



“Everyone who works with Policy Manager loves it. Policy Manager is a greatly appreciated resource.”

- Denise Appel, Policy & Procedure Coordinator,
Meritus Medical Center



Meritus Healthcare Gains Searchability and Faster Approvals with Policy Manager

Situation

Meritus Health, with its flagship Meritus Medical Center and its satellite operations, serves as the largest healthcare provider in Maryland’s Washington County. Located near the crossroads of Western Maryland, Southern Pennsylvania, and the Eastern Panhandle of West Virginia, Meritus Medical Center serves as a respected regional trauma center. The center is home to a nationally recognized Cardiac Catheterization Lab, John R. Marsh Cancer Center, Center for Joint Replacement, and The Center for Breast Health.

As with any other medical center, Meritus has thousands of policies and guidelines to keep its operations in compliance with internal needs and regulatory agency requirements. These documents were stored on an internal intranet.

Keeping documentation up to date, collecting approval signatures, and simply searching for needed information all proved frustrating.

“I would receive numerous phone calls asking where to locate a particular policy,” said Denise Appel, Policy & Procedure Coordinator at Meritus Medical Center. “We had limited searching capability with our intranet. For approvals, rather than using interdepartmental mail, I went desk-to-desk to collect approval signatures to prevent documents from being lost in the process. And then we had what I called ‘hidden policies’ in which departments would create their own guidelines but not upload them to the intranet. Time was lost and frustration was high. We absolutely needed a better system.”

Solution

After considering other options, Meritus Health selected a suite of products from MCN Healthcare including MCN Policy Manager, MCN Policy Library, and MCN StayAlert! Meritus chose MCN Healthcare because of the comprehensive, yet easy to use, solution that includes:

- **Policy Manager.** Designed specifically for how the healthcare industry operates, Policy Manager is a robust workflow and document control management system. The solution gives Meritus staff the ability to go online anywhere, at any time, to easily search and manage policy content.
- **Policy Library.** Policy Library includes more than 19,000 customizable policy and procedure templates authored by MCN clinical staff. Every MCN Policy Library document is up-to-date and instantly downloadable. With 30 years of healthcare policy experience behind it, Policy Library helps Meritus stay compliant with accreditation and regulatory requirements.
- **StayAlert!** MCN Healthcare's highly experienced team monitors federal regulatory agencies and accreditation organizations and sends daily emails that summarize changes and include tools to aid compliance. This helps ensure that Meritus never misses an important regulatory change or health related development.



The decision to go with MCN Healthcare was an easy one once the team at Meritus learned about MCN. “When I came on board, we were already talking with another vendor, but nothing was happening, so we decided to look elsewhere,” Appel recalls. “I went searching online, discovered MCN Healthcare, liked what I saw, and was immediately impressed once I spoke with them.”

From Appel’s standpoint, MCN Policy Manager was exactly what Meritus needed but she wanted to be sure. “I brought in someone from our compliance operations, a clinical educator, and information systems,” Appel expressed. “We all looked at MCN and concurred that we had found the policy management solution we so greatly needed. The next step was to go to our Senior Leadership Team, where MCN presented the solution. The Senior Leadership Team fully agreed that MCN was our answer.”

Deployment Process

Deployment of the MCN solution set, which is offered as a software as a service (SaaS) solution, occurred over the next three months with Appel serving as project manager. She was only able to manage part-time, as she had

clinical responsibilities at Meritus Medical Center. She was assisted throughout by an MCN Healthcare implementation specialist. MCN’s Policy Manager has now been deployed at the Meritus Medical Center and related Meritus Health facilities and programs.

“The implementation process can seem intimidating as you look at the thousands of policies you need to import,” Appel said. “But MCN walks you through step-by-step. The whole process runs like a well-oiled machine.” Appel, an RN who has spent more than 30 years in the field, sees parallels between MCN Healthcare’s approach and the classic *nursing process*.

“The nursing process, with its five steps of Assessing, Diagnosing, Planning, Implementing, and Evaluating, has been part of my everyday work life,” Appel said. “MCN seems to work that way as well, so deployment was a smooth process. When people ask how I was able to manage the roll-out while still spending 20 hours a week working in the Cardiac Cath Lab, my answer is that MCN has great tech support and customer service, and that I’m a nurse.”



Benefits

Meritus Health has enjoyed a number of benefits since deploying MCN Policy Manager, Policy Library, and StayAlert! including better visibility and searchability, use of key words and metadata, faster approval processes, easier to update policy content, and a robust support for competencies. Using the MCN Policy Library and staying current with StayAlert! has been a great return on investment (ROI) through time savings.

Better Visibility and Searchability

MCN Policy Manager has given Meritus more visibility into its documents and the searchability it so greatly needed. Document visibility is helping Meritus eliminate duplicate policies and clearly defines current versions while archiving earlier drafts.

An early test of the new system came soon after going live with Policy Manager. “We were just completing our uploading of documents into Policy Manager when we had a state regulatory agency visit,” Appel described. “I received call requests to urgently locate documents. ‘How are we going to find what we need?’” And I said, “Easy, just type it into the search bar. People just needed to be reminded of the new and easier way to find what they needed.”

The searchability of Policy Manager provided a major turnaround from the previous year when the search for a solution was set in motion. “Prior to moving to Policy Manager, we had a Joint Commission visit in which we experienced difficulty locating some policies,” Appel said. “I was showing our CEO how to search with the old system, and for the first time, he saw how difficult and inefficient it was.” He looked at me and said, “Fix it.” “Soon after, we discovered MCN and Policy Manager.”



Key Words and Metadata

Appel knew that Policy Manager was working well when the number of phone calls dropped immediately after going live with Policy Manager. “My days used to be filled with phone calls of: ‘I can’t find this policy. Where is it?’” Appel said. “Now I rarely get those calls because Policy Manager makes it so easy for anyone to locate the documents they need.”

Policy Manager’s support of key words and other metadata contributes to the ease of users finding exactly what they need. Appel uses the Document Details feature of Policy Manager to assign key words to policies and other documents to help users who might not know the official name of a document. Appel uses Document Details to include the following information:

- Document Name
- Keywords
- Document Description
- Standard References
- Reference Codes
- Document Classification (policy, procedure, form, and other document types)
- Approval Period (how often a document is reviewed and edited)

“Keywords and metadata nicely enhance searchability,” Appel continued. “During Joint Commission visits we pay close attention to the terminology used when a document is requested, and if our terminology varies, we eliminate the problem by adding a key word, which is easy to do with Policy Manager.”

For example, Meritus has what it refers to as its *Incident Weather* policy that outlines preparations and staffing needs for big winter storms that frequently hit the area. “During a

regulatory agency visit, we were asked for our *Code White* policy,” Appel explained. “So we’ve added those key words to our *Incident Weather* document. You can imagine there are many more examples where adding key words make a big difference for searchability.”

Faster Approval Process

Meritus has enjoyed a much faster policy approval process using the flexible and automated workflows of MCN’s Policy

“The workflows of Policy Manager have been a huge time-saver for the approval process.”

Manager. The approval workflows are especially appreciated, because the old system, which involved sending paper documents via interoffice mail, was time consuming and difficult to track. “People would call and want to know where a document was in the approval process and that would mean I had to get on the phone and track down who had signed it so far, and where it was being held up,” Appel said. “Sometimes we ended up simply starting the whole approval process over again.”

With Policy Manager, automated workflows distribute documents for approval according to your chosen hierarchy, delivers the approval request by e-mail, tracks the response, and forwards it to the next approver. By defining approvers on the basis of title, rather than name, the process automatically updates contacts when people change jobs. “The workflows of Policy Manager have been a huge time-saver for the approval process,” Appel said. “And the workflows have eliminated the major headaches of tracking who has and hasn’t responded to approval requests.”

Appel uses Policy Manager to give senior managers direct control over approvals for their domains of interest. “This gives them great visibility into the process so they can take a proactive approach.” Appel said. “As they prepare for something like a Joint Commission visit, they can push the word down the line - ‘We need these documents updated and approved’ and of course, they can track the progress.”

Easier to Update Policy Content

The thousands of policies and related documents that once sat in 3-ring binders on sagging bookshelves are now living documents that can easily be updated whenever needed. “In all of the years I’ve been on the council responsible for policies, I’ve never heard more discussion about our policies,” Appel described. “Now that everything is online with Policy Manager and we have automated workflows to facilitate change, people are having great conversations about policies. ‘Do we still need this policy from 20 years ago? Can we combine these four one-page policies into a single document? Let’s update this paragraph in that section to reflect current practice.’”

The ease with which documents can be updated has taken the pain out of keeping things current. “People can just sit at their computer, click a button, and review whatever policy they need,” Appel said. “This is so much easier than flipping through a 3-ring binder and working from there.”

The Notes feature of Policy Manager has proven especially popular, because it is so efficient and easy to use. Anyone reading a policy in the approval process can insert a note suggesting changes or posing questions.

“The ability to insert notes has huge benefits for us,” Appel stated. “When I update a policy and send it up the review chain for approvals, I can insert a note

describing what was changed, why it was changed, and how it was changed. I can even copy and paste before and after sentences or paragraphs or embed links into the notes. I know this is appreciated because we have one vice president who is responsible for signing off on something like 800 different policies. Notes allow him to review updates with precision and speed.”

All of this active workflow results in transforming policies into the living documents they need to be. “Policy Manager has made a world of difference,” Appel said. “People are paying attention to our policies now more than ever.”

Robust Support for Competencies

Training, testing, and reporting on competencies has been greatly simplified since moving to Policy Manager. When a new competency must be demonstrated or an existing competency reviewed, an automated email is sent to everyone who needs to complete the task.

“They open their email, log into Policy Manager, and up comes the policy they need to review,” Appel noted. “For some competencies, we just require verification that staff have read the document content. Staff simply click a button

“Policy Manager has made a world of difference. People are paying attention to our policies now more than ever.”

“The compliance people absolutely love the way Policy Manager handles competencies because it helps ensure staff accountability.”

to view and verify that they’ve read, and are accountable for this information. We also have the option with Policy Manager to include a quiz. For example we might create a

quiz about the differences between the old and newly updated policy.”

Policy Manager can also be used to generate reports on who has completed the policy review, and who still needs to. “Our administration, and especially the compliance people, absolutely love the way Policy Manager handles competencies, because it helps ensure staff accountability,” Appel said. “We also use Policy Manager for ensuring competency compliance for new employees.”

Using the MCN Policy Library

Meritus has discovered the value of the MCN Policy Library and its more than 19,000 customizable policy and procedure templates authored and always kept up-to-date by MCN clinical staff. “Whenever I hear someone is working on creating a new policy, I get them access into the Policy Library and send them a note along the lines of ‘Have you looked in the Policy Library yet? Here’s a template from the library to get you started.’” Appel said. “They are always amazed by how this slashes their time.”

“Our educators are using the Policy Library too.” Appel continued. “Now when someone is

researching a policy they’ll say ‘OK, what does Policy Manger say?’”

Keeping Current with StayAlert!

Even before Policy Manager was fully deployed, Appel requested to get up and running on MCN StayAlert!, a daily e-mail service that keeps healthcare organizations up-to-date on the latest news from federal regulatory agencies and accreditation organizations. Today, Appel has set up StayAlert! for all departments within Meritus that monitor regulatory changes, but in the early pre-deployment days she was the only one receiving the messages. She would then forward FDA updates to the pharmacy and other regulatory email updates to the operating room, cardiac cath lab, facilities, or any other group impacted.

“One day I called one of our pharmacists just to ask ‘Are you receiving these alerts as repeats?’” Appel described. “The pharmacist cracked up laughing and said they had just been talking about the alerts. They said, yes they received the same information from the FDA, but they occasionally heard first from my forwarding StayAlert!” With each department now capable of receiving its own StayAlert! notifications, Appel doesn’t have to forward them, but she notes it was nice to find out how swiftly information was spread using StayAlert!

Great ROI through Time Savings

While it’s difficult to put metrics to the impact of Policy Manager, Appel believes Meritus is enjoying a substantial and rapid return on investment from MCN Policy Manager, especially from the reduction of time required to track down and deal with policy issues. “Prior to Policy Manager, we spent an enormous

amount of time searching for paperwork, processing paper-based policies, and tracking down approval signatures,” Appel said. “I used to wait outside of conference rooms for meetings to end just to grab someone for a signature.”

“Some of our documents require signatures of individuals who can be hard to track down,” Said Appel. “Policy Manager removes the frustration of having to locate people who can be working all over the place.”

Appel credits the Notes feature of Policy Manager for saving time for senior executives and other approvers who can immediately see exactly what they are being asked to approve and the documentation behind the request.

Another factor is ease of use. “Everyone who works with Policy Manager loves it,” Appel exclaimed. “Since deployment, we haven’t heard a single negative response, especially for those who worked with our old system. Policy Manager is a greatly appreciated resource.”

About MCN Healthcare

MCN Healthcare, Inc. is an innovative provider of custom policy content, workflow management software, and compliance expertise for healthcare providers. Our Policy Manager Software, fully-customizable Policy Library, and StayAlert! regulatory notification system were developed specifically for the needs of healthcare professionals, by experienced healthcare professionals.

The cornerstone of MCN’s accreditation compliance solution is Policy Manager, a robust document control and workflow management software application. Policy Manager helps simplify regulatory compliance by automating policy access, review, and approval throughout a healthcare organization. With its web-based Software-as-a-Service (SaaS) delivery model, Policy Manager minimizes IT cost and resource burdens.



1777 South Harrison Street, Suite 405 Denver, CO 80210

Phone: (800) 538-6264

mcnhealthcare.com