

# Case Study: Improving Incident Management, Record Keeping and Communications Through an EHR



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## Categories:

- ◆ Staff Efficiencies
- ◆ Quality of Life/ Satisfaction with Care
- ◆ Cost of Care and Return on Investment (ROI) to Providers

### About the Organization

**Organization Name:** Stage Management

**Main Contributor:** Troy McClymonds, Partner

**Organization Type:** Senior Housing Operator

**Organization Description:** Founded in 2016, Stage Management is a senior housing operator that puts its employees and residents first. Stage Management currently oversees Golden Pond Retirement Community, a full-service retirement and assisted living community in Golden, CO. With 115 units, Golden Pond has provided housing, personal care, and other senior services since 2004.

### Project Description

Stage Management sought an electronic health record solution to improve incident management, record keeping, and communication at Golden Pond Retirement Community. Through Yardi EHR, caregivers now chart at the point of care on tablets so that progress notes and assessments are always up to date. This also improved billing for care, allowing Stage Management to grow revenue by an extra \$3,500 a month.

### System Type

Electronic Health Record with Point-of-Care Charting

### Describe System Embodiment

Tablets

### Business Model

Private Pay

### Implementation Approach

Stage Management chose Yardi EHR, a complete electronic health record solution built into the Yardi Senior Living Suite, to give caregivers seamless access to resident records and point-of-care charting.

"It's all right there. We don't have many complaints about it being hard to work with," said Troy McClymonds, partner at Stage Management. "That's a huge testament to its user friendliness."

The mobile-optimized design of Yardi EHR also plays a role in the quality care that Stage Management provides. Every caregiver was given a tablet, so they're able to manage everything as they make their rounds. They don't need to return to the office to find specific records.

Yardi EHR also notifies nurses when the next assessment is due. After nurses record care changes, the information syncs across the Yardi Senior Living Suite for accurate billing. Staff require the resident or the Power of Attorney (POA) to sign anytime an assessment change happens, and the integration makes the process simpler.

"It's clear what they're being charged and why, so there are fewer questions regarding changes in billing," said McClymonds.

## Advantages to the Approach

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Using Yardi EHR on the go for their incident response workflows, staff now check off every necessary step as they tend to residents. This includes notifying family members or POAs as soon as possible when a resident's condition changes.

"I think that's been the biggest piece. You can't continue on without notifying a POA," said McClymonds.

The progress notes captured within Yardi are also immediately available to other staff at the community, which makes collaboration more efficient, especially when family members come to visit.

"You can have 9 people working on one particular resident at a time," said McClymonds. The executive director can now pull details for the family in the office while caregivers help in the resident's room. Everyone can look at the same information at the same time.

## Outcomes

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With electronic health records always close at hand thanks to Yardi EHR, Stage Management can take a more efficient and compassionate approach to their care services. Staff have the time to focus on residents without missing a step along the way.

## Capturing real costs

For Stage Management, Yardi EHR has benefitted not only resident care but also the community's bottom line. By using the assessments when needed, "we're capturing the care costs that are necessary for each resident in real time," said McClymonds. Since Yardi EHR integrates fully with the business side, these care changes are readily accessible by the billing team, which has helped Stage Management capture an extra \$3,500 a month in missed revenue.

## Paperless savings

Every file, from lease agreements to medication orders to physician notes, goes right into Yardi EHR. Digitizing their documents helps Stage Management streamline day-to-day record keeping for caregivers. Rather than pull out a booklet and search pages of handwritten notes, staff can quickly see what's taken place and what's important to know. And by going paperless, Stage Management has saved about \$1,000 a year.

## More productive care

Staff now use Yardi EHR on their rounds, and take advantage of the voice-to-text feature on their tablets to quickly capture information. Thanks to workflow efficiencies like these, Stage Management has been able to maintain staffing levels as its occupancy has increased. In terms of time savings, McClymonds estimates Yardi has eliminated at least an extra person's worth of work per shift, the equivalent of 8-24 hours a day.

## Timely communication

Information about residents is more readily available to managers as well as family members. Calls to notify POAs of incidents happen quickly, and Stage Management will frequently make announcements within EHR to keep other caregivers informed of progress or concerns. Assessment results are also shared much sooner, which has helped eliminate 2-3 billing calls a month from family members.

## Accurate, complete records

Thanks to Yardi EHR, medical records are clear and filled out. If managers have questions, they can quickly read through progress notes and incident reports to spot patterns and understand the full situation. There's no more hunting through binders or tracking down the original caregiver. Management can find answers in the system or follow up from anywhere.

## More time for what matters

Yardi EHR supports Stage Management's care-first focus. Better record keeping and clearer visibility are important to staff, but it's the opportunity to provide greater care that the community values.

"Because of Yardi EHR, all of our caregivers are able to spend more time with the residents," said McClymonds. "That's really what it's all about."

## Challenges and Pitfalls to Avoid

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Implementation is hard. It feels like it will never end, and in our case, we uncovered that we needed a better process, so we tried to rewrite the playbook during the implementation. I would not recommend doing this; keep your processes the same as much as possible, and revisit them after you have fully implemented Yardi.

## **Lessons Learned**

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I learned that although we were giving great care, we did not have a great process of recording that care. Yardi EHR helped streamline multiple processes, bringing a number of things to light and providing better visibility and care for the people we serve.

## **Advice to Share with Others**

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If you're looking to automate your business and increase productivity and visibility, this solution is a no-brainer. We are caring for others and we need to have excellent record keeping. Yardi EHR will do this. It's not going to fix all your problems, but it will become an invaluable tool to find trends and themes to combat most problems.