

## ED PIP: Solution Design Phase

Tools: Visual Management

# Visual Management: Overview

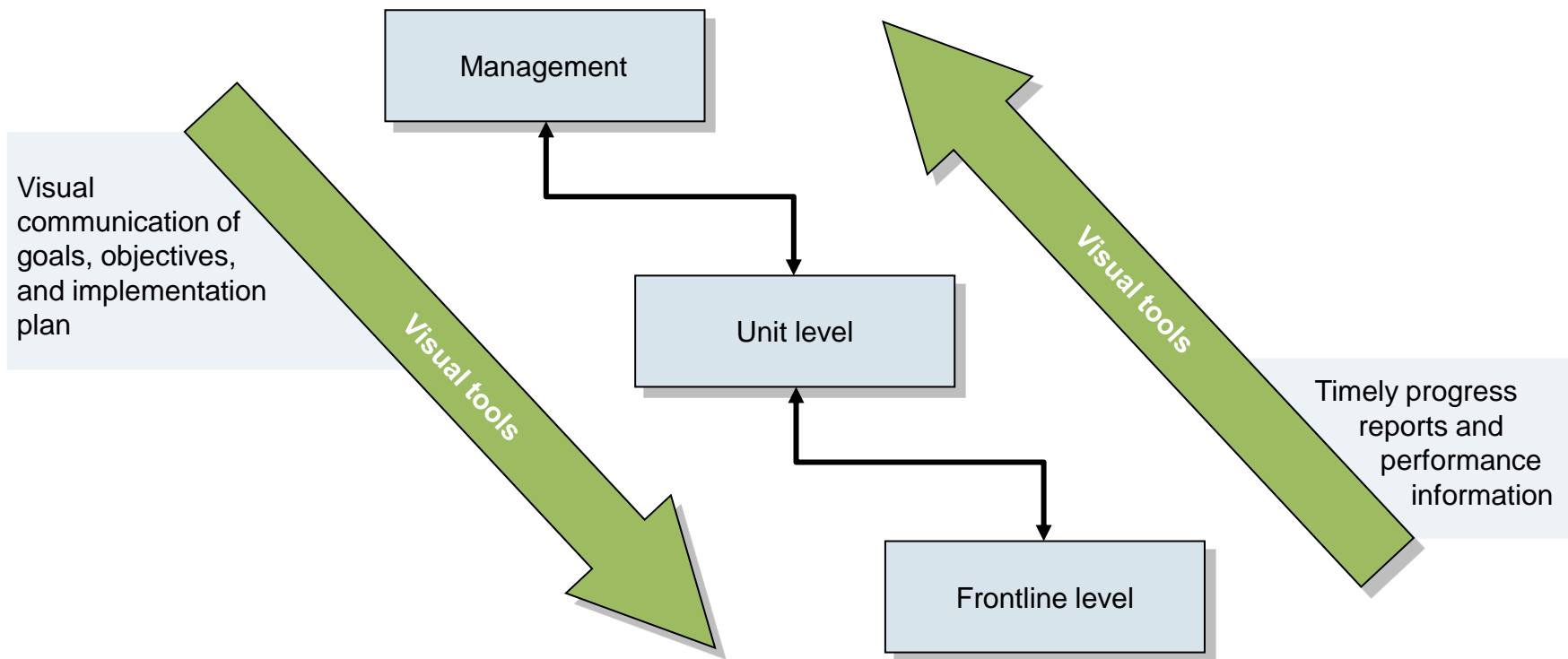
<b>Outcome</b>	<ul style="list-style-type: none"><li>▪ &gt;90% of the information workers need to do their job is displayed visually within their workspace</li></ul>
<b>Definition: 'What is it?'</b>	<ul style="list-style-type: none"><li>▪ Visual Management is part of a broader performance management system that includes the practice of displaying information visually within a work environment so that staff can quickly make decisions without having to search for information</li></ul>
<b>Objectives: 'What is it used for?'</b>	<ul style="list-style-type: none"><li>▪ Visual Management is used to help people make quick management decisions and navigate complex processes as a part of every day operations</li></ul>
<b>Benefits:</b>	<ul style="list-style-type: none"><li>▪ Helps people do their jobs more efficiently and effectively</li><li>▪ Helps new employees get up to speed quickly</li><li>▪ Helps multiple healthcare providers co-ordinate their work</li><li>▪ Provides instant feedback if the process needs adjusting</li></ul>
<b>When to use</b>	<ul style="list-style-type: none"><li>▪ Visual Management should be used as an operational solution whenever clear, concise, real time information can help healthcare providers work efficiently and effectively</li><li>▪ Also used when the work done by various healthcare providers needs to be closely aligned in order to be efficient or effective</li></ul>

# Instructions for use

<b>1. Ensure key stakeholders agree on Metrics and Process for Measurement</b>	<ul style="list-style-type: none"> <li>■ Visual Management is one part of a more broad Performance Management System. Prior to instituting a Visual Management tool, it's critical to ensure that key stakeholders agree on metrics and processes for measurement</li> <li>■ Setup meetings or working sessions with all of the key stakeholder groups. e.g. senior management, line management, doctors, front line staff.</li> <li>■ Discuss metrics and processes required for effective Visual Management</li> </ul>
<b>2. Find appropriate space for a visual management tool and design the tool</b>	<ul style="list-style-type: none"> <li>■ Work with front line staff and managers to find the space where information could be displayed visually in order to help improve the efficiency of a process</li> <li>■ Determine which type of tool will be used (e.g. a poster, white board, computer screen, etc.)</li> <li>■ Determine what type of information will be displayed and how</li> </ul>
<b>3. Determine roles &amp; responsibilities for maintaining, reviewing and responding to metrics</b>	<ul style="list-style-type: none"> <li>■ A Visual Management tool should have up-to-date information, displayed clearly that can be used by people (e.g. healthcare providers, managers or patients)             <ul style="list-style-type: none"> <li>- Ensure a specific person is responsible and accountable for keeping information up-to-date</li> <li>- Ensure a specific person is responsible for monitoring compliance with and effectiveness of the tool relative to key performance metrics</li> </ul> </li> </ul>
<b>4. Train healthcare providers on visual management roles &amp; responsibilities</b>	<ul style="list-style-type: none"> <li>■ Develop a training program for stakeholders involved so that they understand the purpose of the tool and how to use it effectively             <ul style="list-style-type: none"> <li>- Note: this training should become part of the orientation program for new staff</li> </ul> </li> <li>■ Providers should also know exactly how their job is effected by the tool and what is expected of them</li> </ul>
<b>5. Develop a process for maintaining the system</b>	<ul style="list-style-type: none"> <li>■ In order to ensure that the Visual Management system continues to be effective, conduct regular reviews of compliance as well as regular reviews of effectiveness</li> </ul>

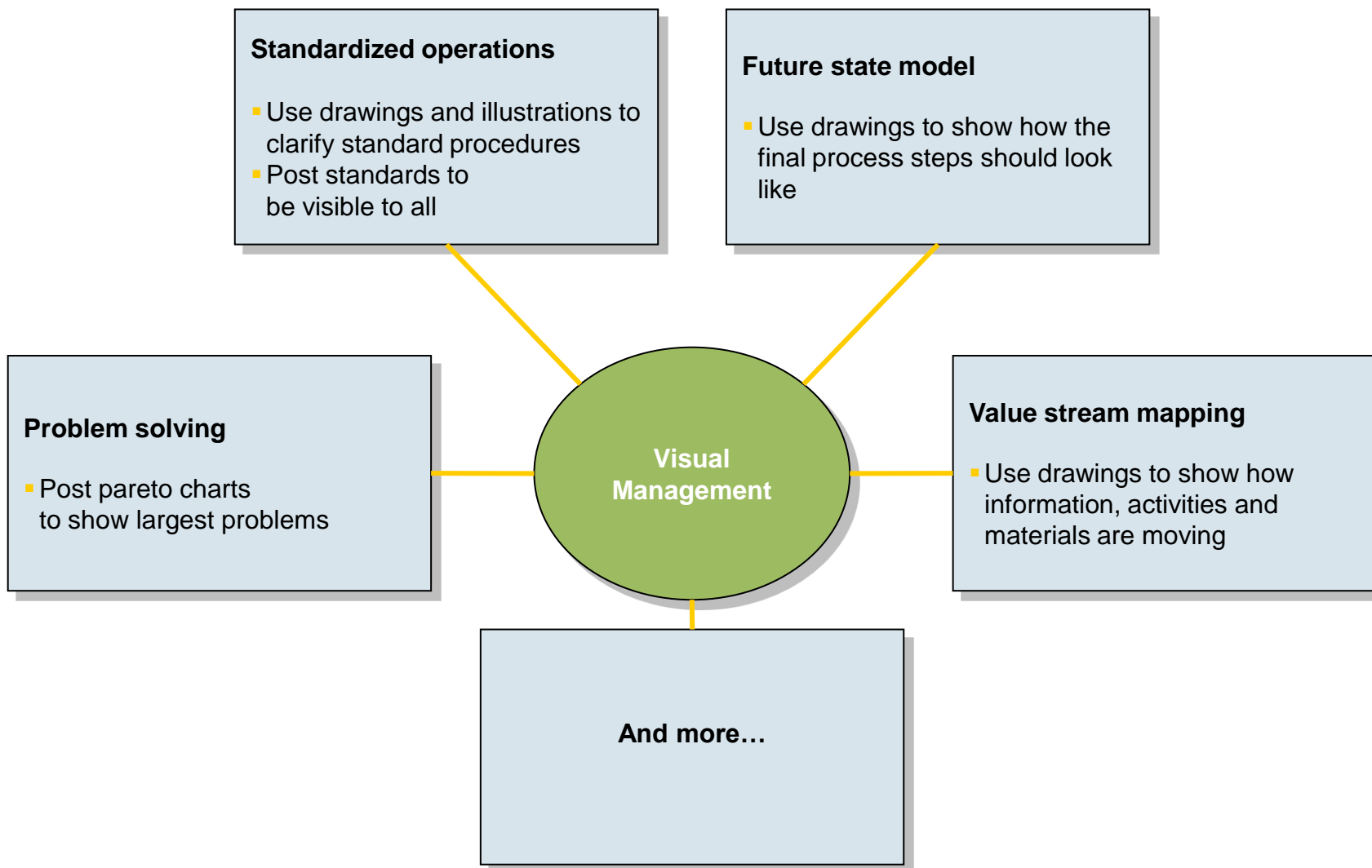
# Visual Management in the Organization

*Visual Management can be used as a tool to communicate goals and objectives down the organization as well as report results up the organization:*



# Visual Management and Lean

*Visual Management can help support Lean elements in an organization:*



# Visual Management and Waste

*Visual Management can help reduce waste in an organization:*

Prevent **overproduction** by visually displaying service levels and target

Eliminate **over-processing** by assuring correct processing standards are visually present

Prevent excess **transportation** by assuring locations and paths are clearly marked and labeled

Minimize **rework** by highlighting all complaints and displaying problem solving results

Eliminate excess **inventory** by displaying levels vs. target and improving visibility of storage

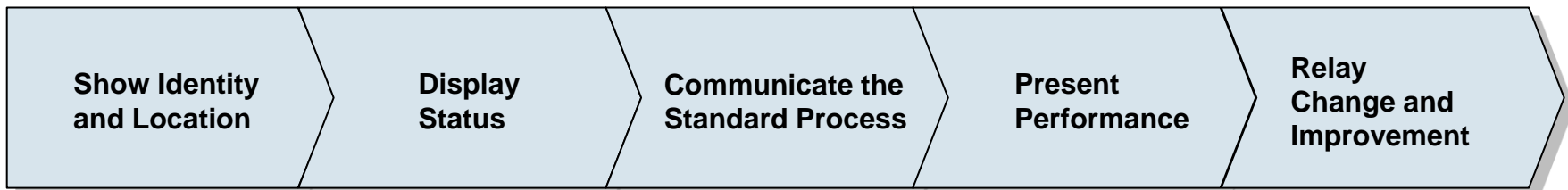
Reduce **motion** by assuring all the necessary forms, tools, etc. are readily available

Prevent **waiting** on application forms to finish cycle by visually defining work sequence

Reduce nonuse of **intellect** by assuring problems are known by all, making all accountable for solutions



# Approach for Applying Visual Management



Potential actions

- Show identity of all equipment
- Make sure all personnel can be identified visually
- Show boundaries around discrete areas
- Display directions to key areas and hang location signs

- Display current service level vs. target
- Display real-time feedback for problems

- Write visual standardized operations
- Hang standardized operations in open view
- Visually pre-sent quality standards
- Chart and display key processes

- Display KPIs
- Install and use performance tracking boards
- Chart targets, goals, and performance toward them
- Display performance trends

- Display problem solving results
- Display improvement plans
- Relay successes of Work-Out events
- Identify all of important changes





# Visual Management tools often require additional resources to be successful

- Posters, Whiteboards, Computer screens, etc. for displaying information
- Information – some tools require up-to-date data, this information should be readily available and easy to incorporate into the tool
- Data analysis tools e.g. Excel

# Visual Management – Tips and Tricks

- Buy-in from front line staff is critical
  - They are the ones who will be using and maintaining the tool, if they don't see the value, the tool will not be effective
- Compliance is important, but be open to adaptation if it helps achieve the end goal of improving the process

# Red Yellow Green Whiteboard to help unit teams track discharge planning for each patient

Room	Patient Name	RN	MRP	Referrals	In Progress	Ready for D/C	Status	Notes
104A	Smi, R	Jan	19963	PT		OT S		ALC
104B	Jam, P	Patty	19962			OT		
105	Rea, I	Mary	19963		S	PT		PICC line
106	Sma, T	Terry	19964	DT	PT			

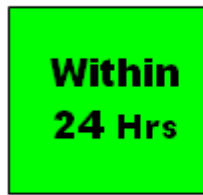
# Daily Metrics

## Medicine Daily Metrics

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
<b>Timeliness of discharges</b>	7						
	6						
	5						
	4						
	3						
>1400							
<1400							
<1100							
<b>Total Admit in ED @ 7:00</b>							
<b>Medicine pts. in ED @ 7:00</b>							
<b>Planned/ unplanned</b>							
<b>Discharge delay reason</b>	<input type="checkbox"/> No Order	<input type="checkbox"/> No Order	<input type="checkbox"/> No Order	<input type="checkbox"/> No Order	<input type="checkbox"/> No Order	<input type="checkbox"/> No Order	<input type="checkbox"/> No Order
	<input type="checkbox"/> Transportation	<input type="checkbox"/> Transportation	<input type="checkbox"/> Transportation	<input type="checkbox"/> Transportation	<input type="checkbox"/> Transportation	<input type="checkbox"/> Transportation	<input type="checkbox"/> Transportation
	<input type="checkbox"/> Family Pickup	<input type="checkbox"/> Family Pickup	<input type="checkbox"/> Family Pickup	<input type="checkbox"/> Family Pickup	<input type="checkbox"/> Family Pickup	<input type="checkbox"/> Family Pickup	<input type="checkbox"/> Family Pickup
	<input type="checkbox"/> Awaiting Tests	<input type="checkbox"/> Awaiting Tests	<input type="checkbox"/> Awaiting Tests	<input type="checkbox"/> Awaiting Tests	<input type="checkbox"/> Awaiting Tests	<input type="checkbox"/> Awaiting Tests	<input type="checkbox"/> Awaiting Tests
	<input type="checkbox"/> Awaiting Results	<input type="checkbox"/> Awaiting Results	<input type="checkbox"/> Awaiting Results	<input type="checkbox"/> Awaiting Results	<input type="checkbox"/> Awaiting Results	<input type="checkbox"/> Awaiting Results	<input type="checkbox"/> Awaiting Results
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	<input type="checkbox"/> Treatments	<input type="checkbox"/> Treatments	<input type="checkbox"/> Treatments	<input type="checkbox"/> Treatments	<input type="checkbox"/> Treatments	<input type="checkbox"/> Treatments	<input type="checkbox"/> Treatments
	<input type="checkbox"/> Paperwork	<input type="checkbox"/> Paperwork	<input type="checkbox"/> Paperwork	<input type="checkbox"/> Paperwork	<input type="checkbox"/> Paperwork	<input type="checkbox"/> Paperwork	<input type="checkbox"/> Paperwork
	<input type="checkbox"/> Unexpected or early discharge	<input type="checkbox"/> Unexpected or early discharge	<input type="checkbox"/> Unexpected or early discharge	<input type="checkbox"/> Unexpected or early discharge	<input type="checkbox"/> Unexpected or early discharge	<input type="checkbox"/> Unexpected or early discharge	<input type="checkbox"/> Unexpected or early discharge
	<input type="checkbox"/> CCAC	<input type="checkbox"/> CCAC	<input type="checkbox"/> CCAC	<input type="checkbox"/> CCAC	<input type="checkbox"/> CCAC	<input type="checkbox"/> CCAC	<input type="checkbox"/> CCAC
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Make sure you clearly communicate what the different displays/colours of the visual management tool means

## What colour is your Discharge Plan?



What does the colour mean?

Ask your Nurse or Doctor!

Are you getting ready to leave the hospital?



Discharge time is before 11:00 a.m.



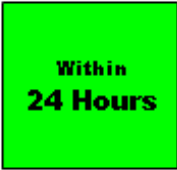
Ask your doctor or nurse what day you will be discharged.




To ensure your timely discharge, arrange for your ride to be available *before* 11:00 a.m.

# Posters and badges are a good way to explain the Red/Yellow/Green tool

Red, Yellow, Green

Legend

	<ul style="list-style-type: none"> <li>✓ Discuss red/yellow/green status with team</li> <li>✓ Make appropriate referrals, including CCAC/community partners.</li> <li>✓ Discuss with patient and family</li> </ul>
	<ul style="list-style-type: none"> <li>✓ Discuss red/yellow/green status with team</li> <li>✓ Ensure referrals are active or signed off</li> <li>✓ Ensure CCAC involvement on d/c</li> <li>✓ Discuss with patient and family</li> </ul>
	<ul style="list-style-type: none"> <li>✓ Discuss red/yellow/green status with team</li> <li>✓ D/C order written</li> <li>✓ Informed patient and family</li> <li>✓ Follow-up appointments</li> <li>✓ Prescriptions</li> <li>✓ D/C summaries or transfer summaries</li> <li>✓ D/C education</li> <li>✓ Transport arranged</li> </ul>

	<p><b>Discuss with Team/Patient /Family</b> <b>Make Referrals</b></p>
	<p><b>Discuss with Team/Patient /Family</b> <b>Referrals –In Progress?</b> <u>O.K. for D/C?</u></p>
	<p><b>D/C orders</b> <b>Scripts</b> <b>D/C summaries</b> <b>Education</b></p>