Baylor College of Medicine

INSTITUTE FOR Continuing Professional Development in Quality Improvement and Patient Safety

User Guide: QI Project Registry

For any inquiries or assistance, contact: CCIT-mgmt@bcm.edu

UPDATE: The QI Project Registry is available now to interested users. Development of additional components and features is ongoing. The information provided below will be updated as new features and improvements are added.

CONTENTS

Note: The data elements for the QI Project Registry are informed by and modified from the SQUIRE 2.0 Guidelines (Standards for Quality Improvement Reporting Excellence: revised publication guidelines form a detailed consensus Process. Ogrinc G, Davies, L, Goodman D, et. al. BMJ Qual Saf 2016; 25:986-992. Doi: 10.1136/bmjqs-2015-004411).

Overview: About the I-QIPS QI Project Registry

What Is the QI Project Registry? Designed and operated by the *Institute for Continuing Professional Development in Quality Improvement and Patient Safety* (I-QIPS) at Baylor College of Medicine, the QI Project Registry is a web-based application designed to help health professionals across the College and its affiliated institutions to:

- **DEVELOP and PUBLICIZE** their improvement projects.

  Through the QI Project Registry, users are prompted to follow a streamlined and systematic approach, using QI methodologies, to manage and track their projects through its project lifecycle. To do so, a project must first be registered (added) to the QI Project Registry. Users (and other associated team members) may access their registered projects to view, update, and track progress via provided prompts.

- **DISCOVER and PARTICIPATE IN** other registered improvement projects.

  Within the QI Project Registry, users are able to view a list of all registered projects by name, along with limited project details. Any projects accepting additional team members are flagged accordingly and interested users may submit a request to participate in those projects.

- **EARN MOC PART IV CREDIT** for those registered improvement projects in which they are actively engaged.

  An exciting and upcoming feature of the QI Project Registry allows eligible physician users to submit (through the QI Registry) an application for Maintenance of Certification (MOC) *Improvement in Medical Practice* (Part IV) credit consideration from participating board(s) for their registered improvement project (see details below).

Who Can Use the QI Project Registry? BCM and affiliated faculty, staff, and trainees may access and use the QI Project Registry, which resides on the I-QIPS website (password-protected), which offers access to quality/process improvement- and patient safety-focused education and training, as well as other ready-to-use resources (e.g., QI tools, templates, worksheets).

Want to Earn MOC Part IV Credit for Registered Projects? With Baylor College of Medicine's awarded recognition as an American Board of Medical Specialties (ABMS) Portfolio Program Sponsor, the I-QIPS manages all Sponsor-related activities in assisting eligible BCM and affiliated physicians in their efforts to earn Maintenance of Certification (MOC) *Improvement in Medical Practice* (Part IV) credit for those approved projects in which they are actively engaged.

As such, an upcoming feature of the QI Project Registry allows "eligible" physician users (those who demonstrate "meaningful participation" in approved projects) to submit their registered and "approved" projects (those that meet ABMS Standards and Guidelines and align with BCM institutional priorities) for MOC Part IV credit consideration.

The standardized process prescribed by the QI Project Registry (including project feedback loops provided by designated I-QIPS QI Coaches) is designed to help ensure that all registered projects are conducted in alignment with ABMS Standards and Guidelines. Further, with the steps of the QI Project Registry interface informed by these Standards and Guidelines and ultimately integrated into a streamlined process (as prompted by the required fields/data elements of the QI Project Registry itself), physician users are able to prepare, conduct, and track their projects in such a way that, upon project completion, the projects should be near-ready for MOC Part IV credit submission.

Signing In and Accessing the QI Project Registry

The QI Project Registry is available only to faculty, staff, and trainees at BCM and its affiliated institutions.

Users must be signed in to the I-QIPS website in order to access the QI Project Registry, where they will be able to register an improvement project, as well as to view or manage any of their already-registered projects. Note: When attempting to view a page with restricted access (e.g., project summaries), the user will be prompted to sign in, in order to proceed.

1. Go to: https://baylorqips.org/qi-project-registry/
2. Select the **Sign in** button, located in the upper right corner of the page. A sign in link also is available in the sidebar, as well as at the bottom of the page. **(Figure 1)**
3. When prompted, enter your **BCM Enterprise Computing Account (ECA) credentials** to sign in.

Don't have (or don't know whether you have) a BCM ECA?

If you are faculty, staff, or a trainee at BCM or an affiliated institution, but you do not have a BCM ECA or you are uncertain about your ECA credentials, submit a QI Project Registry Access Request Form.

All QI Project Registry access requests submitted through the form are considered and approved on an individual basis.

Please allow approximately 2 – 3 business days to receive a response and for your access to be setup, if approved. Decision notifications are sent to the email address provided with the request.

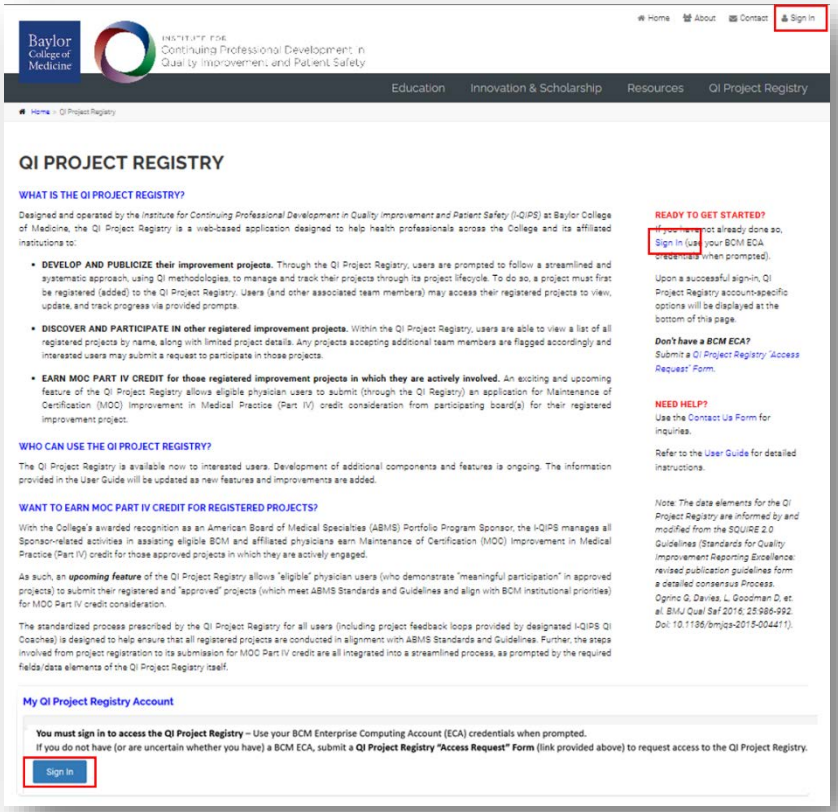

Figure 1. Links for Sign In to Access QI Project Registry (red)

Viewing Registered Projects

While users have full access to their associated projects registered in the QI Registry, they have read-only access to all other registered projects. Allowing users the ability to view completed and in-progress projects across the College and its affiliated institution provides increased opportunities to promote project collaborations, promote project alignment with institutional priorities, as well as to showcase local innovations reflected across projects.

To View or Edit Your Associated Projects:

1. Refer to the **Your Projects** section of the QI Project Registry Home page.

   The Your Projects section serves to display a customized summary list (by project title) of your associated projects, as follows, while also providing quick access to the listed projects: **(Figure 2)**

   - any projects that you have registered in the QI Project Registry
   - any projects already registered by another team member and to which you have been added and designated as a project collaborator

2. Click on the title of the project you wish to view or edit. Note: The project titles shown in the **Your Projects** section reflect those that were entered when the projects were registered in the QI Project Registry.

To Browse, Filter, and Search among Registered Projects:

1. On the QI Project Registry Home Page, select the **Search Projects** button **(Figure 2)**.
2. Identify registered projects of interest by adding a keyword in the "Search" field and/or selecting one or more filtering options in the left column. The search interface provides options to search by keyword text and/or multi-faceted filters.
3. Select the **Search** button to display filtered results. Any registered projects that match the indicated search criteria will be displayed in the right column.
4. Select the project title of interest to display a read-only view of the project record **(Figure 3)**.

Figure 2. QI Project Registry Home Page: Add/Register a project (red); View/Edit "Your Projects" list (blue); Search registered projects (green)

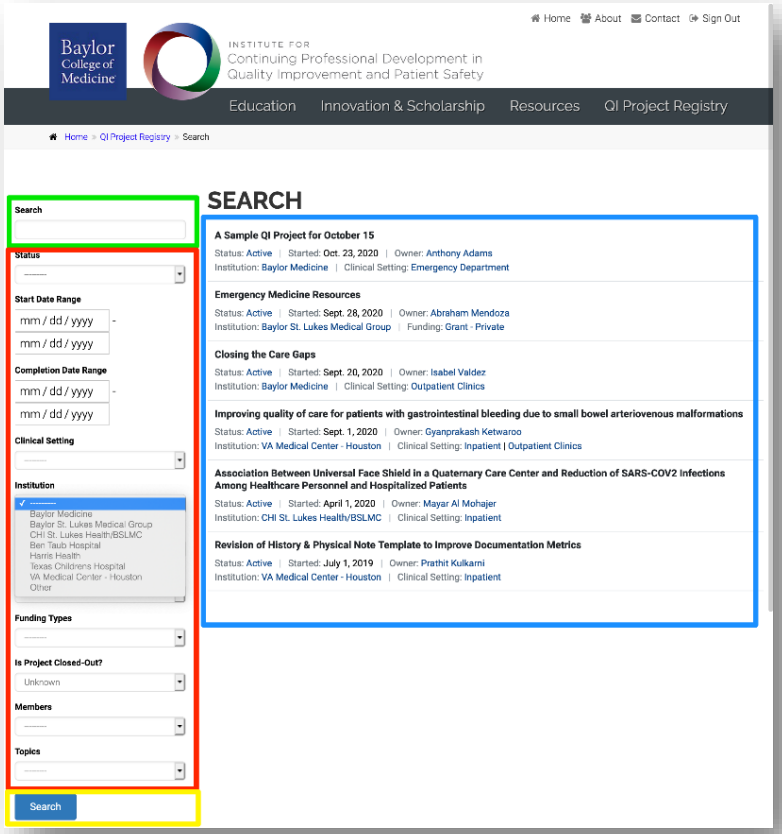

Figure 3. Search Interface: Search by keyword (green); Project filter options (red); Search button (yellow); Search results (blue)

Registering a Project

Any member of the BCM community or its affiliates may register an improvement project to add it to the QI Project Registry. The initial project registration process typically takes about 10 minutes to complete.

To Register (Add) an Improvement Project to the QI Project Registry:

1. On the QI Project Registry Home Page, select the **Add New Project** button **(Figure 2)**.
2. Enter the core project information, as prompted by the data elements included in the "New QI Project" interface.

   After the project is successfully registered, you will be redirected to the **Project Profile** page. For additional instructions on completing the Project Profile page, refer to the "Updating a Registered Project" section below.

Items of Note

- All required fields are denoted by a red asterisk and must be completed in order to submit the form to save/register the new project. If any required information is missing, you will be prompted to provide the missing data elements in order to submit the form to save/register the project.
- Some fields may be conditionally required. For example, the "Project Contact" fields are required only if you have indicated that someone, other than the project lead, should be listed as the project contact.

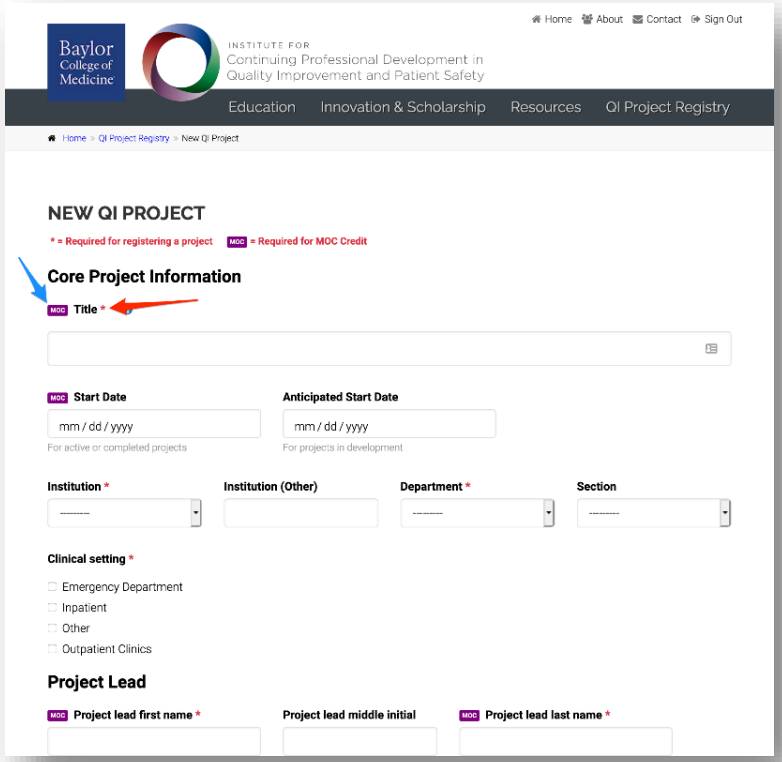

Figure 4. New QI Project Form: Required fields (red arrow); MOC required fields (blue arrow)

Updating a Registered Project

The QI Registry may be used for either tracking progress on a project in development or reporting a completed project. While many sections and fields of the project profile may be used in both of these cases, some functions, such as PDSA cycle tracking, may be particularly useful for projects in development.

To Update a Registered Project:

1. Use the search function or the "Your Project" listing to locate the registered project you wish to update.
2. Click on the project title to open the project's "Project Profile" page **(Figure 2)**. If you have been granted permission to edit the project, each section of the Project Profile will display an **Edit** button **(Figure 5)**. Select the respective Edit button for the section you wish to update.

Items of Note

- For any newly registered projects that are at the start of or in the early stages of its project lifecycle: Users are encouraged to utilize the data elements of the QI Project Registry to guide the development of their project, from initiation through implementation to completion. For example, prescribed options are available to assist project teams in capturing, documenting, and tracking iterative PDSA cycles of their project.
- For any newly registered projects that were previously completed (before being registered/added to the QI Project Registry): Users may wish to enter only the salient descriptions of the project and omit providing some developmental details, such as the iterative PDSA cycles.
- While indicating an Aim Statement is not required to register a project, users are encouraged to provide an Aim Statement for their project. Doing so benefits the user by helping to identify and articulate clear and focused project goals, as well as to inform many basic components of an improvement project, such as stakeholder and resource identification and development of appropriate improvement interventions. Further, a clear and specific Aim Statement also greatly assists other users, when perusing the QI Project Registry, to accurately understand and interpret the intended goals and scope of your registered improvement project.
- **Important:** With the above items in mind, although some data elements of the QI Project Registry are not required to save a project record, they will be required later if an eligible physician on the project team should choose to pursue MOC Part IV credit for their active participation in the project. For informational purposes only, these respective fields are identified by a purple "MOC" badge **(Figure 4)**. Additional instructions forthcoming.

Tips: (Figure 5)

- *To download the project record:* Select the **Download PDF** button.
- *To delete the project record:* Select the **Delete Project** button.

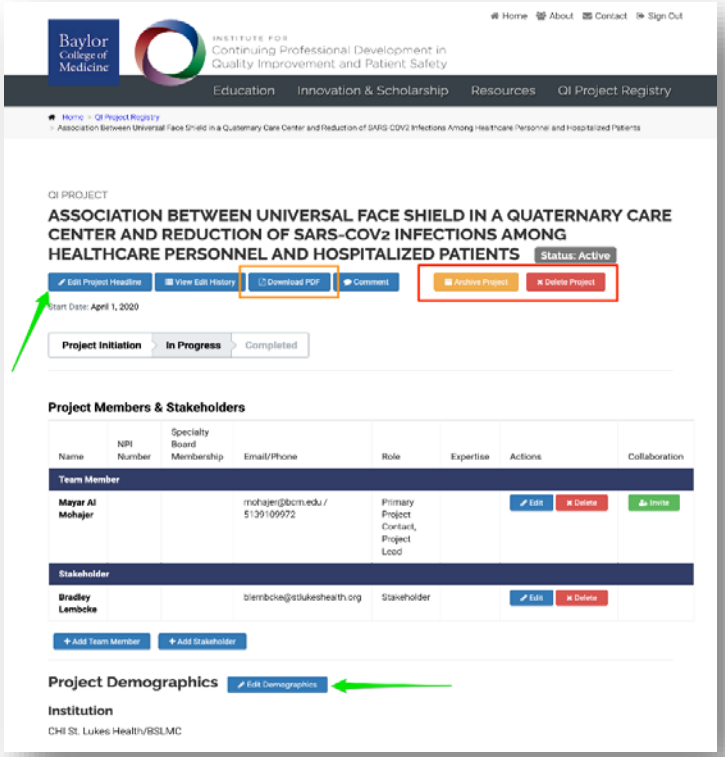

Figure 5. Project Profile: Section edit buttons (green arrows); delete and archive buttons (red); PDF export button (orange)

Managing Team Members, Stakeholders, and Collaborators

Users may indicate individuals and groups associated with their registered projects. This information is managed in the "Project Members & Stakeholders" section, as described below.

Project Team members are individuals who actively contribute time and expertise to the project.

Stakeholders are either individuals or groups who may be involved in the project or otherwise interested in its outcomes.

- *To Add a New Team Member or Stakeholder:* Select the **Add Team Member** or **Add Stakeholder** buttons **(Figure 6)**.
- *To Update or Remove a Team Member or Stakeholder:* Select the respective **Edit** Button or **Delete** Button (see **Actions** column) in the row corresponding to the team member or stakeholder you wish to update or delete **(Figure 6)**.

Collaborators are team members who have been invited to help manage the project information in the QI Registry.

- *To Invite a Team Member to be a Collaborator:*
  1. Select the **Invite** button (see **Collaboration** column) in the row corresponding to the team member you wish to invite **(Figure 6)**.
  2. Confirm that the indicated team member should be given privileges to update the project in the QI Project Registry. In doing so, an automated "collaboration invitation" email will be sent to the team member's email address on file, which includes instructions to join the project.

     Note: The email invitation may be resent by selecting the **Resend** option, in the event that the invited collaborator has not accepted the invitation within a preferred period of time.
- *To Remove Collaborator Access:* Select the "Remove" button **(Figure 6)**.

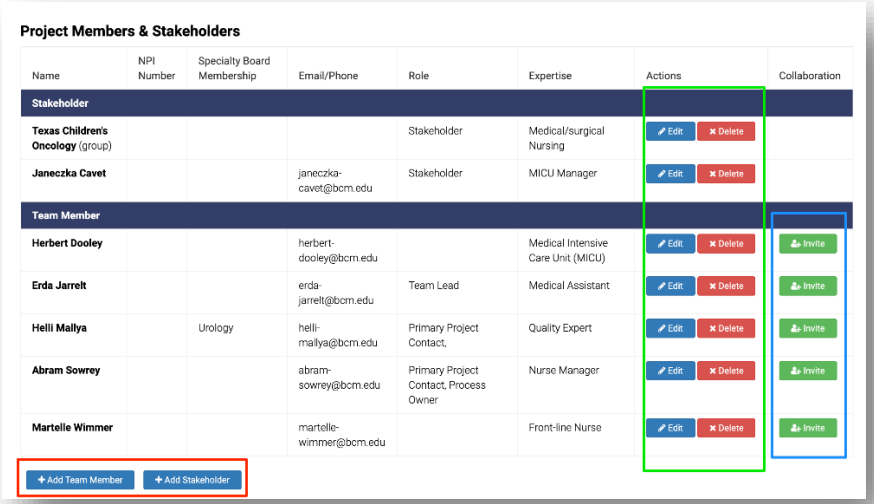

Figure 6. Project Team Members and Stakeholders: Add team member/stakeholder buttons (red); Edit/delete controls (green); Collaborator management controls (blue)

Managing PDSA Cycles

Plan, Do, Study, Act (PDSA) cycles are used to track iterative project progress. Documenting these cycles in the Registry will help record both the current state of the project and its historical evolution.

To Add a New PDSA Cycle:

1. In the "PDSA Cycles" section of the project's Project Profile, select the **Add PDSA Cycle** button **(Figure 7)**.
2. Follow the prompts to provide information for each of the Plan-Do-Study-Act Phases. The respective being edited is referred to as the "active phase". Users may move between phases by using the controls provided in the PDSA Cycle interface **(Figure 7)**.
3. In the final phase ("Act") of the cycle, select one of the following two options **(Figure 8)**:
    - "Save" – To save the information entered for the current PDSA cycle.
    - "Save and Close Cycle" – To save the information entered for the current PDSA cycle AND mark the cycle as complete, which will prevent any further editing to the cycle, as well as allow a new PDSA cycle to be started, if desired.

Items of Note

- Only a single PDSA cycle may be active at a given time. In order to add a new cycle, the previous cycle(s) must be marked as complete in the "Act" phase of the cycle.
- As PDSA cycles are added and/or updated, corresponding core project fields and sections that may have changed during iterative improvement cycles also should be updated accordingly, such as the data elements for the Methods and Interventions section.

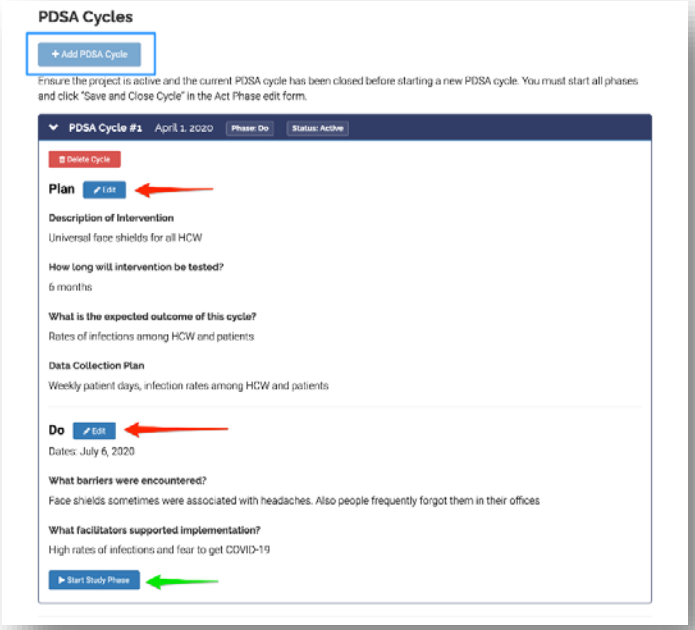

Figure 7. PDSA Cycle Management: Add new cycle (blue); Edit cycle phase buttons (red arrows); Start next cycle phase button (green arrow)

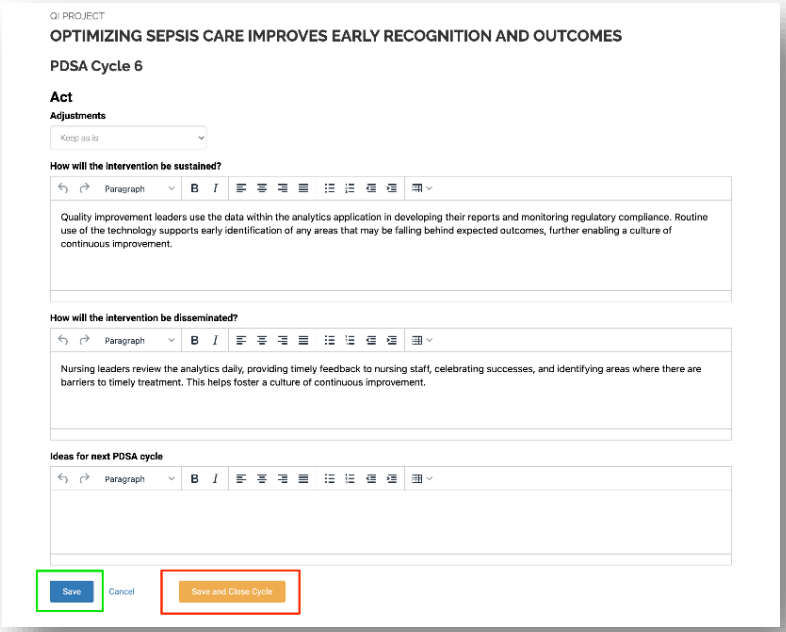

Figure 8. PDSA Cycle Edit Form: Save button (blue); Save and Close Cycle button (red)

Closing Out a Registered Project

In order to close out a registered project, all PDSA cycles must be marked as completed and final findings and conclusions should be provided.

To Close Out a Completed Project:

1. Select the **Edit Project Close-Out** button in the Project Close-Out section of the project's Project Profile **(Figure 9)** and add final findings and conclusions.
2. When ready, select the **Save and Mark Project as Complete** button to finalize the Project Profile and close out the project **(Figure 10)**.

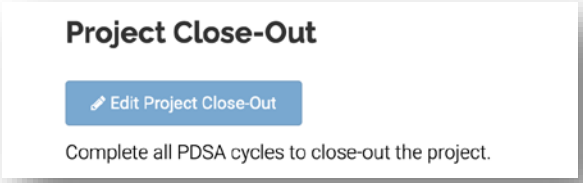

Figure 9. Project Close-Out Section (disabled due to an open PDSA cycle)

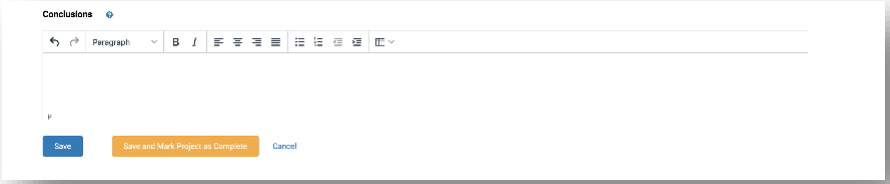

Figure 10. Project Close-Out Form

Adding Dissemination Activities for a Registered Project

Description of dissemination activities associated with a registered project may be added at any time, before or after the project has been closed out.

To Add a Dissemination Activity:

1. Select the **Add Dissemination** button in the "Scholarship Disseminations" section, located at the bottom of the project's Project Profile **(Figure 11)**.
2. Enter the requested information, as prompted **(Figure 12)**.

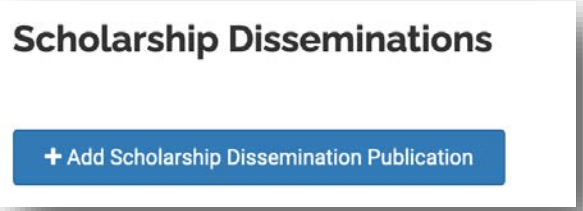

Figure 11: Dissemination Activities Section

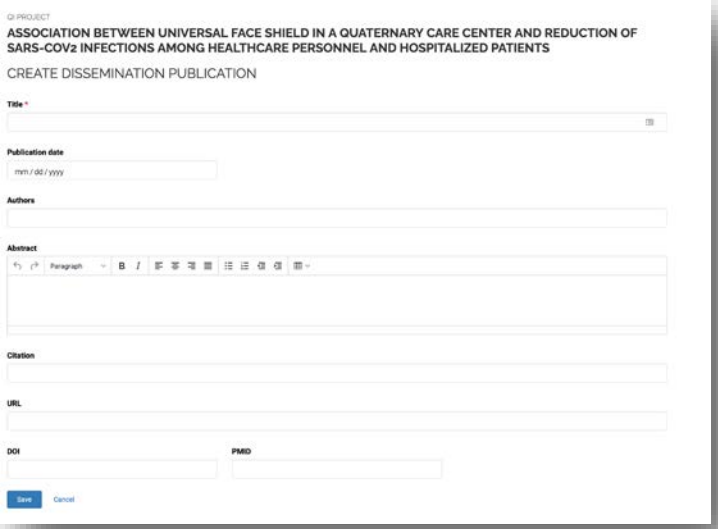

Figure 12: Dissemination Activities Form