How to Enable an Efficient and Effective Mobile Workforce

The BlackBerry and Tablet Journey
Revera Home Health

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YOU MUST BE WILLING TO DO SOMETHING YOU HAVE NEVER DONE BEFORE TO GET TO WHERE YOU HAVE NEVER BEEN BEFORE.
Mobile Workforce Agenda

• The vision in the Revera Home Health Division is a strategic one which includes:
  – A 100% mobile and paperless platform that supports client and employee friendly solutions
  – Reduction in variation of processes, standardization
  – Eliminate waste in the processes

• Direct Benefits
  – Business viability, cost reductions, increase revenue

• In Direct Benefits
  – Growth, standardization, engaged staff

Lean in Health Care

• Lean thinking begins with driving out waste so that all work adds value and serves the customer's needs
• Identify value-added and non-value-added steps in every process as the first step of the journey toward lean operations
• Waste of money, time, supplies, good will = decreased value to the customer/client
Lean in Health Care

**Lean Principles:**
What problem are you trying to solve?

**Areas of Opportunity**
- Paper based processes
- Monitoring HPG manually
- Reliance on static reports for “after the fact” data
- Voice Mail to reach staff
- Home grown DMS solution
- Nurses on Qbit
- Timesheets and Telephony
- Variation in Processes
- Inconsistent Training

**The Solutions**
- GoldCare Pathways
- HPG Interface
- Coordination, Manager and Finance Workspaces
- BB10s
- GDMS
- Workspaces & Web Access
- MobilityPlus
- Standardized Processes
- Training Syllabus
Priority to projects that have the highest impact on customer satisfaction, Quality and financial targets

KEY elements for success

- Clear project owner with authority and accountability to deliver
- Strong, well defined Project Teams
- Solid Project Plan with cross functional representation and SMEs when required
- Project Charter and Scope
- Flexibility to adapt to changes and challenges
- Senior Level Support for the Project
- Regular Updates on Progress
- Good Vendor Partnerships
- Measure and Manage
- Change Management
Technology, Tools, Timelines

- Technology is a tool but it is a means to an end
- The focus should always be on efficient, standardized processes that have a positive impact on employee engagement and quality client care
- Don’t get dazzled by the bells and whistles unless they meet your need
- Always link back to the problem you are trying to solve and the project charter
- Use LEAN project management tools to streamline...don’t complicate the processes
- Timelines will shift so be realistic

Risks

- Competing Priorities
- Limited Resources
- Same resources on multiple projects
- Change Fatigue
- Funder priorities
- Training a mobile community workforce
- Change Management

Don’t bite off more that you can chew or others can digest
Change Management

- Chaos following change should be expected...and planned for

![Change Management Diagram]

Objectives
- Minimize time in the Valley of Despair
- Minimize depth of performance drop
- Avoid ‘knee-jerk’ reactions to the Valley of Despair

Lessons Learned

- Training
  - Employ Adult Education Principles
  - Be nimble and adjust
- Staff that are not English First Language
- Smartphones were “new” to front line, many did not have computers or cell phones
- Inventory Control
- “Stickiness” of process and ensuring the Branches own the process after roll out
- SLA (Service Level Agreement) for all projects
• What needs to happen first
• Strengthen the foundation
• Shift from information gathering to planning
• Capture best practices
• Determine priority areas
• Pilot
• Revise
• Ensure sustainability
Multiple Projects ~ One Goal

Mobile Workforce

BlackBerry
- 4000 BlackBerry Z10s deployed to PSWs, HSWs, HCAs in all 31 sites across Canada
- Completed Feb 24, 2014
- Decrease missed visits
- Decrease Unfilled Shifts

Next Steps :
- Automated travel (Q4)
- Broadcast scheduling

Tablets
- For Nurses and Therapists
- 600 Samsung Galaxy 10s
- Pilot stage in Belleville, Ont Q1
- Windsor, Ont pilot Q2
- Full Roll Out Q3/4
- Replaces QBIT and TELEPHONY (reduce costs and one platform)
- Access to all client documents
- Sets the stage for electronic charting
- Community staff have access to most current physician orders
MobilityPlus Project

4000 Blackberries (BB10s) to PSWs/HSWs/HCAs
All 27 RHH Branches across Canada
600 Tablets to Nurses and Therapists

Scheduling and Time verification Platform in real time

Goals
• to increase communication
• to reduce missed visits
• to add enhancements to the devices to assist the front line
• First enhancements GoldCare MobilityPlus and WebAccess
• Paperless Chart

“Thanks to the Blackberry, the Coordinator got on the case right away we were able to get help for (the Client) and avoid a high risk event.”

~ Burlington PSW
Scheduling – there’s an App for that

Green - complete
Yellow - in progress
Red – late or missed
Grey - upcoming

The Benefits for Coordination

• Benefits to Date
  – Reduce communication errors
  – Staff Satisfaction
  – Fewer payroll errors
  – Improved Communication of schedules
  – Secure email “unfilled” shifts to staff
  – One Point of Contact (replaces calling personal cells, homes, voice mails)
  – Decreased number of calls to verify information
  – Safety

“PSWs are emailing me back directly and if necessary cc’ing supervisors that may need to be involved in the conversation. I have also had discussions with multiple PSWs simultaneously to better share information and find solutions.” – Coordinator
Benefits to Front Line Staff

- Instant Access to their Goldcare Schedule
- Verify visits in real time – replaces telephony system
- Communicate to Coordination by email
- Reduces phone traffic
- Pick Up Messages between visits
- Information at their fingertips
- Safety in remote areas
- Safety for Clients (NSNF)

“So far the Blackberries have been working miracles for us, its opened up an entirely new dimension of secured communication capability that we simply lacked before.” ~ Coordinator

Geo Coding and Travel

- Geo Coding in place July 5th
- Ability to identify clients based on specific postal code area
- Reports and WorkSpaces to monitor travel
- Auto-Travel enhancement underway
  - Delivery end of August
  - Pilot and UAT September
  - Roll Out October
“I have seen a lot of positive outcomes. The staff are not just communicating with the office they are becoming a team and communicating with each other. PSW’s only really saw each other at staff meetings or in-services etc. Now they are learning from each other, it’s been great.”

~ Burlington PSW Supervisor

Mobility and Workspaces for Nurses/Therapists

- Requirements gathering for a mobile Nursing workforce
- Move to one platform for all direct and indirect time entry
- Fully Electronic documentation - future state
- NotesPlus
- Tablets in the process of roll out
- Nurses Workspace in Production (test Oct 2014)
- Supervisors in the field 4 days per week
Training Plan

• Do not underestimate the training needs
• Implementation Training
• Ongoing Training support
• Training developed for the audience
• Follow Up, Follow Up, Follow Up
• Provide Support at all Levels
• Power Users Model
• Sustainability Plan

Sustainability of Projects
From Project to Daily Operations

- Expectation that it is mandatory that the people who have the ownership for the Branches are at the training sessions in order to ensure understanding and sustainability of projects
- Branch Leadership NOT Project team ensures attendance, compliance and sign off of identified key Branch deliverables during planning and implementation
- Conversion plans to formally transfer the ownership of the process to the Branches and not the project team
- Formal sign off from Project⇒Daily Operations
- Formal Support and audit to ensure “stickiness” for a minimum of a week prior to cut-over

From Project to Stats Quo

- **Project Planning** → **Communication** → **Training**
- **Cut Over** → **Formal Transfer to Branch**
- **Branch Ownership** → **Sustain Improvement**
- Support/Monitor/Audit Week Post Cut Over
Project Phases

Formal Hand Off Signals
Project Complete
Transformation

Project Benefits to Date

- Reduced payroll errors by 97%
- Decrease missed visits by 33%
  - Revenue Impact Jan-June $92K
- Decrease Unfilled Shifts by 61%
  - Revenue Impact Jan-June $120K
- Coordination Hours Saved
  - $22K in FTE hours
  - Replace Telephony for travel
- Other cost Reductions
  - $1M (travel, systems, storage etc)
- Automated Travel
  - $1.2M in expected savings
In Progress

- GDMS and HPG post support
- Tablet Roll Out
- Auto Travel
- Shared Care and Congregate/Cluster Care Scheduling
- One place for time entry (from 4)

There is always another step you can take

“Most people, upon reaching the top, look down and enjoy the view.

The smart money is on looking up and finding new mountains to climb.”

- Jeb Dickerson
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