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| --- | --- | --- | --- |
| **Description/Events/Data Requirement** | **Gap/Data Display Suggestions/Notes** | **Responsible Person** | **Date Completed** |
| **Significant Events & Economic Factors** | | | |
| |  | | --- | | * Admission growth/decline | | * Swing bed growth/decline | | * Outpatient registrations | | * Clinic growth/decline | | * Any financing changes/loans/etc. | | * Any enhancements to Complex | | * Medicare patient make-up and volume | | * Charity write-off's | | * Commercial insurance growth/decline | | * Board Stressors * Bad debt reductions | | Bar graphs and trended data  Consider pie chart in some areas  Narrative will be required (may be in summary as well)  Also consider market share…any changes, significant events such as factory or business closings; |  |  |
| **Revenue and Expense Analysis** | | | |
| |  | | --- | | * Gross IP & OP Revenues by Payer | |  | |  | |  | | * Operating Expenses Trended % Change | | * Salaries & Benefits | | * Total Operating Expenses | |  | | * Grant Funding | | * Technology and Capital Improvements | | * Trended Audited Operating and Net Income   Results | |  | | * Chart Reviews | | * EMTALA | |  | | * Transfer/Delays in Transfer | | |  | | --- | | * Bar graph: Medicare, Medicaid, Insurance, Pvt Pay and % change | | * Chart comparing year over year IP & Swing Gross Revenue and by payer | | * Paragraph description of any net operating revenue changes and relations | |  | | * As per monthly report and year over year comparison | |  | | * Incl. narrative description of changes | |  | | * Grant, amount, brief description | | * Line-item dollars and short narrative if necessary | | * Would only look at few years of comparison unless relevant information | |  | | * From Quality/Risk: brief narrative and any findings of significance (one year summary) | | * # patients admitted to ED and transferred | | * Need to begin tracking stats of transfer for detail/narrative description | | * Have not started to trend | |  |  |
| **Hospital Activity Analysis** | | | |
| |  | | --- | | * Medicare/Medicaid/Ins/Pvt Pay/Admissions | | * Acute Care Avg Dly Census & LOS | | * Swing bed activity & Medicare Mix | | * ER Visits & Admissions | | Graph with trend line |  |  |
| Departmental Data TBD by Hospital  List them out here: | May require collaboration of dept manager and finance staff or other |  |  |
| |  | | --- | | * Trend by Level 1-5 incl. % change | | * Observation & O/P Surgery Activity | | * Outpatient Activity | | * Charge master report | | * Stats report IP/OP/Swing/HH/Aquatics | | * Top 10 surgeries IP/OP with volume | | * Any returns to surgery | | * Any new surgeons/physicians added/removed | | * Radiology | | * IP/Retail Pharmacy/340b | | * Specialty Clinics | | * Family Practice Clinics | | |  | | --- | | * Chart and paragraph description | | * Bar graph includes observation stays | | * Chart of year after year comparison | |  | | * May consider adding concussion treatment program or school outreach | |  | |  | | * include dollars associated | | * Paragraph explaining trends/% growth/decline/any new testing | |  | | * Paragraph description and chart comparison/additions/deletions to services | | * Paragraph description and chart comparison/new or deleted practitioners | | * Trend by physician/loss of #'s or $'s from satellite offices/revenue by zip code/% change year over year | |  |  |
| Active Medical Record Review | Determination of 10%  Easily display in table |  |  |
| Closed Medical Record Review | Determination of 10%  Display in table |  |  |
| Policy Review | Table view is easy  Consider making an Appendix for this  May require a short narrative  Staff education/Annual Education and % completed |  |  |
| Consider in HR   |  | | --- | | * Employee Celebrations | | * Employee of the Month celebrations | | * Wellness accomplishments | | * New Hires | | * Turnover rates | | * Culture Changes | | * Employee Health | | * Diabetic Educator * Staff education mandatory/non-mandatory/vendor-related education | | |  | | --- | | * Trends of completion of new hires/any employees turned away? | | * Any trends in turnover | |  |  |
| Community/Market Share   * Community programs? COVID testing tents? Vaccine clinics? * Organization sponsorships? * Scholarships? * Meals on wheels (can be listed in dietary too) | Brief paragraph?  Maybe #s if available (how many served in testing? Could be in lab dept review too) |  |  |
| QAPI Data | Any special teams implemented  Any accrediting bodies and outcomes  Consider quick dashboard view |  |  |
| Infection Prevention and Antibiotic Stewardship  Nosocomial Infections | Table and graphs  Narrative  Any projects, Lean methods implemented? |  |  |
| Patient Satisfaction  Hospital-wide  By Dept (if available) | Graphs/tables  Depends on how your vendor reports data |  |  |
| Contracted Services | Consider table and continued or discontinued  Simple (most of this should be in your QAPI plan) |  |  |
| **Other** | | | |
| New Service Lines  Closed Service lines |  |  |  |
| Daycare  Nursing Home  RHC/Specialty practice changes  Pain/Infusion/Wound clinics | |  | | --- | | * Operation rev/loss; service to employees versus public | | * Rev/loss; number employees versus public; | | * Rev/loss; stats of residents/significant trends; | |  |  |