

Case study overview

Customer Profile

Chris Bliersbach has the unique perspective that comes from serving at the quality director level of three separate hospitals. He currently works as the Director of Quality Management at Eastern Idaho Regional Medical Center. He implemented PolicyTech's Policy & Procedure Manager® at all three hospitals.

Challenge

The policy management challenges Bliersbach observed include low productivity, disorganization, compliance shortcomings, law vulnerability, and cost.

Solution

PolicyTech's Policy & Procedure Manager® (PPM) software allows for central storage and online access of important documents, readership tracking, content quizzes and templates for consistent document formatting. Also, a robust automated review, approval, distribution, archival and update process streamlines the policy management process using automated email reminders.

Results

- Increased policy awareness
- Clear document organization
- Increase compliance
- Streamlined audits
- Archival law protection
- Minimized process costs

Case Study: Why Chris Bliersbach Chooses PolicyTech's PPM wherever he goes.

The software pays for itself after the first audit. The first time you go through a survey, your processes are more reliable and the team is more aware of what they need to do. The real benefit is to get a highly evolved policy management system that you can use to improve performance. I am anxious to see that occur here at EIRMC. It evolved that way at Phoenix Baptist and Lovelace."

*--Chris Bliersbach, Quality Management
EIRMC*

Summary

After experiencing the benefits of PolicyTech's™ software at two former hospitals, a hospital's Director of Quality Management again implements Policy & Procedure Manager® as the management solution for a third hospital--Eastern Idaho Regional Medical Center (EIRMC) to cut costs while increasing productivity and compliance.

Challenge

Low Productivity

When Chris Bliersbach joined EIRMC he was encouraged that they at least had a manual policy management system established and working. Previously he was with Phoenix Baptist Hospital and prior to that Lovelace Medical Center, in Phoenix Arizona. Bliersbach had deployed PolicyTech's Policy & Procedure Manager® (PPM) at both organizations and enjoyed the benefits of the software at these hospitals. Yet, even though EIRMC processes worked, Bliersbach still had concerns about productivity. *"...our policy processes were done manually with paper, which is painstaking. It takes a lot of people's time and attention and kills a lot of trees."* Trying to maintain policies manually with a binder system has its cons. Policy management cost considerations should include the time required for printing, security risks, organization, and the effort required to manually facilitate the review, approval, distribution, archival and update process. Plus trying to track readership and comprehension is also very difficult.

Prior to deploying PPM at Phoenix Baptist, Bliersbach shared, "I saw a lot 'rubber-stamping'. Everyone was so busy and our policy management system was so painful that review and approval and ultimately policy awareness wasn't as good as it should have been. If a process is difficult to do then people are less apt to do it and I saw this affect our productivity."

Regulation Complexity

"The Joint Commission has evolved to where policies are the foundation of your organization and your practice is what surveyors look at. I'd say 5 to 10 years ago, it was an *absolute requirement* (of the Joint Commission) that you had your policies in place. It's still an *absolute* to have your policies in place, but

additionally now you are expected to practice what you preach and use your policies to drive your practice... these new requirements make it more important than ever to have your policies easily accessible, well-organized, and not in conflict with one another, which is really hard to do in a manual process.”

How can organizations stay compliant when they are not aware of what they need to comply with because of disorganization and poor awareness?

Legal Concerns

“It’s not infrequent to have a legal case where an attorney asks for policies and procedures that were in affect three or four years ago... and you need to be able to find them” said Bliersbach. At Lovelace he struggled with a case where a lawyer asked for a policy that was no longer in effect. Bliersbach discovered having a document archival system is a must, but if done manually, it can be difficult and time consuming to maintain in a reliable way.

Direct Costs

EIRMC has a policy management committee that meets once a month for two hours. An average of 20 people attend the committee meetings most of which are management level employees with an average salary of \$30 an hour. Each meeting is estimated to cost \$1,200 making these meetings a \$14,000 annual expense.

EIRMC used almost 200 paper policy binders across the organization. The printing is expensive and policy updates require additional printing expense.

Solution

Chris Bliersbach has served in Director level Quality Management positions at Phoenix Baptist Hospital, Lovelace Medical Center, and is currently the Director of Quality Management at EIRMC. Bliersbach has experienced the same challenges with policy management at all three hospitals. He chose PolicyTech’s Policy & Procedure Manager® as the solution for each hospital because of its organizational and automation capabilities that increase productivity and compliance. He chose PPM to accomplish the following objectives:

- Automate and digitize their policy management processes
- Eliminate the costs of printing and minimize the time spent in costly meetings
- Create an accessible hub where documents could be quickly organized, updated and distributed to the EIRMC team.

When asked why he chose PPM, Bliersbach replied:

“There were many of reasons... the ability to customize the software to our own needs and current templates... the ability to download our staff into the software and keep records of your employees in it as well. We liked the automated review, approval, distribution and archival flow of documents including the email reminders. Because we have competency exams the quizzing feature and the ability to build quizzes right into the policies was a major plus. PPM had more

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features and flexibility than the others that we looked at.”

“There are direct costs savings at EIRMC we are anticipating like reducing the amount time we spend in meetings is a productivity improvement for our staff. There are also the potential benefits that having these policies more accessible will help employees be more effective in doing the right thing. These are harder things to quantify, but it stands to reason that if you are requiring employees to spend the time reviewing policies and taking competency exams, that having a more accessible, easy to use policy system will improve productivity.”

Result

Increased Productivity = Better ROI

A policy management solution needs to be easy to setup. If it's complicated and time consuming then is it really a solution or just another challenge? *“When I had the Joint Commission coming in to do surveys at Phoenix Baptist, I needed a quick solution without a lot of hassle. I was up and running a couple days after I first saw PPM... and a couple weeks after that I had my policies into it. PPM was able to quickly make sense of disorganization.”*

Bliersbach has worked with many different software products and without hesitation rates PolicyTech's customer support as *“one of the best.”* He says, *“It's hard to find a software system these days that works out-of-the-box, without some headache and a big learning curve, or some kind of problem. I've really never run into anything that is significant or fatal or not easy to overcome with PPM. Again like I've said the support staff has always been there when we've needed them. They are pleasant to work with but we haven't even had to call support that much.”*

The ability to be compliant hinges on organization, awareness and comprehension. *“What's nice about PPM is documents don't get lost. Documents stay where they are put and the software reminds me when I need to review or update a policy. I organize my homepage by next review date. That way I can see what is coming up so I don't miss anything. That is a nice feature. I love that I can customize it to organize and fit my workflow.”*

Yes. Compliance Is Possible.

In order to be compliant your organization has to:

1. Have policies and procedures organized and current
2. Understand them as an organization and prove comprehension, and
3. Practice what the policies teach

PPM helps organizations accomplish these requirements by organizing, automating, tracking, and quizzing for the policy management process.

“When I was in Albuquerque, we had quite a few surveys from CMS and the state. The ability to have a computer terminal in the conference room and give the surveyor access to PPM was a helpful relief. CMS and the state have a tendency

“I figured that for the cost of one of our interdisciplinary policy committee meetings we could maintain PPM on a yearly basis.”

to be more policy driven and PPM allowed them find the policies themselves, rather than find policies ourselves and make copies. It was especially helpful to me at the time because I was new to the organization. The surveyors loved PPM because it made their job easy. They were impressed.”

“The software pays for itself after the first audit. The first time you go through a survey, your processes are more reliable and the team is more aware of what they need to do. The real benefit is to get a highly evolved policy management system that you can use to improve performance. I am anxious to see that occur here at EIRMC. It evolved that way at Phoenix Baptist and Lovelace”

Legal Cases: No More Holding Your Breath

PPM’s automated archival feature helped Bliersbach. *“While I haven’t had to use PPM’s archival feature at EIRMC, we have used it in the past at both Phoenix Baptist and Lovelace. We were able to get an archived copy of the policy we needed easily by going to the archive folder. Our Risk Manager here at EIRMC is just tickled that he has this ability.”*

Minimizing Direct Costs

“I figured that for the cost of one of our interdisciplinary policy committee meetings we could maintain PPM on a yearly basis. When I realized EIRMC was maintaining 200 paper manuals I saw an immediate application of PPM. Not only are we more organized, but we are saving money on copying. Just the reams of paper that we used and the time it took to copy and distribute policy updates is worth having PPM.”

Conclusion

Joint Commission and HIPAA regulations and expectations are becoming stricter and harder to comply with. Having an accessible, automated, and customizable policy management system has proven to increase the performance and ROI for many healthcare organizations.

Phoenix Baptist, Lovelace and EIRMC have all experienced the challenges that come from regulatory pressure place on healthcare organizations today. While policies and procedures promote safety and performance, they can become a challenge when not effectively managed. Optimal safety and performance are the objectives of all organizations, yet many still aren’t where they want to be.

To learn more of the benefits of implementing policy and procedure management software visit PolicyTech.com

About PolicyTech:

Policy Technologies International Inc. (PolicyTech) develops and provides web-based software that manages company or government policies and procedures in a convenient, reliable way. PolicyTech software has become the policy management software of choice for over 700 companies in a variety of industries including government, health care, education, and finance as well as in non-profit organizations. With a slate of recent government regulations pressing the need for corporate responsibility to an all-time high, PolicyTech’s policy management software is the solution for quality assurance and enforcement best practices.

Contact:

Josh Perry, correspondent

Email: jperry@policytech.com

Web: www.policytech.com

Phone: 1.888.359.8123 ext. 440
