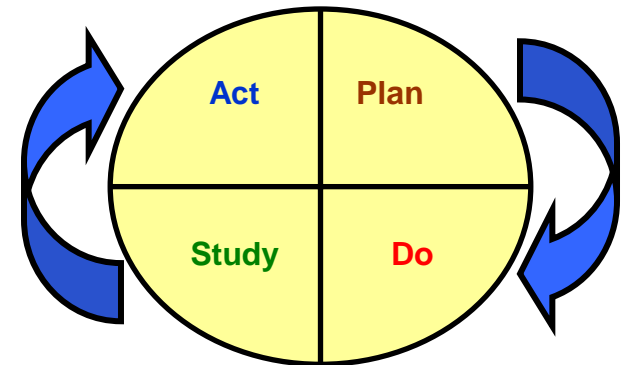


Appleton Health Department Excel Reports 2013 - 2014 Quality Improvement Project



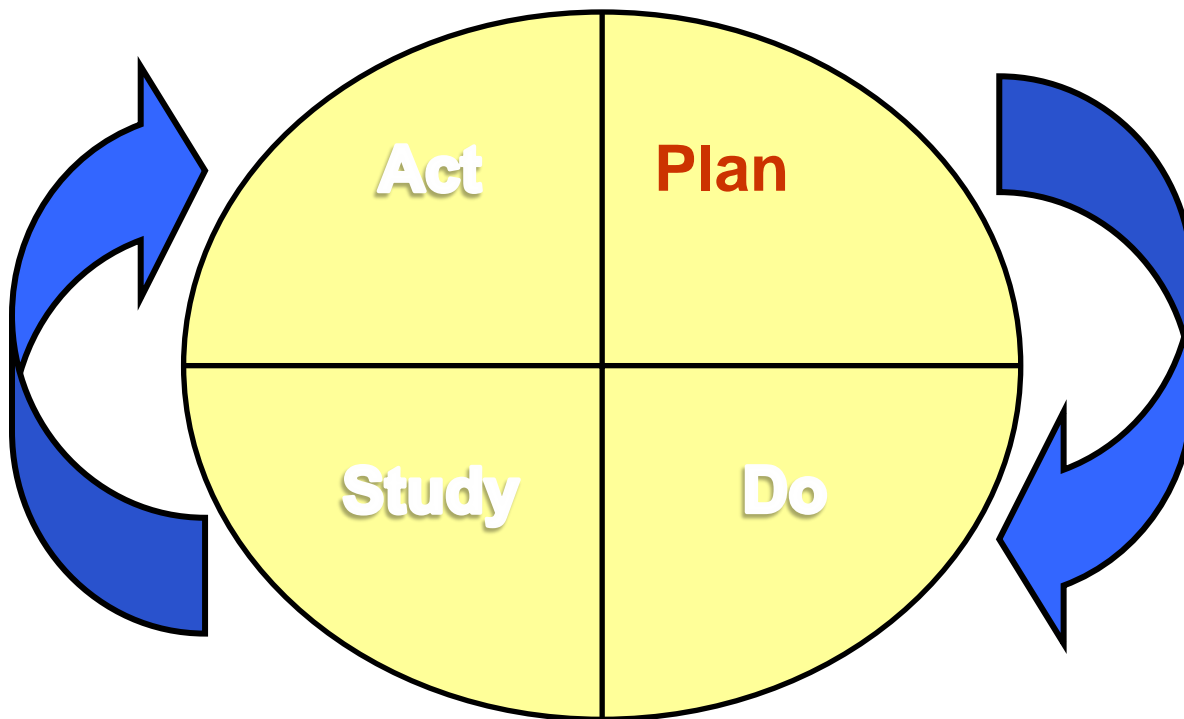
Excel



- Microsoft Excel gives businesses the tools they need to make the most of their data.
- Widely used by businesses, service agencies, volunteer groups, private sector organizations, scientists, students, educators, trainers, researchers, journalists, accountants and others.
- Excel can be used to bring information from various files and documents together, so that it exists in a single location

Source: Microsoft.com

Appleton Health Department Excel Reports 2013 - 2014 Quality Improvement Project



PLAN

Identify an Opportunity and Plan for Improvement



Getting Started

- **Problem:** The responsibilities of public health and the services our department provides to the community are diverse. Our department reporting of activities within reports is often duplicated among monthly and quarterly reports.
- **Plan:** To modify and enhance existing reporting documents. Find efficiencies in the current reporting format and identify ways of linking different reports (monthly, quarterly, annual) to avoid duplication.

PLAN

Identify an Opportunity and Plan for Improvement



Step One: Getting Started (continued)

- The team selected to work on this project consisted of representation from disciplines within the department: Nursing, Weights & Measures, Environmental and Administrative Staff.
- Approval for the project was granted by the Health Officer

PLAN

Identify an Opportunity and Plan for Improvement



Assemble the Team

Eric Maggio – City Sealer	Weights & Measures
Sonja Jensen – Nursing Supervisor	Nursing
Tim Mirkes – Environmental Supervisor	Environmental
Renee Kranja – Administrative Assistant	Administrative Staff

PLAN

Identify an Opportunity and Plan for Improvement



The team established the following AIM statement for the project (using SMART objectives):

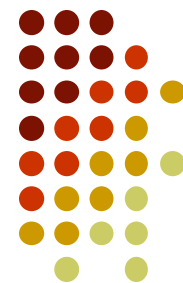
By January 31st, 2014, The Appleton Health Department's monthly and quarterly report will be updated and be ready for staff to enter data into it."

PLAN

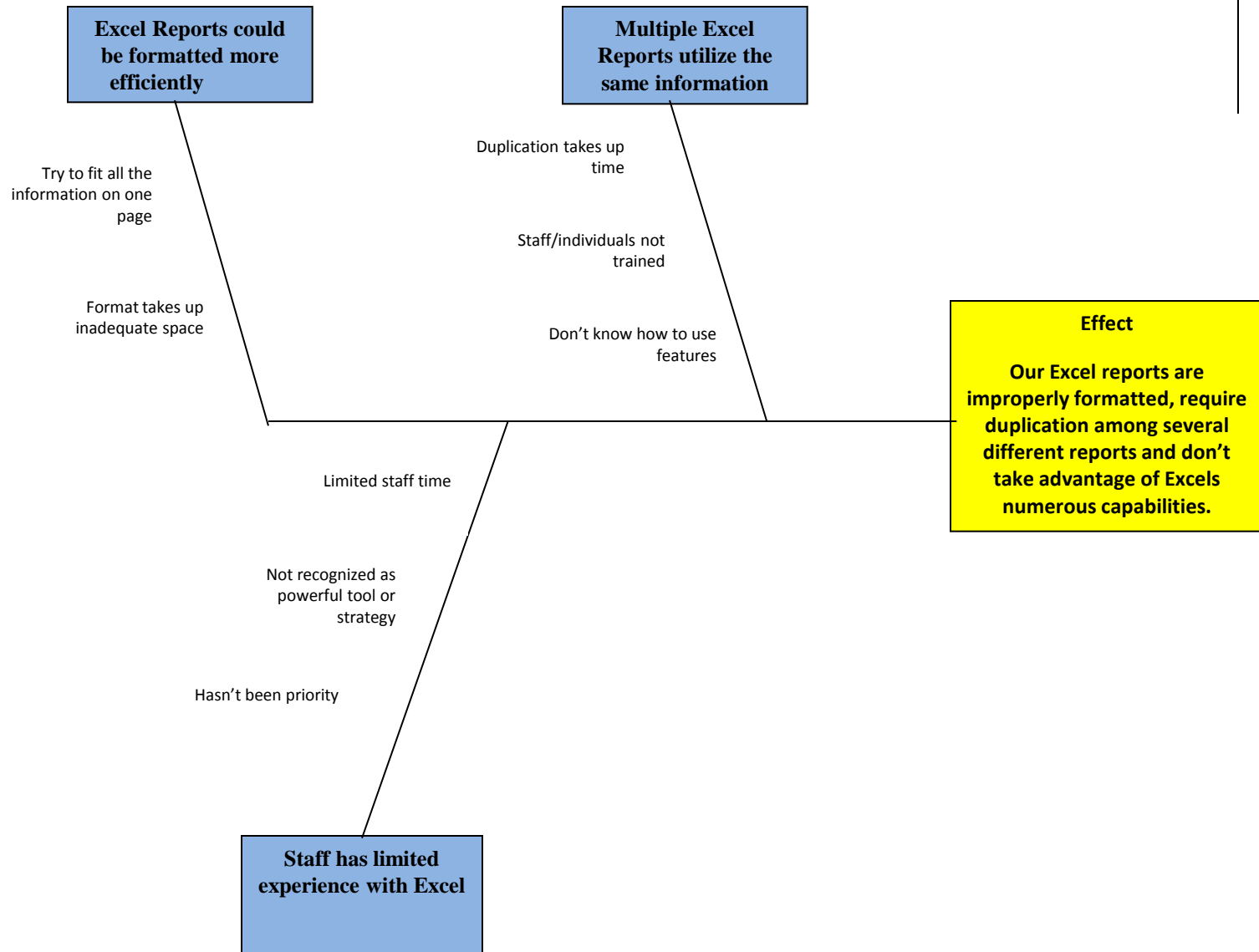
Identify an Opportunity and Plan for Improvement

Examine the Current Approach

- Currently, we enter data into the monthly, quarterly and annual reports. The reports contain data that is duplicated between the reports. Management from each department enters data into the report from many different data collection programs (WINWAM, WEDSS, RECIN, WIR, ISERIES, Etc...)
- The team used root cause analysis in the form of a “fishbone diagram” to identify new methods to improve the look and feel of our reports.



Fishbone Diagram



Developed a Work Plan



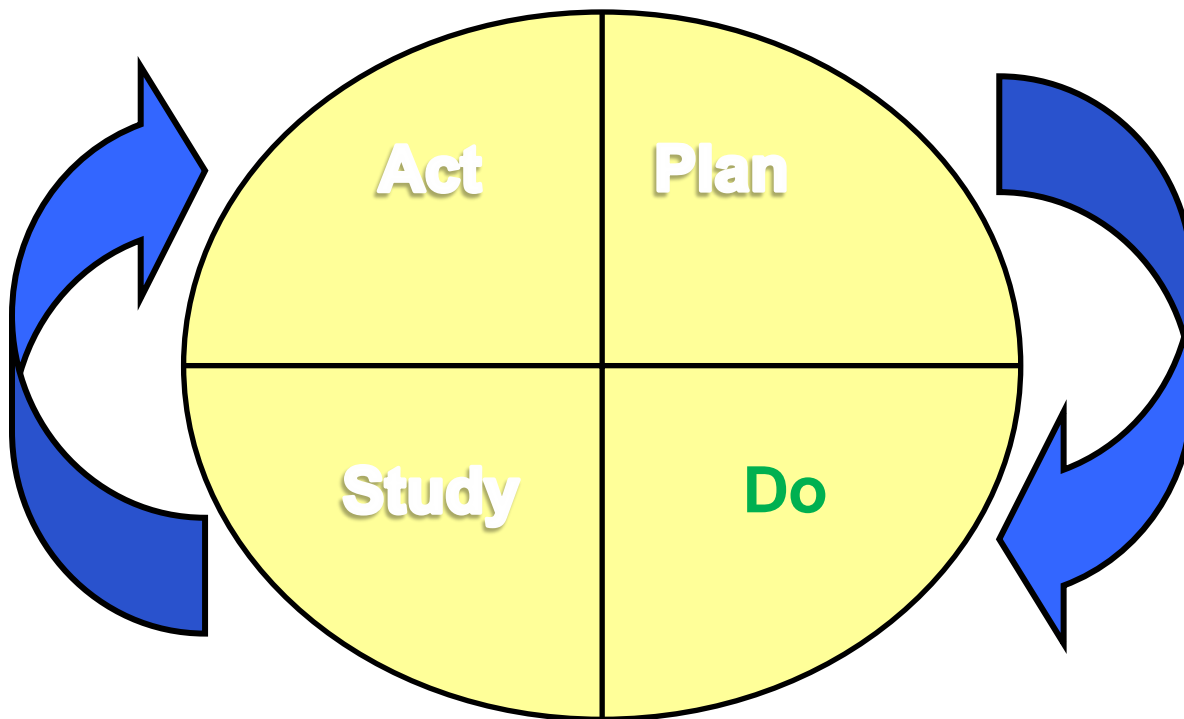
Problem	Reason	Recommendation	Primary Responsible Person(s)	Start Date	Completion Date
AHD Monthly/Quarterly/Annual Reports need an update	With recent advances in Microsoft Excel, AHD should be able to not have to duplicate information among the different reports we use and the reports should be formatted to fit today's many different technologies.	Complete overhaul of each worksheet that includes updated appearance, layout, reformatting, formula/function repairs, and additional worksheets that capture annual report information so that duplication is removed.	Eric Maggio Sonja Jensen Tim Mirkes Renee Kranja	10/1/2013	1/31/2014

To do's for Department Staff



- Identify duplications between reports
- Review old reports for formula errors
- Explore solutions for improvement
- Explore inclusion with community by making the report accessible and interactive

Appleton Health Department Excel Reports 2013 - 2014 Quality Improvement Project



DO

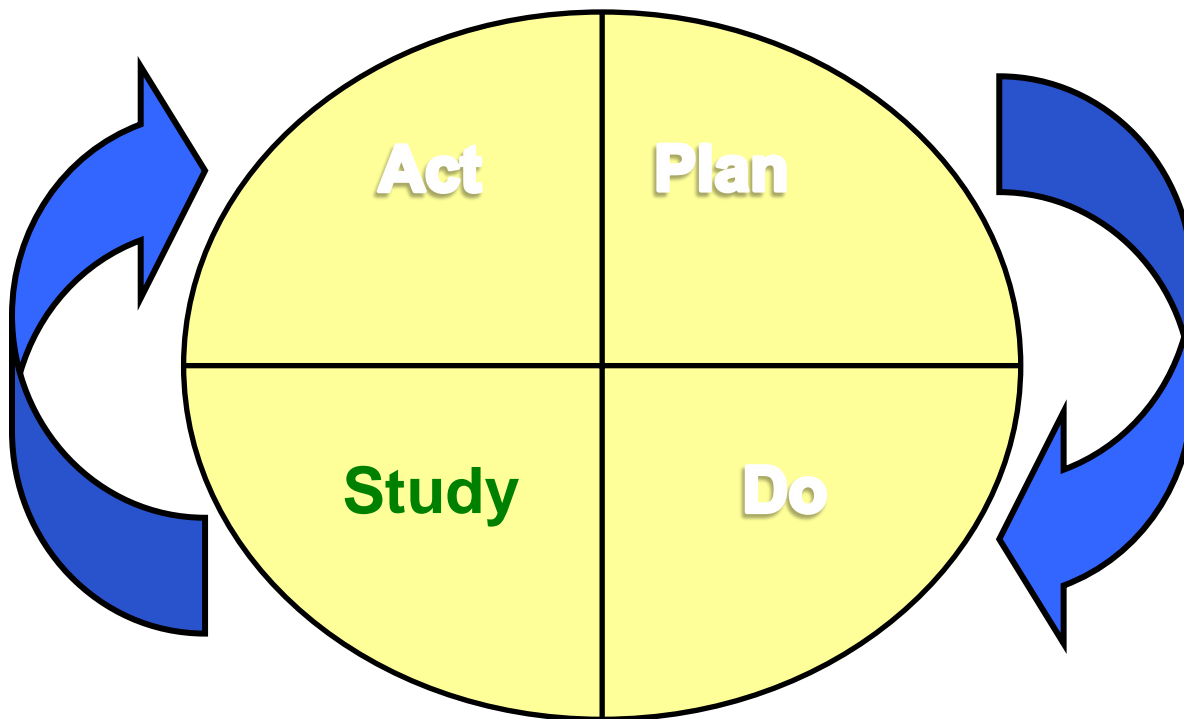
Test the Theory for Improvement



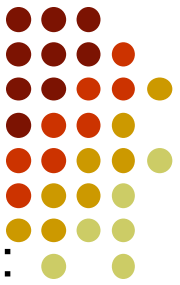
Our initial steps that we implemented in our project included items identified in our Work Plan:

- Reached out to sub-department management about items that are duplicated between the reports.
- Spoke with administrative staff about formatting and how we share the report with the community, City Council, Board of Health, other city departments and State of Wisconsin.

Appleton Health Department Excel Reports 2013 - 2014 Quality Improvement Project



Study



The team had established the following AIM statement for the project:

“By January 31st, 2014, The Appleton Health Department’s monthly and quarterly report will be updated and be ready for staff to enter data into it.”

Result:

Appleton Health Department staff updated the format of all existing reports, introduced new functions for data gathering, added hyperlinks so that the public could better understand the data that was gathered. In addition we included notes on how to gather data as cross trained activity.

STUDY

Use Data to Study Results of the Test



Study the Results

- Results at the end of our implementation phase (January 31, 2014) indicated all targets were met.
- During the testing phase we were able to determine some of the formulas were inconsistent on the older excel report so they had to be entered again. Hyperlinks were added to the infectious disease portion of the report that links to the CDC website.
- As technology improves and we become increasingly reliant in the workplace we must continue to review new reporting methods and update our reports accordingly.

STUDY

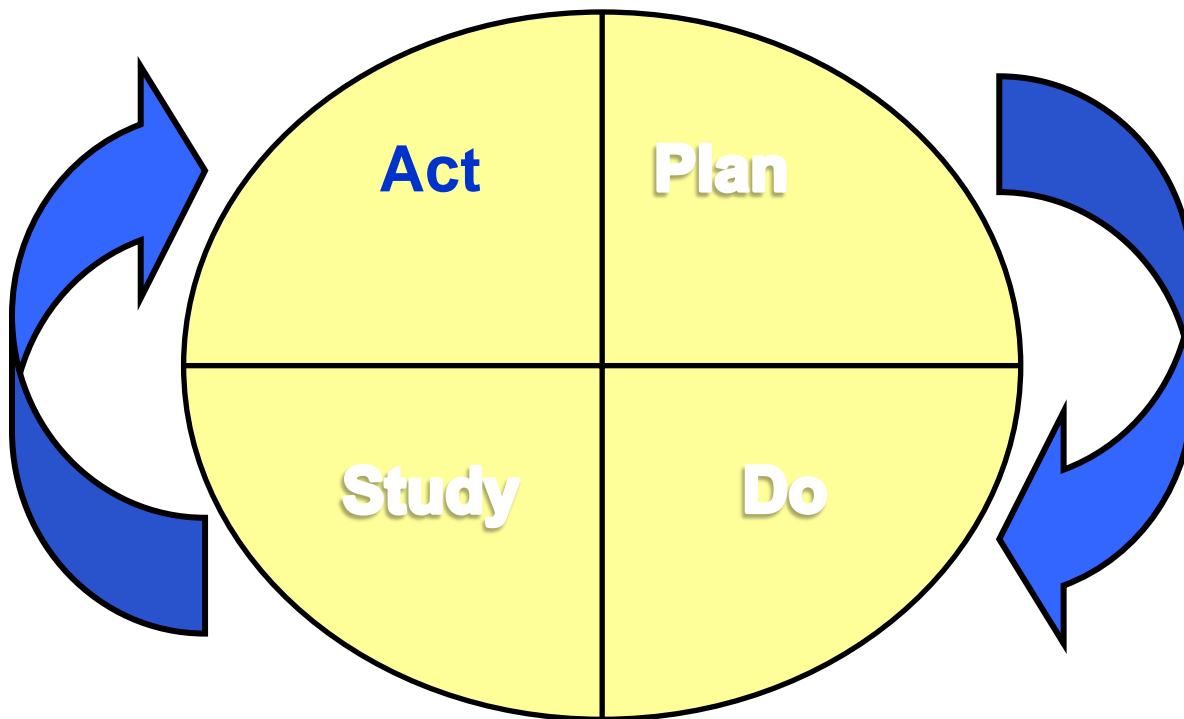
Use Data to Study Results of the Test



Unanticipated positive outcomes

- While updating the aesthetics of the reports we decided to change from a landscape to a portrait view. This let us better utilize the paper that was used in printing as well as viewing electronically.

Appleton Health Department Excel Reports 2013 - 2014 Quality Improvement Project



ACT

Standardize the Improvement and Establish
Future Plans



Standardize the Improvement or Develop New Theory

- Maintain long term approaches by periodically reviewing data collection methods and utilizing developing excel options.
- Continue quality improvement discussions with staff during monthly meetings.
- Seek feedback from public who views reports on line.

ACT

Standardize the Improvement and Establish
Future Plans



Establish Future Plans

- Excel Quality Improvement Project Team will continue to meet to track progress and discuss other possible strategies.
- Items identified for future implementation focus on exploring Microsoft Publisher.



Lessons Learned

- **What did you learn from your QI project?**

Excel Reports can be a great tool to gather and share data.

- **Are there things you would do differently?**

Start with the QI process during the Spring/Summer months so we could test different styles during the last two quarters of the year.

- **Did you improve the organizational capacity in your local health department?**

We improved the look and feel of the reports and included improvements that will raise awareness of our programs and services.

- **How and when will you apply your knowledge of QI to other problems or other opportunities in your local health department?**

In 2014, we will continue our successful QI process by addressing the annual report improvement and other opportunities.