Ildiko (Ildi) Polgar MHST, BScN, RN
Care Process Coach
GREEN BELT PROJECT

My Figuring Out Journey to Inactive Status of Casual Home Support Community Health Workers
PRESENTATION OBJECTIVES

● Gain insight into a Green Belt Project conducted 2018-2019

● Understand the process journey in resolving a Northern Health regional problem specific to the Termination of Inactive Casual Community Health Workers within the Procura application system

● Share the value of QI tools when trying to understand and tease out root cause(s) of a problem within complex application systems and processes
BACKGROUND

- Personal background
- Project Selection
- Project Scope
- Sponsorship
- Timeline
A large number of casual Home Support (HS) Community Health Workers (CHW’s) were listed as active (available for work) in Procura Database when they had been either been terminated or changed work site within Northern Health (NH).
Decrease number of existing inactive casual HS CHW’s in Mackenzie Procura Database by 50% by May 2019
OVERALL PROJECT WORKPLAN

1. Identify Key Stakeholders
2. Selecting QI Tools to:
   ✓ Understand Current State
   ✓ Understand Problem
   ✓ Find Solutions to Problem
3. Implement Solutions
4. Evaluate Implementation of Solutions
5. Sustain the Gains
SMOOTH LINEAR FLOW...?
PRE-IMPLEMENTATION PHASE

- Discussions - to help understand Procura processes and the problem

- Email Communications - to help identify:
  - Who are the key stakeholders?
  - Who are the content experts?
  - Who should be invited to the working group?
DESIGN PHASE

- Project Charter
  - Drafted
  - Validated with Project Sponsor
  - Work plan outlined
- Coordinate Process Mapping Session
KAIZEN EVENT

Empowering Teams with structured team-based activities focused on solving problems
MAPPING OUT TERMINATION PROCESS
DRILLING DOWN

5 WHY'S

Why? Are CHW's not being terminated from Procura?

Scheduler will not terminate without an e-shifting event

Was an event created?

Was the event completed?

Was the event reviewed?

Did the scheduler receive it?

Was an update received?

Training

Design limitations

NI IPCC Resource Team
TIC PROCESS

Termination Process Defined

- Other
- TIC

Inactive CHW → TIC Report

HR

Manager CHW

HS Scheduler → Inactivate CHW

Loop Closed

Communicate to HR & Manager

NI IPCC Resource Team
TIC PROCESS - CURRENT STATE
“HOTSPOTS”
BLASTING THE ASTEROID!
<table>
<thead>
<tr>
<th>Problem</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reporting Portal - Manager contact details not complete/accurate. 51% of Distribution database contained inactive manager details</td>
<td>Update Manager Position status in Reporting Portal database</td>
</tr>
<tr>
<td>HR Procura Office and manager distribution list outdated</td>
<td>Update HR Team Site distribution list</td>
</tr>
<tr>
<td>Procura Office may not receive instructions if sent to wrong address</td>
<td>Update HR Team Site distribution list</td>
</tr>
<tr>
<td>Managers may not receive TIC instructions</td>
<td>Manager contact details updated and current in reporting portal and HR distribution list</td>
</tr>
<tr>
<td>Inconsistent responses by managers to HR</td>
<td>Communicate to managers the need to respond to HR requests</td>
</tr>
<tr>
<td>Managers not aware if TIC process completed by HS Scheduler</td>
<td>Add manager contact to Procura dated note distribution list</td>
</tr>
<tr>
<td>TIC email instruction sent by HR unclear with confusing language</td>
<td>Revise TIC instructions for Procura Office with clear language and process steps</td>
</tr>
<tr>
<td>HS Scheduler unaware of responsibilities and/or processes in inactivation process</td>
<td>Educate Procura Office on Inactivation Process</td>
</tr>
<tr>
<td>Inconsistent use of Procura related to inactivation process</td>
<td>Educate Procura Office on Inactivation Process</td>
</tr>
</tbody>
</table>
COMMUNICATION

- Skype Teleconferences to all regions
- Bi-Weekly Primary Care Round-up
- NH Confluence (How To’s)
<table>
<thead>
<tr>
<th>Safety - clients would not be left without a needed visit because an inactive CHW was mistakenly scheduled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eliminate and/or reduce non-value activities of email overproduction, form re-submissions, workflow delays, and excessive processing due to inaccurate and unclear instructions</td>
</tr>
<tr>
<td>Streamline communication pathways</td>
</tr>
<tr>
<td>Establish an accurate and up-to-date workforce database</td>
</tr>
<tr>
<td>Eliminate calls to inactive CHW’s if active database accurate</td>
</tr>
<tr>
<td>Ensure timely and efficient client care scheduling and coordination</td>
</tr>
</tbody>
</table>
IMPLEMENTATION & EVALUATION

✓ Procura database clean-up from time problem identified during initial audit
✓ TIC Report generated September 2019
✓ Audit of TIC process planned for December 2019
CHALLENGES ENCOUNTERED

- Understanding communication pathways between internal systems
- Moving away from symptoms to targeting actual problem
- Selecting QI tool that would be most effective
- Limited knowledge on application and system processes
- Workloads and competing schedules
- Defining Scope
● QI tools work! 😊
● You do not have to be the content expert
● NH employees want to be engaged to help improve their workflows and ultimately Patient Care
● Chocolate goes a long way
● Asteroids can be blasted
CREDITS

Andrea Wolowski, HSA MCK
Bini Ball, Regional Procura Analyst
Nikki Bennet TL IPT MCK
Angela Pontius, CSM HCC PG
Chari Ollinger, HS Scheduler PG
Cindy King, Regional Manager Employee Services

Alexi Rivera, HR Admin Asst
Nicole Lupul, HR Admin Asst
Leeann McDowell, HR Asst HRES
Yingxin Hong, Business Analyst MCK
Lauri Fowlie, Coordinator Payroll Services
Leon Verhelst, TL Reporting Services
QUESTIONS?

ildo.polgar@northernhealth.ca