Your Project Checklist

This document contains checklists for the following section:

Translating Data Into Information

- Showing Differences in Performance
- Describing Measure
- Organizing Measures
- Choosing a Point of Comparison
- Displaying the Data
- Taking Advantage of Web Functionalities

Translating Data Into Information: Showing Differences in Performances

Key Points

- Generating scores for your report can be challenging. The scores need to be understandable to your audience, accurate, fair, and acceptable to the entities being measured.
- The scores you present in your report depend largely on the measures you have chosen to include in your reporting project. But there are alternative ways to present scores for the same measure. Explore this topic in Scoring Different Kinds of Measures.
- Scores can be adjusted for differences in patients or providers, but some kinds of adjustments are more appropriate for quality reports than others. Explore this topic in Making Adjustments to Scores.
- Combining measures into composite scores, summary scores, or categories reduces information overload and helps consumers understand the information on quality. Explore this topic in Combining Measures Into Composites or Summary Scores.
- Report sponsors need to decide whether the scores will emphasize how well or how poorly the subjects of the report are performing. How you "frame" the score will impact the decisions of your audience. To the extent that it's feasible, it is important to use a consistent frame (either positive or negative) for scores throughout your report. Explore this topic in Framing Scores as Positive or Negative.

To learn more, go to Generating Scores that Show Differences in Performance.

Questions and Tasks

☐ What type of scoring would be best suited for the measures you have chosen to report?
Type your response here.

☐ What adjustments could you make to your scores (e.g., for age, medical history, provider size)? Which should you make?
Type your response here.

- What are the implications of making each adjustment?
  Type your response here.
- Do you have enough information to make the adjustments you think are needed? If not, what additional information do you need?
  Type your response here.
- Might any of these adjustments cause the scores to mask important disparities in the quality of care received by different groups (e.g., different income or ethnic groups)?
  Type your response here.

☐ Can you combine the measures you are reporting into composites or summary scores? Will you? Indicate why or why not.
Type your response here.

Translating Data Into Information: Showing Differences in Performances

☐ If you are creating a composite or summary score, will you weight the measures in each category unevenly? If so, how will you determine the appropriate weights? Be sure to assess the impact of different weighting strategies on the composite or summary score and whether you can justify your weighting scheme.

Type your response here.

☐ Will you frame scores as positive or negative in your report? Document your rationale.

Type your response here.

- Do any scores need to be framed differently than the others? How can you explain this to users of your report?

  Type your response here.

- How will you test the frame you choose with your audience? Be sure to document your findings and note any implications for changing your approach.

  Type your response here.

- Learn more about Translating Data Into Information.
- List all topics in the *Checklist*.

Translating Data Into Information: Describing Measures

Key Points

- Your audience is probably not familiar with even the most common quality measures. Report developers must describe measures and terms used in your report so that they are easy to understand. Explore this topic in Label Measures in Plain English.
- Report developers also need to define complex and unfamiliar terms. Explore this topic in Define Complex Measures.
- People are more likely to look at and use the data if you clearly demonstrate the importance of the measures in your report. Explore this topic in Explain Why the Information Matters.
- Both consumers and health care organizations sometimes worry that health plans or providers have limited influence over certain measures, so that they may be unjustly judged on issues they cannot control. You can often alleviate these concerns by explaining how a plan or provider can improve their performance on a given measure. Explore this topic in Describe How the Plan or Provider Can Influence the Measure.
- Users of your report need to know whether to look for high or low scores on the quality measures. Report developers can minimize confusion by keeping this perspective consistent across measures when possible and being explicit about changes in direction when it's not. Explore this topic in Explain What's Better: a High Score or a Low Score.
- You can enhance trust in the data you are presenting by addressing fundamental questions, such as the year the data were collected, the source, and possibly the data collection method. Explore this topic in Describe (and Legitimize) the Source of the Data.
- "Less is better" is an effective guiding principle to avoid overwhelming the user with technical information. Explore this topic in Present Only Essential Information About Technical Issues and Caveats.

To learn more, go to Describing Measures in User-Friendly Ways.

Questions and Tasks

☐ What steps will you take to ensure that the labels and descriptions of measures are user-friendly?
Type your response here.

☐ Which measures and terms will you need to define for readers?
Type your response here.

☐ Which measures do you already know consumers care about? How will you explain the importance of measures that consumers may not fully understand?
Type your response here.

☐ Confirm that the subject of your report can influence each measure. How will you explain that to users of your report?
Type your response here.

Translating Data Into Information: Describing Measures

- ☐ Will you frame the measures as positive or negative? How will you explain any inconsistencies you can't avoid?
  Type your response here.

- ☐ What technical information do you have to include in your report? Where will you put the basic information? Where will you put the details?
  Type your response here.

- ☐ Who will be responsible for developing this kind of content for your report?
  Type your response here.

- ☐ How will you determine whether the information you've developed around measures is understandable to your audience? Sketch your plans for testing with your audience:
  Type your response here.
  - How will you test the language?
    Type your response here.
  - What exactly do you hope to learn? Be sure to document what you learn from this testing and the implications for the report.
    Type your response here.

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Translating Data Into Information: Organizing Measures

Key Points

- Organizing the measures in your report into composites or categories allows you to provide a great deal of information without overwhelming users.
- Using composites allows you to combine and present related items as a single score. You can present this information in layers so that users have the option of viewing the composite score only or "drilling down" to individual items.
- Measures can be organized in different ways: quality domains, disease or condition, type of measure, and data source. While all of them are feasible, the first two are more likely to be understandable and meaningful to consumers.

To learn more, go to Organizing Measures to Reduce Information Overload.

Questions and Tasks

☐ Is it feasible to generate a composite score for the measures you are reporting? If so, will you display the composite score only or offer access to the individual measures as well?
Type your response here.

☐ What models could you use to organize and categorize the measures?
Type your response here.

- Could you categorize measures by quality domain? If so, what categories could you use?
  Type your response here.
- Could you categorize measures by disease or condition? If so, what categories could you use?
  Type your response here.

☐ How would you map your measures to various domains of quality or to specific diseases or conditions? Document your decision process, the results of this process, and any unresolved issues.
Type your response here.

☐ State your plans for testing these organizational schemes. Document any findings and implications for changing the model.
Type your response here.

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Translating Data Into Information: Choosing a Point of Comparison

Key Points

- A comparator is the level of performance against which you are assessing everyone in your report (e.g., State or national average).
- There are several different kinds of possible comparators. Choosing a comparator that's appropriate for the data you are presenting is a key step in your reporting project because it will affect whether your audience perceives differences in performance and understands the messages you are trying to convey. Explore the different kinds of comparators in Choosing a Comparator.
- To help consumers make fair and meaningful comparisons among health care organizations, you should use statistical tests that indicate whether differences in performance are meaningful or random. You can also let consumers know when to pay attention to a point difference in scores. Explore this topic in Categorizing High and Low Performance.
- You have a few options for ordering health care organizations in a data display: ranked in order of performance, alphabetically, within cost tiers, or customized to the user's preferences. Studies of these strategies indicate that rank ordering is the best way to help consumers see differences in performance. Explore the options in Ordering the Data.
- While you will want to keep your data displays as uncluttered as possible, some information needs to be included, such as why you are showing the average score (or another comparator), which kind of score is desirable (high or low), and whether to pay attention to small differences in performance. Explore this topic in Explaining Your Comparisons.

To learn more, go to Choosing a Point of Comparison.

Questions and Tasks

☐ What comparators could you use for the data you plan to report? Can you get the data you would like to use as comparators or will you need additional data?

Type your response here.

☐ Which of these comparators will be most understandable and helpful to your audience? To the subjects of your report? If you're not sure, how can you find out?

Type your response here.

☐ What strategies will you use to categorize high and low performance in your report? Document your reasons for selecting a particular strategy and any downsides you can anticipate.

Type your response here.

☐ Is there a minimum difference in performance that you would regard as meaningful for consumers? How will you determine this?

Type your response here.

☐ Which ordering options would be appropriate given the measures and data you are presenting in your report?

Type your response here.

Translating Data Into Information: Choosing a Point of Comparison

- Which would be most useful for your audience?
  Type your response here.
- Which would be acceptable to the entities included in the report?
  Type your response here.
- Can you offer alternative options (e.g., alphabetical or rank order)?
  Type your response here.
- What will drive your decision?
  Type your response here.

☐ How will you explain the comparisons in your report? What information do you need to include around the data display? What information would you want to make available in a technical "appendix?"
Type your response here.

☐ How will you test your choices with your audience? Document your findings and note any implications for changing your approach.
Type your response here.

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Translating Data Into Information: Displaying the Data

Key Points

- Visual presentations are powerful tools for communicating quality information. It is critical to make the graphs and tables in your report as user-friendly as possible.
- One way to make graphics user-friendly is to make them as self-explanatory as possible. Titles, legends, and other explanatory information can help users "decode" charts with minimal effort. Tactics for making bar charts easier to interpret include limiting what's shown, presenting results in rank order, and using color selectively. Explore ways to Make Graphics Self-Explanatory.
- When used appropriately, symbols can be effective in conveying relative performance. Research with word icons suggests that they help users reach more accurate conclusions about good and bad performers. It is important to test the symbols you plan to use or take advantage of symbols that have been tested extensively with positive results. Explore this topic in Providing Self-Explanatory Symbols.
- Some readers will find it difficult to interpret the information in a chart. You may need to explain what they should focus on and what the key points are. Explore ways to Show the User How To Read and Interpret the Chart.
- You can also help readers understand a chart more readily by minimizing the use of abbreviations and jargon. Explore this topic in Avoid Abbreviations and Jargon.
- If you are using tables to show your information, you may want to consider breaking the information into "chunks" to make it easier for users to find what they need and process it. Explore this topic in Keep Tables a Manageable Size.

To learn more, go to Displaying the Data.

Questions and Tasks

☐ What kinds of displays could you use for the data in your report (e.g., tables with symbols, bar graphs)?

Type your response here.

☐ Which displays seem most appropriate for the information you want to present to your audience? Are there reasons to favor one approach over another?

Type your response here.

☐ What steps can you take to make your graphics self-explanatory?

Type your response here.

☐ If you plan to use symbols to represent relative performance, which symbol would you use? Are word icons an option for your report?

Type your response here.

Translating Data Into Information: Displaying the Data

- ☐ If you are using tables, in what ways could you break a large table into more manageable "chunks?"

  Type your response here.

- ☐ How will you test the data display options you have chosen for your report? Document your findings, noting how audiences responded and how you will address the issues raised by your audience.

  Type your response here.

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Translating Data Into Information: Taking Advantage of Web Functionalities

Key Points

- Web-based reports offer options that are hard to replicate on paper.
- In a Web-based report, you can provide the information in layers so that your audience can view the high-level information and drill down to more specific information if they want to get details. Explore tactics for Layering Data Displays.
- You can make a great deal of information accessible and manageable by allowing users to customize the display to their own needs. Options include letting them specify which organizations they see, which measures they see, and/or how many layers of information they see. Explore ways of Creating Pathways for Users.
- You can make it easier for users to find information on your site by providing navigation links, links from one section to another, and breadcrumb trails. Explore ways of Making It Easy To Find Data on Other Topics.

To learn more, go to Taking Advantage of Web Functionalities.

Questions and Tasks

☐ Could you present the information in your report in layers? What layering options are feasible given the measures you have selected?

Type your response here.

- How will you find out whether this approach would be useful to your audience?
  Type your response here.
- Document your findings and the implications for your report.
  Type your response here.

☐ If you are printing a report, how could you layer information in the document?

Type your response here.

☐ If you are producing a Web report, how will you manage layering on the site?

Type your response here.

☐ Can you give your audience ways to narrow down what they view in your report? What options can you offer?

Type your response here.

- Can you allow users to choose the providers or plans they want to compare?
  Type your response here.
- Can you allow users to choose a category and the individual measures under each category?
  Type your response here.
- Can you allow users to view detailed measures in a summary or composite score?
  Type your response here.

Translating Data Into Information: Taking Advantage of Web Functionalities

- ☐ If you are producing a Web report, what strategies can you use to help people navigate through your report (e.g., navigation links on the Web pages, breadcrumb trails)?
  Type your response here.

- ☐ Sketch your plans to conduct audience testing to see how they move through the document and where they get confused. Document your findings from the testing. Note the implications for new or different navigational aids.
  Type your response here.

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