



A medical center located in Hawaii decided to take advantage of Joint Commission Resources (JCR) advisory services. As part of an effort to standardize resources and processes across sister hospitals, this medical center contracted with JCR for Continuous Service Readiness (CSR) services.

Due to the pandemic, meeting in person was not feasible. However, according to the Quality Director, the virtual sessions were just as effective as in-person sessions – and thanks to the online format, enabled her to invite more people across several institutions to join in.

Preplanning makes a big difference

As with in-person sessions, planning ahead is key for virtual sessions. “We had a lot of topics we wanted to go over with our CSR consultant, but we needed to break them up into shorter timeframes,” says the Quality Director. “Rather than two 8-hour days, we broke it down to four 4-hour sessions, with specific topics, which fit much better into our busy colleagues’ schedules.” The Quality Director worked with their JCR CSR consultant to develop a detailed agenda that covered the topics of greatest interest to the attendees.

Walking the consultant through different departments virtually

The first session, which included virtual rounds of the Allergy Clinic and Imaging Departments, was largely a matter of showing their consultant the environment via Zoom. “During the first session, I brought my iPad and walked her through our allergy clinic, showed her the physical space and she discussed things like our compliance with USP 797 standards. It was almost like having her there,” says the Quality Director.

“During the second session, I used a laptop with a camera and put it on a wheeled cart,” she continues. “That enabled me to both show her the environment, but also to use the ‘share my screen’ function so we could all see the documents she was reviewing at the same time.” This was particularly helpful when the group performed a patient tracer where a documentation trail was the primary source of information.

More colleagues were able to attend

“The biggest benefit of the virtual session,” says the Quality Director, “is that more people could join in. A larger audience heard the feedback first-hand. I sent the agenda out ahead of time, and people throughout the organization could log on and participate in the session. During an in-person session, it’s usually just the Quality Director and a few others who attend and then try to disseminate that information out to others afterwards. With the virtual session, people could log in when we got to the topics they were interested in, and get the information in real time.” Mid-level leadership, floor managers, executive leadership, the chief nursing officer, VP of operations and the chief quality officer all signed in for a few sessions – a much greater audience than usual. “Best of all, these people could hear for themselves the affirmations when we were doing things right,” asserts the Quality Director.

Minor challenges were easily overcome

The biggest challenge was scheduling a good time for as many people as possible to attend. With a large online group, there can also be the challenge of environmental noise; but with the Host function on Zoom, it was easy to mute everyone while the speaker was speaking.

Advice for the most effective virtual session

The Quality Director has some sound advice for those considering virtual sessions:

- Ensure that stakeholders are on board, and that you manage expectations appropriately. If possible, have your stakeholders participate in the sessions so they understand the value of the process.
- Test your WiFi ahead of time with whatever device(s) you are planning to use in the exact locations where you plan to use them.
- Be organized so you can maximize your time with your consultant.
- Develop a realistic agenda with intentional goals and distribute it ahead of time.

“It’s more than just a phone call,” says the Director. “We were able to show her specific areas, show workflow, follow tracers – we even followed an endoscopy tech from the endoscopy suite down to sterile processing so the consultant could see it all – and it was like she was there with us. With social distancing rules and no clear end to the pandemic in sight, it’s a great way to avail yourself to your consultant’s experience.”

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