



Lawson Healthcare Webinar Series

October 20-24, 2008

Webinar Series October 20 – October 24

▶ **Monday, October 20**

[Road to Budgeting & Planning 9.0](#)

10 am CST

▶ **Tuesday, October 21**

[Getting Everyone in the ACT Through Self Service HR](#)

10 am CST

▶ **Wednesday, October 22**

[Taking Inventory of Mobile Supply Chain Management](#)

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Thursday, October 23

[Banner Savings With Employee and Manager Self Service](#)

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[Increase Your IQ on Lawson Business Intelligence](#)

1 pm CST

Friday, October 24

[Getting on Solid Ground with Joint Commission Compliance](#)

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<http://www.lawson.com/hcwebinarseries>

Todd Horton is a Project Manager for Catholic Healthcare West. He has over 15 years of systems experience in the health care, finance, consulting, and automotive industries. He has been with Catholic Healthcare West in several roles including implementation project manager for over 4 years supporting the system wide rollout of Lawson for HR, Payroll, Finance and Materials.

Positioning Performance Management for Healthcare as THE Tool to Support Joint Commission Compliance Administration: A Catholic Healthcare West Value Proposition

PRESENTED BY:

Todd K Horton

Project Manager, Human Resource Information Systems



Catholic Healthcare West

CHW

Catholic Healthcare West (CHW)

- ✓ Largest Catholic health care system based in the western United States
- ✓ 42 acute care facilities and two medical practice groups in California, Arizona and Nevada.



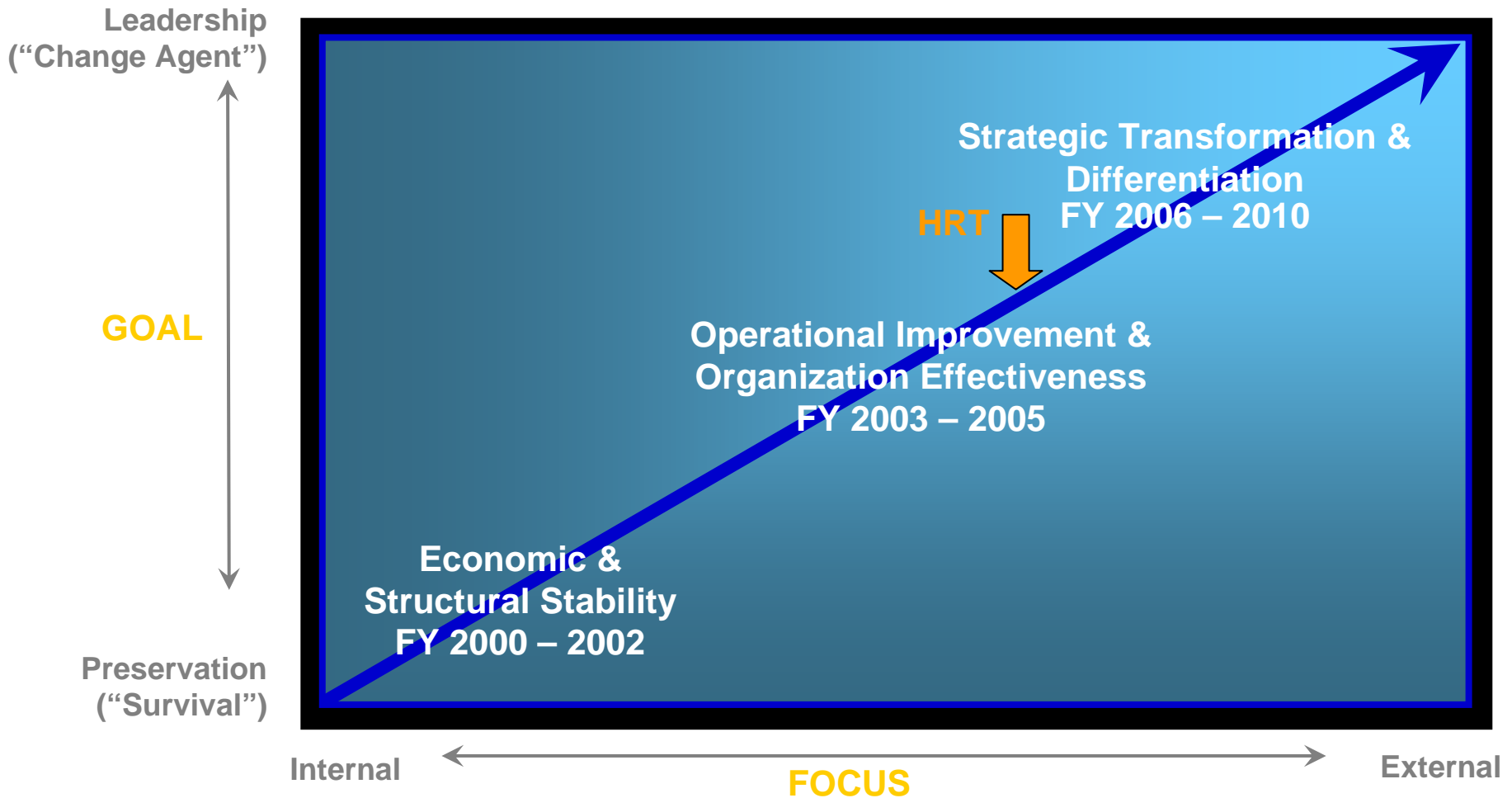
Our Mission

Catholic Healthcare West and our sponsoring Congregations are committed to furthering the healing ministry of Jesus.

We dedicate our resources to:

- ✓ Delivering compassionate, high-quality, affordable health services;
- ✓ Serving and advocating for our sisters and brothers who are poor and disenfranchised; and
- ✓ Partnering with others in the community to improve the quality of life.

Fit with Strategic Redevelopment Plan



From What to What?

From

- Transactions as core
- Reactive / respond
- “Police”
- Follower
- Maintenance
- Today Only
- React / Execute
- Sit at the Table

To

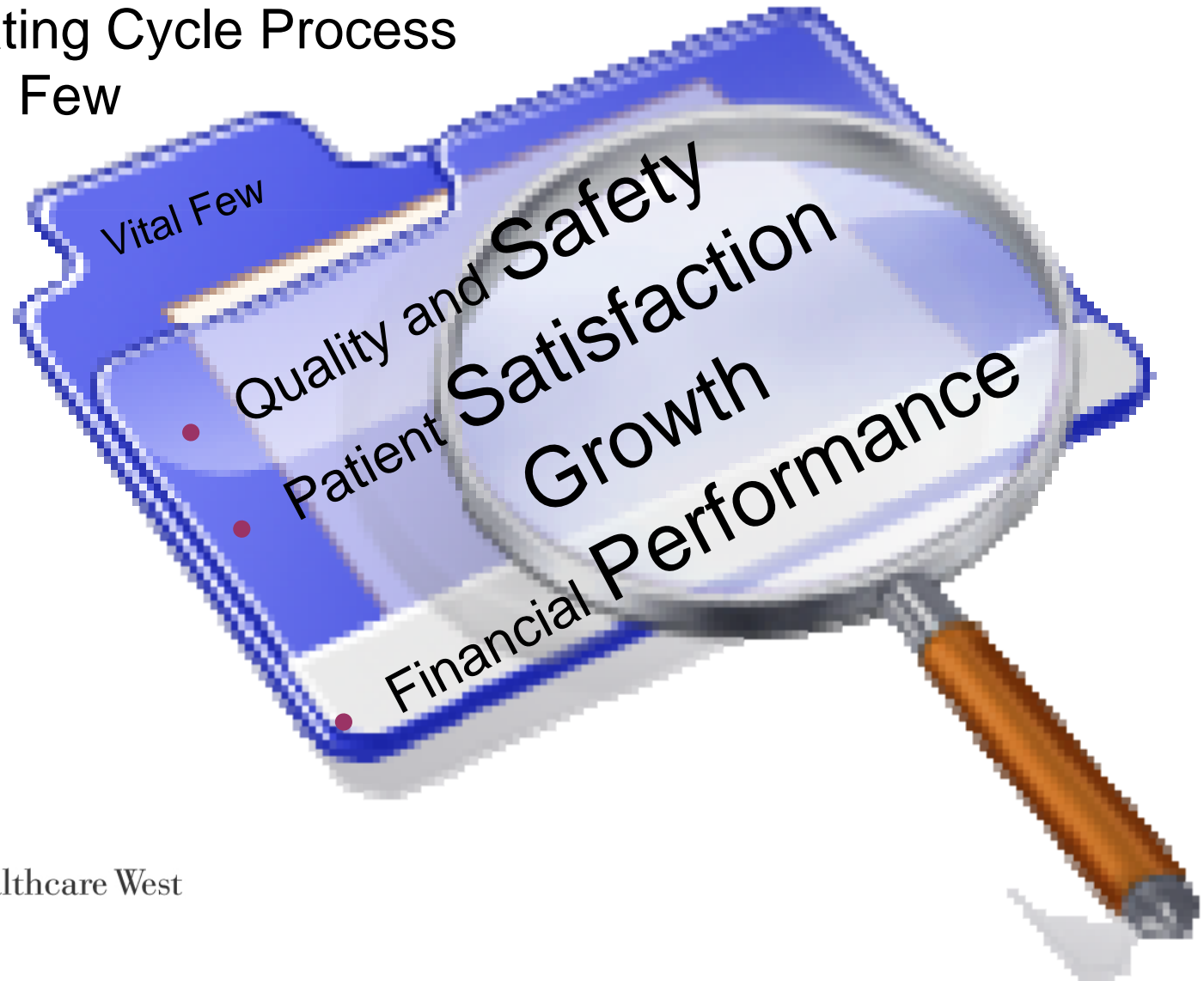
- Strategic/Transformation as core
- Proactive/Lead
- Coach/Counsel
- Leader
- Provocateur
- Towards the Future
- Plan/Execute
- Set the Table

HR Principles

1. HR is a driver of our mission through focusing on business outcomes
2. HR operates using business principles
3. HR provides right people, right job, right time
4. HR fosters a culture of accountability

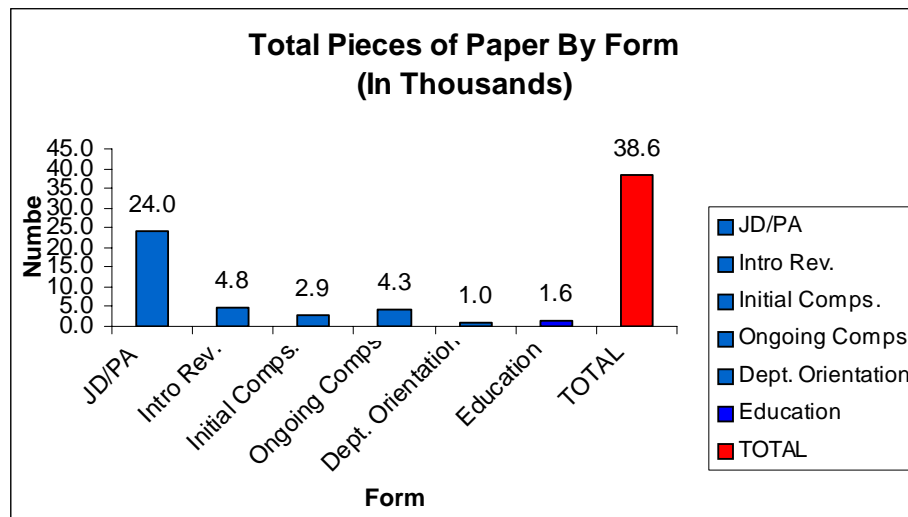
HRT Prioritization

HRT Projects were Prioritized Through the Lens of Operating Cycle Process and Vital Few



A facility with 2,400 employees processes over 38,000 pieces of paper related to performance management ANNUALLY.

- Our Performance Appraisal Process
 - Manual Process is cumbersome and error prone
 - Managers fill out MS Word/Excel forms manually, make duplicate records on the unit and send the original to HR
 - HR manually enters into the HRIS when a performance appraisal is completed and audits performance appraisals for completeness



- Complicating Factors

- 24/7 Per Diem Workforce
- Managers w/ large Span of Control
- Multiple templates in use across business units

	<u>#</u> <u>Required</u>	<u>Avg #</u> <u>Pages</u>
Job Description/Performance Appraisal	2400	10
Introductory Review	480	10
Initial Competency Checklist	480	6
Ongoing Competency Checklist	720	6
Dept. Orientation	480	2
Education Record	800	2

JCAHO

- JCAHO Surprise Visits in 2006
 - Random audits of HR files will occur without notice.
 - Under our paper based system, knowing our compliance posture at a moments notice is difficult.

- Mid Cycle Periodic Performance Review (PPR)
 - HR is now required to submit compliance statistics every 12 months.
 - If we report non compliance with a standard, JCAHO requires a follow up phone call and the development of a detailed action plan and will require that we show improvement during their next unannounced survey

What's at Stake?

- Medicare/Medicaid Funding – On average 40-50% of hospital revenue is derived from government reimbursements (HealthLeaders, 2006)
 - JCAHO has reported an increase in hospitals with denied and conditional accreditation status under the surprise visit methodology. The average number of Requirements for Improvement (RFIs) increased to 7.4% in 2006 compared with 5.8% in 2005. (www.jcaho.org)
 - Executive Vice President of JCAHO was quoted directly in January 2006: “Down the road, I absolutely expect that organizations are going to find it tougher to be accredited.”
- Patient Safety – Root Cause Analyses of hospital sentinel events shows a significant link to orientation, training and competency assessment
 - JCAHO reported that in 2004, orientation and training processes were cited over 60% of the time and competency assessment 45% of the time as causes. (www.jcaho.org)
- Community Perception of our Hospital – Hospitals with conditional or denied accreditation fail in the local press

- Workforce Planning (2)
- Workforce Development (3)
- Rewards and Recognition (3)
- HR Development and Best Demonstrated Practices (2)

Deliverable:

Streamline the actions and time required to complete quality individual performance assessments as required to meet Joint Commission requirements

Actions:

1. Pilot; Lawson Performance Management for Healthcare
2. Ensure processes / data are scalable across CHW
3. Include metrics for assessing success
4. Implement Pilot in Summer 2007
5. Assessment of success in Winter 2007

Pilot Defined: 3 Northern California Hospitals (2,500 employees)

Mount Shasta Medical Center

- 10/31/07 common review date

St Elizabeth's

- 10/31/07 common review date

Mercy Redding Medical Center

- Anniversary driven review date

Scope

- Define Job Descriptions for all employees
- Review all employees below director level in LPHMC
- Competencies not addressed for Pilot
- Department orientations not addressed for Pilot

How We Will Measure Success:

- Ability to maintain Joint Commission compliance for 95% completion rate (a Joint Commission standard)
- Elimination of the paper-based performance review and competency assessment process
- Manager and employee acceptance and satisfaction with the process
- Seamless integration of employee data with Lawson HR system
- Creation of an implementation standard that is scalable across the CHW organization

- Creation of custom and scalable interface from Lawson to Lawson Performance Management for Healthcare
 - Employee Data (HR11)
 - Review Data (PA26)
 - Licensure Data (PA22)
- **All managers trained (about 4 hours of training per manager)**
 - Job Description design and workflow
 - Performance events (manager, self, and peer)
- **Communication to all employees by HR and managers**
- **Compliance rate for hospitals with 10/31/2007 common review date**
 - 400 reviews due / 379 reviews completed on time
 - Target was 95%
 - Actual was 94.8%

- Positive feedback from frontline managers, Managed Care, and Joint Commission.
- Not able to secure HR data by facility or facility group
 - HR administrators see across all hospitals
- Not able to run reports by facility or facility group
 - Currently reports run at department level or system-wide
- Not able to configure key system components at a facility level
 - Organizational standards, rating scale, and patient population are defined once for all facilities – more flexibility is required to support variations across CHW



OK, so we have completed the pilot...

Now What?

Business Case for Change

Performance Review Lifecycle

Manager

Pre Review Administration

- Journaling
- Historical Reviews
- Job Description Enhancement
- HR Counseling

MM/EE
face-to-face

Post Review Administration

- Filing
- Compliance Reporting
- Joint Commission Responses

HR

50 % Reduction in Administrative Tasks



- 90% of CHW employees (48,000)
- Average span of control – 17
- Manager spends 1 hour per employee per event on administration
- Average 2.5 events per year per employee
- 50% reduction in administrative tasks for HR and Employees

- 3 year projected savings
 - \$6.5 M
- 3 year ROI
 - 172%



There must be HR Transformation

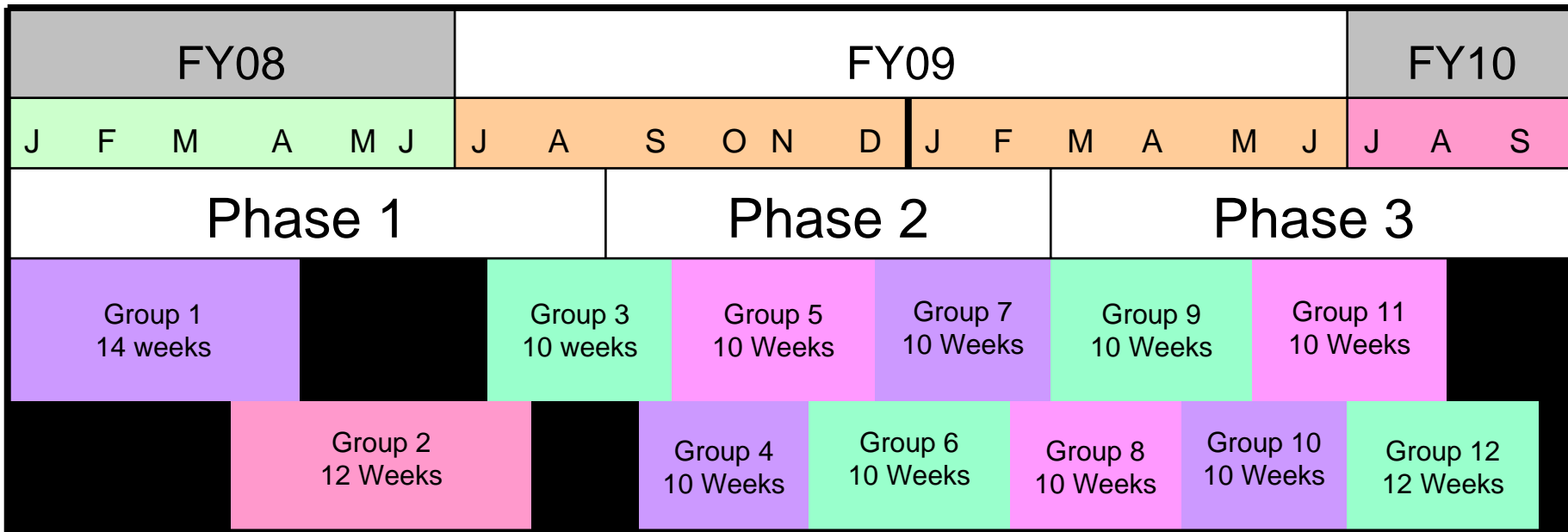


- Organizational rollout will occur across 3 phases and within each phase will be implementation groups
- 12 implementation groups will be comprised of 3 to 5 facilities of geographic proximity
- Implementation timeframe will range on average of 10 weeks per implementation group
- Implementation prerequisites will be communicated and monitored

- Facilities will be engaged at least one month prior to implementation
- Facility will be trained on JD/Competency build requirements
- Facility must have JD/Competency content created prior to implementation
- Union approval of JD changes must occur prior to implementation
- Implementation prerequisites will be communicated and deliverables monitored



Organizational Rollout Plan – Time Line



Organizational Rollout Plan – 10 Week Project Plan

Weeks

Week	1	2	3	4	5	6	7	8	9	10
Kickoff / Team Training	█									
Requirements	█									
Lawson Data Conversion	█	█	█	█						
Configure Application	█	█	█	█	█	█				
Sr Mgr Training (JDs & Checklist)							█			
Rollout JDs & Checklist to Sr. Mgmt							█	█		
Mgr & EE training (Evaluation Events)									█	
Rollout Evaluation Process to Mgr & EE									█	█



Tactical Challenges & CHW Solutions

1. Security Administration
2. HR Administration
3. PA26 Used as Driver
4. Lawson Performance Management for Healthcare to Lawson Interface



Security Administration

Challenge

- Can not create labor intensive process
- HRIS not staffed to support
- Rollout down to employee level

Solution

- Let the system work for you – initial password in interface
- Local HR first line of support – can reset passwords
- HRIS supports HR Super Users

HR Administration - Scalability

Challenge

- HR can see all data
- No key field to identify facility
- Single configuration Org Standards, and Patient Population

Short Term Solution

- Concatenate facility into Lawson Performance Management for Healthcare fields such as Department and Position

Long Term Solution

- Upgraded Lawson Performance Management for Healthcare (Conglomerates)

PA26 Used as Event Driver

Challenge

- Multiple scheduled events
- Multiple positions needs independent events
- Not all events on PA26 go to Lawson Performance Management for Healthcare

Solution

- Scheduled event = no actual date
- Inbound interface logic to pull earliest event for each position
- Reserved codes on PA26 for extractions to Lawson Performance Management for Healthcare

PA26 – Review Types

Drill Around® -- Webpage Dialog

https://lawson.chw.edu/lawson/portal/drill/drill.htm

Close | Search | Find Next | Reset | Printable View | Explorer View

REVIEW TYPE ▾

Code	Description	Active Flag
120-DAY	4 MONTH REVIEW	Active
30-DAY	30 DAY REVIEW	Active
6-MONTH	6 MONTH REVIEW	Active
60-DAY	60 DAY REVIEW	Active
90-DAY	3 MONTH REVIEW	Active
ANNUAL	ANNUAL	Active
DISCIPLINR	DISCIPLINARY REVIEW	Active
INELIG	INELIGIBLE / EXCLUDE	Active
JC-P1-A-CO	'JOINT COMM POS 1 ANN COMPTNCY	Active
JC-P1-A-EV	'JOINT COMM POS 1 ANN EVAL	Active
JC-P1-I-CO	'JOINT COMM POS 1 INIT COMPTNC	Active
JC-P1-I-EV	'JOINT COMM POS 1 INIT EVAL	Active
JC-P2-A-CO	'JOINT COMM POS 2 ANN COMPTNCY	Active
JC-P2-A-EV	'JOINT COMM POS 2 ANN EVAL	Active
JC-P2-I-CO	'JOINT COMM POS 2 INIT COMPTNC	Active
JC-P2-I-EV	'JOINT COMM POS 2 INIT EVAL	Active
JC-P3-A-CO	'JOINT COMM POS 3 ANN COMPTNCY	Active
JC-P3-A-EV	'JOINT COMM POS 3 ANN EVAL	Active
JC-P3-I-CO	'JOINT COMM POS 3 INIT COMPTNC	Active
JC-P3-I-EV	'JOINT COMM POS 3 INIT EVAL	Active
LOAEXTEND	EXTENDED	Active
PROBATION	PROBATION REVIEW	Active

Previous 25 Next 25 Records 1 - 25

https://lawson.chw.edu/lawson/portal/drill/drill.htm Trusted sites

LPMHC Outbound Interface

Challenge

- Delivered Lawson interface inadequate
- Create an automated process which schedules next years event

Solution

- Customized Interface with logic to find matching review on PA26, update information from Lawson Performance Management for Healthcare and create next annual review based on incoming review date.

Questions?



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