

OCTOBER 2010

ANNE FORD

When you find yourself short on resources in a high-stakes situation, what do you do? You grab whatever you can—a Swiss Army knife, a roll of duct tape—and you improvise.

But to hear laboratory operations managers tell it, no one can improvise a lab work schedule that truly works—not even with duct tape.

Unfortunately, managers and supervisors are often called on to create and maintain enormous, constantly shifting schedules with little in the way of preparation. “Supervisors are trained in a lot of aspects of their job, but I’ve never seen anybody sit down and officially train supervisors on how to schedule,” says Rosalee Allan, chief operating officer, Pathology Associates Medical Laboratories, LLC, Spokane, Wash. “So what you see out there is people just making it up.”

If you find yourself thinking “Well, how hard can that be?,” you’ve never looked at an outdated Excel spreadsheet and tried to figure out, say, which of your multi-site laboratory’s five employees named Linda has been accidentally scheduled to work at two different locations on the same morning. You’ve also probably never been on the receiving end of a phone call from a draw site that starts with, “We’ve been open for 15 minutes now. Where’s my phlebotomist?” and doesn’t improve from there.

Matt Swanson has. That’s why he, a patient services center manager for PAML, spent years looking for scheduling software designed to meet the needs of a laboratory. “There’s a huge number of appointment- or reservation-based scheduling programs for doctors’ offices and restaurants,” he says. “But for staff scheduling software, I couldn’t find really anything.” All the while, “Probably half the time we had our monthly leadership meetings, it came up as an issue: ‘What do we do about the schedule?’”

The solution PAML finally embraced:

ScheduleLabs, software from Spokane-based Maplewood Software. Swanson and other users say ScheduleLabs has resulted in not only fewer headaches for supervisors but also better service, higher employee morale, and thousands of dollars in overtime savings. Perhaps that’s what leads Allan to say: “Scheduling is normally a boring topic, and then you come across a lab like us that”—now that they’ve found a solution—“kind of gets excited about it.”

Like most people who find themselves in the position of coordinating schedules for a large number of people, Swanson and the other members of his staff who handle scheduling originally relied on a spreadsheet program not

designed for the purpose. “There’s only so far you can take Excel, ‘I am not a macro guy; I’m an operations manager.’” For example, he found it impossible to set up the spreadsheet so that the right workers would automatically be scheduled in the right combinations. “You need to make sure you have the right people working together,” he points out. “You don’t want to get a combination of your lower performers; you want a good mix, so there are leaders involved. I couldn’t really replicate that sort of logic and knowledge” in the Excel document automatically.

Then, too, handling requests for paid time off was a major issue, in part because employees submitted those requests in haphazard fashion.

“We’d get some things delivered to the department supervisor by e-mail, some things faxed to me, some things sent in courier mail,” Swanson says. And those odds and ends didn’t always make it into the spreadsheet. “That really did become a morale problem. If a piece of mail gets lost, if a fax gets overlooked, if an e-mail is read but not acted on,” he says, employees start grumbling: “‘Well, I can put in all the PTO requests I want, but you guys will never give it to me.’”

In addition, some supervisors tended to rely on schedule printouts rather than the latest, electronic version. “I saw people walking around with notebooks full of tattered spreadsheets that had names crossed out and names written in,” Swanson remembers. “If the supervisor got sick, we would have pretty much been dead in the water, because most of the schedule pretty much resided in their head, and what was left on paper was minimal and typically out of date.”

And, in the worst-case situations, “we did have some service failures,” he says, when scheduling mistakes led to no phlebotomist showing up at a draw site. “If you’ve ever gone without your cup of coffee in the morning, and you come in for a fasting lab test, and someone’s not there to serve you, that’s a real negative,” he points out ruefully. “That filters back to our clients, and that doesn’t do us any good.”

Now, three years after PAML began using ScheduleLabs, the amount of staff time needed to manipulate and maintain the schedule has dropped dramatically—by 162 hours a year. At the same time, it has become much easier to track which employees are edging close to overtime, so much so that the average number of overtime hours has dropped from 81 per pay period in 2006 to 53 in 2009.

Case Study



Another benefit: The ScheduleLabs interface allows employees to not only submit their PTO requests online but also to see whether a supervisor has received their PTO requests and whether and how many other employees have requested the same day off. "If they go in and see that seven other people have asked for that Friday off, they know there's not a snowball's chance they're going to get it," and they tend to change their request to another date, Swanson says. "So they're more likely to get approved," which in turn boosts morale.

Josh Buessing's experience with ScheduleLabs has been similar. As the outreach operations manager for MuirLab, the Concord, Calif.-based laboratory outreach service of the John Muir Health System, he doesn't handle the schedule, but he certainly experiences the ramifications of it. Before ScheduleLabs was implemented in 2008, "our supervisors weren't supervising," he says. "They were spending so much time on the schedules that they weren't fulfilling their supervisory duties. I got continued complaints. We knew we needed some solution; we just didn't know what."

After learning about ScheduleLabs, Buessing had a return-on-investment analysis performed. The analysis suggested it would take MuirLab six months to see a return if it invested in the software. After the laboratory put the software to use, it saw a return in two months, Buessing says. "We went from spending, collectively, three and a half hours a day on the schedule to under an hour a day. That's significant savings.

Now MuirLab is considering whether to use related Maplewood software—a product called **Inspection Ready**—to help the laboratory achieve ISO 15189 accreditation. Among other things, Inspection Ready is designed to help a laboratory track its accreditation processes. In addition to ISO 15189 checklists, it can be loaded with CAP, CLIA, and Joint Commission checklists.

Inspection Ready also helps laboratories track their employees' licensing and certification statuses, to which end it works in conjunction with ScheduleLabs. "When you go into your ScheduleLabs as a supervisor, if an employee's license has expired, that person's name will light up in red," Buessing explains. "It's a great visual." The software can be configured so that the appropriate renewal form is automatically sent to the employee in question. The employee can then print out the form, complete it, and give it to his or her supervisor, who in turn can scan the approved and signed form back into Inspection Ready.

PAML uses Inspection Ready for another purpose, too—to track its employees' annual competency requirements. "We have a supervisor sit down with the individual and verify, either through a question-and-answer situation or direct observation, that they can do all the components of their job," Swanson says. "All of those are recorded upon hire, within the first six months of employment, annually, and then annually thereafter. We don't have to remember, 'It's been six months and we have to do Susie's competency assessment.' The supervisor just logs in one day and sees that."

It was PAML that prompted Maplewood to develop Inspection Ready, says COO Allan. "As we got used to scheduling people in ScheduleLabs, we started saying to Maplewood, 'You've got to know you've got the right people—that their competency is up to date, that they've read their procedure manuals, all those things that leadership should do before they schedule someone in a specific spot.' And Maplewood listened."

Swanson is particularly excited about the ability to use Inspection Ready for CAP checklists. "We'll be able to go in on a question-by-question basis and not only record yes, no, or not applicable, but also provide links to internal documentation that proves we do this," he explains. "And then, since so many of the same CAP questions are asked about different departments, the administrator can see what the responses are and work with management to try to harmonize those responses, so the organization has one approach to that accreditation question—so you don't have one department that's still using stone tools and another that's using a laser."

Has he experienced any downside to Inspection Ready or ScheduleLabs? Well, "you can't whip out a folder, open it up, and see the schedule," he says. "I'll admit that. You've got to get to a laptop or PC or iPad or whatever." Anything else? Yes, he says with a smile: "No software's going to change whether people call in sick."

Anne Ford is a writer in Evanston, Ill.

About Maplewood Software

Founded in 1996, the company is noted for working with some of the largest reference, outreach and medical center laboratories in the country. Maplewood Software's online, skill-based, staff scheduling and inspection compliance solutions are recognized as solving real-world laboratory problems. Over 150 medical centers and laboratories utilize one of their **ScheduleCore** or **Inspection Ready** solutions.

ScheduleLabs and Inspection Ready are part of ScheduleCore, a suite of scheduling, credentialing and competency verification products. Other ScheduleCore products include ScheduleRx, ScheduleRad and ScheduleRn, all solutions designed specifically to meet niche markets within the healthcare industry. All ScheduleCore products, including ScheduleLabs, were designed collaboratively with key healthcare institutions already committed to finding leaner solutions for the unique workflow challenges facing their industry. For additional information visit www.maplewoodsoftware.com



508 W 6th Ave, Suite 900
Spokane WA 99204
1-877-229-5230