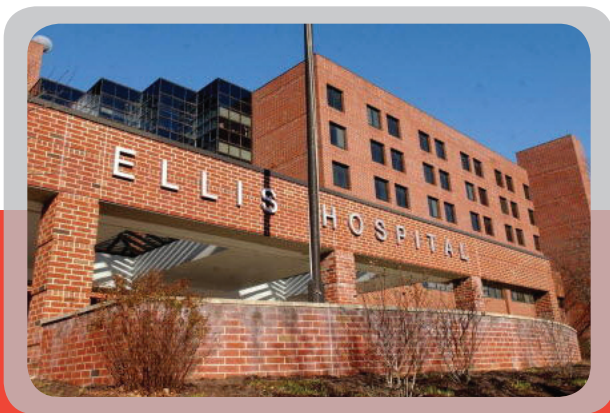


## Case Study: Ellis Hospital

# Getting Everyone — Even Physicians — Involved in Improving Safety and Security



Ellis Hospital is part of Ellis Medicine, a 438-bed community healthcare system located in Schenectady, N.Y. The hospital administration felt it needed a vendor credentialing program to meet Joint Commission's recommendations and improve hospital safety, but didn't have the manpower to maintain a manual program.

### CHALLENGE

Colleen Norberg, purchasing manager for Ellis Medicine, said there were a lot of reasons why the hospital needed a vendor credentialing program. "Not only would it help our Purchasing Department control where vendor reps were going and who they were seeing, it would help improve patient safety demands by ensuring vendors had proper vaccinations and appropriate training."

Originally, the hospital distributed vendor registration packets asking for credentials and immunization records. However, with such a cumbersome system, the paperwork was often left uncollected. In addition, vendors were supposed to register at the Purchasing Department when they came into the hospital, but it was easy for them to come and go without signing in. The hospital also tested a badging system. Vendors going to the Operating Room were assigned red badges while all other vendors had green badges. In the end, the hospital realized it just didn't have an administrative staff that was large enough to effectively manage the paperwork needed to track the thousands of vendors who came into their facility.

### SOLUTION

Norberg first heard about the Reprax™ vendor credentialing system at a Yankee Alliance group purchasing organization (GPO) meeting and thought it was worth investigating. The Purchasing Department worked with the hospital's administration, Infection Control, and Employee Health Departments to get a better understanding of the credentials and immunizations vendors needed. Once planning was complete, Ellis Hospital installed the Reprax system in 2009 and required all pharmaceutical, medical device and vendor reps to be credentialed. Kiosks were installed at key locations, such as entryways and registration areas, throughout Ellis Hospital as well as in the other Ellis Medicine campuses including Bellevue Women's Center, Ellis Healthcare Center, and in the health system's Purchasing Department. Additional kiosks were placed outside the areas of greatest concern—the operating rooms.

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**- Colleen Norberg, Purchasing Manager  
Ellis Medicine**

Once the hospital staff began running reports available through the Reprax system, it found compliance scores were still low. Employees were not reporting vendors who hadn’t registered or weren’t wearing badges because they thought this was something that Security was handling. However, it was clear to Norberg that the Purchasing Department could not be the only department responsible for the program. She knew a successful program would require hospital-wide involvement.

Norberg was part of a team that educated employees about vendor credentialing and the importance of their role as the eyes and ears of the program. Employees were required to inform the Purchasing Department if they saw a vendor without a badge, so the situation could be addressed. By the same token, if vendor reps came to a department unannounced, hospital policy required staff to send the reps to Purchasing before meeting with them. To make sure this information is shared with new employees, it is reviewed during the facility’s new employee orientation process. Initially, they didn’t understand the strength of the relationship between physicians and reps — particularly in the orthopedic area. However, it quickly became apparent that they were a key audience. “Since orthopedic reps work closely with surgeons, the doctors didn’t want their reps to have their privileges revoked because of credentialing issues,” said Norberg. “It was important to educate them about credentialing and get them on board with the program.”

Together with hospital administration, Norberg met with the surgeons to explain that the program was not designed simply to save money or to create roadblocks for vendors. Instead, it was designed to improve the safety and security of the hospital’s patients, employees, and visitors. Surgeons were informed of the required credentials and the easy access to an OR kiosk. Once an understanding was reached, confidence developed and it became a smooth process for getting the cooperation of both surgeons and surgical reps.

Running reports on a regular basis is another important key to compliance. Ellis Hospital runs compliance reports multiple times a week to check on things such as whether reps are accurately credentialed to visit certain parts of the hospital and, when appropriate, restrict their access. By the same token, Norberg runs a daily report to restore access to reps when they have addressed the appropriate issues. According to Norberg, it is also important to carefully review the reports to make sure reps are registering for the right credentials. For example, a rep might register to go to the administrative offices, which have fewer compliance requirements, but actually visit another part of the hospital with more stringent requirements.

## **RESULTS**

Even vendor reps are beginning to understand the importance of a strong credentialing system. For example, an orthopedic rep was frustrated because he had submitted all his credentials and thought his immunization records were up-to-date. He couldn’t understand why he was repeatedly denied access to the Operating Room. It turned out he had submitted all the right paperwork, but it showed that he needed a new Hepatitis B vaccine because his titer was low, and he was no longer immune. The rep was a regular OR visitor, and once he understood why he was being denied access, he was grateful and quickly got vaccinated.

Over the last several years, Ellis Medicine has acquired a number of clinical and physician offices and today has 10 different facilities. The administration has rolled out the Reprax credentialing program to these facilities as well. Rather than installing additional kiosks, they installed the system on the administrative computers. When reps schedule meetings, they contact the appropriate administrative assistant who can approve the meetings after ensuring the reps have the required credentials. When the reps come in, they simply stop by the desk to check in.