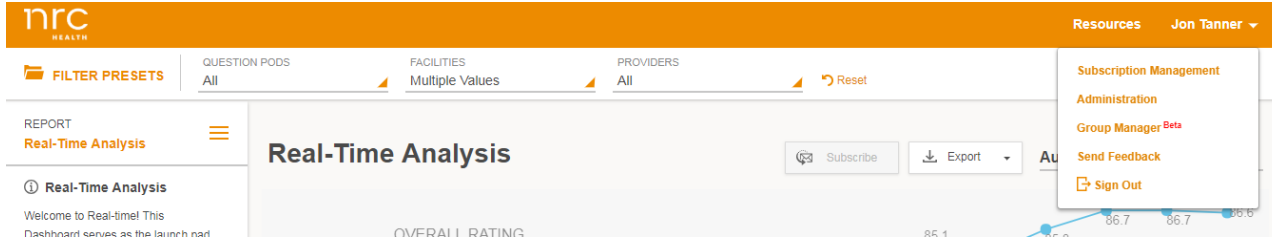


# List of Updates for September 28

Bucket	Enhancement(s)	Slide #
<b>Retiring “Old Portal”</b>	<ul style="list-style-type: none"> <li>• Subscription Management</li> <li>• Administration Tools               <ul style="list-style-type: none"> <li>• User Management</li> <li>• Provider Management</li> <li>• Organizational Targets</li> <li>• Scorecard Configuration</li> </ul> </li> </ul>	<b>3</b>
<b>Analyst Corner Extract</b>	<ul style="list-style-type: none"> <li>• Email Delivery</li> <li>• Additional Filters</li> </ul>	<b>4</b>
<b>Personalized Outreach</b> <small>Oct 3rd</small>	<ul style="list-style-type: none"> <li>• Collect feedback from patients and families via the mode that they prefer</li> </ul>	<b>5</b>
<b>Analyst Corner Reports</b>	<ul style="list-style-type: none"> <li>• Benchmark Summary</li> <li>• Provider and Location Percentile</li> <li>• Composite Reporting</li> <li>• Control Chart</li> </ul>	<b>7-10</b>
<b>Magnet Report</b> <small>Beta</small>	<ul style="list-style-type: none"> <li>• Beta visualization for Magnet Submission. Still pending review by ANCC and subject to further changes from ANCC and beta user feedback.</li> </ul>	<b>12</b>
<b>Outreach Monitor</b> <small>Beta</small>	<ul style="list-style-type: none"> <li>• Beta report to track what happens to the patient/family records you send us?</li> </ul>	<b>13-14</b>
<b>Other Enhancements and Bug Fixes</b>	<ul style="list-style-type: none"> <li>• Fix of Key Metric Summary Export Format</li> <li>• Fix of Participation Report Export Format</li> <li>• Fix of Search Filter Persisting on Feedback Report</li> <li>• Add back N-size on Landing Page Hover Over</li> <li>• Warning Message For Unsaved Group Assignments</li> <li>• Performance Stabilization</li> <li>• Additional Provider Coaching Tips Improvement Videos</li> <li>• Expansion of Key Metrics Questions Available</li> <li>• Include Provider’s Name in Provider Scorecard Subject Line</li> </ul>	<b>16</b>



# Retiring Old Portal



Feature	What's New?
<b>Subscription Manager</b>	No feature or capability changes. Just a slightly different layout and design.
<b>User Administration</b>	Similar layout with a handful of new capabilities making it easier to setup and manage users. <ol style="list-style-type: none"> <li>1. Bulk User Actions. Send invites, and delete users in bulk.</li> <li>2. Automatic Invite Emails. By default users are now sent an invite email when added by a user.</li> <li>3. New User Status. ID users who have been created, but have not yet signed in. Or Users that have been deactivated.</li> </ol>
<b>Providers Administration</b>	No major feature or capability changes. Please note that Org Group 1 and Org Group 2 tags are now handled through the Group Manager capability. Org Groups created have been copied for you to the group manager.
<b>Organizational Targets</b>	No feature or capability changes. Just a slightly different layout and design.
<b>Configure Scorecard</b>	No feature or capability changes. Just a slightly different layout and design.

# Analyst Corner Extracts

1. Top line filters are the same as available on all other reports. These filters can be saved as filter presets. The filter settings will persist when set on other reports within the portal.

2. Users are now emailed a link to the extract. The email will come from

[DoNotReply@NRCHealth.com](mailto:DoNotReply@NRCHealth.com)

3. Subject Line is “Your Real-time CSV Export is Ready”

4. The export is usually available within a few minutes. Especially large files, during peak hours may take up to 30 minutes to generate.

5. The export link is available for seven days after being generated.

The Analyst Corner Extracts have been updated to be more user friendly.

1. A faster and easier email delivery mechanism allows you to work as we generate the extract
2. Topline filters allow you to generate smaller data sets without manipulating the large excel file

**Extracts**

You will be emailed a link to download a CSV. At peak times this may take a few hours.

Aug 01, 2018 - Aug 31, 2018

Extract Name	Filter by Date	
Surveyed Encounters	Visit Date	X
Responses	Response Date	X

Reply Reply All Forward

jtanner@nrchealth.com on behalf of DoNotReply@NRCHealth.com Jon Tanner 10:31 AM

Your Real-time CSV Export is Ready

Your CSV export is ready. Click [here](#) to download file.

Please note that the link will expire within 7 days.

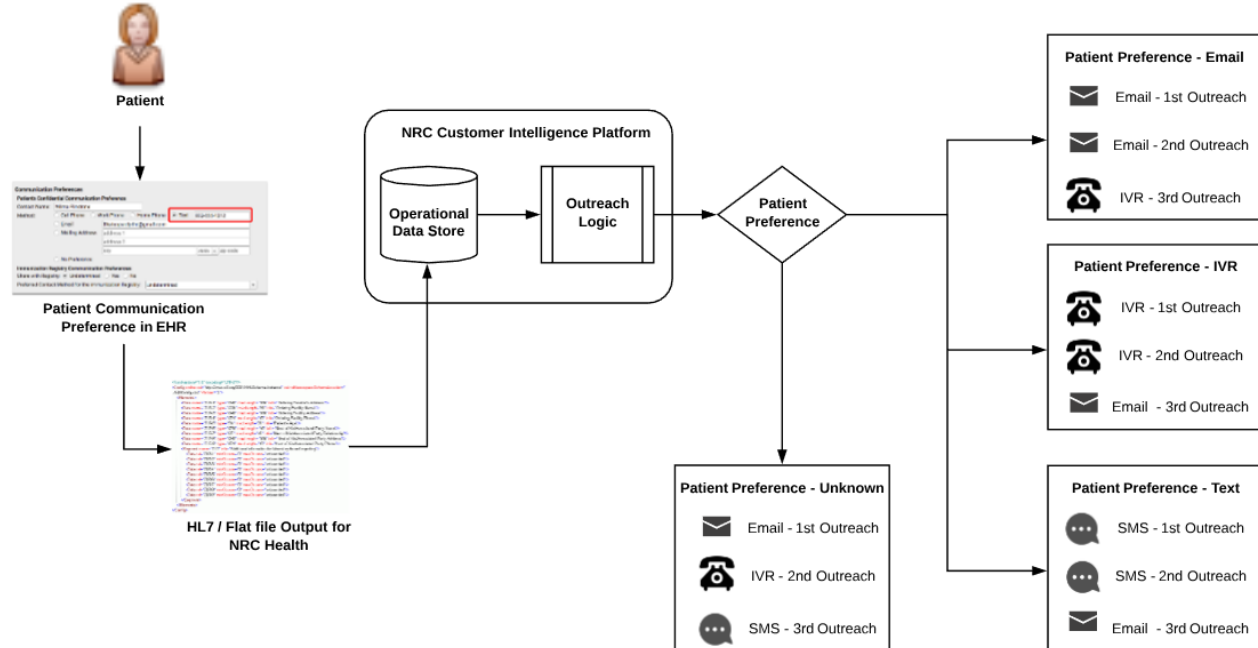
IMPORTANT NOTICE: This e-mail message and all attachments, if any, may contain confidential and privileged material and are intended only for the person or entity to which the message is addressed. If you are not an intended recipient, you are hereby notified that any use, dissemination, distribution, disclosure, or copying of this information is unauthorized and strictly prohibited. If you have received this communication in error, please contact the sender immediately by reply e-mail, and destroy all copies of the original message.

# Personalized Outreach — available starting October 3

- Gather patient's preferred mode of outreach via patient record
- Preference will be used to determine first two outreach attempts
- Patients without established preference will use preconfigured schedule
- **Please contact your Project Specialist if you would like to learn more about and implement this feature.**

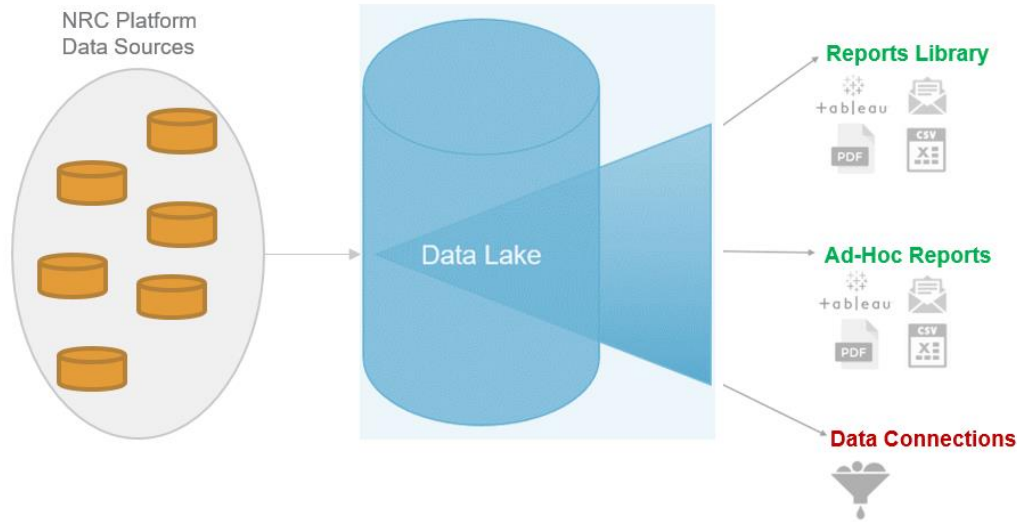
## Reach out to patients with their preferred mode of communication

### Personalized Outreach (draft vision)





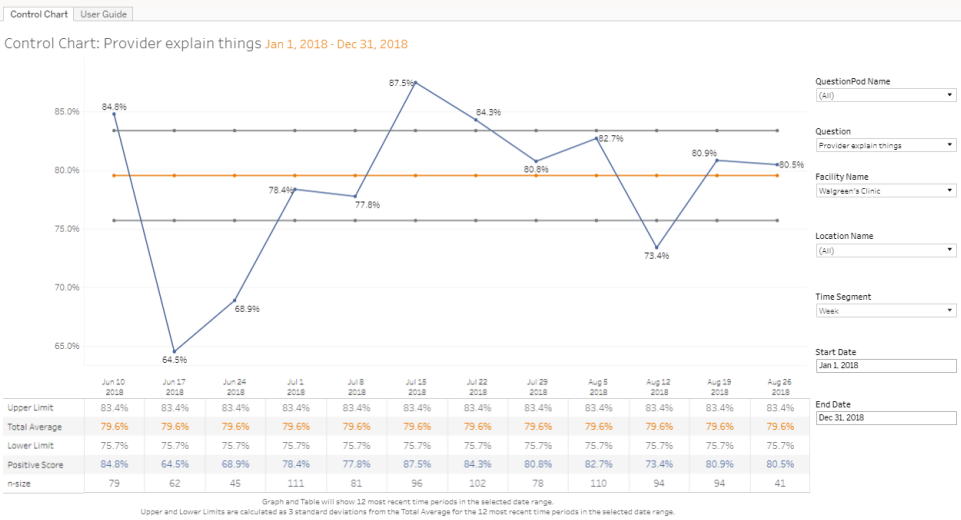
# NRC Health – Analyst Corner



- To further meet the needs of a growing NRC Health analyst user persona, we have built out an internal data lake that integrates disparate platform data sets into a single source of truth.
- This data lake will allow NRC Health to provide our customers data insights in three different ways:
  1. Reports Library: Going live on October 1st with the phase one rollout of a standard library of reports (Control Chart, Benchmark Summary, Location & Provider Percentiles 1-100, and a Custom Composite dashboard).
  2. Ad-Hoc Reports: Ability to deliver custom designed dashboards for unique use cases.
  1. Data Connection: Not a capability today. Building towards allowing customers access to their data to allow for easier integration of NRC collected data into other systems and data sets.

# NRC Health - Control Chart

## Control Chart



- Dashboard showing both a trend chart view and data table for a single selected question. The chart shows the associated upper control bound, lower control bound, and an average line (Control bounds using 3 standard deviations). This dashboard allows users to see how a question has performed over time and instances when it has trended above or below the upper/lower control bounds.
- Users have the ability to filter to specific question pods, facilities, locations, time segments (Week, Month, Quarter, Year), and questions.
- Users have ability to export PDF, Image, or CSV (Raw Data).
- A user guide is included to further explain what a control chart is, why it's useful in analyzing metrics, when controls charts reveal data patterns, and how users can use these results.
- The trend view will show the last 12 trended periods for the selected time segment, if they exist.



# NRC Health - Benchmark Summary

## NRC - Benchmark Summary

### NRC Health - Benchmark Summary - NRC Average

	Confidence/trust in provider (1423)	Confidence/trust in deep tech (1436)	Confidence/trust in therapists (1427)	Confidence/trust staff (1419)	Net Promoter Would Recommend (1017)	Provider explains things (189)	Provider explains-if not better (1424)	Provider listen (188)	Provider respect (1410)	Rating of provider (138)
NRC Selected Benchmark	72.2%	77.4%	81.8%	71.9%	80.2%	68.6%	61.8%	73.8%	71.3%	84.1%
NRC Total n-size	1,273,223	1,276	39,790	425,848	1,990,879	1,250,304	434,430	1,857,564	363,406	3,565,886
NRC Number of Locations	3,247	5	307	1,044	6,318	2,949	598	4,921	1,272	7,798
NRC Number of Providers	19,085	443	5,075	25,617	46,827	18,591	7,156	24,772	5,519	30,781

↓ Export

Choose Benchmark  
NRC Average

Question Pod Name  
(All)

Search By  
Question-Friendly Text

Question Friendly Text  
(Multiple select)

Benchmark Date  
Q2 2018

Location Type  
All

Service Line  
(cannot be used with Classification/Specialty filter)  
All

Classification  
(cannot be used with Service Line filter)  
All

Specialty  
(cannot be used with Service Line filter)  
All

Score Type  
Positive

- The Benchmark Summary dashboard displays customer fielding questions along with the associated selected NRC Benchmark, NRC total question n-size, NRC total number of locations question is fielding at, and NRC total number of providers question is being fielded for.
- Users have the ability to filter to specific question pods, questions, desired NRC benchmark, benchmark date, location types, service lines, provider classifications, provider specialties, and score type.
  - \*Note that service line filter cannot be used in combination with provider classification or specialty filter. Similarly, provider classification and specialty filters cannot be used with the service line filter.*
- Users have ability to export PDF, Image, or CSV (Raw Data).

# NRC Health - Location & Provider Percentiles 1-100

NRC Health - Location Percentiles 1-100

Percentile	Care provider explain-if not better (1059)	Care providers explain things (1056)	Check-in process easy (1108)	Communication about wait time (1422)	Confidence/trust in provider (1423)	Confidence/trust in therapists (1427)
1	28.4%	31.4%	19.4%	33.6%	34.1%	44.8%
2	32.6%	36.7%	19.4%	33.6%	38.1%	47.5%
3	34.5%	39.6%	19.4%	33.6%	42.2%	48.6%
4	35.7%	42.7%	19.4%	37.5%	45.2%	54.3%
5	36.6%	43.7%	28.1%	37.5%	46.8%	58.3%
6	38.8%	44.7%	28.1%	40.8%	48.6%	63.6%
7	39.4%	46.1%	35.6%	40.8%	50.0%	64.9%
8	40.0%	47.1%	35.6%	42.1%	52.0%	65.2%
9	41.5%	48.6%	35.6%	42.1%	53.7%	68.6%
10	42.2%	50.4%	36.6%	42.9%	54.7%	68.9%
11	43.2%	51.6%	36.6%	42.9%	55.8%	69.7%
12	43.5%	53.0%	38.8%	45.2%	57.1%	70.3%
13	44.4%	55.0%	38.8%	45.2%	58.2%	70.6%
14	45.9%	56.1%	40.0%	46.7%	59.0%	71.1%
15	46.3%	57.1%	40.0%	46.7%	59.9%	71.9%

\*NRC Health business rules require at least 30 providers/locations with a minimum of 30 responses each in order for percentiles to be calculated. Only questions with a NRC Health percentile are shown.

QuestionPod Name  
(All)

Search By  
Question Friendly Text

Question Friendly Text  
(All)

Benchmark Date  
Q2 2018

Location Type  
All

Service Line  
All

Score Type  
Positive

- The Location & Provider Percentiles dashboards represent two dashboards showing customer fielding questions (that have a generated NRC percentile) along with the associated location or provider percentile scores 1-100.

*\*Note that NRC Health business rules require at least 30 providers/locations with a minimum of 30 responses each in order for percentiles to be calculated.*
- Users have the ability to filter to specific question pods, questions, benchmark date, location types, service lines, and score type.
- Users have ability to export PDF, Image, or CSV (Raw Data).

# NRC Health - Custom Composite Dashboard

## Score Summary with Custom Composite

Aggregation Level: Location | Discharge Date (Start): 7/20/2018 | Discharge Date (End): 8/20/2018 | Facility Group: (All) | Facility: (All)

Location Group: (All) | Location: (All) | Provider: (All) | CMS Specialty: (All) | CMS Classification: (All) | Org Group 1: (All) | Org Group 2: (All)

### 1. Choose Question Pod

Question Pod: (All)

### 2. Choose Questions to include in Composite

- Question Friendly/Text
- Nurses courteous and respectful
  - Open/Waiting else re: experience
  - Provider explain things
  - Provider explain-if not better
  - Provider listen
  - Provider respect
  - Provider spent enough time with pa...
  - Rating of provider
  - Reason for score
  - Rehab front office courtesy
  - Schedule appointment timely
  - Seen in timely manner
  - Sleep Lab cleanliness
  - Sleep tech explained things
  - Sleep tech listened carefully

This report provides a detailed breakdown of the score & n-size by Questions. The Custom Composite Score represents the combined score for all the selected questions for the given date range.

Name	Custom Composite Score*	Provider explain things	Provider listen	Provider respect
<b>Grand Total</b>	83.0% (n-size: 2,118)	80.5% (n-size: 426)	84.5% (n-size: 2,118)	81.3% (n-size: 421)
Boardwalk Joy Schools Health and Wellness Center	96.0% (n-size: 25)		96.0% (n-size: 25)	
Downtown Joy Schools Health and Wellness Center	95.8% (n-size: 24)		95.8% (n-size: 24)	
East Joy Schools Health and Wellness Center	100.0% (n-size: 14)		100.0% (n-size: 14)	
Joy Clinic at Walgreens 10th	57.2% (n-size: 33)	57.6% (n-size: 33)	51.5% (n-size: 33)	62.5% (n-size: 32)
Joy Clinic at Walgreens 26th	69.7% (n-size: 22)	68.2% (n-size: 22)	68.2% (n-size: 22)	72.7% (n-size: 22)
Joy Clinic at Walgreens 62nd	83.5% (n-size: 61)	83.6% (n-size: 61)	80.2% (n-size: 61)	86.7% (n-size: 60)
Joy Clinic at Walgreens Absolute Drive	90.6% (n-size: 32)	90.6% (n-size: 32)	90.6% (n-size: 32)	90.6% (n-size: 32)
Joy Clinic at Walgreens Apples	72.6% (n-size: 39)	71.8% (n-size: 39)	71.8% (n-size: 39)	74.4% (n-size: 39)
Joy Clinic at Walgreens F Road	82.5% (n-size: 19)	89.5% (n-size: 19)	73.7% (n-size: 19)	84.2% (n-size: 19)
Joy Clinic at Walgreens Grapes	94.8% (n-size: 32)	96.9% (n-size: 32)	96.9% (n-size: 32)	90.6% (n-size: 32)

- The Custom Composite dashboard allows users the flexibility and configurability to select any combination of fielding questions, creating a custom composite average score. The table shows individual selected questions with score & n-size along with the custom composite score column with score & n-size.

Combinations of questions is not limited, for example, users wanting to create provider communication composite scores have the ability to do so.

\*Note this dashboard populates empty until a users selects questions to display.

- Users have the ability to filter to specific aggregation levels (location, facility, provider, question pod), desired time period range, question pods, questions, facilities, locations, classification, specialty, and org groups.
- Users have ability to export PDF, Image, or CSV (Raw Data).



# Magnet Report Beta

1. While in Beta the Magnet Report is available to Admin Users only, so we can gather feedback from power users.
2. While in Beta the report has not yet been reviewed by ANCC and is subject to change based on their feedback and review
3. Export all categories/questions/and locations by using Export PDF (All)
4. Drill to trend report by clicking on score boxes for a particular question and location.
5. Green box represents the score is higher than the selected benchmark
6. Select from NRC Health benchmarks by service line, location type (CHCA or Vizient Academic), classification, and sub-specialty.
7. The report defaults to last 12 months. Larger time frames can be selected using custom time period.
8. Report is limited to most recent 8 quarters of data.
9. Only a small number of Magnet aligned questions have been added to the report. We will be adding more questions in the coming weeks. If your report is blank you may not be utilizing these questions.

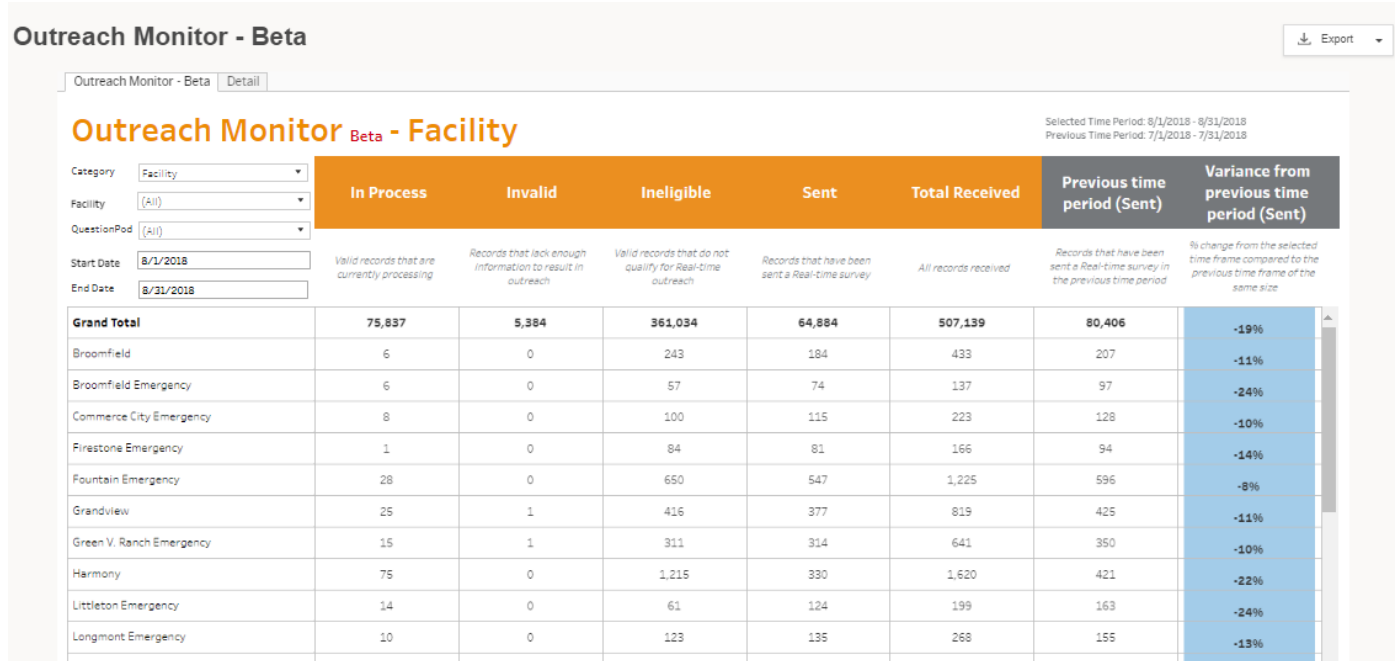
We are introducing a Magnet Report as a Beta. We fully anticipate this report will not fully solve the reporting needs for Magnet Designation. However, we wanted to introduce to power users to get feedback before circling back to create a more complete version.

REPORT SETTINGS <span>Reset</span>		QUESTION PODS		FACILITIES		PROVIDERS		
<b>FILTER PRESETS</b> CATEGORY: All QUESTION: Multiple Values BENCHMARK: NRC Average SERVICE LINE: All LOCATION FILTER: All CLASSIFICATION: All SUB-SPECIALTY: All Magnet		All	Multiple Values	All	Reset			
Category	Question	Location	2018 Q1	2018 Q2	2018 Q3	2018 Q4	2018 Q5	
Careful Listening	Nurses listened carefully	16th Street Urgent Care		75.7 n=307,855	81.8 n=11	74.6 n=498,854	75.0 n=4	
		Delafield Urgent Care	77.2 n=148,388	100.0 n=1	75.7 n=307,855	88.9 n=83	74.6 n=498,854	100.0 n=21
		Mayfair Urgent Care		75.7 n=307,855	87.3 n=55	74.6 n=498,854	90.0 n=30	
		Mequon Urgent Care	77.2 n=148,388	100.0 n=1	75.7 n=307,855	88.6 n=79	74.6 n=498,854	88.2 n=34
		New Berlin Urgent Care	77.2 n=148,388	100.0 n=1	75.7 n=307,855	84.3 n=108	74.6 n=498,854	94.9 n=59
Courtesy and Respect	Nurses courtesies/respect	16th Street Urgent Care		79.1 n=883,094	54.5 n=11	79.3 n=1,285,291	75.0 n=4	
		Delafield Urgent Care	79.7 n=443,362	100.0 n=1	79.1 n=883,094	96.8 n=83	79.3 n=1,285,291	95.2 n=21
		Mayfair Urgent Care		79.1 n=883,094	90.9 n=55	79.3 n=1,285,291	96.7 n=30	
		Mequon Urgent Care	79.7 n=443,362	100.0 n=1	79.1 n=883,094	94.9 n=79	79.3 n=1,285,291	91.2 n=34
		New Berlin Urgent Care	79.7 n=443,362	100.0 n=1	79.1 n=883,094	91.7 n=108	79.3 n=1,285,291	96.6 n=59
Pain	Staff eased discomfort	Oak Creek Urgent Care	79.7 n=443,362	0.0 n=1	79.1 n=883,094	97.1 n=35	79.3 n=1,285,291	100.0 n=20
		16th Street Urgent Care		70.1 n=175,112	66.7 n=9	69.3 n=324,284	66.7 n=3	

# Outreach Monitor - Overview

1. Currently available to a small handful of beta customers.
2. Data pulled is based on the date that NRC Health received data from your organization.
3. Data can be organized by Facility, Location, or Provider
4. Additional question pod, and time period filters can be applied.
5. Seen next slide for detailed explanation of chart elements.

Use the Outreach Monitor to understand what information you sent to NRC Health and to monitor how much of your data resulted in outreach across your providers, locations, and facilities



# Outreach Monitor – Data Elements

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## How to interpret the 'Records Received' columns

- **In Process:** valid records that were actively processing at the time of the nightly refresh
- **Invalid:** records that lack enough information to result in outreach (e.g., invalid location ID, or missing required data such as contact information)
- **Ineligible:** valid records that do not qualify for Real-time outreach (e.g., depending on your survey configuration, if a person had two visits with a week, they will likely receive a survey for the first visit, but the second record would be ineligible)
- **Sent:** records that have been sent a Real-time survey
- **Total Received:** all records NRC Health received from your organization during the selected time frame

## How to interpret the 'Variance' and 'Previous time period' columns

Here you'll see the variance between the count of people (records) who were sent a survey during the selected time period compared against the count of people that were sent a survey during the previous time period. (Note: The 'previous time period' is the exact number of days occurring in the 'selected time frame' but occurring immediately prior to the time period you selected.) The calculation used is a "percent change". Where  $a$  = the number of surveys sent this week, and  $b$  = the number of surveys sent last week:  $(a - b)/b =$  the percent change from this week to last week.

## Using the Detail tab to understand more

Selecting the Detail tab presents you with two pie charts – one showing a more granular view of the Invalid counts for the units you have selected, and the other showing Ineligible counts. Hovering over the labels on each slice of the pie will yield a description of the status. Use these charts to understand why these records are not resulting in outreach.





# Other Enhancements and Bug Fixes

Enhancement / Fix	Description
<b>New Practicing Excellent Videos for Provider Scorecards</b>	New provider improvement videos have been added to the provider scorecard rotation, and are also available on the Coaching Tips page.
<b>Provider's Name in Provider Scorecard Subject Line</b>	For provider coaches who receive multiple provider scorecards the subject line now clearly identifies who the scorecard belongs to
<b>Expansion of "key metric" options to include 4pt and 5pt would recommend questions.</b>	4pt scale Excellent, good, fair, poor can be used as a key metric  5pt scale Poor (1), Average (2), Good (3), Very Good (4), Excellent (5) can be used as a key metric
<b>Fix of Participation Report Formatting</b>	Participation Report PDF Extract would occasionally have ##### instead of the participation rate - this has been corrected.
<b>Add back N-size on Landing Page Hover Over</b>	N-size available in tool tip.
<b>Warning Message For Unsaved Group Assignments</b>	Warning message added.

The screenshot displays the NRC Coaching Tips interface. At the top, there's a header with the NRC logo and the text "COACHING TIPS". Below this is a video player showing a man speaking. To the right of the video is a sidebar with the following content:

- Watch Coaching Tips**  
Apply these techniques today
- Building Patient Confidence Tip
- Learn More**  
Revisit Coaching Tips videos
- What worries you the most? Tip
- Guess what I'm thinking? Tip
- I've Been Thinking About You Tip
- Listening Made Easy Tip
- Empathy. What matters most to patients. Tip
- Shared Decisions. A Starting Point Tip

Below the video player, there's a section titled "Building Patient Confidence Tip" with a small text block: "Patient confidence may be the most important feeling in forming an opinion about their provider. But, it's more than clinical ability. In the 'Building Patient Confidence Tip' learn how to position yourself well, your colleagues well, and reference previous work up to build patient confidence and reduce anxiety."

In the center, there's a line graph with two data points: 86.6 and 85.3. A tooltip box is positioned over the 85.3 point, displaying:

OVERALL RATING: 85.3  
n-size: 551

At the bottom, there's a warning message box with the following text:

stageportal.nationalresearch.com says  
WARNING: You have unsaved changes.  
Press "Cancel" to go back and save changes. Press "Okay" to continue without saving current changes.

The warning box contains two buttons: "OK" (highlighted in blue) and "Cancel".