

CASE STUDY: POLICY MANAGEMENT | HEALTHCARE
Eastern Idaho Regional Medical Center



"The software paid 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."

– Chris Bliersbach
EIRMC



NAVEX Global's policy management system, **PolicyTech**, is endorsed by the American Hospital Association.



Improved Performance Pays Off After First Audit

The largest medical facility in the region, Eastern Idaho Regional Medical Center (EIRMC) is a modern, JCAHO-accredited, 331-bed full-service hospital located in Idaho Falls. The organization had struggled to keep policy binders current and effectively distributed to hospital employees. Additionally, the policy committee meetings cost the hospital more than \$14,000 per year on top of annual Joint Commission audits.

After implementing NAVEX Global software at two former hospitals, a hospital's director of quality management, Chris Bliersbach, implemented PolicyTech policy management software as the management solution for EIRMC, allowing them to cut costs while increasing productivity and compliance.

In The Beginning, There Was Low Productivity

When Chris Bliersbach joined EIRMC he was encouraged that they had a manual policy management system established and working. Previously, he worked at both Phoenix Baptist Hospital and Lovelace Medical Center (AZ) where he deployed NAVEX Global's policy management software and enjoyed the benefits.

Even though EIRMC's 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."

Prior to deploying NAVEX Global's policy management software at Phoenix Baptist, Bliersbach shared: "I saw a lot 'rubber-stamping.' Everyone was so busy and our policy management system was so painful, review and approval and ultimately policy awareness weren't as good as they 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."

Regulatory Complexity Increases in Healthcare

Bliersbach noted a gradual change the Joint Commission's view of policy and procedure management: "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."

"With NAVEX Global's PolicyTech, documents stay where they are put and the **software reminds me when I need to review or update a policy**," said Bliersbach.

Legal complexities are also on the rise. "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 noted a case where a lawyer asked for a policy that was no longer in effect. That experience helped him realize having a document archival system is a must, but manually it can be difficult and time consuming to maintain reliably.

He also noted that efficiency needed to increase around the process. The paper printing associated with at least 200 binders across the organization was an expenditure that could be avoided, he knew. Also, one of the largest expenses, a policy management committee met once a month for two hours to approve and update policies and procedures. On average, 20 staff members attended the meetings and most were management-level employees with an average salary of \$30 an hour. The result was every meeting incurred an estimated cost of \$1,200, making them \$14,000 annual expense.

Past Experience Comes in Handy at EIRMC

"What's nice about Policy & Procedure Manager 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," said Bliersbach.

More than policy management; its **performance management.**

Having served as the director of quality management at three organizations, Bliersbach had experienced the same challenges with policy management at all of them. He chose NAVEX Global's PolicyTech as the solution for each hospital because of its capability to implement a common workflow, increase productivity and compliance. He specifically wanted a solution that accomplished the following objectives:

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

Bliersbach stated that he chose PolicyTech for "the ability to customize the software to our own needs and current template, the ability to download our staff into the software and keep records of our employees in it as well." He continued, "We liked the automated review, approval, distribution and archival flow of documents, including the email reminders. Because we have competency exams, the ability to build quizzes right into the policies was a major plus. PolicyTech had more features and flexibility than the others that we looked at."

He continued, "One of the direct costs savings we have received was reducing the amount time we spent in meetings. This was productivity improvement for our staff. Having these policies more accessible has helped employees be more effective in doing the right things. 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."

"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 PolicyTech, and a couple weeks after that I had my policies into it. It was able to quickly make sense of disorganization."

Bliersbach has worked with many different software organizations and – without hesitation – rates NAVEX Global's Client Care team as "one of the best." He lauds, "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 PolicyTech. 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."

How are you training against your policies?

Having your policies and procedures organized and easily managed is critical to your compliance program, and the overall health of your business. But how do you know your staff and vendors have **read and understand them**?

Ask one of our compliance experts about NAVEX Global's complete online training systems.

The ability to be compliant hinges on organization, awareness and comprehension. "What's nice about PolicyTech 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," continued Bliersbach.

"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."

In fact, Bliersbach only had good things to say. A few more relevant comments: "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 PolicyTech was a helpful relief. CMS and the state have a tendency to be more policy-driven and PolicyTech has 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 PolicyTech because it made their job easy. They were impressed."

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"We have used it [automated archival feature] in the past at Phoenix Baptist, Lovelace, and EIRMC. 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."

"I figured that for the cost of one of our interdisciplinary policy committee meetings we could maintain PolicyTech on a yearly basis. When I realized EIRMC was maintaining 200 paper manuals, I saw an immediate application of PolicyTech. 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 PolicyTech."

In short, NAVEX Global's policy management software has earned a fan in Chris Bliersbach. It has reduced costs, improved efficiency across this third hospital for Bliersbach and brought consistency to the complicated job of policy management. "The real benefit to a highly evolved policy management system is that you can use to improve performance," said Bliersbach.

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866-297-0224 | info@navexglobal.com | www.navexglobal.com