

Monthly Snapshot Template

A simple repeatable grid for tracking a small number of refugee health indicators over time. Capture process, outcome, and balancing measures month-by-month.

The Monthly Snapshot Template helps practices track a small number of refugee health indicators over time. Repeat the same searches monthly using the same definitions, record the results in one place, and review for trends.

The three indicator types

Process <i>are we doing it?</i>	Whether key actions are occurring. For refugee health: interpreter need recorded at registration, refugee health assessment booked, follow-up tasks assigned.
Outcome <i>is it making a difference?</i>	Whether identified needs are being met. Number of patients with completed health assessments, patients with interpreter need acted on, follow-up actions completed.
Balancing <i>what else moved?</i>	Unintended consequences worth watching. Increased reception time per interpreter-supported appointment, staff workload, appointment wait times.

TIP

Three to five measures is enough. More than that becomes hard to maintain. Add more once the rhythm of monthly reporting is established.

Worked example

EXAMPLE — MATER FAMILY PRACTICE

TYPE	MEASURE	BASELINE	TARGET	DATA SOURCE
Process	Proportion of new patients with preferred language recorded	42% (audit of 20 records)	90%	Best Practice record audit
Outcome	Number of refugee-background patients with a completed refugee health assessment	14	Trend up over 6 months	Clinical system search by code
Outcome	Proportion of interpreter-supported appointments booked in advance (vs same-day)	60%	85%	Reception appointment review
Balancing	Average appointment duration for new refugee-background patients	~25 min	Track and monitor	Appointment report

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FILL IN WITH YOUR TEAM

PRACTICE NAME

REPORTING PERIOD

INDICATOR SET

TYPE	MEASURE	BASELINE	TARGET	DATA SOURCE

MONTHLY TRACKING

Re-run the same searches each month using the same criteria. Record the result alongside the previous month's number.

MEASURE	MONTH 1	MONTH 2	MONTH 3	MONTH 4	MONTH 5	MONTH 6

TIP

Plot the outcome measures as a simple run chart, even just on paper. Four or five data points make trends visible and give the team something to react to at monthly huddles. A measure that does not change does not need to be reported in detail every month, but the data point should still be recorded.

REFLECTIONS

What is the data showing? What is working? What needs attention?

NEXT STEP

Use this monthly snapshot in **Appendix 10 (Team Huddle Template)** as the starting point for a brief team discussion. Where measures are not improving, return to **Appendix 07 (MFI & PDSA Template)** to test a new change idea.