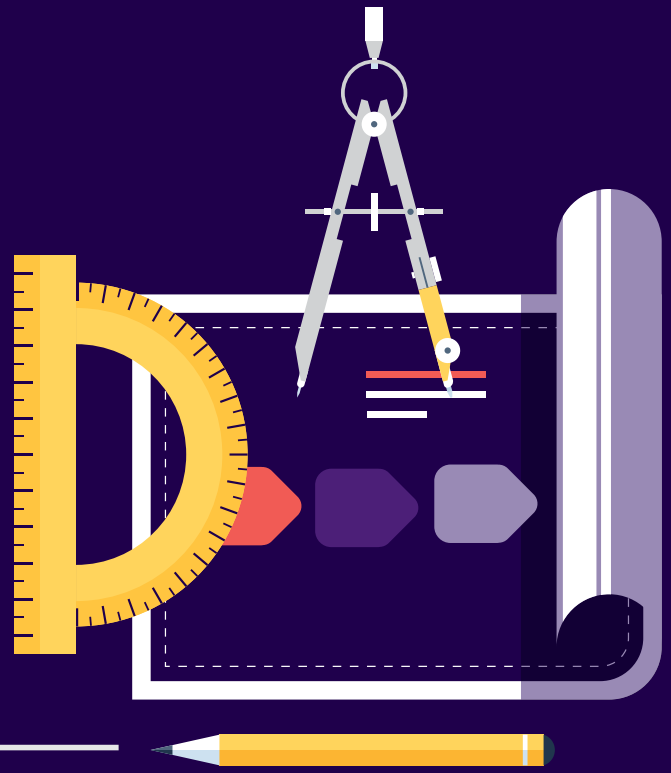
5 Phases of Automation Installation



A detailed guide to planning your next pharmacy automation installation

A Swisslog Healthcare eBook

swisslog healthcare

Managing technological changes to your pharmacy is no small task. From selecting automation to gaining capital budget approval, competing stakeholder priorities can easily derail any installation.

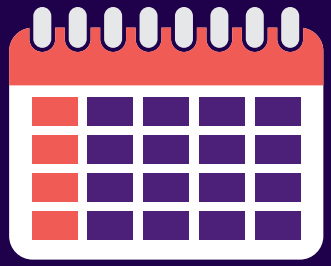
Developing a detailed timeline that accounts for possible delays will be the key to staying on track and instilling confidence in pharmacy staff.

Automation experts recommend this timeline start well before signing a contract; it should also account for the RFP process, site visits and even budget approval.

This eBook focuses specifically on the Five Phases of Automation Installation.

Timeline Development

Your project timeline should be comprehensive, including minor milestones for inventory overhaul and reconciliation and IT infrastructure as well as major milestones for pre-construction area preparation, the automation build, testing and go-live.



A typical automation project could take anywhere from 9 to 18 months, depending on project complexity. Multiple pieces of equipment or vendors, construction and changes in distribution model could expand the schedule.

The timeline should be published and updated regularly to keep all stakeholders and staff aware of project status.

Installation Delays

When developing a timeline, it's important to avoid an overlap with other big projects. The installation of your automation needs to be the primary focus for your stakeholders—including other departments that are essential for go-live, such as information technology (IT).

A hospital-wide project such as an HIS or EMR upgrade likely will take precedence over any single department's projects.

Communication with these groups is critical to avoiding installation delay.

«Integration planning early and often can reduce the risk of project delays. With standard interfaces the technical aspects of the interfaces are not as difficult as they once were, but having the right resources in place is a challenge for many organizations. All of your vendor partners need to be involved as well.»

-Michael Palone, RPh, MPH, Director of Field Operations for Swisslog Healthcare

Top Causes of Installation Delay

- State Board inspection and approval
- Construction permit denial and construction delays
- IT/IS availability issues
- Custom interface delays
- Incomplete formulary data
- Damaged/missing parts or components
- Equipment failure during testing

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Phase 1: Project Start Up

During the initial phase of the installation process, it's important to set a solid foundation for the changes to come. Gaining support from project stakeholders is critical to ensuring a successful, on time completion.

Begin by assembling a project team that is responsible for driving and communicating the change. It's advantageous to involve both leadership and staff so that you can have project promoters relaying the benefits of the coming automation to the rest of the staff.

This team may also include stakeholders from outside of pharmacy, including:

- Information Technology
- Nurse Leadership
- Lean Consultants
- Patient Safety Managers

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Phase 1: Project Start Up

Identifying Super Users

Phase 1 is a good time to determine who your super users will be. These people will be the automation experts and those responsible for shaping the policies and procedures, as well as training new staff and communicating updates and improvements to users.

It's recommended that you select one person from each shift as well as an IT pharmacist. Utilizing the «train-the-trainer» methodology, the super users are responsible for training other people on their shift.

«Often times directors of pharmacy want everyone on their staff to be an expert on the automation, but that's not realistic. Having a group of people, or 'automation team,' that is responsible for the equipment ensures the staff feels ownership and gains expertise. This is a group of people beyond just 'Super Users' that provide complete coverage across shifts.»

-Jeanine Garcia, Automation Training Specialist

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Phase 1: Project Start Up

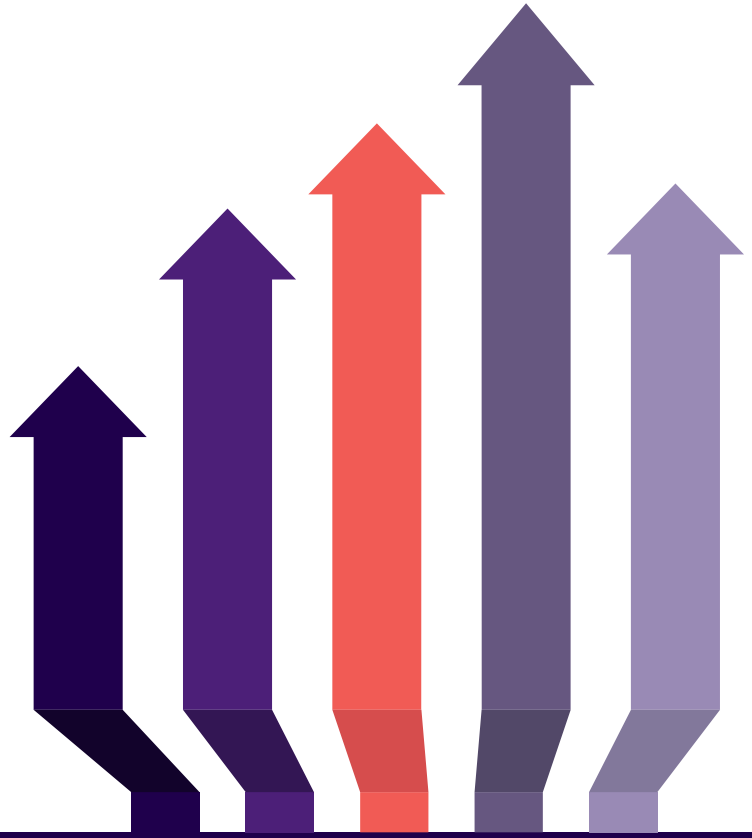
Managing Change

With the installation of automation and an alteration of workflow there will be a substantial amount of change. Phase 1 is a good time to kick off your change management plan.

Clear change management plans are essential to staff acceptance and the success of automation implementation. At a minimum, your change management plan should include:

- A project charter
- A strong communication plan
- Quick wins
- Process and transition review

Bonus Content
Download the Swisslog Healthcare white paper, «**Managing Technological Change in Your Pharmacy**»



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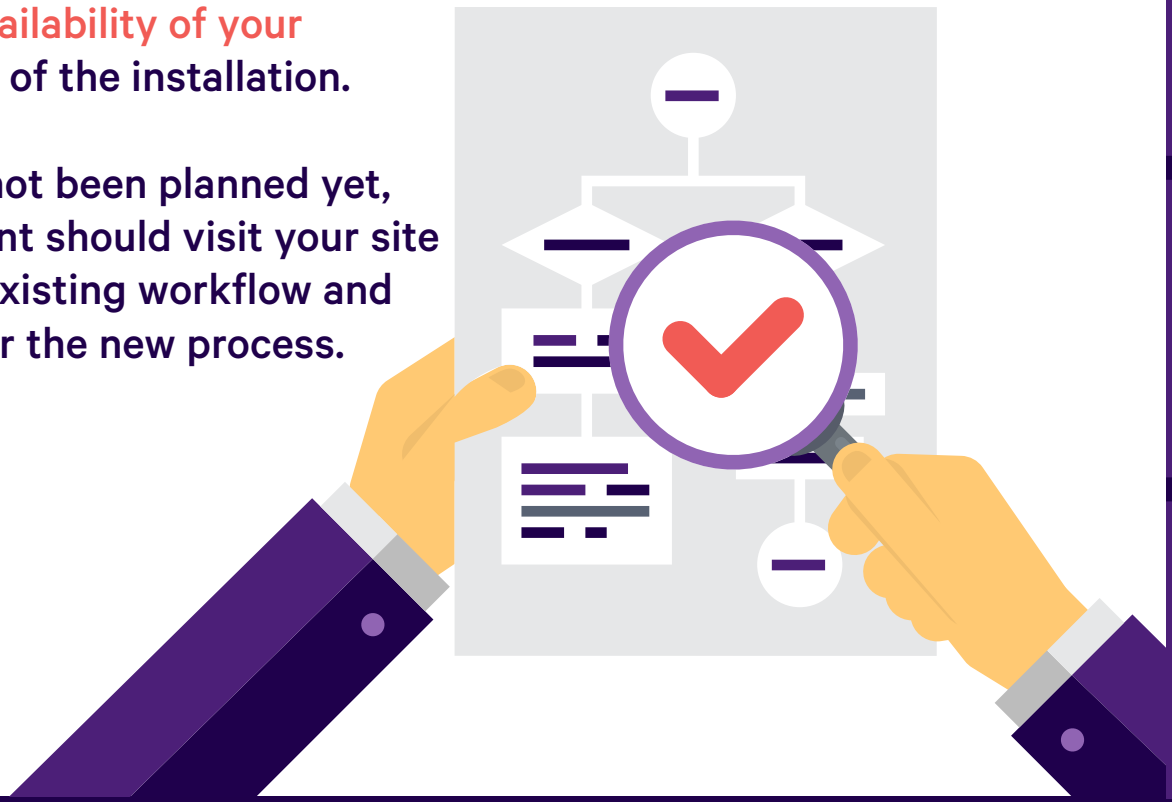
Phase 2: Configure and Prepare

Once the project schedule is defined and a go-live date has been established, assign the responsibilities of your super users to other staff, since your super users will need to be deployed full-time on the project.

The super users will spend their time working with their vendor counterparts to make decisions about equipment configuration, preparing the data and learning the logic of the system.

You are responsible for the availability of your super users during the course of the installation.

If workflow optimization has not been planned yet, the vendor workflow consultant should visit your site to do an assessment of your existing workflow and generate recommendations for the new process.



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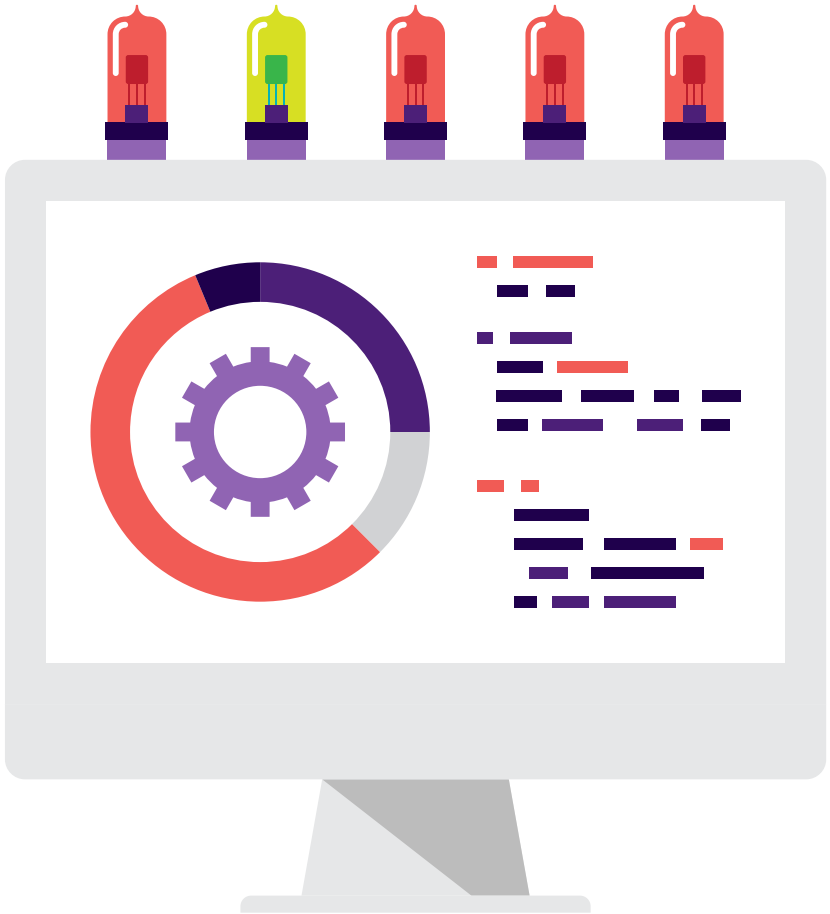
Phase 2: Configure and Prepare
Information Technology Planning

During Phase 2, IT projects will begin, requiring hardware and software infrastructure to be in place and IT resources to be available. Interfaces with third-party systems, such as your Hospital Information System (HIS) are installed and configured during this time to allow for adequate testing.

It's important to have test messages available for your vendors, as well as a pharmacy resource to validate that the messages received and processed by automation contain the appropriate information.



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Phase 3: Build and Train

Once the equipment arrives on site, the build begins. This is an exciting time, as most of your staff will not have had the benefit of seeing the equipment before this time.

Make sure that your change management plan is fully executed and that super users are prepared to answer questions about functionality, downtime and changing processes.

Your project team should work together to keep staff and stakeholders informed about the progress in order to alleviate any anxiety this may cause.

When the equipment is built, your staff will begin to load the machines. This allows for full-dispense testing and will be the time to see the process in action.

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Phase 3: Build and Train

End-User Training

End-user training should begin as soon as the equipment is operational. Super users should start to train the entire staff to ensure knowledge of the equipment is spread throughout the pharmacy.

Develop a training checklist so that training is standardized, and some sort of form should capture who has been trained and who hasn't.

A certification and continuous improvement program is a great way to recognize staffers who have been through training and are eager to learn more, and provides user documentation for Joint Commission audits.

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Phase 4: Go-Live

Most vendors require large amounts of testing prior to go-live, so “flipping the switch” to automation is sometimes a non-event. However, this is an important occasion and one that should be recognized. Make a point to celebrate the accomplishment and congratulate your staff for a job well done.

It’s also important to increase staffing during the go-live period. There will be bumps in the process as everyone gets used to the changes, and keeping staff calm and focused is critical to promoting a positive environment.

Work with your vendor to ensure they will provide appropriate resources, such as a trainer, project manager and technician, for this critical part of implementation.

They are key to troubleshooting any potential issues.

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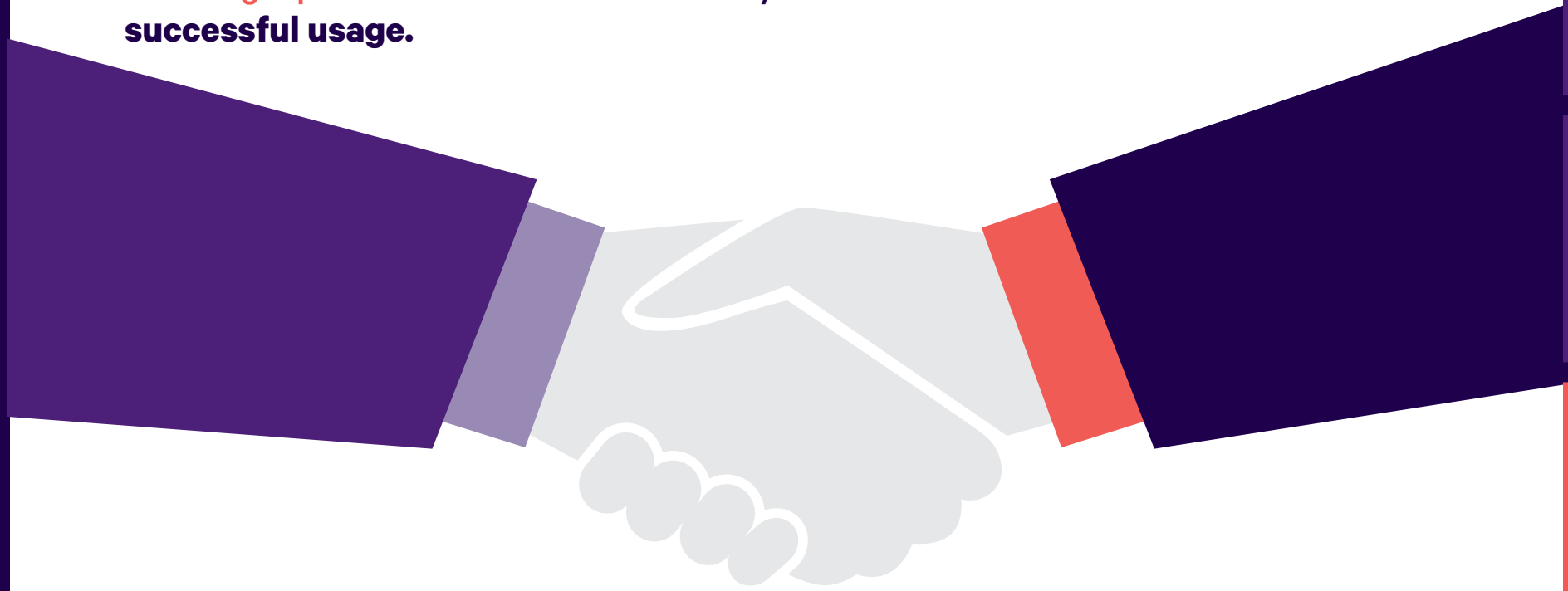
Phase 5: Post-Implementation

As your staff settles in to the new workflow and must rely on the automation in a real working environment, it is normal for issues to arise. Scheduling a super user for each shift will assure your staff that help is available when they need it.

As best practices are developed and workflow is optimized, this knowledge should be shared among staff across all shifts. Look for ways to reward your staff who quickly adopt the new technology or help the team resolve questions.

Creating a positive environment around your automation is **critical to successful usage.**



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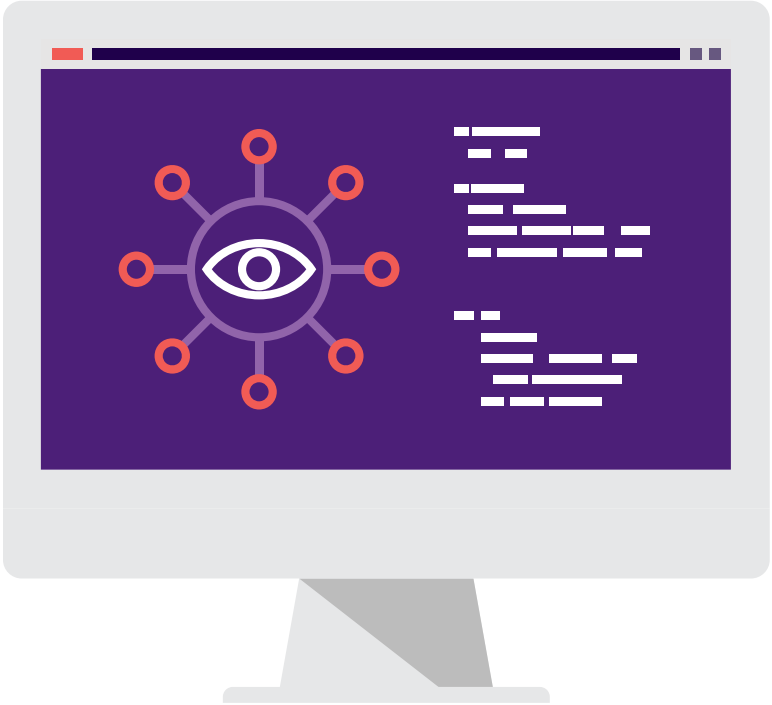
Phase 5: Post-Implementation
Ensuring Staff Compliance

The compliance of pharmacy staff is critical also to ensuring the integrity of your data as well as the best use of your automation. This is especially relevant when transitioning from manual to automated processes.

For example, inventory management software is only as accurate as the information it is given. If the system is told that five units of medication have been dispensed, but the technician takes seven, your inventory quantities will be off.

«It is initially challenging to get all staff to trust the automated system. Going from a manual system, where you could see the stock on the shelves, to having to trust the automation can be difficult. It is critical to properly in-service your staff and standardize processes for successful maintenance of accurate inventory levels in the automation.»

- Andrea Gimpel-Blanchard,
Director of Pharmacy for Maine General Health



Conclusion

Implementing automation in a pharmacy is an exciting project. It's something that most leaders will do only once or twice in their careers, and it can often define their future opportunities.

There is no perfect piece of automation, so more important than choosing the right equipment is choosing how you'll implement the technology.

Managing through change, getting everyone involved and truly assessing the quality of your processes and staff are critical to ensuring the project will be successful.

Bonus Content

For more information on this topic, download the Swisslog Healthcare white paper «**Preparing for Pharmacy Automation**»

Swisslog Healthcare Solutions

At Swisslog Healthcare, we strive to lead change for better care. At the core of this vision is a focus on improving workflows and reducing the time clinicians spend doing repetitive tasks—enabling more time to care for patients and residents. Our solutions and services extend across the continuum of care, including transport, medication and supply chain management for long-term care facilities, consolidated service centers, hospitals and health systems.

Visit swisslog-healthcare.com/pharmacyautomation to learn more.

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