



Are you on track for success?

**Transitioning from a Manual
Process to Automated
Instrument Management**



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Introduction

The HITECH Act (Health Information Technology for Economic and Clinical Health Act) and Meaningful Use incentive programs were designed to push U.S. healthcare providers to adopt electronic health record (EHR) systems. But getting an EHR system in place is just the first step in the effort to become more efficient.

Now, in the post-HITECH Act era, healthcare solution vendors and providers will need to work together to layer in additional technologies and capabilities to work toward improving overall healthcare quality, safety, and efficiency for patients.

In the Central Sterile Supply Department (CSSD), moving from a manual to an automated system not only helps to reduce costs and improve efficiency, but it can also impact patient safety and

quality by deploying checks and balances that ensure:

- ◆ Technicians perform tasks in proper sequence
- ◆ Technicians have easy access to accurate instructions for use (IFUs) and tray assembly guidelines
- ◆ Complete data capture of each step in the reprocessing cycle to make information easily retrievable in the case of recalls, adverse event investigations, and department quality improvement analysis

Combine these meaningful benefits with the recent FDA Unique Device Identifier (UDI) initiative that involves tracking individual assets used in patient cases, and it is clear that the need to move to automated instrument and device management is fast approaching. How do you prepare and what are some tips for transitioning?

Effectively Budgeting for a System

With over a decade of results showing the benefits of electronic data capture versus paper recordkeeping in CSSD, there are many examples of why opting for an automated instrument management system not only supports regulatory requirements and guidelines, but is also much more cost-effective. For example, studies have shown that automation in instrument reprocessing has led to:

↓ 50%

in lost or missing items¹

↓ 10%

in maintenance and repair costs

↓ 50%

in CSSD time spent locating assets²

↓ 20%

in OR case delays due to instruments being unavailable

Using these type of statistics to quantify a return on investment (ROI) for transitioning to an instrument management automation system can be very helpful in attaining budget approval. It is preferable to differentiate between hard dollar savings (a direct reduction in department expenses) and soft dollar savings (avoidance of potential costs or improvements in efficiency). Although ROIs are typically based on hard dollar savings, including the soft dollar savings can still be helpful in underscoring the value of moving away from manual processes.

Since every CSSD is unique in how things are done, ROIs must be customized to the facility. This can make determining a ROI for your facility challenging, but not impossible. For example, Censis Technologies offers a no-charge assessment program that helps facilities calculate the positive impact automation can have in over 20 different aspects of instrument reprocessing management, calculated with evidence-based, research findings. Whether you develop your own ROI or take advantage of a company's assessment program, including a detailed ROI in your budget request can be the key to getting budget approval.





Choosing a Solution Partner

Choosing a software and solution partner requires a lot of research and consideration. While it is important to investigate lists of features and benefits that instrument management systems offer today, keep in mind that there are additional costs associated with changing systems if the one you choose stops meeting your needs in the future. Because the CSSD is a highly regulated environment that is constantly evolving, the value of choosing a company that is committed to ensuring their solution continues to meet regulatory changes and address industry trends should not be overlooked.

As you begin your search, some questions to consider include:

- ◆ *What percentage of the company's overall revenue does instrument management automation represent?*
- ◆ *Does the company customize its implementation process around each facility's needs?*
- ◆ *How many system enhancements has the company released each year? How are those provided to their users?*
- ◆ *Does the company have a User Group dedicated to instrument management automation?*
- ◆ *What percentage of the company's revenue is dedicated to instrument management automation research and development?*
- ◆ *What is the company's retention rate specific to instrument management automation?*
- ◆ *Does the company offer comprehensive solutions that address needs throughout the perioperative loop? Solutions like:*
 - *Loaner tray management pre- and post-delivery by vendor*
 - *Endoscope management*
 - *Competency management for sterile processing personnel*
 - *Quality management communication between OR and CSSD*
 - *Effective analytic reporting*

Tips for an Easy Transition

Many different factors contribute to smooth transitions, especially when approaching the decision of moving from a manual system to an automated one. Keep the following tips in mind to ensure that your transition is an easy and effective one for everyone on your team.

1. INVOLVE BOTH CSSD AND OR IN DECISION-MAKING

Giving both departments the opportunity to be part of the selection process sets the stage for a successful implementation. According to *Sterile Processing in Healthcare Facilities: Preparing for Accreditation Surveys*, 2nd Edition published by AAMI, the delivery of sterile healthcare products for use in patient care not only depends on the efficacy of the sterilization, but also on “effective quality control and process improvement systems that encompass all aspects of device reprocessing from point of use through sterilization to reuse.”³

Having a multi-disciplinary team involved in the selection process helps to ensure the entire reprocessing loop is being considered when investigating automation options. Involving both teams also creates the opportunity for you to get everyone on board with the change early on before any major decisions are made—all guaranteeing a smoother transition down the road.



2. PRE-EDUCATION OF STAFF ON BENEFITS OF AUTOMATION

Technology solutions are embedded in so many aspects of healthcare delivery today, it can feel like a burden for technicians and care providers to learn and adjust to yet another software product—especially when the manual process seems to get the job done. Highlighting the benefits and advantages that an automated instrument management system brings to the table in terms of patient safety, cost savings, and provider efficiency can help to earn staff buy-in. Benefits related to instrument management automation include:

Productivity:

- ↓ Reduction in CSSD/OR time spent locating assets
- ↓ Reduction in assembly time related to reprocessing of equipment & case cart building
- ↓ Reduction in Loaner Tray management time
- ↓ Reduction in scrub technician time related to Immediate Use Steam Sterilization
- ↓ Reduction in new hire training
- ↓ Reduction in understaffing and overstaffing

OR Time:

- ↓ Reduction in case delays due to tray availability and sterility concerns

Patient Safety:

- ↓ Reduction in surgical site interventions



3. ANTICIPATE SCAN POINTS

Anticipating what points in the perioperative loop will be important to capture data at your facility can help when you sit down with your vendor to determine hardware needs. The basic points at which assets are scanned within the perioperative loop and additional scan points to consider typically include:

Decontamination

- ◇ Pre-wash
- ◇ Cart washer
- ◇ Sink
- ◇ Ultrasonic staging
- ◇ Washer

Set Assembly

- ◇ Pre-assembly staging
- ◇ Pre-sterilization staging

Sterilization

- ◇ Cool down area

Storage

- ◇ General Storage
- ◇ Room, row, rack, shelf

Case Cart Assembly – (if case carts utilized)

- ◇ Case tracking
- ◇ Post-assembly or OR

OR Area

- ◇ OR Core
- ◇ OR room
- ◇ Clean return
- ◇ Other storage
- ◇ Post-op staging





4. CONVERT COUNT SHEETS TO ELECTRONIC FORMAT

When moving from a manual system to an automated solution, a facility's count sheets will need to be imported into the system. To do this, the count sheet data will need to be put into an electronic format. This process can be as simple as inputting key data into an Excel spreadsheet.

If your count sheets are not in an electronic format, your solution vendor can help you format and import the data. Examples of the type of data to convert are listed below; some items may be recommended but optional, while the ones in bold are usually required.

- ◇ **Container name**
- ◇ **Product name**
- ◇ **Quantity**
- ◇ Catalog number
- ◇ Supplier
- ◇ Placement
- ◇ Catalog number
- ◇ Supplier
- ◇ Critical items
- ◇ **Sterilization method**
- ◇ Whether or not substitutions are allowed
- ◇ Bio test required (Y/N)
- ◇ Assembly comments
- ◇ Decontamination comments
- ◇ Physician
- ◇ **Procedure**
- ◇ Home location

Summary

Changes to regulatory requirements along with increasing volume and complexity of trays that central sterile supply departments are expected to reprocess daily are paving the way for facilities to adopt instrument management automation systems. However, adding the transition process to the already heavy workload can be a daunting proposition. By combining a few key pre-implementation preparations with focusing the staff on the benefits associated with automation can put your team on track for a successful implementation.

References:

- ¹Carrigan, Robert; Milton, Ron; Morrow, Dan. "Surgical Instrument Management Reduces Surgery Delays and Drives Staff Productivity." Computerworld Honors Case Study, 2005.
- ²Hamelin, Tom. "Use Case Analysis for RTLS and Instrument Tray Tracking." March 31, 2009.
- ³Seavy, Rose. Sterile Processing In Healthcare Facilities Preparing for Accreditation Surveys, 2nd Edition, AAMI 2014, 192.





About Us

Founded in 2001, Censis Technologies, Inc. quickly became the industry leader in surgical asset management by offering highly advanced, web-based software systems focused on maximizing OR efficiency while advancing efficiency, transparency, and regulatory compliance.

With more than 600 organizations utilizing solutions in the Censis portfolio, Censis is committed to partnering with healthcare facilities year after year to enhance patient safety through innovative technology.

To see how automated surgical asset management can work for you, contact us at www.censis.com/contact-us.



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