Implementation of New Policy Software to Enable Quick Access to Best Practice Resources

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Background

- Existing policy software with limited search functionality
  staff not able to locate policies quickly or easily
- Existing policy software not able to notify authors of policies due for review timeline

Assessment

- Google-type search engine = comprehensive search
- Locates policies quickly and easily = speedy search

Goals

1. Conversion to new software increases access to policies
2. Preserve formatting, attachments & links to policies
3. Communication of software change clear & extensive

Interventions

- Performed inventory of policies and documents
  Total 6300 documents for conversion
  - 1300 Policies
  - 1700 Addenda
  - 3300 Forms
- Archived outdated content
- Staged conversion from simple to complex
- Retained original policy format to minimize change
- Built new Policy and Forms SharePoint sites
- Relinked thousands of related policies and addenda
- Completion of project on time
- Used multiple methods to communicate change
  emails, huddles, trainings, videos, resource pages

Policy – Practice – Quality

Using policies → Correct action steps → Best practice

Outcomes

<table>
<thead>
<tr>
<th>Before</th>
<th>After</th>
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<tbody>
<tr>
<td>Difficult to find policies if not an exact match</td>
<td>Google-like search engine searching easier</td>
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<tr>
<td>Time consuming to locate policies</td>
<td>Search engine finds documents quickly</td>
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<tr>
<td>Leave Epic to locate policy</td>
<td>Direct link from Epic to PolicyStat</td>
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Survey Results

2 Questions – 23 responses out of 65 people (35% response rate)

Time it takes to find a policy old vs new software?
Faster/Much Faster = 74%
Same = 13%
Slower/Much Slower = 13%

How user friendly is software old vs new software?
Easier/Much Easier = 82%
Same = 4%
Easier/Much Slower = 10%

Next Steps

- Collaborate with users how to best utilize software
- Streamline policy review process using software features
- Introduce app for PolicyStat access on phones

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