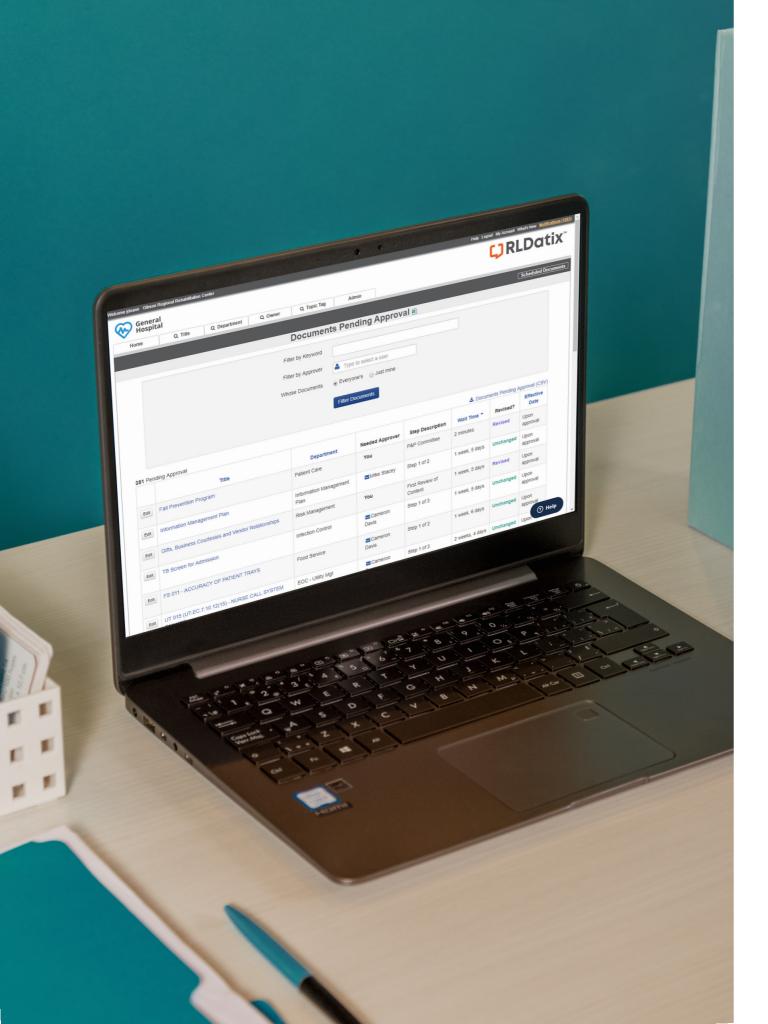CASE STUDY: GREATER BALTIMORE MEDICAL CENTER

Promoting organizational unity with effective policy management

Greater Baltimore Medical Center (GBMC) is a 342-bed medical center located in the Baltimore suburb of Towson, Maryland. GBMC manages 21,014 admissions and 57,731 emergency room visits annually. Before implementing RLDatix PolicyStat in 2018, GBMC conducted a thorough search in hopes of finding a policy management solution that fit their unique needs. Across GBMC, there was a clear need to find a solution that could meet each department's individual requirements while promoting unity across the organization.

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Success began early on in GBMC's search when they clearly established a process for evaluating potential software and its compatibility with their requirements. Rebecca Stover, Nurse Clinical Systems Project Manager, served as the project manager throughout GBMC's vetting process. In collaboration with various GBMC departments, Stover created "Policy Software Evaluation Forms" to evaluate each vendor. The scorecard consisted of objective requirements (rated as 1= unacceptable, 2= acceptable, 3= superior) and open-ended questions. Below are several examples of more than 20 criteria GBMC used when evaluating PolicyStat.

- *Ability for relevancy search to locate policies*

- *Automation of policy overdue notifications*

- *Ability to see and track individual changes made to policy during approval process*

- *Do they convert existing documents for standardization?*

- *Integration with videos and multimedia within policies?*

- *Can individual logins sync with Active Directory?*

In addition to individual department needs, GBMC also identified collective requirements they wanted to see in the final selection of a policy management tool, including:

👁 **The ability to view all versions and iterations of policies within one centralized system**

☰ **Streamlined approval workflows to improve organization-wide communication**

» **Automated processes around acknowledgements, supporting accountability for all staff members**

◔ **Efficient and automated reporting functionality**

Siloed policy management
The need for a comprehensive solution

Prior to using PolicyStat, GBMC used a variety of workflows for managing their policies and procedures. While some departments housed and shared information using an Excel spreadsheet, others used the organization's intranet, an alternative document management system or printed documents stored in binders. With a variety of systems in place, there was a lack of consistency in how to access or share documents, and each department experienced its own set of unique challenges.

Organization Wide

The clinical side of GBMC housed a majority of its policies in an internal policy portal and tracked them using an Excel spreadsheet that was sent out monthly to staff. "A main challenge for the hospital was the inability to see where policies were and what the approval workflows were for the associated policy," Stover says.

Without functionality for bulk overrides, staff had to manually update policies to reflect changes including who should be notified when policies were ready for review. Additionally, any time a policy was updated, the date on the policy would change, creating a manual process for tracking policies' review dates. Stover also experienced difficulties when the organization needed to produce policies for legal matters such as reviews from regulatory bodies including the Joint Commission. Without robust searching functionality, locating policies was often a delayed, manual and time consuming process.

After implementing PolicyStat, GBMC no longer experiences the stress of searching for policies from different areas of the organization. PolicyStat has empowered GBMC to efficiently find and share their policies whenever needed. "When regulatory bodies used to come to GBMC, I would spend every day in the command center – pulling and finding the relevant policies in the archives," Stover says. During a recent survey, the time it took for Stover to find the necessary policies in PolicyStat totaled less than one hour. PolicyStat has also allowed GBMC to run bulk override actions on policies, eliminating the tedious work involved with updating each individual policy when applying updates. When edits are made on PolicyStat, the policy's original date is maintained, regardless of when changes are made.

Pathology & Laboratory

Catherine Seeley, Quality and Safety Systems Coordinator at GBMC's Department of Pathology and Laboratory Medicine Administrator says that the laboratory's previous policy management system made it difficult to upload policies and changes had to be monitored using a spreadsheet.

"If a change was made to a policy, staff needed to make detailed notes and rely on memory to ensure that those changes were communicated. PolicyStat is lightyears ahead of where we were."

Catherine Seeley, *Quality and Safety Systems Coordinator at GBMC's Department of Pathology and Laboratory Medicine Administrator*

Since implementing PolicyStat, Seeley says that software's automated notifications have improved communication among team members. "We have received feedback from our team that they really appreciate those notifications, especially for changes that affect everybody, such as when we make adjustments to the safety manual." Seeley also notes that, in the context of COVID-19, receiving these change notifications in a timely manner is crucial to ensuring that staff are aware of the organization's latest COVID-19 updates.

Pharmacy

Vaishali Khushalani, Medication Safety Officer at GBMC, describes the previous process for the pharmacy department's policy approval process as long and drawn out. This was most evident when policies were shared among different departments. Staff needed physical signatures from various individuals as part of the approval workflow process. Once policies received their required approvals, they needed to be returned to the location where they were originally housed. "This could take potentially up to a month to complete, creating a lag for when frontline staff could finally access the policies," Khushalani says.

PolicyStat has allowed GBMC to easily share policies across the organization, streamlining the approval process and promoting efficiency across all departments. "It has helped with assigning people to work on policies and updating them has been much easier. I don't have to maintain three separate Excel sheets because I can access reports from PolicyStat directly," Khushalani says.

The organization's previous system did not have robust searching functionality, which left staff feeling overwhelmed. Key-word searching within PolicyStat has supported GBMC's most important function: providing care. Staff can now quickly search for and find policies when they are delivering care to patients. Khushalani also points to PolicyStat's acknowledgements feature that has allowed for accountability and helps departments ensure staff are reading relevant policy information.

Quality & Patient Safety

GBMC's patient safety and risk area has also experienced organizational improvements with the use of PolicyStat. Evelyn Bowmaster, Director of Quality & Patient Safety Physician Practices at GBMC, says that the organization has benefited from having a centralized location that stores all versions of a policy. "If we're doing a chart review for a case, it's very helpful to research the version of the policy. Even if the case happened several years ago, we are able to pull the correct version of the policy to determine if standards of care were met," Bowmaster says.
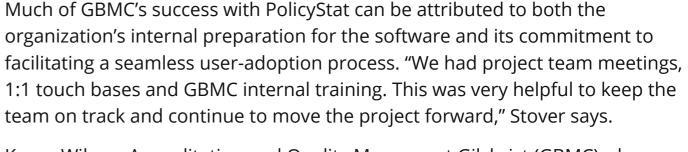
The organization has also benefited from the ability to apply applicability levels. This has helped them identify individual policies that can be merged together to create a stronger system-wide policy.

> "It's really helpful because it aligns not only what we should do from a regulatory aspect but also helps us to operationalize that in a usable, realistic policy that staff can easily follow."
>
> **Evelyn Bowmaster**, *Director of Quality & Patient Safety Physician Practices at GBMC*

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Promoting organizational safety and compliance goals with PolicyStat

Much of GBMC's success with PolicyStat can be attributed to both the organization's internal preparation for the software and its commitment to facilitating a seamless user-adoption process. "We had project team meetings, 1:1 touch bases and GBMC internal training. This was very helpful to keep the team on track and continue to move the project forward," Stover says.

Karen Wilson, Accreditation and Quality Manager at Gilchrist (GBMC), shares that PolicyStat has been incorporated into some of the staff training and onboarding processes at Gilchrist (GBMC). "We've actually included some staff and management on the frontline to be a part of the policy review processes put into place. This ensures those with subject matter expertise have an opportunity to be an integral part of the process to ensure we're capturing processes and standard work accurately and that they're on board with it, and I think it's working very well," Wilson says.

In addition to implementing PolicyStat into training materials, Stover says that incorporating frontline staff's insights as GBMC searched for a solution was a key way the organization was able to cultivate strong user-adoption. GBMC also put together a comprehensive communication and change management plan before PolicyStat even went live. "We had a communication plan to make sure we contacted all of the end users across the board, to make sure they knew when [PolicyStat] was coming, what was coming, what they needed to prepare for and the positive changes that were going to occur. When that was delivered, it was a win all across the board," Stover says.

When PolicyStat went live, Stover created "Policy Rocks" t-shirts for the team to wear. This generated excitement around GBMC's adoption of PolicyStat and served as a way to celebrate the organization's journey to a unified policy management system.

A lasting solution: supporting an organization through change

Healthcare organizations around the world, including GBMC, have had to pivot and adapt to new challenges brought on by the COVID-19 pandemic. According to Stover, GBMC currently has 44 policies across the organization related to various COVID-19 subtopics. These policies relate to a wide variety of topics including surgical procedures, remote work policies and infection prevention. To track their COVID-19 policies, GBMC has used PolicyStatistics, an optional add-on module that allows organizations to access valuable PolicyStat insights including usage data, top search terms and site health vital signs. PolicyStatistics has revealed that COVID-19 has been searched for over 1,300 times across the organization. In GBMC's COVID-19 response command center, PolicyStat has served as a great avenue to streamline processes and map policies to approval workflows that do not exist under normal circumstances. Additionally, the organization has benefited from the ability to update COVID-19 related attachments directly in the system, so staff can easily access and print documents to reference.

GBMC's journey to PolicyStat is just a glimpse into how the organization continuously strives for their processes to drive unity and collaboration among

departments. When GBMC identified gaps in their policy management processes, the organization adopted a thoughtful approach when they began their search and ultimately selected PolicyStat.

"We chose PolicyStat because of our confidence in the PolicyStat team and product. PolicyStat checked most of the features that GBMC was looking for on our wish list, and our organizational wide stakeholders had confidence in the PolicyStat team to implement and support the product moving forward."

Since launching PolicyStat, the software's functionality has equipped GBMC staff with an easy to use tool that also supports staff in providing the best care possible. "Our end users, myself included, previously struggled to find the correct document within our legacy system. [PolicyStat's] robust searching features help our clinicians find the information they need quickly, so they can provide the care they would want for their own loved ones," Stover says.

Discover how RLDatix PolicyStat can drive effective and unified policy management across your organization.

Tracking policy management improvements at GBMC

After GBMC launched PolicyStat in 2018, Stover had a personal key performance indicator to decrease outdated policies by 10% for nursing policies. Stover credits a report within PolicyStat that indicates when policies are pending approval for more than 30 days for helping GBMC achieve this. Weekly automated reminders to staff and clear ownership outlined on each policy contributed to this success as well.

Twelve months after implementation, Stover shared a survey with staff and found that 90.23% of nursing staff were satisfied with PolicyStat. Additionally, the survey results indicated that nursing staff were able to easily find the correct policy during their first policy search with 87.20% accuracy.

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RLDatix is on a mission to change healthcare. We help organizations drive safer, more efficient care by providing governance, risk and compliance tools that drive overall improvement and safety. Our suite of cloud-based software helps organizations reduce healthcare-acquired infections, report on adverse events, and ensure patient safety learnings are deployed effectively and immediately through dynamic policy and procedure management.

With over 3,000 customers in 19 countries, RLDatix software protects hundreds of millions of patients around the world. For more information, visit **www.rldatix.com**.

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