Power in Numbers

Dashboard Data Boosts Performance

MARK TOSH / SENIOR EDITOR

From Fitbit-type performance metrics to likes on Instagram and Facebook, Americans are infatuated with checking their status and/or tracking progress across various activities. While this tracking trend may be more common across personal activities, it's becoming fairly standard in professional dealings, as well, to measure all kinds of performance. As the adage goes, you can't manage what you can't measure.

The measurement phenomenon is widespread in business, including the optical sector where there now exists a wide selection of tools and technologies designed to help eyecare professionals (ECPs) and their staffs to measure a business' successes or failures.

One of the tools that is becoming more popular in eyecare is the dashboard practice management system that can automatically compile and analyze performance across a wide range of service and sales metrics. These dashboards provide insights into how an eyecare practice can operate more efficiently and profitably, while also better serving patients.

In addition, a dashboard will show historical data, category trends and benchmarking statistics, which allows a practice to compare itself with other practices of similar size or demographic characteristics. When an OD sees a measure trending in the wrong direction, a quick review of the dashboard data often reveal where the problem lies. A dashboard today also is capable of tracking utilization of new product offerings and, sometimes, even associates or staff productivity.

While much of the data a dashboard will provide is available in a practice's EHR system, ODs have found that pulling reports from the EHR is time consuming and not as accurate as dashboard software in gathering and filtering the data into easily-read practice reports. The "visualization" of data often helps make it actionable. Some dashboards also aggregate data from other participating practices that enable benchmarking exercises.

So, it's no wonder, that there is a growing emphasis on developing and utilizing new tools that help an eyecare professional chart business progress and identify strengths and weaknesses. Over the following pages, *Vision Monday* takes a look at some of the dashboards being used in eyecare practices today. ∎

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NEW YORK—Eyecare professionals who manage their own practices have almost limitless choices of equipment and services they can select today to drive improved performance. From diagnostic equipment to dry eye treatments and software, the assortment of available products is quite broad.

Dashboards, or practice management platforms, are one of the "tools" starting to play an increasingly larger role in guiding practice management decisions and adjustments to operational tactics as a way of enhancing overall patent care and practice performance.

Several companies today provide dashboard tools in the optometry space, and even alliances and firms specializing in practice management software are adding new features to their services that provide dashboard functions. These companies include Glimpse Live (a division of ABB Optical), GPN Technologies (with the EDGEPro dashboard) software firms Eyefinity and Rev360, and ECP network Vision Source, among others.

ECPs are starting to realize that the ability to see and measure data in new ways is helping them make more productive decisions and gain a better understanding of both the eyecare and dispensing aspects of their practice.

David Kading, OD, who operates the two-location practice Specialty Eyecare Group near Seattle, said he has used the Glimpse dashboard for about three or four years. Glimpse is a "really good tool to consolidate all of the information from the EHR, and it gives me a good feel for what's happening with the practice," he said.

Specialty Eyecare Group has six doctors and will be adding a third location by the end of October, Kading said. "We're trying to manage a lot of different things [with the dashboard]," he told *Vision Monday* in an interview. "We are looking at different specialties. I do custom contact lenses and dry eye, an associate [specializes] in retina and glaucoma and another doctor does binocular vision and pediatrics. So it's a challenge in our practice to really know how well we are doing."

The practice utilizes the dashboard for benchmarking exercises, and Kading said he has several areas of the business that he tracks regularly, including the specialty care areas, contact lens sales and utilization (his practice has a 95 percent daily disposable prescribing rate), doctor performance and opticians' results.

Within his practice, Kading said the data he wants to review may be available in the electronic medical records platform, but it "just takes forever to pull through all of that and look at it." In the past, when he used the electronic records for reviews, it involved lengthy spreadsheets. "It just can be very, very tedious if you are trying to run a practice and see patients at the same time," he said. One of

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>
> **—Charlie Biegel, Eyefinity**

the things he finds valuable about Glimpse is that it has a feature that allows him to run reports on individual doctors within the practice, also.

Kading added, "From my perspective, so many doctors go to school to become physicians and then find themselves [running the business side of the practice]. ... They need to come up with ways to make money to pay the bills and they just want to see patients. They tend to forget about the business side so much that their practice begins to suffer and they find they are not able to care for patients the way they want. I think the reality is that we need to take on and embrace leadership on the business side of our practices and [find the] specific benchmarks and specific tools that will help make sure that we are heading in the right direction."

Dr. Lorie Lippiatt, a graduate of The Ohio State University College of Optometry, founded The Salem Eyecare Center, in Salem, Ohio, in August 1989. She has extensive clinical experience, including an externship at the Cincinnati Eye Institute, Veterans Administration Hospital, and today uses the GPN EDGEPro dashboard to review practice performance. She has been using EDGEPro for seven years or longer, and considers it a key tool in her practice's success. "The two elements that are the most impactful for managing my practice are the KPIs (key performance indicators) and .. ease of understanding our frame sell-through," she noted. The KPI tracking, she said, is used during the staff meetings to help determine and set goals, and then monitor success in reaching those objectives.

The data EDGEPro provides on frame sell-through enables year-over-year sales comparisons and the ability for the practice to project inventory and make purchasing decisions, Lippiatt said.

Glimpse: The ECP's 'Analytical Arm'

Glimpse Live is another dashboard option for eyecare professionals to use in management their practices. ABB Optical Group, of Coral Springs, Fla., in late May acquired Glimpse, which identifies itself as "the first push informatics service" in eyecare. Glimpse is designed to help business owners measure and track performance, identify growth opportunities, forecast future trends and compare results among peers.

Casey Hedberg, who founded Glimpse in 2013, became managing director of Glimpse following the acquisition. "If a doctor doesn't know what their business is doing today and what they need to get better at, they are putting themselves in a difficult position," Hedberg said. Without a dashboard, it's difficult to make educated practice and business decisions and unclear where the best supplier partnership opportunities might be found.

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Glimpse (a mobile friendly platform) was launched by Hedberg about six years ago and has grown over time, in part via key business relationships with such groups as Vision Source, PECAA and some manufacturers. "We started off as a practice performance dashboard and have morphed from that [to where we] provide data services and customizable dashboards now and are moving into other industries such as dermatology," he said.

Revenue per patient, revenue per refraction, capture rate for all services, lens capture rate, net production, percent of new patients, frame capture rates, revenue per contact lens fitting, and sales of multiple pairs are all covered within Glimpse's metrics. (Glimpse announced in September that it was integrating with Uprise, an EHR platform from VisionWeb. The integration of the Glimpse platform into Uprise allows Uprise customers to easily dig into the data that matters to their practice and maximize their profitability, the companies said at the time.)

Hedberg said ECPs are becoming more at-tuned to the importance of using a dashboard approach to managing their practice to achieve the superior results. "It's definitely becoming more of a hot topic," he said. "[In the past], doctors have not measured their performance as much as they should, quite frankly, because it hasn't been that easy." Some ODs measured practice performance by pulling raw data out of their EHR system, which didn't always provide the best information, he explained. "Unfortunately, in the past, that data has never been easy to navigate, and it hasn't been intuitive to understand." As a result, this led to missed opportunities and uncertainty about key trends.

Glimpse, Hedberg said, aims to become the OD's "analytical arm" and a way to save the practice time. "They can just click and open up our dashboard from any web-enabled device and see exactly what they are doing, and where their strengths and weaknesses are."

Casey Hedberg.

In a study it oversaw, Glimpse monitored over the course of a year 100 doctors who began using the dashboard in 2016. All of the doctors increased revenue per patient by more than $21, Hedberg said. "The interesting part is that when we interviewed all of these doctors and asked why they saw an increase, none of them did anything glaringly different. But they all acknowledged that they were looking at the data more frequently and they were more aware of where they were strong, where they are weak and where the missed opportunities were," he noted. "The moral of the story here is that the more you look, the more you improve."

The Glimpse dashboard also includes a "gaming" capability, which is customizable, so doctors can create in-office competition, as well, Hedberg said, noting this feature is very popular among OD practices. The gaming feature can be set up to include just doctors, just opticians or even mul-
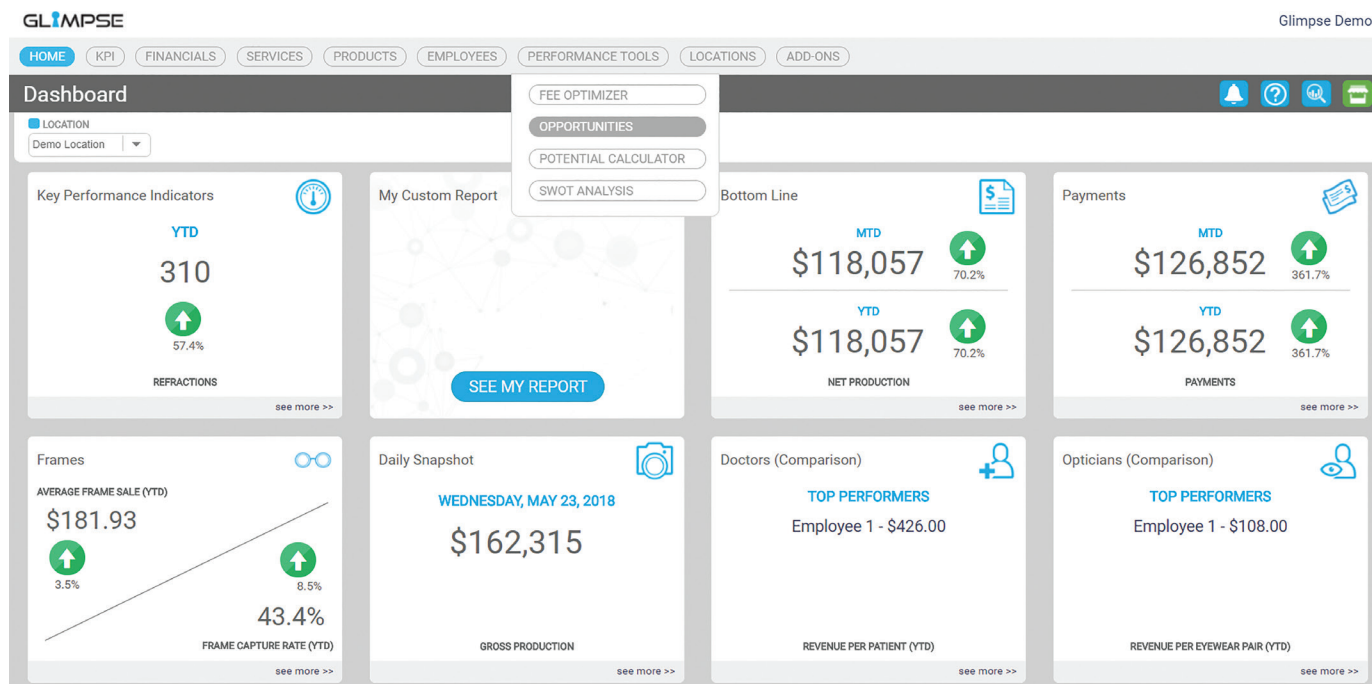
In addition to daily snap shots and key performance indicators (KPIs), the Glimpse dashboard has "gaming" capability, which is customizable, so doctors can create in-office competitions.

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tiple practices. "It's a really great way to get the staff engaged on what the practice's goals are," he added.

Eyefinity: A Clinically Focused Dashboard

Eyefinity, the practice technology division of VSP Global, offers a set of dashboards that integrate into its cloud-based practice management platform, and is preparing to roll out a new, additional dashboard focused on the clinical aspects of eyecare, according to Eyefinity vice president and chief operations officer Charlie Biegel. The new dashboard is expected to debut in next year's first quarter and will be part of the Eyefinity EHR product suite.

The key features of the new dashboard offering will be that they provide primarily clinical views of data, such as Current Procedures Terminology (CPT) codes and ICD 10 code distributions, he said. This will enable the ECP to review the types of exams being performed and the types of procedures occurring on a regular basis. "ODs will be able to drill down and see which diabetic patients have missed their retinopathy checkup and things like that," he noted.

Biegel said a dashboard represents an alternative to the typical static report and a dashboarding module facilitates different views of practice data, such as billing, patient demographics, sales, staff performance and sales revenue across different dimensions and product categories.

"Traditionally, EHRs and practice management systems sat on a wealth of interesting data," Biegel said. The capability to access that data and to build easy-to-read, relevant reports has been lacking over time, he added. "People realize that the treasure trove of information is all of the data that is being collected by these systems. [Now] we can surface that in a way that enables ECPs to make better decisions and to improve their practices."

Eyefinity also has offered a MIPS dashboard to Eyefinity users for a few years. This dashboard is "one of the differentiating features in our product," Biegel told *Vision Monday*. "It allows an ECP to see where he/she stands in real time against all of their quality measures and what their MIPS score is," he explained. Traditionally, ECPs have to wait un-

Charlie Biegel.

til year's end to see their MIPS score. By enabling practitioners to see their scores in real time, it allows for changes that avert end-of-the-year surprises, he added.
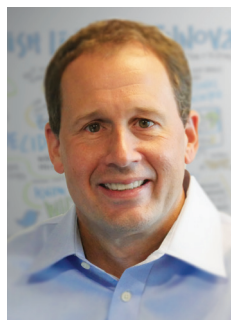
The Eyefinity MIPS dashboard is able to reduce the complexity and guesswork for ODs, and offers a visual scorecard that is easily accessible.

In developing new dashboard features, Eyefinity taps into many sources, including user groups, practice visits and social media user groups. "The nice part about our groups is that we have real dialogue and it's not just us talking to our customers. It's customers talking to customers and helping each other out," he said.

Even as dashboards become more prevalent, Biegel said he sees challenges on the ECP side in terms of making the time to review the dashboard reports, interpret the data and then determine which behaviors need to be modified to drive different results. "This can still be a challenge," he noted.

Reporting: Dashboard
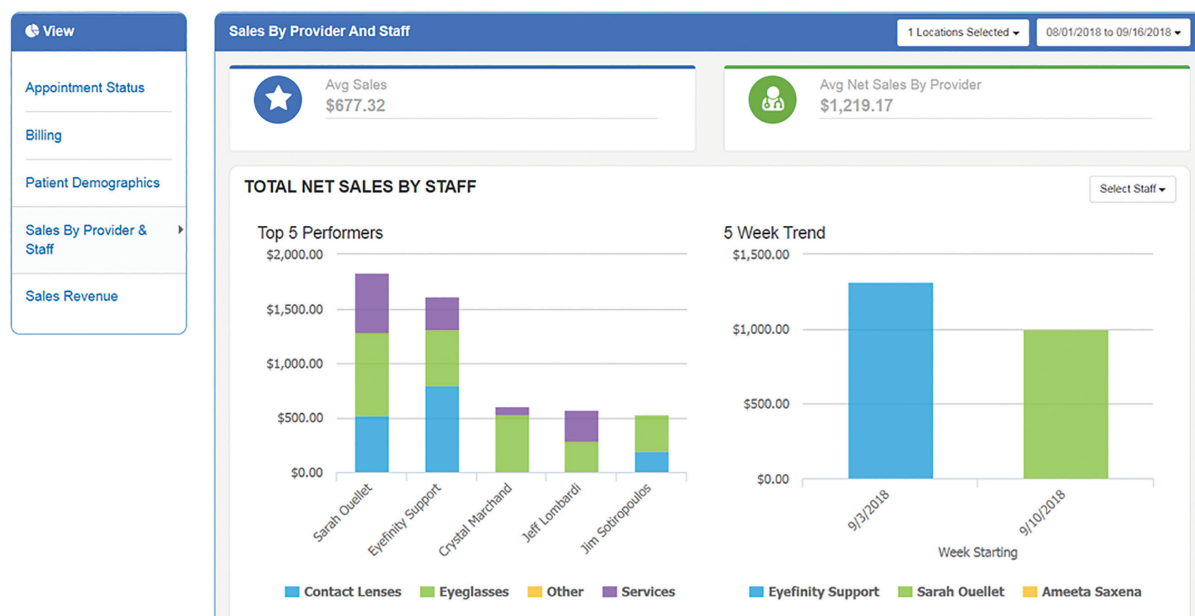
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EDGEPro: Certified Integration With EHR Platforms

According to C. Edward "Ed" Buffington, president and chief executive of GPN Technologies, there's a simple reason dashboards are becoming more popular. "Data analytics and data is king today," he said in an interview. GPN offers the EDGEPro dashboard. A dashboard can reveal "nuggets of gold sitting there" that are easily uncovered with a little investment in such an analysis tool, Buffington said.

GPN Technologies was founded in 2007 with a goal of providing "big business" infrastructure to independent practitioners. Its EDGEPro analytics platforms have changed the way ECPs view, understand and act on their business data.

Key metrics tracked by the EDGEPro dashboard include cost of goods, forecasts for frame turnover, average frame sale, add-on sales, and true "net numbers" for each transaction. Buffington said EDGEPro also has "certified integrations" with the top EHR platforms. What this means is that GPN / EDGEPro receives advance notice of updates or new releases so it can adjust its software accordingly and head off any service disruptions when a new release comes out.

Edward Buffington.

Another important feature of EDGEPro, Buffington said, are the focus on security and HIPAA compliance. "We have an annual audit that certifies our security because we have millions of records," he added. "Security and HIPAA compliance ... are critically important. And many of our protocols are consistent with or better than the national requirements for HIPAA compliance."

In terms of updates, Buffington said EDGEPro is continually updating its capabilities, and now has the ability to provide ECPs with national and regional rankings for practices. EDGEPro also sends by email to a doctor's iPhone or iPad a snapshot of

One of the key features of the EDGEPro dashboard is the focus placed on security and HIPAA compliance.

the practice's recent performance. "Even if they don't take the time to look at the reporting, the snapshot literally in seconds can tell them whether they are up or down for the month," Buffington said. "So even if you have non-compliant users they still have the opportunity on a monthly basis to get the pulse of what's going on in their practice."

A "staff filter" feature of EDGEPro gives the OD an insight on who the practice's top performers are and it assists with decisions on scheduling, compensation changes and training initiatives. One of the "big things we do is to expose opportunities" that improve practice performance, Buffington said.

Vision Source: Building Optical Sales with Dashboard Support

At Vision Source, there are a couple of dashboard-type options for members to evaluate performance, according to Maria Beard, Vision Source's director of strategic planning and analysis. The data analysis systems tie into the Optical Dream and Essilor Experts initiatives that Vision Source offers to members.

"The purpose of those two programs is to help practices enhance their optical sales through dif-

ferent mechanisms," she said. The Optical Dream program focuses on providing data and tools designed to help the staff increase sales in the dispensary, in part through a "gamification" aspect that increases motivation with a point and reward system. This dashboard resides within the member's Insight portal (or intranet) or via the Optical Dream tab

"We have dashboards in place to help the staff identify what areas of that point system they are currently in," she said. "It's a way to help the staff sell more by highlighting and gamifying where we think they should be selling to help the business." While a dashboard provides a practice more visibility into their operations, Beard noted that "consultation and support from the field" is an important second part of taking advantage of data collection and analysis.

One trend that has emerged, Beard said, is that member practices that enroll and use the available dashboards have higher-level business performance than practices that are not participating. "We see quite a difference," she said. "The results tell us that these seem to be very effective programs."

Another solution that Vision Source has developed is called Abacus Practice Productivity Calculator, which debuted in 2016 and allows members to do financial modeling, goal setting, budgeting and planning for practice growth, based on their individual practice metrics. "We do have things that showcase practice performance, and how a practice can grow, but our ultimate thing is to showcase how your practice can grow as a Vision Source member and these are the additional programs that we have to help you," said Alysia Gradney, senior director, digital marketing and public relations. "[We want to make sure] our members know more about their practices and the resources we have."

Vision Source also is working on other new and unique benchmarking capabilities for members, Beard said.

An update to Rev360's Pulse dashboard brought in a more detailed accounts receivable report and an analysis of receipts per exam.

Rev360: Providing Enhanced 'Data Visualization' Capability

Rev360, an eyecare software and business services company, introduced its first dashboard, Pulse, earlier this year via its practice management platform RevolutionEHR. Mike Rothschild, OD, director of practice management initiatives at Rev360 and an experienced RevolutionEHR user, noted that savvy ODs have tried to develop ways to review and make decisions based on practice data for many years. In the past few years, he has been actively involved in developing the Pulse dashboard and the frequent new releases that the company issues.

A practice performance dashboard, Pulse helps ODs manage their business from within the RevolutionEHR platform. It provides instant, robust views into practice data that enable tracking of key performance indicators, trend analysis and comparisons of performance metrics across the practice. Because RevolutionEHR is cloud-based, the Pulse dash-

Mike Rothschild.

board was immediately enabled for practices using RevolutionEHR upon its launch. There was no setup or install required, Rev360 said.
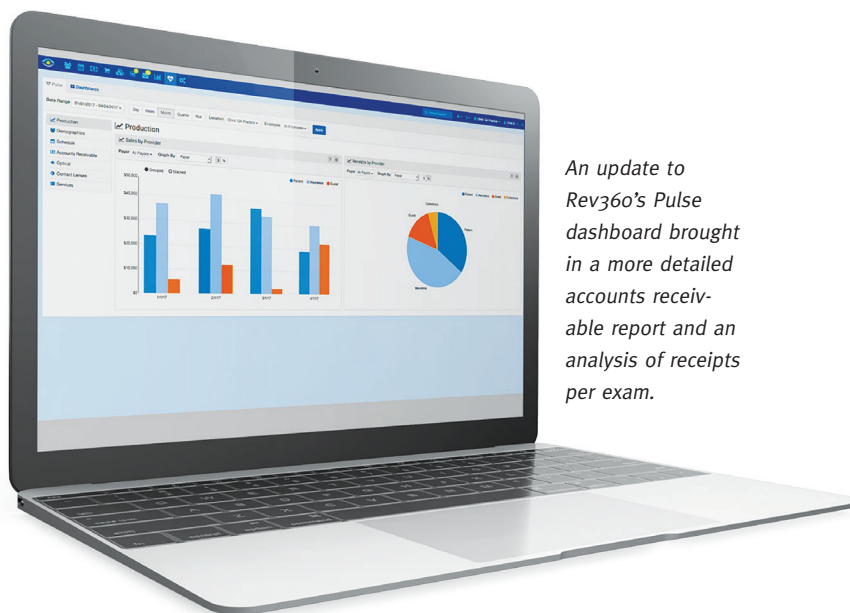
Rothschild, who practiced in the Atlanta area before taking on a full-time role with Rev360, said the RevolutionEHR platform had provided access to reports that ECPs used to uncover different statistics within their practice, but Pulse has simplified the process. "Our goal was to find a way that people could compare things quickly and easily," he said. "We talked to doctors to find out what they were using, what was important and what they were accomplishing, and so we came up with an easy way to access the most commonly used [metrics]. It's full of potential," he added.

The advantage of Pulse, Rothschild said, is that it allows the OD to visualize the data in a way that makes it more actionable. "It enables quick decisions on the fly," he added.

Pulse also continually issues new releases that improve functionality and add more data analysis solutions. Users also are discovering new analytics within Pulse that help them enhance practice operations. Rothschild said at times he refers to these discoveries as "smoke alarms," and he cited the example of a Rev360 practice that mined the Pulse data to uncover issues related to insurance billing that it was not picking up in day-to-day operations. A review, via Pulse graphics, of the practice's accounts receivable indicated a steady and consistent increase in the accounts receivable category. "That was a warning sign that something was going on," he said. "A further analysis showed that the insurance [claims] were not being followed up."

In the newest updates to Pulse, rolled out in September, the additions include a more detailed accounts receivable report and a measure of receipts per exam. "In my opinion [receipts per exam] is kind of the granddaddy of all metrics when you're measuring the performance of your practice," Rothschild said. "It accounts for everything a practice brings in, whether it's services, products, or medical billing versus vision exams." ∎