Planning for Automation

Everything You Need to Know Before the Transition

Censis

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Introduction

As you consider moving from a manual to an automated system or from your current system to a new one, you'll be faced with a lot of decisions to make. Transitions like these can often be painful if preparation for the change hasn't been handled with care and in great detail. To help you ensure a smooth decision-making process and transition, we've put together a few key tasks that you can focus on right now, before you choose an automation system.

The first task is to figure out which vendor and solution you're going to partner with, which is the most important decision you'll make in the entire process.

Secondly, you'll want to investigate instrument marking to see if it's a service you want to utilize to enable patient-level tracking. And the third task is to begin preparing your data so that you can ensure a smooth and time-efficient implementation process of the new solution.

While tackling these tasks might seem time-consuming at first, you'll benefit from this strategic preparation in the end with a smooth implementation.

Evaluating Partners

Evaluating and choosing a partner is the most important yet tedious decision that you'll make in this whole process. The company that you partner with will determine how efficient your department is and how well your entire facility is taken care of after the solution is deployed. Without the right partner at your side, your new solution could not be as effective as you had hoped.

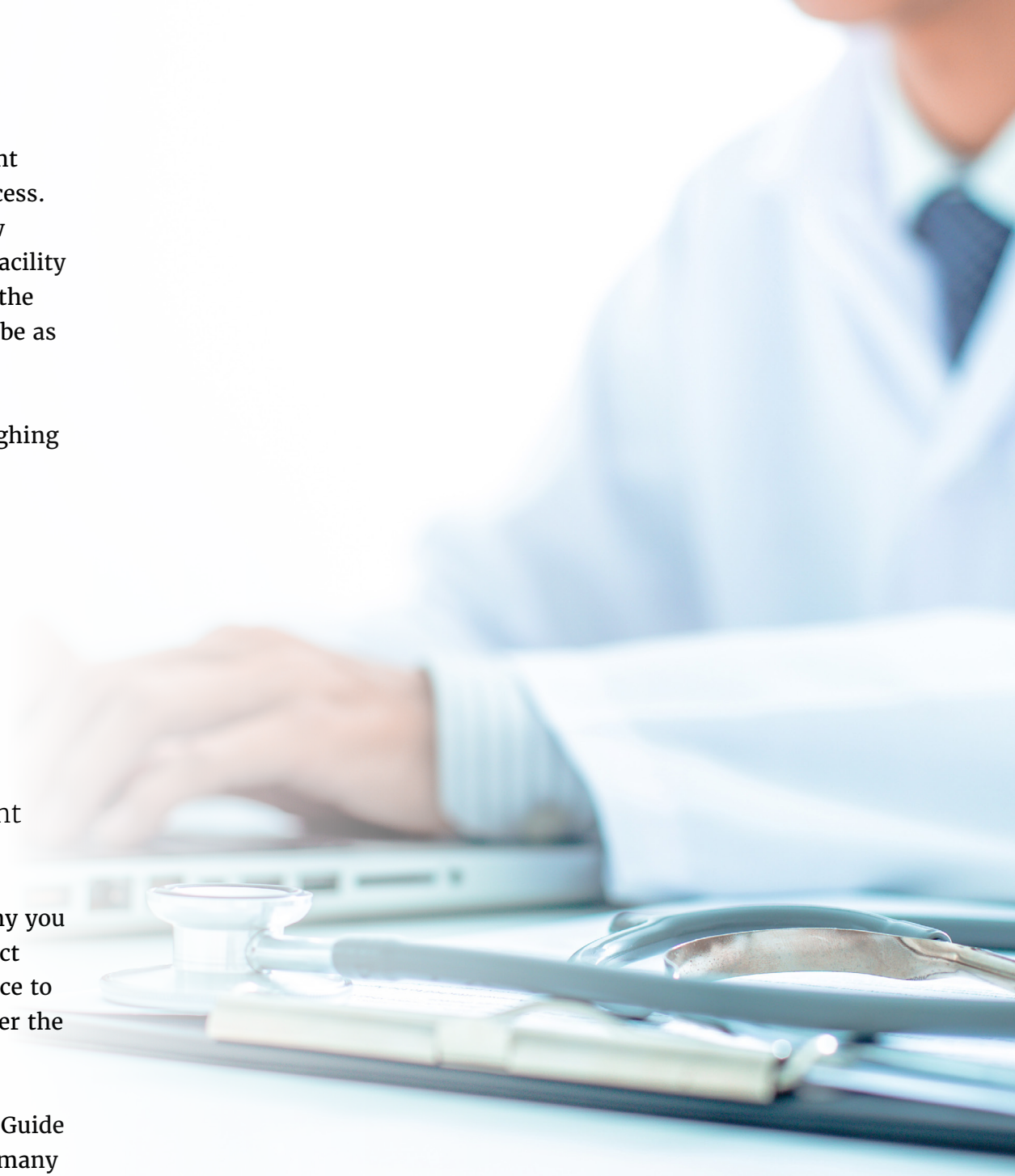
Evaluating service providers goes further than just weighing the pros and cons of their solution.

YOU SHOULD EVALUATE:

- Financial Stability
- Years in Service
- Internal Support Resources
- Process for Client Service and Management

As a facility, you want to be sure that whatever company you partner with not only provides you with a stellar product but also has a system and strong support system in place to make sure that you are well taken care of even long after the company's solution is launched in your facility.

To aid in your evaluation, use the Company Evaluation Guide on page 5 that hospitals like Mayo, John Hopkins, and many more have used to make a buying decision.



Company Evaluation Guide

1. How **financially stable** is the vendor? What has growth increase or decrease looked like in the past five years?

2. **How many years** has the company been in instrument tracking business?

3. What **percentage of the market** have they deployed their solutions in?

4. **How many solutions** do they have in their portfolio?

5. Does the vendor offer **comprehensive solutions?** If not, how invested is the vendor in ensuring all needed functionality works together seamlessly?

6. How often do they release **updates and enhancements** to their solutions?

7. Do they show **dedication to improving** the processes and workflows of medical facilities or do they just want to make a fast dollar?

8. Does the vendor have a **dedicated project management and implementations** team? If so, how comprehensive is the implementations and training process? Do they customize a statement of work for your site?

Company Evaluation Guide

9. Does the vendor offer **post-implementation assessments/ evaluations** as part of their support package to ensure the client is getting the full value of their investment?

10. Do they have a **client services team?** If so, how dedicated is the team to providing support to clients on an ongoing basis?

11. Do they have a **service desk** that can be reached for emergency help around the clock?

12. What is the company's **retention rate** specific to instrument tracking and surgical asset management automation?

We recommend keeping this checklist with you anytime you talk with service providers. Take the time to record your evaluation notes so that you have a complete profile of each company to aid in discussion and the decision-making process.

Investigating Instrument Marking

UDI

The adoption of the FDA's Unique Device Identifier (UDI) labeling and marking requirements for reusable instruments and devices by manufacturers, new surgical assets purchased by facilities will have to have an approved 2D barcode. However, this marking only tracks reusable instruments to the lot level, it does not track exact individual instruments. To allow a CSSD facility to take full advantage of their asset management software they will need to incorporate a standardized marking process that is compatible with their new solution.

PATIENT-LEVEL TRACKING

Tracking to the patient level is only possible when a system can read an instrument's unique serialized mark and maintain that history for the life of each instrument. Utilizing instrument-level tracking to track to the patient level is so important because it adds an extra layer of protection for both the facility and the patient. In order to properly capture and identify the exact instrument used in a specific case, your instruments need to be marked.

So, have you investigated instrument marking? There are a lot of different options available on the market from laser etching to engraving to electro-chemical. To help you see the benefits of all the different options, check out the **chart below**.

	ECMP	LASER ETCHING	DOT PEEN	ENGRAVING	MECHANICAL LABELING
Durable	✓	✓	✓	✓	✓
Non-detachable	✓	✓	✓	✓	✗
No Risk of Bio-Burden Buildup	✓	✗	✗	✗	✗
No Physical Change to Instrument Surface	✓	✗	✗	✗	✓
Corrosion Resistant	✓	✗	✗	✗	✓
Able to be Applied to Confined Spaces	✓	✓	✓	✓	VARIES BY TYPE
VA-Preferred Mark	✓	✗	✗	✗	✗

CensiMark

Here at Censis, we offer the industry's **most proven electro-chemical mark** that does not disturb the passivation layer of your standard or specialty instruments through a service known as CensiMark. CensiMark embeds a 2-D mark below the passivation layer, applying a guaranteed corrosion-free mark to the instrument rather than altering the surface as etching or engraving do. With two different sizes of marks, CensiMark can be applied to all different types of instruments, including flexible scopes, neurosurgery, and cardiovascular instruments.

Our team has utilized CensiMark to mark more than **3.5 MILLION INSTRUMENTS** in over **450 FACILITIES**. To learn more about CensiMark and what it can do for your facility, click below or visit **www.censis.com/censimark**.

Preparing for Quality

While you're evaluating companies, you can also get a head start on preparing your data. If you're moving from a manual system with paper count sheets, it's especially important to begin converting your paper data to electronic files so that this task doesn't slow down time during the implementation.

ASK YOURSELF THESE QUESTIONS

1. *How am I currently assembling my sets?*
2. *Where am I keeping my extras?*

If you already have electronic count sheets, you can still check your data against the information that we recommend and begin filling in any holes or information gaps that your current count sheets may currently have. By working with a company experienced with validating data, you can be assured that instruments on your countsheet will align with the vendor's standards. Thereby, decreasing errors during assembly and increasing your staff's overall instrumentation knowledge.

We've now worked with more than 700 hospitals nationwide, and if you would like to see how our customers prepared for the transition, **click here**.

Preparing for Quality

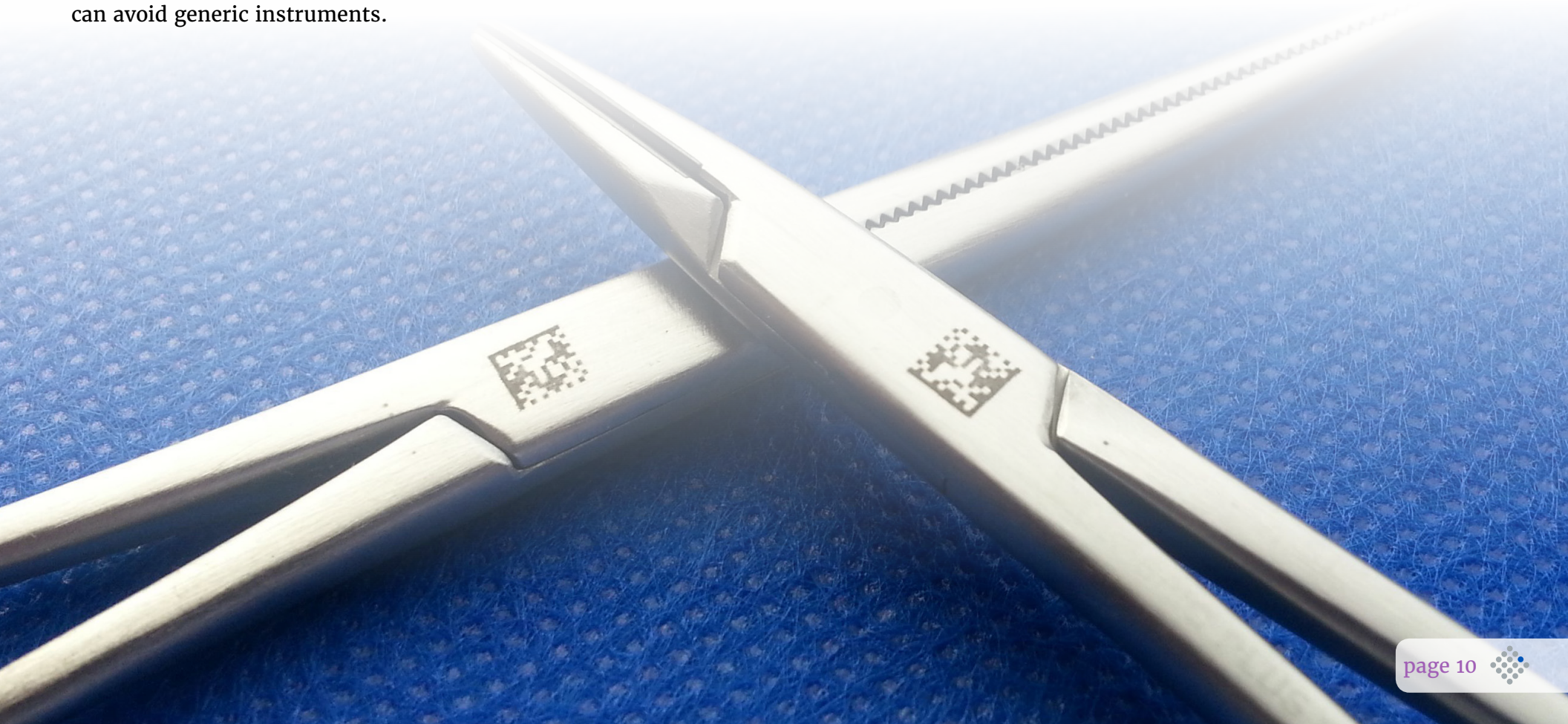
As you prepare your data, we understand that this can be a time-consuming process and why we recommend that you start early to minimize any issues in the validation and upload process. Before you start converting your data, check out two of the common errors that we see so you can avoid making these in your count sheets.

GENERIC INSTRUMENTS

Generic instruments result when facilities just list the description of the instrument versus the specific instrument's catalog number and supplier. Take the time to fill in those details so you can avoid generic instruments.

DUPLICATE DESCRIPTIONS

Duplicate descriptions result from facilities listing the same catalog number and supplier for multiple instruments that have different descriptions. For example, some facilities might not know a catalog number for a Depuy instrument, so they just use Depuy #1001 for multiple instruments that have different descriptions of what the instruments actually are. This results in multiple duplicates throughout the data.



Exploring Interfaces

Before your service provider's implementation team even arrives onsite to begin implementing the solution and training your staff, you need to figure out which interfaces are right for your facility and which need to be revisited at a later date. Interfaces include items like oneSOURCE, the OR scheduler, sterilizers and washers, and 3M incubators.

oneSOURCE

Dynamic link between inventory in your instrument tracking solution to corresponding IFUs in oneSOURCE

How does the solution interface with oneSOURCE?

Do you need or already have an existing account?

Do you need to set up accounts for staff?

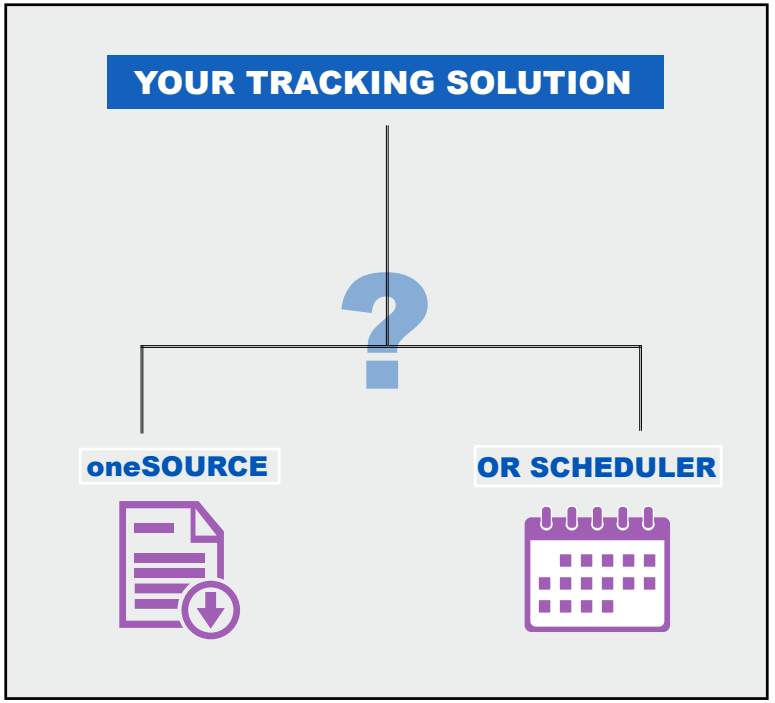
OR SCHEDULING INTERFACE

Incorporates information from the OR scheduling system to your new instrument tracking solution

What is your OR Scheduling System?

What are the options for transmitting the information from the Scheduling System to your solution (HL7 messages or flat-file extract)?

What is needed to set up this interface with your solution?



Exploring Interfaces

STERILIZATION EQUIPMENT INTERFACE: Transmit cycle tape details to the corresponding sterilization load in your instrument tracking solution

Who is the manufacturer of your washers & sterilizers?

Do they offer network connectivity and the ability to capture the cycle tape data electronically?

What is needed to set up this interface with your solution?

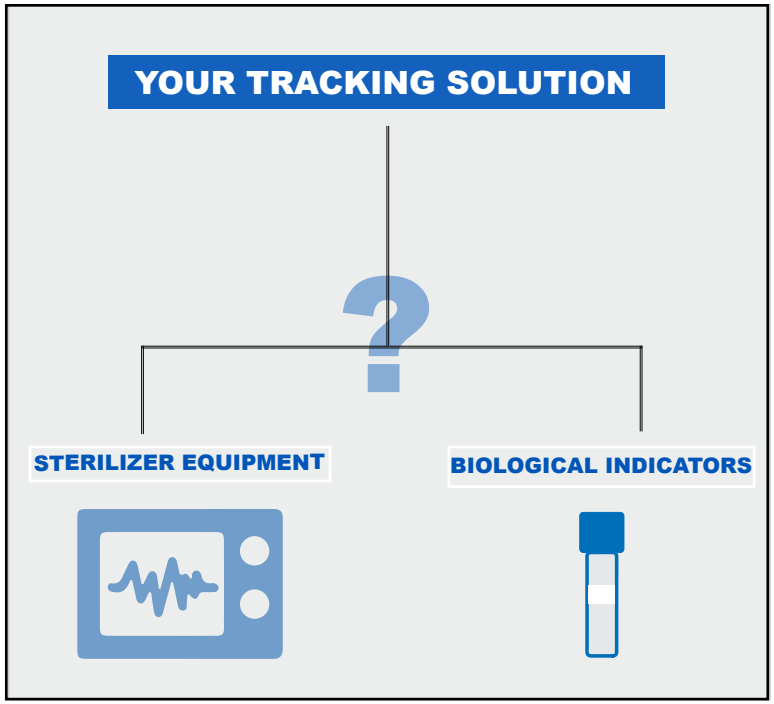
Did you know that some sterilizer equipment manufacturers charge for interfacing to instrument tracking solutions? Ask the service providers you're working with if they can use flatbed document scanners to turn your sterilization data paperless without the interface.

BI INTERFACE: Transmits the BI result automatically into your instrument tracking solution

What type of incubators do you have?

Do they offer network connectivity to capture the BI results electronically?

What is needed to set up this interface with your solution?



Evaluating Hardware

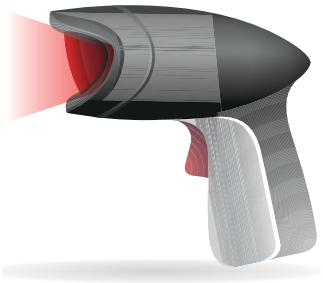
Preparing to implement and install a brand-new solution within your facility can require new hardware. To help you prepare and review options with the service providers, we've put together a hardware ordering checklist so you can quickly see exactly what you may want to make your new solution work!

PC AND MONITOR

As a software package, the basic component is a PC at each assembly workstation for staff (technician) use. Additional PCs can be placed throughout Sterile Processing to complete the reprocessing loop for hospital instruments and sets: Decontamination, Sterilization, Sterile Storage.

BARCODE SCANNER

Linear Barcodes and 2D Matrix instrument marks are used to identify instruments and sets as they move throughout Sterile Processing, OR, and other clinics supported by the reprocessing areas. Each PC located at a scan point requires the appropriate barcode scanner to capture that item's movement.



LABEL PRINTER

Staff working in Assembly need a Label Printer to create the barcodes for the containerized sets, wrapped goods, and peel packed items. That barcode is scanned as the item moves around the facility.

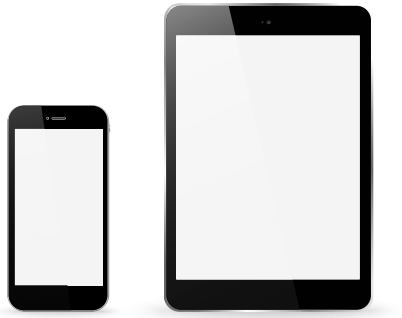
PAGE PRINTER

Count Sheets, sterilization records, and department reports can be printed for use, distribution, and/or archival purposes.

Evaluating Hardware

Document Scanner

With a document scanner, preferably flatbed, sterilization cycle tapes and quality assurance test cards can be scanned and attached to the sterilization loads they relate to.



Mobile Devices

Mobile devices allow staff to scan containers and peel packs throughout the reprocessing cycle, especially in areas where a full PC workstation is needed. Mobile devices can also be used during distribution and pick-up of instruments reprocessed in Sterile Processing when the department supports more than just Surgery/ OR.

RFID (Radio-Frequency Identification)

RFID is another technology available for tracking medical equipment throughout your hospital. Movement of your medical equipment is automatically captured and recorded, ultimately improving location awareness of all equipment and simultaneously decreasing costs from lost/missing devices.

Typically, there are two paths we see customers take when they purchase their hardware. They purchase from the instrument management company or the materials management department. Any company should be able to provide you the exact list of the hardware based on their on-site assessment.

Preparing IT

Ordering hardware goes hand in hand with preparing IT. Automation of your surgical inventory management requires your IT team to put systems and processes in place that enable automation to run smoothly. As such, working with IT during the vendor evaluation process is the best way to ensure that everyone in the organization is on the same page once the project starts.

Here's a list of items your hospital will need to review as you consider deploying a solution. Talk to your IT team to make sure you understand the right questions to ask vendors. Also take this time to see which methods and processes your facility requires, if any. Just remember that a vendor must be flexible in their IT capabilities, so as your facility grows they are able to grow with you.

TYPES OF SOFTWARE HOSTING

On-site Server: The hospital hosts the instrument tracking application server and the hospital IT is typically responsible for building and maintaining the application server.

- *Buffer Server*: a physical server set-up and maintained to host the instrument tracking application
- *Virtual Server*: a virtual instance is setup on the hospital's virtual server

Cloud Server: The instrument tracking application is hosted virtually via cloud services, requiring little to no support from Hospital IT for the set-up and maintenance of the server.

POWER AND DATA DROPS IN THE DEPARTMENT

Part of adding a surgical inventory management solution means strategically placed work stations to maximize output. A vendor's project management team should work with your facility's IT, SPD/OR Management, and Biomed/Facilities to map-out the best location for each workstation so that the correct power and data drops can be ran to that location.

Preparing IT

VPN

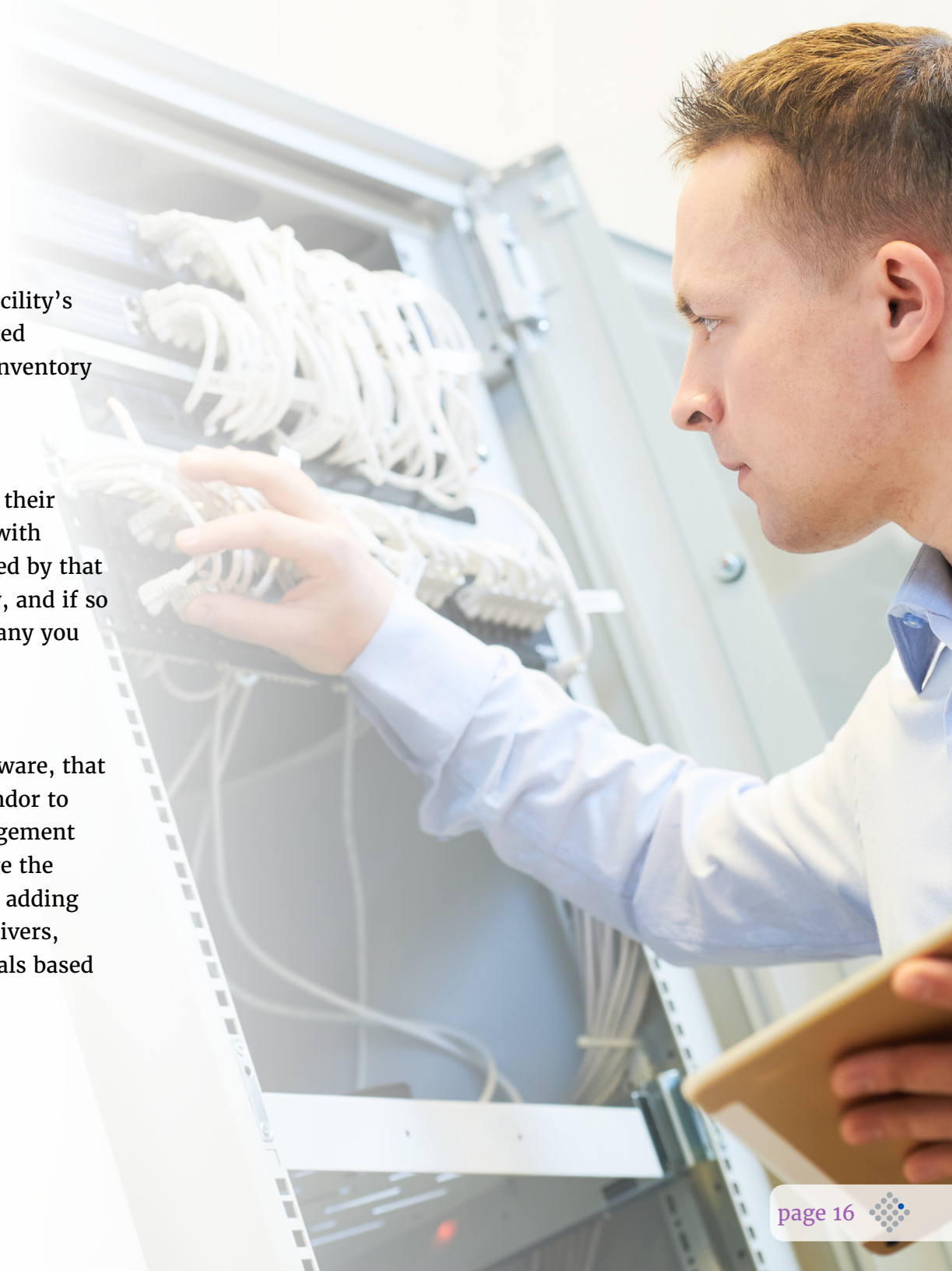
The company you choose may need the details for your facility's VPN (Virtual Private Network). This will allow for expedited handling of all troubleshooting needed for your surgical inventory management solution.

USING ACTIVE DIRECTORY

Many hospital/hospital systems, are now choosing to use their active directory to standardize login procedures for staff with respect to the hospital network and other applications used by that staff. Talk with your IT to determine if this is their policy, and if so make sure this is a question you are asking of each company you meet with.

INSTALL HARDWARE & SETUP

Each facility has different ways they handle their IT hardware, that is why we recommend having your IT work with your vendor to order the needed hardware for a surgical inventory management solution. Then when it arrives, have them directly manage the installation and setup of all equipment. This will include, adding standard hospital network applications, adding printer drivers, adding drivers for document scanners and other peripherals based on manufacturers' requirements for install and use.



Questions?

If you have any other questions or concerns as you prepare for implementation of your surgical inventory management automation solution, don't hesitate to reach out to us at www.censis.com/contact. We'd be happy to chat with you and provide any assistance we can.

888-877-3010

sales@censis.com

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