

At-A-Glance: Manage Performance Improvement Projects

Step 1 Login to My HR

Step 2 Access UBT Tracker

Go to the **My HR** Link

1. Click Sign-On
2. Enter NUID and Password
3. Verify Login to My HR
4. Click **Workspace** Tab
5. Click **Team Tools** Link
6. Verify UBT Tracker is displayed

Note: UBT Tracker is designed for **Internet Explorer 6 (IE 6)**

If you are using **IE 7**, upgrade to **IE 8** and run in **Compatibility Mode**

California - Northern [change] | New user? | Sign on

1 My HR

Please sign on:

National User ID (NUID)

Look up your NUID

First time user? [Activate your account now](#)
 Returning users, [Manage your account](#)

Password

Forgot your password?

Questions? Please see self-service [user guide](#).
[What is Web Single Sign-on?](#)

[Privacy practices](#)

2

3 Welcome Chevon | California - Northern [change] | [Manage your account](#) | [Sign off](#)

My HR

Home | KP & Me | **Workspace** | **4** About

Manager Tools

HR Pro Tools

5 Team Tools

UBT Tracker

Select a UBT

My Teams **6**

Search Projects

Feedback

Add a Performance Improvement Project

Home | KP & Me | **Workspace** | About HR | PF_MenuTesting | [Bookmark this page](#)

Manager Tools
 HR Pro Tools
 Team Tools
 UBT Tracker
 Select a UBT
My Teams
 Search Projects
 Feedback

My Teams
 Click **My Teams**
 Click the Name of the Team
 Scroll down to the Project Details tab
 Click Add New Project

9 Teams found

ID	Name of UBT	Team Rating	GL String	Entity	Area	Location
1552	Allergy		06-014-5800	06	Greater Southern Alameda	HAYWARD
1606	Dermatology					

Project Details | Test Of Change Details | Test Data

1 - 3 * Performance Improvement Project

* Start Date Completed Date

4 * Focus Area Value Compass [Select Focus Area to view Value Compass](#) Status Active

5 Our SMART Goal
TIP: Include Specific Target and Deadline
Example: We will improve [measure] to 87% by Q4-10
 1024 characters left

3 + 5 * Performance Metric [Select the Focus Area to get list of Performance Metrics](#) * Data Source for Metric [Select the Performance Metric to get list of Data Source](#)

3 PSP Goal? **TIP: If metric is Other, describe metric**
Example: Coding Turn Around Time

3 * Results

3 Describe Results
TIP: Enter Date and Value of Metric. Enter the baseline for a brand new project
Example: 1/15/10 [measure] = 76.3% (baseline)
 1024 characters left

13 * Using RIM / PDSA?

11 Learnings or Successful Practices
TIP: Enter the Date for each update. Identify a procedure/tool that has given the best results or helped overcome an obstacle.
Example: 2/25/10 Leaving a card in the patient room with the name of the housekeeper and a check marked list of what was cleaned has helped inform the patient. Previously, if the patient was not there or awake, they assumed we had not cleaned.
 1024 characters left

Fields of the NEW blank Project:

1. Enter Name of Project
2. Click Start Date field and Select the date
3. Do NOT enter a Completed Date
4. Select the Focus Area from dropdown
5. Enter your SMART Goal
6. Select the Performance Metric
7. Select the Data Source for Metric
8. Select the Results from dropdown
9. Enter information in Describe Results
10. Select Using RIM/PDSA Yes/No answer
11. Enter Learning or Successful Practices

Leave Chart Labels blank
 Click Save

At-A-Glance: Manage Performance Improvement Projects

Update Performance Improvement Project (PIPs)

My Teams

Click the Name of the Team

1. Find the project in the List
2. Select the Project
3. View Project details
4. Click Edit this Project
5. Update Results Rating
6. Update Describe Results &
7. Update Learnings or Successful Practices

Tips:

Describe Results:

- Include baseline performance on the target metric:
- Include current performance on target metric
- Do not delete previously entered data
- Include other relevant measurable or observed results.

Learnings or Successful Practices:

- Complete and enter a sentence that begins: "The most successful things we've tested so far are: 1)...."
- Complete and enter a sentence that begins: "The biggest barriers we've encountered so far are [X & Y] and we have overcome them by....."

Performance Improvement Projects and Tests Of Change

ABOUT THIS UBT

Members History

ID	Name of UBT	Service Type	Using Huddles	Date Team Established	Team Rating
921	Women's Health PLS	Outpatient	N	11-14-2008	4 - Unit Based Team

Performance Improvement Projects

Status	Last Updated	Start Date	Name Of Project	Focus Area	Performance Metric
Active	6-29-2010	6-29-2010	Improve access	Cost Management (including Attendance)	Other
Active	6-29-2010	6-29-2009	Attendance	Employee Well-Being (including Workplace Safety)	Maintain Healthy Workforce

1 List of Projects

3 Selected Project Details

Project Details Test Of Change Details Test Data

Add new Project Edit this Project

Performance Improvement Projects	Focus Area	Value Compass	Best Place to Work
Attendance	Employee Well-Being (including Workplace Safety)		

Results not Available
-select-
Results not Available
Target Not Achieved--No Measurable Progress
Target Not Achieved--Some Progress toward Target
Target Met
Target Sustained for >=6 Mos

* Results

Results not Available

Describe Results

Q4-09	13.5 Baseline
04/01/10	11.2 Current
06/01/10	9.7 Dept Survey of 20 clients applying Test of Change XYZ. We implemented XYZ as daily process/practice
09/01/10	10.1 Current

1024 characters left

* Using RIM / PDSA?

YES

Learnings or Successful Practices

If providing updates over multiple time periods, place month/year or quarter/year at end of sentence in parenthesis, e.g. (Mar09) or (Q1-09)

Check Metric Value

Project Details Test Of Change Details Test Data

Add new Project Edit this Project

Performance Improvement Projects	Work to decrease the number of Injuries in Radiology		
Focus Area	Employee Well-Being (including Workplace Safety)	Value Compass	Best Place to Work
Start Date	10-1-2009	Completed Date	Project status is Active. No Completed Date
Our SMART Goal	Decrease our rate of injury by 25% for first Q of 2010 as compared to first Q of 2009		
Performance Metric	Improve Workplace Safety (reduce # accepted claims)	PSP Goal?	Y
Data Source for Metric	WPS Reports or WEISS		
Results	Results not Available	Data Charts	
Describe Results	Review each quarter		

Navigate to the Project Page

- Click **My Teams**
- Click the Name of the Team
- Select the Project
- Scroll down to the Project Details tab

Click the link and the website will open in a new window.

Check Metric Values: Determine how the team is doing toward the goal by checking the most recent rating for the metric.

Delete Performance Improvement Projects

Delete PIPs:

Projects that contain no Tests of Change and no Test of Change Data can be removed from UBT Tracker.

Steps:

- Delete all Test Data for each Test of Change
- Delete all Tests of Change
- Delete the Performance Improvement Project

List of Projects

Performance Improvement Projects

1 to 5 of 6 page 1 of 2 Team Reports & Exports

Status	Last Updated	Start Date	Name Of Project	Focus Area	Performance Metric
Active	9-10-2010	9-10-2010	Clinical Services OT - Dont mix whole and decimal numbers	Cost Management (including Attendance)	Overtime (% total payroll dollars)
Active	9-10-2010	9-10-2010	Reduce Dept Incremental OT - Data is xy.z format	Cost Management (including Attendance)	Overtime (% total payroll dollars)
Complete	2-4-2010	5-21-2009	Coding workflow		

Are you sure you want to permanently delete this Project?

Microsoft Internet Explorer

*In order to delete this Project, you must first delete all Tests of Change associated with it.

At-A-Glance: Manage Team Membership

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Assign a Role

UBT Tracker

- Select a UBT
- My Teams**
- Search Projects
- Feedback

column header to sort

9 Teams found

Select a Report

ID	Name of UBT	Team Rating	GL String	Entity	Area	Location	Cost Center	Shift	View Details
1606	Dermatology		06-014-5830	06	Greater Southern Alameda	HAYWARD	5830-Dermatology	All	- Select -
1651	URI - Center for EdMem- Karen Colead								

Performance Improvement Projects

Performance Improvement Projects and Tests Of Change

ID	Name of UBT	Service Type	Using Huddles	Date Team Established	Team Rating
1606	Dermatology	----	N	1-6-2009	1 - Pre-Team Climate

Click My Teams

1. Click Name of UBT
2. Click Members button
3. Scroll Down
4. Click *Defaulted Members* or *Manually Added Members* Tab
5. Scroll as necessary
6. Click Team Roles Dropdown and select a *Role*

Defaulted Members | Manually Added Members | Add Members

View 20 Employees per Page 1 to 20 of 23 page 1 of 2

Last Name	First Name	NUID	Union Code	CKPU	Team Role
Carroll	Glenda				
Davis	Edine				
Dooley	Andrea L				
Ebuen	Michael Chad				

Note on Proxy:
The same data entry rights as the Co-Lead.
Assign this role to a member of the team to assist in keeping the data in the Projects and Test of Change current.

Member
Co-Lead
Consultant
Excluded
Member
Proxy
Representative
Sponsor

Add non-Cost Center Members

Defaulted Members | Manually Added Members | Add Members

Click "SEARCH" to search for employees by their name From External Cost Centers

Last Name: gonz First Name: ca

Search

View 20 Employees per Page 1 to 8 of 8

Add	Last Name	First Name	NUID	Location
	Gonzales	Carrey M		
	Gonzales	Cathy L		
	Gonzalez	Carlos Alberto		
	Gonzalez	Candace		
	Gonzalez	Catherine J		

Click My Teams

- Click Name of UBT
- Click Members button
- Scroll Down
1. Click Add Members Tab
 2. Search for employee
 - Use the name as listed in My HR
 - **Hint:** enter as little of the name as possible
 3. Click the green icon to add to the team
- Assign a Role

Note: Submit a Service Request to add Program Office employees