From In-Person to Virtual, Creating a Strong and Resilient Team

PD1, August 9, 2021

Terri Couts, RN-BC Informatics, MHA, CHCIO,CIO,The Guthrie Clinic

Gail Strausser, MT, Application Manager,
The Guthrie Clinic

DISCLAIMER: The views and opinions expressed in this presentation are solely those of the author/presenter and do not necessarily represent any policy or position of HIMSS.
Welcome

Terri Couts  
VP, Epic Applications

Gail Strausser  
Application Manager
Conflict of Interest

• Terri Couts, RN-BC Informatics, MHA, CHCIO
• Gail Strausser, MT

• Has no real or apparent conflicts of interest to report
Agenda

- Guthrie Overview
- Guthrie IT Clinical and Revenue Team
- Working Remotely Research
- Team Engagement Strategies
- Outcomes
Learning Objectives

- Explain studies that show when a team transitions to a completely remote workplace, there is a high possibility of loss of engagement and innovation.
- Discuss strategies to positively influence regular communication, learning opportunities and most importantly, making the team feel valued and appreciated.
- Discover technology tools to aid in team engagement.
The Guthrie Clinic

- Physician-Led 501© (3) Non-Profit Integrated Health System
  - Serving 11 Counties in the Southern Tier of NY and Northern Tier of PA
  - 5,000 Employees
  - 1.2 Million Outpatient Encounters

- Guthrie Medical Group
  - 107-Year-Old Multi-Specialty Group Practice - One of the first in the US
  - Approximately 300 Physicians and 200 Advanced Practice Providers
  - Regional Office Network of Primary and Specialty Sites in 25 Communities
The Guthrie Clinic

- Guthrie Hospitals
  - Robert Packer Hospital - Sayre, Pennsylvania
  - Corning Hospital - Corning, New York
  - Troy Community Hospital - Troy, Pennsylvania
  - Towanda Memorial Hospital - Towanda, Pennsylvania
  - Cortland Medical Center - Cortland, New York
The Guthrie Clinic
The Guthrie Clinic

• 12-County Service Area by Region

<table>
<thead>
<tr>
<th>Region</th>
<th>CY2019 Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bradford/Western Tioga NY</td>
<td>82,175</td>
</tr>
<tr>
<td>Chemung/Steuben/Schuyler</td>
<td>194,591</td>
</tr>
<tr>
<td>Tioga PA</td>
<td>41,010</td>
</tr>
<tr>
<td>Broome/Eastern Tioga NY</td>
<td>222,861</td>
</tr>
<tr>
<td>Tompkins/Cortland</td>
<td>153,456</td>
</tr>
<tr>
<td>Sullivan/Wyoming/Susquehanna</td>
<td>75,994</td>
</tr>
<tr>
<td><strong>12 County Service Area</strong></td>
<td><strong>770,087</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>County</th>
<th>CY2019 Population</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bradford</td>
<td>60,137</td>
</tr>
<tr>
<td>Chemung</td>
<td>82,858</td>
</tr>
<tr>
<td>Cortland</td>
<td>47,464</td>
</tr>
<tr>
<td>Steuben</td>
<td>94,170</td>
</tr>
<tr>
<td>Tioga NY</td>
<td>48,429</td>
</tr>
<tr>
<td>Tioga PA</td>
<td>41,010</td>
</tr>
<tr>
<td>Tompkins</td>
<td>105,992</td>
</tr>
<tr>
<td><strong>Total PSA</strong></td>
<td><strong>480,060</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Secondary Service Area (SSA)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Broome</td>
<td>156,470</td>
</tr>
<tr>
<td>Schuyler</td>
<td>17,583</td>
</tr>
<tr>
<td>Susquehanna</td>
<td>39,189</td>
</tr>
<tr>
<td>Sullivan</td>
<td>5,985</td>
</tr>
<tr>
<td>Wyoming</td>
<td>30,820</td>
</tr>
<tr>
<td><strong>Total SSA</strong></td>
<td><strong>250,027</strong></td>
</tr>
</tbody>
</table>
Our Business Philosophy

Mission
Guthrie works with the communities we serve to help each person attain optimal, life-long health and well-being.

Vision
Improving Health through Clinical Excellence and Compassion; Every Patient. Every Time.
Guthrie IT Clinical and Revenue Cycle Teams

- Over the past 5 years, our IT Clinical and Revenue Cycle teams were transformed to a group that:
  - Educates our users product trends and functions
  - Actively participates in strategy and daily operational planning
  - Achieves national awards
Guthrie IT Clinical and Revenue Cycle Teams

- March 16, 2020
  - To comply with executive orders from our state Governors, the team had to quickly transition to working remotely
  - The team had to pick up the pace and agility to complete the multitude of configuration changes needed for our patients and clinicians for the treatment and prevention of Covid-19
Gartner HR Press Release

ARLINGTON, Va., March 19, 2020

Gartner HR Survey Reveals 88% of Organizations Have Encouraged or Required Employees to Work From Home Due to Coronavirus

Time Off, Remote Work and Cost Cutting Top Priorities for Business and HR Leaders

A Gartner, Inc. survey of 800 global HR executives on March 17 found that 88% of organizations have encouraged or required employees to work from home, regardless of whether or not they showed coronavirus-related symptoms. Nearly all organizations (97%) have canceled work-related travel, more than an 80% increase since March 3.

“As the COVID-19 crisis disrupts organizations across the globe, HR leaders must respond quickly and comprehensively, considering both immediate and long-term talent consequences,” said Brian Kropp, chief of research for the Gartner HR practice.

ADP Research Institute

- ADP Research Institute completed a Global Workplace Study in 2020
  - Marcus Buckingham
  - Mary Hayes, Ph.D.
  - Frances Chumney, Ph.D.
ADP Research Institute Global Workplace Study

A worker is 14x more likely to be Fully Engaged if he or she trusts the team leader.
ADP Research Institute Global Workplace Study

Only 15% of workers globally are Highly Resilient.

Global Workplace Study 2020 | ADP Research Institute
Higher Engagement still happens **virtually** during COVID-19.

**VIRTUAL:** 20% Fully Engaged and 18% Highly Resilient.

**OFFICE-BASED:** 11% Fully Engaged and 9% Highly Resilient.
Setting the Stage

Minimum Requirements for Working Remote

Needed to quickly assess minimum requirements for working remote along with engaging the rules of the road for new work environment.
## Team Engagement Strategies

**Communication**
- Communicate daily and not just about work

**Reinforce the power of collaboration**
- Updated our change control to get everyone involved

**Manage accountability**
- Microsoft PWA to document time

**Make the team feel valued and appreciated**
- Fun ways to make the team feel valued
Communication

• IT Management Connected with their Team Every Day

  • We set up a Virtual Meeting structure
  • The expectation was to meet every day
  • Meetings are no longer than 30 minutes

<table>
<thead>
<tr>
<th>VH</th>
<th>Virtual Huddles</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td></td>
</tr>
<tr>
<td>Beaker PMO</td>
<td></td>
</tr>
<tr>
<td>Epic Training Team</td>
<td></td>
</tr>
<tr>
<td>Imaging Informatics</td>
<td></td>
</tr>
<tr>
<td>Inpatient Clinical</td>
<td></td>
</tr>
<tr>
<td>Radiant, Cupid, Innovations</td>
<td></td>
</tr>
<tr>
<td>Revenue Cycle</td>
<td></td>
</tr>
<tr>
<td>Saras Team</td>
<td></td>
</tr>
<tr>
<td>Terri Direct Huddle</td>
<td></td>
</tr>
</tbody>
</table>
Communication

- As weeks turned into months, continued to re-invent the meeting format
  - **Each week one team member did the Friday Fun Day item**
  - It turned into each team member sharing a personal fact
  - We learned more about each other virtually then when we were in-person
  - When the staff was asked if we should reduce the daily meeting, the answer was a resounding “No”
  - The daily meetings transformed them into a solidified team
  - We are still meeting every day
Power of Collaboration

- Urgent System Changes
- Virtual System for Change Control
  - We developed a virtual change control policy
  - Urgent changes were approved within a Microsoft Teams channel
  - The data courier team posted when the change was moved to the production environment
  - This provided an audit trail of changes applied to the system
Power of Collaboration

- Change Statistics for Covid-19
  - Change period – March 2020 to March 2021 - Epic Related
    - Number of SU (Special Updates) – 28 separate SU packages were applied
    - Number of Covid-19 configuration changes – 151
    - Number of System Upgrades – 4 Upgrades
    - Cortland go live
Manage Accountability

• Using Timesheets with Microsoft Project Online App, we created a structure where each team member documented time on what they were working on each day.
  • The expectation was to complete this documentation daily.

• Microsoft PWA
  • Resource

<table>
<thead>
<tr>
<th>RESOURCE NAME</th>
<th>2021-05</th>
<th>2021-06</th>
<th>2021-07</th>
<th>2021-08</th>
<th>2021-09</th>
<th>2021-10</th>
<th>2021-11</th>
<th>2021-12</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strausser, Gail</td>
<td>1</td>
<td>46</td>
<td>113</td>
<td>127</td>
<td>129</td>
<td>133</td>
<td>142</td>
<td>156</td>
</tr>
</tbody>
</table>

• Capacity Assignments

<table>
<thead>
<tr>
<th></th>
<th>2021-05</th>
<th>2021-06</th>
<th>2021-07</th>
<th>2021-08</th>
<th>2021-09</th>
<th>2021-10</th>
<th>2021-11</th>
<th>2021-12</th>
</tr>
</thead>
<tbody>
<tr>
<td>COVID-19 Project</td>
<td>0.00</td>
<td>0.03</td>
<td>0.03</td>
<td>0.03</td>
<td>0.03</td>
<td>0.03</td>
<td>0.03</td>
<td>0.03</td>
</tr>
<tr>
<td>Epic 2021 Upgrades</td>
<td>0.00</td>
<td>20.00</td>
<td>50.33</td>
<td>31.09</td>
<td>46.92</td>
<td>20.44</td>
<td>22.20</td>
<td>21.00</td>
</tr>
<tr>
<td>FHIR Upgrade</td>
<td>2.00</td>
<td>9.71</td>
<td>12.73</td>
<td>1.53</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gail Test Project</td>
<td>6.80</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interface Team Mini Projects</td>
<td>2.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lab Mini Projects</td>
<td>34.02</td>
<td>33.42</td>
<td>18.01</td>
<td>34.25</td>
<td>2.68</td>
<td></td>
<td></td>
<td>0.00</td>
</tr>
</tbody>
</table>
Make the Team Feel Valued and Appreciated

• We got creative.....virtually
  • Monthly Staff Meeting turned Virtual Scavenger Hunt
    • The team loved the opportunity to blow off some steam and be competitive
  • Birthday Surprise
    • Each manager sends a little something (e.g. Cookies, Dunkin Gift Card)
  • Hand-written cards
  • Staff Picnic/Games
Outcomes

- With all the challenges, our Team surpassed our expectations
- We were able to complete very complex projects; bringing up a new hospital on Epic
- Being recognized for completing national programs
- Employee Engagement scores
Outcomes

- During the challenging time period of March 2020 to March 2021
  - July 2020
    - Epic Beacon Module Go Live
    - CBORD Go Live
  - August 2020
    - Epic Gold Star Level 10
  - October 2020
    - Cortland Medical Center Epic Go Live
  - January 2021
    - Epic Honor Roll – Summa Cum Laude
Virtual work is here to stay....now what

- Defined Remote Policy
- Hoteling/Collaboration Space
- Hiring new Staff
Questions?
Thank You!

- Terri Couts, RN-BC Informatics, MHA, CHCIO
  - Terri.Couts@Guthrie.org

- Gail Strausser, MT
  - Gail.Strausser@Guthrie.org