

POLICY MANAGEMENT USING SHAREPOINT

FOCUSED HEALTH CARE SOLUTIONS

The development of solutions for Microsoft SharePoint and Microsoft Dynamics platforms in the health sector can be complex, particularly when business requirements combine with complex information management platform's it can be hard to know where to begin. Managing policies and procedures within a clinic or large scale hospital requires many priorities to be maintained.

POLICY CHALLENGE

Health care providers have the challenge of ensuring the right policy or procedure is available to the right patient at the right time, and this can be critical in the booking, care and discharge of a patient.



In addition, policies and procedures can have an overlapping priority when applied to clinical patient care and require training in the application of procedures to meet the outcome (i.e. wound care or medication applications).

SETTING GUIDELINES

To develop the policy solution for the health sector, a number of guidelines were defined to allow a solution to work within a framework, respond to process challenges and manage exceptions to a policy process as they are encountered.



The following are some of the core solution guidelines that the policy management solution has been developed to:

- Policy Management would utilise the full features of the Microsoft SharePoint technology platform to manage a policy from creation to retirement
- Doctors, Nurses and health care staff would be provided with only the most recent version of a policy or procedure to reduce confusion
- Policy and procedure documents need to be categorised in order to apply to clinical and non-clinical areas of the health care provider including wards, surgery, administration and training
- Policy and procedures require approval by peer based committees before they could be used

OUTCOMES

Through the implementation of the health care Policy Management Solution, a number of Sharing Minds' clients have been able to centralise management of policy and procedure related information while ensuring that staff have the right information around patient care available when they need it.

The Policy Management Solution also enables automated approval processes and reduces information search times because it is linked directly into their specific division or department information store.

ORGANISATIONAL BENEFITS

Through the deployment of the Policy Management Solution a number of organisational benefits have been realised, including:

- Centralisation of the creation and management for Policies, Procedures, Forms, Training Schedules and Clinical Manuals
- Potential reduction in the insurance cost for the health care provider through stronger adherence to policy guidelines and acceptance of doctors preferences
- Utilisation of the existing SharePoint platform requiring less investment to establish new environments
- Ability to align information in regards to critical care ensuring that patient care for booking, management and discharge are managed end to end

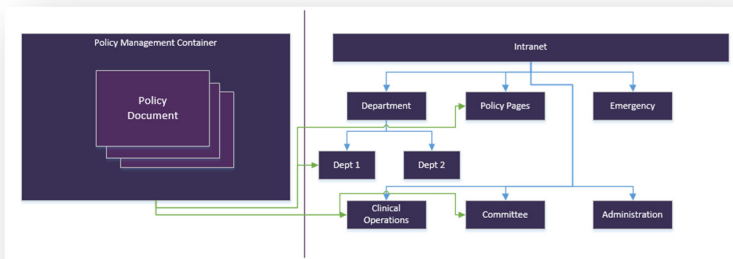


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SOLUTION DEVELOPMENT

Utilising strong information management principals and customised configuration within Microsoft SharePoint, the Policy Management Solution was developed to support a multi-tiered environment where a single policy document could be required in any number of locations.

Through a centralised editing location, policy editors are able to create and collaborate on information prior to gaining approval and then make it available to end users through the defined policy distribution framework (example below).



Policy Management Example Distribution Framework

The solution utilises out-of-the-box Microsoft SharePoint functionality to manage and distribute information between the policy library and the end user policy views. This minimises the bugs often generated when custom code is built into third party SharePoint solutions that inevitably break with updates and version changes, leading to increased cost and stakeholder dissatisfaction.

HOW WAS IT DONE?

By combining an understanding of SharePoint environments and quality assurance procedures native in Policy and Procedure management, the Policy Management Solution:

- Utilised a central creation and editing location
- Distributed information throughout the Microsoft SharePoint environment regardless of location due to a unique tagging system developed
- Use of SharePoint tagging and search capabilities to manage information (metadata) increasing publishing locations

Using native customisation of Microsoft SharePoint, this solution was created utilising simple jQuery scripts for visual formatting, some custom XML to format results and no custom code.

The key for any organisation is knowing the structure of policy creation and publishing, from there, it is only a short journey to configuring and running a full Policy Management Solution.

ABOUT SHARING MINDS

At **Sharing Minds** we take a customer first approach to reaching outcomes, be it a technical solution or a strategic business roadmap. Everything we do is about 'Connecting **People** to their information' and ensuring that your business can get the outcomes it needs when it needs it.

We work *with* your business as no one knows your business like you do.

We provide support through four main core business areas including:

Strategy – Assisting organisations to position their technical roadmaps, align to core business values and outcomes and measure deliverables.

Consulting – Our team have a depth of experience in the delivery of technology solutions to organisations across a multitude of industries. Our focused teams will assist your organisation to position your projects for the best possible outcome.

Support – Organisations implement complex technology solutions to help solve business needs. And often technology teams are overworked running the platforms the organisation needs. **Sharing Minds** can assist your organisation is achieving support and maintenance outcomes through our detailed support packages.

Applications – Often the right solution involves getting the right product as opposed to bespoke solutions, **Sharing Minds** maintains a number of in-house solutions and partner products that will help your organisation without large bespoke development costs.

