IAC QI Tool Demonstration

Presented by
Jeremy Kempner
IAC Project Coordinator / Information Security Analyst
Overview

• Creating “QI Users”

• Self-Assessment Process
  Managing an Assessment – Admin Users
  Completing Case Reviews – Admin and QI Users

• Quality Improvement Self-Assessment Analysis Report
Creating QI Users
QI Users

- Users with limited access to the IAC Online Accreditation Portal
- Only able to perform quality improvement case reviews
- Can be created from existing staff members in your account
Creating a New QI User
To add a user click the [Add New User] button. At least one active Admin User must be listed below. After entering the initial Admin User, it is **strongly recommended** that **at least two** additional Admin Users are established or linked for the account.

### Users

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>User Type</th>
<th>Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dr. Christopher Jenkins</td>
<td><a href="mailto:cjenkins@ecoc.tst">cjenkins@ecoc.tst</a></td>
<td>QI User</td>
<td>Active</td>
<td>Deactivate</td>
</tr>
<tr>
<td>Dr. Natalie Smith</td>
<td><a href="mailto:nsmith@ecoc.tst">nsmith@ecoc.tst</a></td>
<td>QI User</td>
<td>Active</td>
<td>Deactivate</td>
</tr>
<tr>
<td>Mr. Joseph Clark</td>
<td><a href="mailto:jolark@ecoc.tst">jolark@ecoc.tst</a></td>
<td>QI User</td>
<td>Active</td>
<td>Deactivate</td>
</tr>
<tr>
<td>Dr. Edward Echo</td>
<td><a href="mailto:eecho@ecoc.tst">eecho@ecoc.tst</a></td>
<td>Admin User</td>
<td>Active</td>
<td>Edit</td>
</tr>
</tbody>
</table>
Once the User ID and Account ID are established, they cannot be changed. Complete or edit fields and then click [Save My Work]. When setting or changing a password the [Set Password] button must be clicked prior to [Save My Work].

Required information*

**New User Id**

<table>
<thead>
<tr>
<th>New User Id*</th>
<th>WLangley</th>
</tr>
</thead>
</table>

**Account ID:**

<table>
<thead>
<tr>
<th>Account ID</th>
<th>b191044108</th>
</tr>
</thead>
</table>

**Degrees (i.e., RDOS, MD):**

<table>
<thead>
<tr>
<th>Degrees</th>
<th>MD</th>
</tr>
</thead>
</table>

**Job Title:**

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Doctor</th>
</tr>
</thead>
</table>

**Prefix:**

<table>
<thead>
<tr>
<th>Prefix</th>
<th>Dr.</th>
</tr>
</thead>
</table>

**First Name**

<table>
<thead>
<tr>
<th>First Name</th>
<th>William</th>
</tr>
</thead>
</table>

**Last Name**

<table>
<thead>
<tr>
<th>Last Name</th>
<th>Langley</th>
</tr>
</thead>
</table>

Enter and confirm a valid Email Address for this user.

**Email:**

<table>
<thead>
<tr>
<th>Email Address</th>
<th><a href="mailto:wlangle@eccc.tst">wlangle@eccc.tst</a></th>
</tr>
</thead>
</table>

**Confirm Email Address**

<table>
<thead>
<tr>
<th>Confirm Email Address</th>
<th><a href="mailto:wlangle@eccc.tst">wlangle@eccc.tst</a></th>
</tr>
</thead>
</table>

**Applicable Modalities:**

Select the applicable notification modalities for this user.

- Adult Echocardiography
- Pediatric Echocardiography
- Nuclear/PET

**Should this user receive IAC email news updates?**

The IAC never shares email addresses with third parties.

- Yes
- No

**User Roles:**

- Admin (full account access)
- QI Facility Reviewer

[Save My Work]

[Cancel]
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<td><a href="mailto:jenkins@ecoc.tst">jenkins@ecoc.tst</a></td>
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</tr>
<tr>
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<td>Deactivate</td>
</tr>
<tr>
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<td>Admin User</td>
<td>Active</td>
<td>Edit, Deactivate</td>
</tr>
<tr>
<td><strong>Dr. William Langley</strong></td>
<td><strong><a href="mailto:wlangley@ecoc.tst">wlangley@ecoc.tst</a></strong></td>
<td>QI User</td>
<td>Active</td>
<td>Edit</td>
</tr>
</tbody>
</table>

*First Previous Next Last*

Page 1 of 1

**Link Admin User (Optional)**

Click [Link User] to grant an existing Admin User for another account access to this account. Upon login a linked Admin User will view the My Accounts screen. From My Accounts the linked user may launch/access any account to which they are assigned.

[Link User]
Creating a QI User
From an Existing Staff Member
Staff
You may enter continuing education hours or modify a staff member by clicking the 'Edit' link associated with the individual but do not overwrite the staff member's name with that of a new staff member. To add a staff member, select the highest role the staff member fills (for any modality) from the drop-down list and click [Add New Staff Member].

- Place a check in this box to have all added/modified staff included in the previous accreditation.
- Select Highest Role
- Add New Staff Member

- Check this box to hide inactive staff members. Uncheck this box to view inactive staff members.

Click one of the Alphabet Navigator links to see a list of individuals whose last name starts with the letter. Or return to Page-by-Page navigation (with staff sorted by Role) by clicking the page navigation links (First, Previous, Next, Last) below the staff list. To view the entire list, click [ALL] in the Alphabet Navigator.

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Modality</th>
<th>Specialty</th>
<th>Status</th>
<th>Status Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jenkins, Dr. Cristopher</td>
<td>Medical Director</td>
<td>E, N, EP</td>
<td>Cardiology</td>
<td>Active</td>
<td>QI, Edit, Deactivate</td>
</tr>
<tr>
<td>Logan, Ms. Tracy</td>
<td>Medical Staff</td>
<td>E, N, EP</td>
<td>Cardiology</td>
<td>Active</td>
<td>Create QI User, Edit, Deactivate</td>
</tr>
<tr>
<td>Clark, Mr. Joseph</td>
<td>Medical Staff</td>
<td>E, N, EP</td>
<td>Cardiology</td>
<td>Active</td>
<td>QI, Edit, Deactivate</td>
</tr>
<tr>
<td>Smith, Dr. Natalie</td>
<td>Technical Director</td>
<td>E, N, EP</td>
<td>Cardiology</td>
<td>Active</td>
<td>QI, Edit, Deactivate</td>
</tr>
<tr>
<td>Sloan, Ms. Nicki</td>
<td>Technical Staff</td>
<td>E, N, EP</td>
<td>Cardiology</td>
<td>Active</td>
<td>Create QI User, Edit, Deactivate</td>
</tr>
<tr>
<td>Burns, Mrs. Sophia</td>
<td>Technical Staff</td>
<td>E, N, EP</td>
<td>Cardiology</td>
<td>Active</td>
<td>Create QI User, Edit, Deactivate</td>
</tr>
</tbody>
</table>

Click to download active staff list into an excel spreadsheet / Click to download CE information for active staff into an excel spreadsheet

Direct Patient Care (Personnel Who Supervise Stress Testing)
Enter, using the [Add Direct Patient Care Personnel] button, the personnel who supervise stress testing for your organization that are not otherwise listed as medical or technical staff. Include the nonmedical or technical staff whose responsibilities are to provide ACLS services to the stress-testing lab.
Staff Details for Ms. Logan

Required information is indicated by a red asterisk (*) and bold. To save changes, click [Save My Work] and you will be returned to the Manage Staff screen.

Status
Highest Role:
Name:
Email:
Active
Medical Staff
Ms. Tracy Logan
Edit Name
tlogan@ecc.tst

Primary Specialty:
Cardiology
Endocrinology
Family Practice
Gastroenterology
General Surgery
Internal Medicine
If other specialty, specify:

Degree:
Other Degree:
Credentials:
If other credential, specify:

Select the accreditation type for the staff member below. For Directors you MUST verify the division(s) they are directors for.

Diagnostic:
- Adult Echocardiography
- Nuclear/PET
- Pediatric Echocardiography

Click [Save My Work] to save all additions and updates to this staff member or [Cancel] to discard changes made on this page.

Save My Work  Cancel
Staff
You may enter continuing education hours or modify a staff member by clicking the 'Edit' link associated with the individual but **do not over-write the staff member’s name with that of a new staff member.** To add staff, select the **highest role** the staff member fills (for any modality) from the drop down list and click [Add New Staff Member].

- Place a check in this box to have all added/modified staff included in the previous accreditation.
- Select Highest Role
- [Add New Staff Member]

Check this box to **hide inactive** staff members. Uncheck this box to **view inactive** staff members.

Click one of the Alphabet Navigator links to see a list of individuals whose last name starts with the letter. Or return to Page-by-Page navigation (with staff sorted by Role) by clicking the page navigation links (First, Previous, Next, Last) below the staff list. To view the entire list, click [ALL] in the Alphabet Navigator.

<table>
<thead>
<tr>
<th>Name</th>
<th>Role</th>
<th>Modality</th>
<th>Specialty</th>
<th>Status</th>
<th>OI</th>
<th>Edit</th>
<th>Deactivate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jenkins, Dr. Christopher</td>
<td>Medical Director</td>
<td>E,N,EP</td>
<td>Cardiology</td>
<td>Active</td>
<td>Q1</td>
<td></td>
<td>[Create OI User]</td>
</tr>
<tr>
<td>Logan, Ms. Tracy</td>
<td>Medical Staff</td>
<td>E,N,EP</td>
<td>Cardiology</td>
<td>Active</td>
<td>Q1</td>
<td></td>
<td>[Create OI User]</td>
</tr>
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<td>E,N,EP</td>
<td>Cardiology</td>
<td>Active</td>
<td>Q1</td>
<td></td>
<td>[Create OI User]</td>
</tr>
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<td>Active</td>
<td>Q1</td>
<td></td>
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<th>Deactivate</th>
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<td></td>
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<td></td>
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- Select Highest Role
- Add New Staff Member

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Direct Patient Care (Personnel Who Supervise Stress Testing)

Enter, using the [Add Direct Patient Care Personnel] button, the personnel who supervise stress testing for your organization that are not otherwise listed as medical or technical staff. Include the non-medical or technical staff whose responsibilities are to provide ACLS services to the stress-testing lab.

Add Direct Patient Care Personnel
Self-Assessment Process

Managing an Assessment

(Admin User)
What is an Assessment?

Assessment: Adult Echo

Case: Stress, Stress, Transthoracic

Reviewer: Armand Jones, Nicki Sloan, Chris Ward, Chris Ward, Armand Jones, Sophia Burns
Creating a New Assessment

1. Click the [Create New Assessment] button.
2. Click the [Enter] button under "Enter Cases" to create a case log for the assessment. You can enter up to 20 cases per assessment. If you wish to review more than 20 cases, add a new assessment.
3. For each case within the assessment, assign staff members as reviewers. Staff members will be notified of their assignments via email.

Managing an Assessment
Click the [Manage] button to view the status of an assessment. From here you can make changes to case review assignments.

Completing Case Reviews
Click the [Review My Cases] button to review the cases that have been assigned to you.

Filter Assessments

- Status: Not Started, Active, Completed
- Assigned Between: [ ]

Assessment ID: b1453504191-4-0008
Assigned Date: 04/15/16

Assessment ID: b1453504191-4-0006
Assigned Date: 04/13/16
Creating a New Assessment

1. Click the [Create New Assessment] button.
2. Click the [Enter] button under "Enter Cases" to create a case log for the assessment. You can enter up to 20 cases per assessment. If you wish to review more than 20 cases, add a new assessment.
3. For each case within the assessment, assign staff members as reviewers. Staff members will be notified of their assignments via email.

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Click the [Review My Cases] button to review the cases that have been assigned to you.

Assessment ID: b1453504191-4-0007

Assessment ID: b1453504191-4-0008  Assigned Date: 04/15/16

Assessment ID: b1453504191-4-0006  Assigned Date: 04/13/16
## Quality Improvement Case Log

Enter up to 20 case studies you want to include in this assessment into the table below, then click the [Start QI Process] button to continue. For additional cases, create additional assessments.

### Add Case

<table>
<thead>
<tr>
<th>ID</th>
<th>Patient Name (aaa, bbb)</th>
<th>Exam Date</th>
<th>Case Type</th>
<th>Interpreted By</th>
<th>Performed By</th>
<th>Identifying Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Jer, Kem</td>
<td>04/01/2016</td>
<td>Adult Transesophageal</td>
<td>McCloud, Dr. Gavin</td>
<td>Gander, Dr. Erin</td>
<td>X</td>
</tr>
<tr>
<td>2</td>
<td>Chi, Gor</td>
<td>04/05/2016</td>
<td>Adult Stress</td>
<td>Floss, Dr. Geena</td>
<td>Bassof, Mrs. Erin</td>
<td>X</td>
</tr>
<tr>
<td>3</td>
<td>Jos, Mas</td>
<td>04/06/2016</td>
<td>Adult Transthoracic</td>
<td>McCloud, Dr. Gavin</td>
<td>Thoms, Mrs. Yvette</td>
<td>X</td>
</tr>
</tbody>
</table>

---

Add any additional cases within the table above. Ensure that all necessary case details are entered correctly.
### Assign Staff (1 of 3)

**Patient Name:** Jer, Kem  
**Exam Date:** 4/1/2016  
**Case Type:** Adult Transesophageal

**Performed By:** Gander, Dr. Erin  
**Interpreted By:** McCloud, Dr. Gavin

**Assessment ID:** b1453504191-4-0007

Select the staff members who will review this case from the list below.

If you would like to add a staff member to the list of available reviewers, click the [Save and Close] button, then proceed to the Manage Staff tab, and select the "Create QI User" option for the desired staff member.

<table>
<thead>
<tr>
<th>User ID</th>
<th>Name</th>
<th>Email</th>
<th>Assign</th>
</tr>
</thead>
<tbody>
<tr>
<td>AJones</td>
<td>Mr. Armand Jones</td>
<td><a href="mailto:AJones@demo.org">AJones@demo.org</a></td>
<td>✓</td>
</tr>
<tr>
<td>CJenkins</td>
<td>Dr. Christopher Jenkins</td>
<td><a href="mailto:CJenkins@demo.org">CJenkins@demo.org</a></td>
<td></td>
</tr>
<tr>
<td>Cward</td>
<td>Dr. Christopher Ward</td>
<td><a href="mailto:Cward@demo.org">Cward@demo.org</a></td>
<td>✓</td>
</tr>
<tr>
<td>NSmith</td>
<td>Dr. Natalie Smith</td>
<td><a href="mailto:NSmith@demo.org">NSmith@demo.org</a></td>
<td></td>
</tr>
<tr>
<td>NSloan</td>
<td>Mrs. Nicki Sloan</td>
<td><a href="mailto:NSloan@demo.org">NSloan@demo.org</a></td>
<td></td>
</tr>
</tbody>
</table>

---

**Previous Case**  
**Next Case**  
**Save and Close**

---

**Assessment ID:** b1453504191-4-0008  
**Assigned Date:** 04/15/16

**Assessment ID:** b1453504191-4-0006  
**Assigned Date:** 04/13/16
Creating a New Assessment

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Managing an Assessment
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Completing Case Reviews
Click the [Review My Cases] button to review the cases that have been assigned to you.
### Self-Assessment Status

**Assessment ID:** b1453504191-4-0007

<table>
<thead>
<tr>
<th>Assignee</th>
<th>Status</th>
<th>Replace</th>
<th>Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mr. Armand Jones</td>
<td>Open</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dr. Christopher Ward</td>
<td>Open</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Patient Name:** Jer, Kem  
**Exam Date:** 4/1/2016  
**Performed By:** Gander, Dr. Erin  
**Interpreted By:** McCloud, Dr. Gavin  
**Case Type:** Adult Transesophageal

**Patient Name:** Chi, Gor  
**Exam Date:** 4/5/2016  
**Performed By:** Bsscf, Mrs. Erin  
**Interpreted By:** Floss, Dr. Geena  
**Case Type:** Adult Stress

**Assigned Between**

Enter Cases  
Assign Staff  
Manage Assessment  
View Report  
Complete Survey

- **Assessment ID:** b1453504191-4-0008  
  **Assigned Date:** 04/15/16

- **Assessment ID:** b1453504191-4-0006  
  **Assigned Date:** 04/13/16

**Apply**  
**Clear**
Self-Assessment Process

Completing Case Reviews
(Admin and QI Users)
Creating a New Assessment

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Click the [Review My Cases] button to review the cases that have been assigned to you.

Filter Assessments
Status
- Not Started
- Active
- Completed

Assigned Between

- Assessment ID: b1453504191-4-0007
  - Assigned Date: 04/15/16

- Assessment ID: b1453504191-4-0008
  - Assigned Date: 04/15/16

- Assessment ID: b1453504191-4-0006
  - Assigned Date: 04/13/16
<table>
<thead>
<tr>
<th>Assessment Id</th>
<th>Patient Name</th>
<th>Exam Date</th>
<th>Testing Area</th>
<th>Due Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>b1453504191-64-0006</td>
<td>aaa, bbb</td>
<td>04/13/2016</td>
<td>Echo Pediatric: Pediatric Transesophageal</td>
<td>12/12/2016</td>
<td>Open</td>
</tr>
<tr>
<td>b1453504191-4-0008</td>
<td>ali, ali</td>
<td>04/15/2016</td>
<td>Echo: Adult Transthoracic</td>
<td>12/12/2016</td>
<td>Submitted</td>
</tr>
<tr>
<td>b1453504191-8-0008</td>
<td>Jer, Kern</td>
<td>04/15/2016</td>
<td>MR: Musculoskeletal MRI</td>
<td>12/12/2016</td>
<td>Open</td>
</tr>
<tr>
<td>b1453504191-4-0007</td>
<td>Jer, Kern</td>
<td>04/01/2016</td>
<td>Echo: Adult Transesophageal</td>
<td>12/12/2016</td>
<td>Open</td>
</tr>
<tr>
<td>b1453504191-4-0007</td>
<td>Chi, Gor</td>
<td>04/05/2016</td>
<td>Echo: Adult Stress</td>
<td>12/12/2016</td>
<td>Open</td>
</tr>
</tbody>
</table>

1 2 3 4
I. Test appropriateness

With the clinical information provided, was the test ordered for an appropriate indication? Part C, 2.1.1C

- Appropriate/usually appropriate
- May be appropriate
- Rarely appropriate/usually not appropriate

Comments:

Perfectly appropriate.
**II. Technical quality review**

1. Does the study include transgastic images? *Part B, 2.8.7.1B*  
   - [ ] Yes  
   - [ ] No

2. Does the study appropriately evaluate mitral valve anatomy and function? *Part B, 2.8.7.4B*  
   - [ ] Yes  
   - [ ] No

3. Does the study demonstrate the atrial septum and its integrity (including the use of contrast)? *Part B, 2.8.7.7B, Part B, 2.8.7.8B, and Part B, 2.8.7.9B*  
   - [ ] Yes  
   - [ ] No

4. Are the ascending arch and descending portions of the aorta demonstrated? *Part B, 2.8.7.11B*  
   - [ ] Yes  
   - [ ] No

5. Is the left atrial appendage demonstrated in two views? *Part B, 2.8.7.7B*  
   - [ ] Yes  
   - [ ] No

---

**Could the technical quality of this case have been improved?**  
- [ ] Yes  
- [ ] No
Improving health care through accreditation®

Quality Improvement

QI Self-Assessment

Creating a New Assessment

1. Click the [Create New Assessment] button.
2. Click the [Enter] button under "Enter Cases" to create a case log for the assessment. You can enter up to 20 cases per assessment. If you wish to review more than 20 cases, add a new assessment.
3. For each case within the assessment, assign staff members as reviewers. Staff members will be notified of their assignments via email.

Managing an Assessment
Click the [Manage] button to view the status of an assessment. From here you can make changes to case review assignments.

Completing Case Reviews
Click the [Review My Cases] button to review the cases that have been assigned to you.

Filter Assessments

Status
- Not Started
- Active
- Completed

Assigned Between
- and

Assessment ID: b1453504191-4-0007
Assigned Date: 04/15/16

Enter Cases
Assign Staff
Manage Assessment
View Report
Complete Survey

Assessment ID: b1453504191-4-0008
Assigned Date: 04/15/16

Assessment ID: b1453504191-4-0006
Assigned Date: 04/13/16

Apply Clear
<table>
<thead>
<tr>
<th>I. Test appropriateness</th>
<th>Responses</th>
<th>Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td>With the clinical information provided, was the test ordered for an appropriate indication?</td>
<td>Part C.</td>
<td>✓</td>
</tr>
<tr>
<td>2.1.1C</td>
<td></td>
<td></td>
</tr>
<tr>
<td>✓ Appropriate/usually appropriate</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>✓ May be appropriate</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>X Rarely appropriate/usually not appropriate</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

Comments:
- Perfectly appropriate.
- Unclear if this should have been performed.
### Case Quality Summary

<table>
<thead>
<tr>
<th>QI Measure</th>
<th>Quality Score</th>
<th>Overall Case Quality</th>
</tr>
</thead>
<tbody>
<tr>
<td>I. Test appropriateness*</td>
<td>100%</td>
<td></td>
</tr>
<tr>
<td>II. Technical quality review</td>
<td>80%</td>
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</tr>
<tr>
<td>III. Interpretive quality review</td>
<td>100%</td>
<td></td>
</tr>
<tr>
<td>IV. Report completeness and timeliness</td>
<td>60%</td>
<td>80%</td>
</tr>
<tr>
<td>V. Correlation*</td>
<td>100%</td>
<td></td>
</tr>
</tbody>
</table>

The overall quality score for this case was calculated by averaging the scores of each QI measure. An asterisk (*) denotes that the measure is not reflected in the Overall Case Quality score.

### Staff Agreement

<table>
<thead>
<tr>
<th>QI Measure</th>
<th>Agreement</th>
<th>Overall Staff Agreement</th>
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</thead>
<tbody>
<tr>
<td>I. Test appropriateness</td>
<td>67%</td>
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</tr>
<tr>
<td>II. Technical quality review</td>
<td>80%</td>
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<tr>
<td>III. Interpretive quality review</td>
<td>100%</td>
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<tr>
<td>IV. Report completeness and timeliness</td>
<td>74%</td>
<td>84%</td>
</tr>
<tr>
<td>V. Correlation</td>
<td>100%</td>
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</table>

The overall staff agreement for this case was calculated by averaging the agreement level of each QI measure. For each question, the agreement level is the percentage of staff who selected the most agreed-upon response.