

## Case study overview

### Customer Profile

Methodist Healthcare System of San Antonio is composed of seven hospitals with more than 6,000 employees including 2,000 physicians in 15 healthcare facilities around the San Antonio, Texas area. MHS sees more than 250,000 patients a year.

### Challenge

Joint Commission audits identified areas of weakness in MHS's policy management system. Surveyors discovered that employees could not find documents in MHS's electronic policy manager and some policies were not kept current. Additionally, policy documents were difficult to find and difficult to edit. While these shortcomings were not fatal to the JCAHO survey, they did alert MHS officials to the need for improved policy management.

### Solution

PolicyTech's Policy & Procedure Manager™ (PPM) software gave MHS a convenient way to store policies and procedures with a robust search engine; automated review and approval system; and the ability to infuse pictures, links, and videos into the documents making it a multifunctional document storage tool.

### Benefits

Using PPM, MHS has regained control of their policy management. JCAHO and internal policy audits now flow smoothly and meet high standards.

## Case Study: Methodist Healthcare of San Antonio Enhances JCAHO Compliance

*"I love this product. I just love it. I don't know why more people don't know about it. Your product can revolutionize the industry."*

*-- Susan Andrews-Carden, MHS*

### Summary

Methodist Healthcare System (MHS) of San Antonio utilized what they termed a "horrible" document management system that used primitive search methods, did not support uploading of documents, and routinely lost or truncated documents within the system causing great difficulty during Joint Commission surveys. To remedy the problem, MHS now operates PolicyTech's Policy & Procedure Manager (PPM) to make the process more reliable with automated policy tracking, readership quizzing, and the multipurpose use of PPM documents.

### Efficient Policy Management A Big Relief

MHS is the largest healthcare provider in the San Antonio, Texas area. As such, its policy and procedure management needs are significant. Unfortunately, MHS had difficulty managing them because of an outdated system that was unreliable and ineffectual.

"The old system needed an enormous amount of manipulation," Susan Andrews-Carden, RN, MS, MHS Director of Clinical Informatics, said. "It just wasn't that friendly of a system. There wasn't a way to refine the search. There was no guidance to the end user on how to help you find that search."

Besides being difficult to use, the program lacked notification for policy review as well as a document archive. Furthermore, the system required users to have email accounts—something most staff do not have.

"It was a hot issue with the VP's so I said 'how do we (fix it),' " Andrews-Carden said.

When she came across PolicyTech's PPM with its exclusive endorsement from the American Hospital Association and robust search engine, she knew she was on to a solution to her document management problems.

"The number one reason we chose PolicyTech was the depth of the search engine," said Andrews-Carden. PPM's variety of search features include keyword, title, in-text, author, date, and process searches.

MHS was also enticed by the automated reminders for policy review. Next the ability to embed photos, links, videos, and various file types into PPM documents appealed to their desire to use PPM for a broad variety of documents in addition to hospital policies and procedures.

## Software Features Connect Hospital Staff

Policy & Procedure Manager's wide array of policy specific features made it an easy choice to implement at MHS's multiple healthcare facilities.

"Every (software) does some tracking features but nobody does it as well as PolicyTech," said Andrews-Carden.

The prominent features allow document administrators to view documents in each step of the draft, review, and approval process as well as create reports of which readers have read—or have not read—each document. Reviewers use Microsoft Word™ reviewer tools to edit and make suggestions to documents all along the approval process.

While PPM is compatible with Active Directory it is not a requirement for the system to function. At MHS much of the staff, including nurses, technicians, and housekeepers, do not have email accounts. These employees can still have PPM accounts, read policies, and be held accountable for their policies without an email address.

## AHA Endorsement a Big Plus

As Andrews-Carden looked for a solution to her policy management problems she took confidence in the American Hospital Association's (AHA) exclusive endorsement of PPM software.

"The biggest 'ah-ha' was the AHA endorsement," Andrews-Carden said. "The fact that it was a complete document management system was the icing on the cake."

MHS also liked PolicyTech's offer of concurrent licensing. This licensing plan is an affordable system of software licensing where MHS purchases licenses based on the number of simultaneous users of the software rather than the number to total users. Concurrent licensing allows MHS flexibility to grow PPM as it adds users and facilities to their healthcare network. It also is a cost-efficient way to manage policies when shift work is a dominant feature of a company's employment structure.

## Conclusion

MHS faces JCAHO audits of policies and procedures once every two years, yearly corporate compliance audits, and a three-year review cycle for all documents. In this regulated environment, each employee needs to stay current on all relevant policies and procedures in order for this aspect of compliance to be satisfied.

Andrews-Carden keeps referring back to PPM's unique functionality and focus on policy and procedure management when considering the possibilities with the software.

"I love this product. I just love it. I don't know why more people don't know about it," Andrews-Carden said. "(PPM) can revolutionize the industry."

### 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 650 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 policy management software is the solution for quality assurance and enforcement of best practices.*

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