



## Smart Square, Implementation Made Easy

A Case Study of Mountain States Health Alliance

In November of 2007 the leaders of Mountain States Health Alliance decided to partner with Avantas to revolutionize their labor management processes using Smart Square.

**Mountain States Health Alliance is a not-for-profit healthcare system based in Johnson City, Tennessee. It serves residents in 29 counties in Kentucky, North Carolina, Tennessee and Virginia.**

### The MSHA system includes:

- » 21 primary/preventive care centers
- » 13 outpatient sites providing care
- » 1,467 licensed beds
- » 7,317 team members

Determined to drive meaningful improvements to their labor management processes, Mountain States Health Alliance (MSHA) set their sights on a solution that would simplify and automate scheduling activities, manage their float pools and give over 3,000 staff members the ability to self-schedule and communicate from anywhere with an internet connection.

The ambitious project scope and timeline necessitated meticulous planning. The task was to implement Smart Square in nine hospitals within six months, including system configuration, custom data feeds, testing, and education and training.

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Sharron GrindStaff, Corporate Director of Central Staffing Services  
Mountain States Health Alliance

MSHA had experienced the fallout firsthand from the lack of planning on a technology project during a system upgrade with their previous vendor. Following the upgrade, the entire system crashed and was down for more than 96 hours. This could not happen again. As a health system nationally recognized for quality, MSHA required a partner that was of like reputation—one that was equally committed to quality and able to deliver exactly what they promised.

All agreed the most important ingredient to this implementation project was teamwork. It would be the catalyst that could either lead to success or bring about failure.



## The Avantas Solution

### *Streamlining your scheduling and staffing processes*

With current changes to the healthcare industry cutting into profitability, many providers are looking for ways to cut costs. Labor makes up 60 percent of the average healthcare organization's budget, and caregivers have a direct impact on clinical outcomes. Therefore, it makes sense for labor management to be a priority.

The Avantas Solution is an integrated process that combines consultation, automation, and education to deliver significant savings in time and costs while improving your organization's quality of care.

We'll show you how your organization can achieve the financial, clinical, and operational outcomes you're looking for.

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All Avantas projects start with a Statement of Work. Avantas and MSHA clearly defined and built consensus around all the stages of implementation. Responsibilities were assigned, timelines and expected deliverables were mapped out in a phase-by-phase approach and a series of update meetings and calls were scheduled to ensure communication and timely progress updates. Overseeing the project was a dedicated Avantas Senior Project Manager and support staff consisting of various subject matter experts. Their counterparts at MSHA were the IS Project Manager, Corporate Director of Central Staffing Services, and the System Administrator.

The Avantas Senior Project Manager served as the day-to-day internal project coordinator and main contact for MSHA, documenting and managing all aspects of the Smart Square implementation project. Working closely with her colleagues at MSHA, they mutually ensured that the lines of communication remained open and that all implementation activities were orchestrated and effective.

"We really can't say enough about our Avantas Project Manager," said Sharron Grindstaff, Corporate Director of Central Staffing Services. "She was always there to support us, keeping everyone on track, listening to all parties, and working to ensure that there were no misconceptions on either side of the fence. In a sense, she took down the fence, making us all one team!"

The team understood that just as each health system is different, individual implementation projects are also unique. With Avantas' guidance, the number and extent of each implementation phase was planned according to the following factors:

- The number and size of the hospitals in the health system
- The number of users and their various access privileges
- The types and sources of data feeds involved in the configuration
- Which Smart Square Modules were requested
- The amount of education required.

While building a plan, it is encouraging to know that no matter what variances occur from project to project, the one constant is that a Smart Square implementation requires very limited involvement of the client's IT staff. Smart Square is an entirely web-based and hosted solution, requiring very little, if any, additional hardware, servers, and internal IT support.

"Smart Square is a totally hosted solution, so that was a definite plus for us," said Angela Harkleroad, IS Project Manager. "Having everything on the web meant that there were no servers or hardware for my IT staff to worry about."



## Smart Square

### *Automating your scheduling and staffing processes*

Developed by healthcare professionals for healthcare professionals, Smart Square staffing, deployment, and reporting process from beginning to end.

Smart Square provides you with the ability to:

- » Develop your resource goals
- » Maximize your core staff resources
- » Proactively fill your open shifts
- » Strategically allocate resources system-wide
- » Use real-time business intelligence

As a Web-based application, it integrates easily with your current systems and can be conveniently accessed anytime, anywhere.

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The implementation at MSHA required seven short phases, each lasting two to three weeks on average. In the first two phases, the foundation for the project was laid. As a part of this groundwork a series of detailed and open discussions occurred in the form of a cross-functionally represented steering committee. This exchange resulted in a mutual understanding of the overall shared vision of the project. MSHA Business Rules and Policies and Avantas Work Strategies were discussed in detail and corroborated to ensure that the roadmap to MSHA's desired future state was always at the forefront of the minds of everyone involved. The rules and policies facilitating this vision formed the hierarchy that customized Smart Square specifically for MSHA.

"The work that goes into the planning of the implementation is impressive," Grindstaff said. "The way that Avantas really listened and worked with us is something I have never experienced in my career in healthcare."

The next few phases focused on setting up and testing the custom interfaces that make Smart Square so unique. Smart Square's open design made it compatible with MSHA's third-party software systems such as their time and attendance, census (ADT), and HR platforms. This interface capability allows Smart Square to automatically update information from these sources and use this data to deliver customizable reports containing real-time metrics.

In conjunction with the setup of these data feeds, MSHA historical data was shared in order to set up the Predictive Model, the powerful regression tool that drives Smart Square by anticipating future staffing needs to facilitate proactive staffing. The Predictive Model uses this historical data as a base, and with the inputs from MSHA's various data feeds routinely reevaluates the current and future staffing outlook, providing managers the most current projection of staffing. This intensive data-crunching done within the system eliminates the guess work of staffing and gives managers the peace of mind to focus less on day-to-day staffing concerns and more on staff development and patient care.

While this configuration was being managed, staff communications and education pieces were being finalized. In the same way that MSHA received a customized version of Smart Square, different cultural realities from system to system require customized solutions in regards to communication and education.

A major component of implementing any sort of change is the anticipation of cultural challenges. The strong leadership at MSHA was crucial in helping Avantas craft the correct messages at the right time and in the right manner, and having those messages accepted and understood. The cooperation and



## Consulting Services

*Develop and Implement your organization's customized plan*

There's one common thread between financial, operational, and clinical outcomes: LABOR.

Our experienced consultants will work closely with your nursing leaders to develop and implement customized plans that effectively address your organization's labor management needs.

By streamlining your practices, we can help your organization achieve positive financial, clinical, and operational outcomes.

The success our clients have had is proof that a more proactive, logical approach to managing resources is culturally and financially transformational to a healthcare organization.

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support of MSHA leaders and staff was essential to the project coming to a successful completion on schedule.

"The Avantas Implementation team was really great to work with," Harkleroad said. "They helped us turn the little snags into learning

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*Angela Harkleroad, IS Project Manager  
Mountain States Health Alliance*

opportunities which really helped us come to understand the system. Most of all, they were honest with us. We put our trust in them and they didn't let us down."

The next two phases of the implementation consisted of finalizing the configuration of data feeds, initial schedule entry and a general array of testing, followed by phased Go-Lives. Also during this time came a period of intensive testing and configuration for one of MSHA's most anticipated Smart Square modules, its self-scheduling and incentive management tool, i-Choice. Embedded within Smart Square, i-Choice continuously weighs census predictions (from the Predictive Model) against scheduled core staff and automatically posts open shifts in Smart Square. Incentives, within ranges set by MSHA, fluctuate in parallel with patient need, keeping the expense in line with a targeted overall rate. MSHA adopted this strategy whole-heartedly, providing accessibility and training for over 3,000 employees, and taking a major step toward truly proactive staffing.

"Proactive staffing is a part of our desired future state," Grindstaff said. "i-Choice is really helping us get out of the 'in the moment' staffing mentality by enabling us to fill holes in the schedule up to a month out."

In addition to proactive staffing, MSHA's desired future state included the development of an efficient and effective staffing process that supports an enterprise-wide philosophy. To coordinate these efforts, MSHA chose to institute an integrated staffing office. Smart Square, MSHA determined, was the perfect tool to put these elements of their desired future state within reach.



## Educational Offerings

### *Healthcare Working Smarter*

Continual evaluation and improvement is the key to success. We provide ongoing support and education to help your organization achieve optimal results.

Our team of experts can custom-create learning opportunities that best suit your needs. Subject matter may include the following:

- » Productivity
- » Workforce optimization
- » Labor pool and incentives
- » System integration
- » Resource management
- » Business analytics

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The final phase of any implementation project follows closely behind the system Go-Live. After “handing off” the system, Avantas continued to work with MSHA to make sure everything was working just as it should, and just as it was promised. In a sense, the final phase of implementation is ongoing. Avantas is continually working to add functionality, enhance training materials and introduce new video tutorials to further improve the end-user experience.

“The support we got before, during and after the configuration process was crucial to our immediate and future success,” said Debbie McInturff, System Administrator. “I knew we could count on our colleagues from Avantas to help us get the job done right. And, with our ongoing relationship with our Avantas Account Manager, we know we have a direct line to the team that is as committed to our success as we are.”

Avantas utilized the “Train the Trainer” approach to educate MSHA super-users. Smart Square training is highly interactive and incorporates various methods to appeal to different learning styles. Smart Square education employs user guides, video tutorials embedded within the software, and an array of hands-on activities to help the user learn the most key functions of the software, such as schedule creation and proactive staffing.

“Our Avantas trainers were excellent,” said McInturff. “They didn’t just teach us how the software works, they helped us understand how what we do in the software affects the system. That really helped drive it home.”

### About Mountain States Health Alliance

Mountain States Health Alliance, a not-for-profit health care organization based in Johnson City, Tenn., operates a family of hospitals serving a 29-county, four-state region (Northeast Tennessee, Southwest Virginia, Southeastern Kentucky and Western North Carolina). MSHA offers a large tertiary hospital, several community hospitals, two critical access hospitals, rehabilitation, a children’s hospital, a behavioral health hospital, home care and hospice services as well as a comprehensive medical management corporation. Its 13,500 team members, associated physicians and volunteers are committed to its mission of bringing loving care to health care. For more information, visit [www.msha.com](http://www.msha.com).