PolicyStat™

Quest for the Files: A Tale About Building a Digital Policy and Procedure Process

INTRODUCTION:

Meet Brenda, the Director of Quality and Accreditation for Granite Pines Health System (GPHS) of Granite Pines, Colorado, and the hero of our story. What makes her a hero?

Brenda has been assigned a monumental task for which she has no experience. The task and its outcome have implications for every staffer, department, and patient of GPHS.

Of course, she is expected to execute this task without fail.

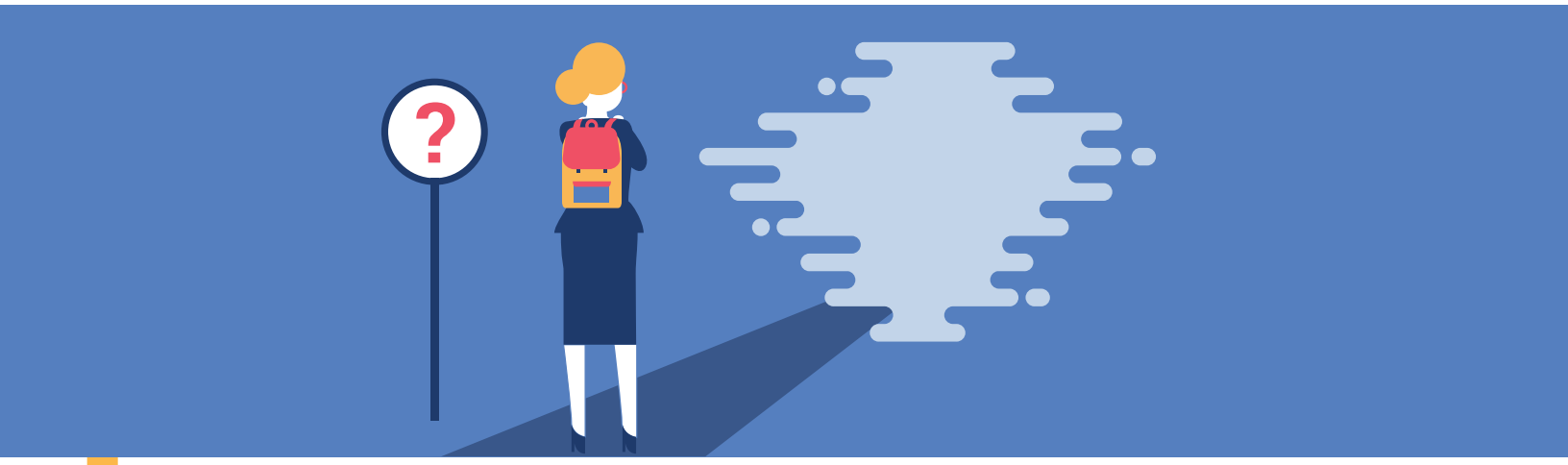
While Brenda's name, her employer, and the place where her story unfolds are fictional, the challenges she must overcome are real.

The obstacles in her path are based on our experience guiding hundreds of healthcare clients on the journey of building a digital process for creating and managing healthcare policies and procedures.

Let's see what happens.

PolicyStat™

CHAPTER 1:
BEGIN WITH THE END



Increased competition within a 20-mile radius of Granite Pines Health System (GPHS), along with more intense regulatory scrutiny, have Brenda and the rest of senior leadership feeling vulnerable to the new realities of healthcare.

Brenda has been tasked with getting GPHS out in front of their compliance requirements by finding a better way to manage their policies and procedures.

Brenda has been with Granite Pines long enough to know the answer is bigger than a few incremental changes. The entire workflow process, from authoring to audit, needs to be revised and replaced with a digital solution.

She doesn't know exactly what it will look like yet, but she knows what she's seeking.

That's because before she ventures down a path of unfamiliar territory, Brenda has the presence of mind to define what she's in search of:

- A more efficient way to manage policies and procedures
- Insulation from compliance risk
- Clarity of policy and procedure process
- Confidence in accuracy of document information and compliance readiness
- Immediate, intuitive access to all information by all who need it
- More time for clinical staff to focus on patient care

Clearly defining the end goal is the first step to a successful journey. But Brenda is about to discover that a great first step is often followed by a stumble.

PolicyStat™

CHAPTER 2:
THE FORCES ARE NOT WITH HER

On a sunny day in mid-October, Brenda crosses the parking lot with a deliberate, but relaxed stride. She's even earlier than usual, and she stops for a moment to enjoy the deep azure of the Colorado sky.

It's a shade of blue you can only see in Colorado, and only in the autumn. The fact that she was able to take the time to drink it in helps calm her nerves about the presentation she's about to give to senior management.

Tucked inside her laptop is a 10-slide PowerPoint deck that succinctly makes the case for scrapping the health system's current physical binder and SharePoint-based policy archive in favor of the digital solution she's been picturing in her head.

She's envisioning something like an easy-to-use content management system. Anything but the clunky, error-prone process GPHS has cobbled together over the last few administrations.

Between her preparation and the weather, she'll be able to get agreement about the need for a digital policy and procedure solution, as opposed to just another series of band-aids.

Less than 20 minutes later, Brenda is back in her office wishing that she could join the formation of Cinnamon Teal ducks outside her window and fly as far away from GPHS as possible.

Before she even had time to ask for them, the questions came whizzing at her from every seat around the conference table.

"No one disagrees with the need to find efficiencies, but have you crunched the numbers on the overtime pay we might incur with off-shift training sessions? Have you consulted with the shift supervisors about scheduling?"

"Our in-house system isn't perfect, but what you're talking about sounds like starting from scratch. A digital policy library? Who's going to enter all the data?"

"Have you consulted with legal?"

"That could cost hundreds of thousands of dollars, if not more. Whose budget will it come out of? Not IT's."

Fortunately for the staff and patients, Brenda is not easily discouraged.

Despite leaving the meeting feeling like a human dartboard, she takes a long run after work where the crisp fall air clears her disappointment. She decides to use the rough start as an opportunity to really appreciate what she's up against.

Coming into work the following day, Brenda fully understands that she will need to overcome two kinds of forces in order to bring her vision to life:

External

- Inertia of existing processes
- Demands of compliance and accreditation authorities
- Policy locations that drain staff time and attention to find, make copies of, and share
- Time (speed of industry change x urgency to catch up, plus time available to find and implement a solution)

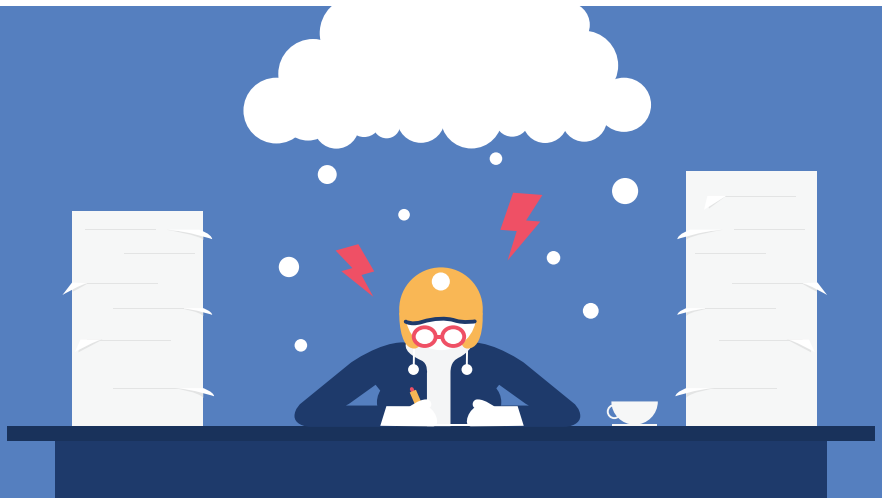
Internal

- Fear of the unknown
- Lack of experience with such a comprehensive project
- Lack of technical knowledge needed to evaluate and recommend the best solution
- Uncertainty about which outside vendor can help her achieve the goal

Brenda is armed with insight that can help illuminate a path to her solution, but she still has a major problem: She's never done anything like this before.

So she gets to work on creating an RFP to find a partner who can deliver on GPHS's specific policy and procedure management needs.

CHAPTER 3:
AN ALLY EMERGES



The RFPs have gone out, and after working through detailed proposals as thick as the season's first snowfall, Brenda finally has a list of finalists she can take to her second meeting with the evaluation team. The CEO has been invited.

The meeting goes worse than the first one.

The first question comes from the CEO herself, Jackie Averbach. Jackie cuts right to the chase.

"So Brenda, which approach do you recommend we take?"

It's a simple question but Brenda finds it impossible to give Jackie a direct answer.

"Well, Jackie, all three companies clearly have their merits. I think my role here is to gain…"

Before Brenda can say "alignment," Jackie interjects.

"Brenda, your role here is Director of Quality and Accreditation. I appreciate that we're asking you to solve a problem that's been years, if not decades in the making, but how can we be confident in your solution if you're not convinced you've found someone who can make it happen?"

"Besides," Jackie adds before glancing at the Blackberry she can't bring herself to abandon, "the proposals you've shared all take too long and cost too much."

Brenda nods gamely and says something that elicits a gracious response from the CEO as she's gathering her notebook to leave. Later that evening, Brenda recalls that she thanked Jackie for "her time and feedback."

Still, as she's trying to fall asleep, she also recalls that she promised the committee (with the CEO still in the room) that she would return in two weeks with a vendor she could recommend without hesitation.

During her elliptical session the following morning, she mentally reviews the proposals, and her thoughts linger on one from a company called PolicyStat.

The PolicyStat proposal stuck out for its lack of tech-speak and its relatively short timeline. It required almost zero IT resources, and the cost was surprisingly low compared to the others. GPHS spent more on the annual Christmas party than the figure PolicyStat was quoting.

PolicyStat's solution was so simple and affordable that Brenda actually wondered if what they proposed was comprehensive enough.

Now it occurs to her that if PolicyStat's digital policy and procedure process makes sense to a layperson like her, she ought to be able to get IT, Finance, and HR on board.

And who knows? Maybe she'll even get GPHS staff to actually use the solution and stay on top of expirations and compliance guidelines.

She finishes her workout and heads into the office.

CHAPTER 4:
THE DESTINATION DRAWS NEAR

After reviewing PolicyStat's proposal again, Brenda's hopes are high that she has found a partner she can recommend with confidence to her evaluation team and CEO. She puts the finishing touches on her revised presentation and sends out the calendar invitations.

On the day of the meeting to present PolicyStat's solution, Brenda is having a second cup of coffee and reviewing her notes one final time before she puts them away.

In the bare limbs of the dogwood next to the driveway, a flash of blue catches her eye. It's a Mountain Bluebird, the same shade of blue as the sky had been on the day two months earlier when she began her quest to implement a digital policy management process.

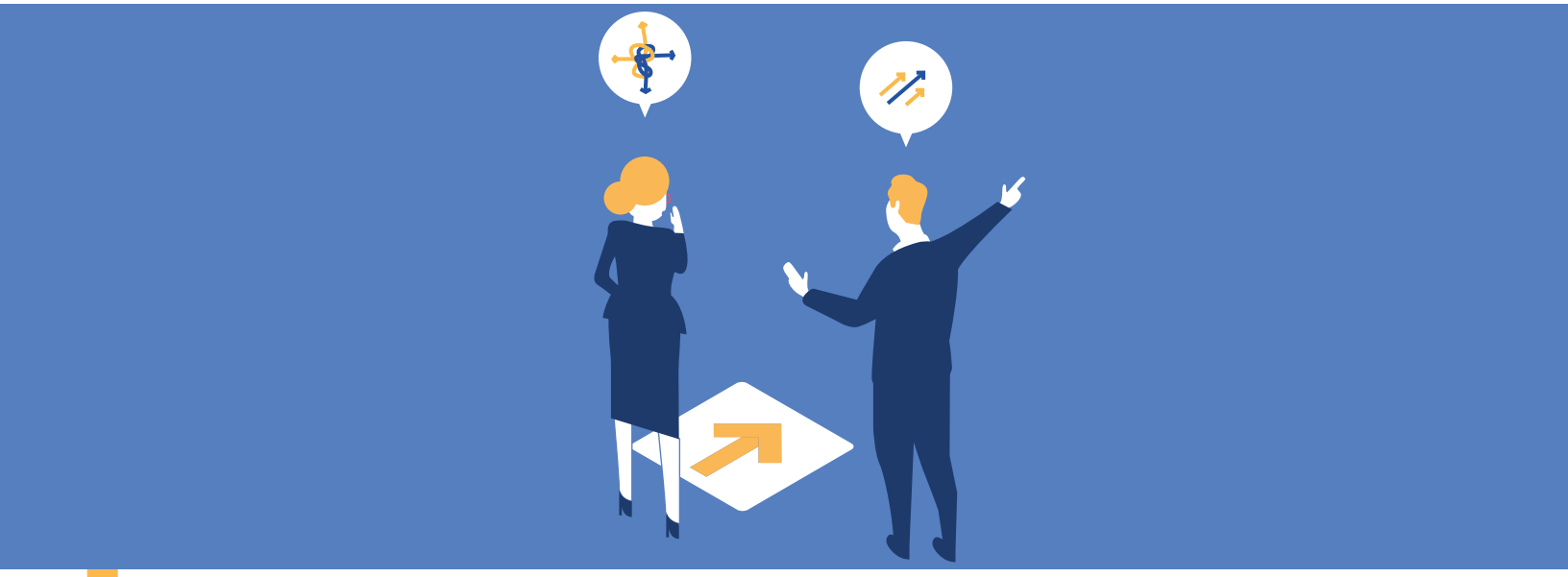
Would today's outcome be any different than the others thus far? After all, nothing about the process had been predictable up to this point.

Still, as Brenda made her way to GPHS, she took the unexpected appearance of the bluebird as a good sign.

Driving toward the GPHS campus, the sun breaks through the clouds for a moment and shines a ray of golden encouragement on the highway a few miles ahead of her.

She's not there yet, but something tells her she's headed in the right direction.

CHAPTER 5:
BRENDA PREVAILS



Although it required the fewest pages to explain, in the end, PolicyStat brought Brenda a solution with the longest list of reasons to support her recommendation to implement their system.

PolicyStat helped her overcome internal objections and gain buy-in from all stakeholders with a digital policy and procedure solution that delivers:

- Digital authoring tools that eliminate the inefficiencies and confusion of manual document creation
- Automatic updating to ensure that all document contributors and reviewers are working with the latest version of a document
- Configurable task notifications to ensure that staff are held accountable to timelines and team members
- An alternative to long approval meetings, log jams, and inefficiencies
- Minimal impact on IT resources or budget
- A solution that is easy to implement and train users on
- Real-time document accessibility from any location via any desktop, laptop, smartphone, or tablet
- HTML-formatted documents that can be keyword-searched and quickly located
- Greater compliance and exceptional patient care
- A partner who views the conclusion of the implementation as the beginning of a lasting relationship

PolicyStat™

Brenda's story may be a work of fiction, but it contains a moral inspired by true events.

When it comes to successfully navigating the journey to digital policy and procedure management, choose a partner who knows the shortest possible route.

After all, it's hard to know what obstacles you might encounter along the way.

Thanks to our experience with hundreds of healthcare facilities of all sizes and types, we can help you overcome them.

See compliance differently

If you have two minutes, watch our demo to learn how you can automatically begin shifting thousands of hours you're spending on policy and procedure management into focusing more time on delivering exceptional patient care.

You can also contact us to set up a live demo and learn why we have a 99 percent client retention rate and a 99.8 percent customer support satisfaction score.

PolicyStat™