

Preparing for a Virtual Magnet Site Visit: Lessons Learned

Laura Pfeifer MS, RN, CGRN, NEA-BC

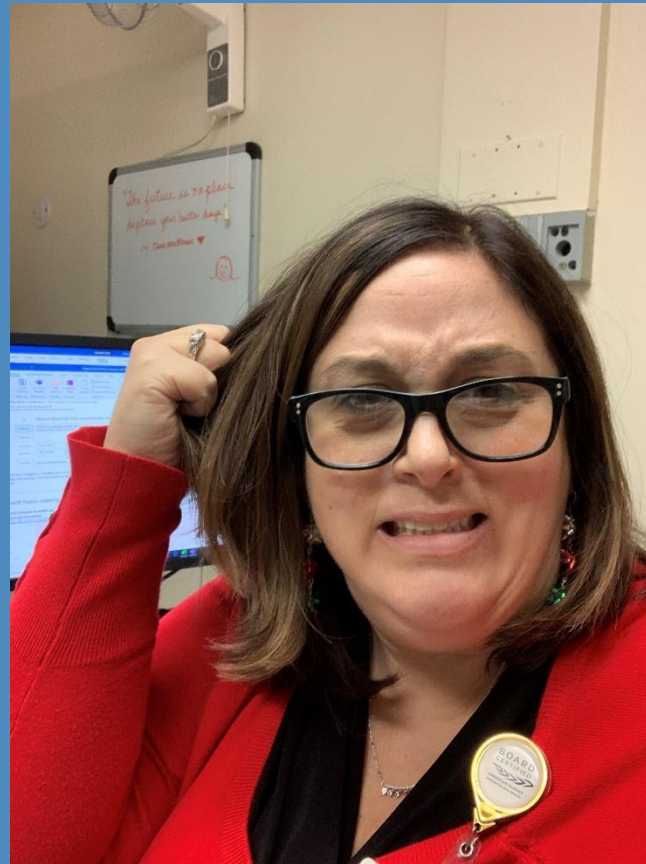
Director of Nursing Excellence & Magnet Program



Glens Falls Hospital

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It's not as bad as you think it's going to be!



Platform Choice: Microsoft Teams

- Pros:
 - It is the platform used since COVID for meetings & presentations at our organization
 - Familiarity for leaders
- Cons:
 - Most clinical nurses did not have MS Office licenses that gave them full version of Teams
 - Our IT Department had to create generic log-in Teams Accounts for staff to use
 - We underestimated staff's unfamiliarity with using virtual meeting platforms



Using Teams to Create a Schedule

- Every meeting had its own Teams link and log in info
- Teams allows one person to have multiple meetings in their name running at one time
- I created every Teams invite on my account and invited the appropriate hospital staff

12 PM			
1 PM	Magnet Site Visit: Unit Visits 1 (T2, T3, 4W) Microsoft Teams Meeting Pfeifer, Laura	Magnet Site Visit: Unit Visits 2 (T6, 2W & SCN/Tour of the Watson Room) Microsoft Teams Meeting Pfeifer, Laura	Magnet Site Visit: Unit Visits 3 (ED & Med Rec, BHU, Infusion Center/Vascular Access Team) Microsoft Teams Meeting Pfeifer, Laura
2 PM			DK/MS/LP re: Go Over Grievance Log for Magnet; Microsoft Te
3 PM	Magnet Site Visit: Unit Visits 2 (ICU, GI, Wound) Microsoft Teams Meeting Pfeifer, Laura	Magnet Site Visit: Unit Visits 3 (PAT/AM Admits, OR, PACU) Microsoft Teams Meeting Pfeifer, Laura	Magnet Site Visit: Open Forum for Hospital Staff Microsoft Teams Meeting; in 4 NWT Conference Room; Pfeifer, Laura
4 PM			Magnet Site Visit: RN Satisfaction Document Review Microsoft Teams Meeting Pfeifer, Laura



Creating a Magnet Site Visit Schedule

- For Appraisers:
 - We embedded the Teams links right into the agenda
- For Staff:
 - We put an agenda with clickable links right on the desktop of the computers they were to use for the sessions

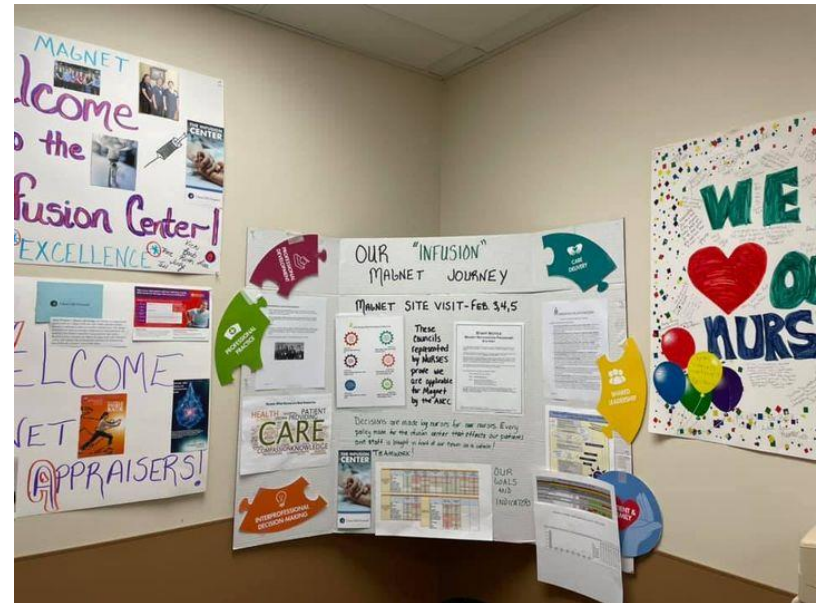
Time Location	TL time zone	TM CT time zone	Topic	Link to dial in (if applicable)	Attendees	Appraisers		
	EDT	PDT		<i>Responsibility for Attendance register</i>		PW	LG	CT
0700-0730	0700	0400	Private meeting with appraisers		Appraiser meeting only	X	X	X
0730-0800 Click here to join the meeting	0730	0430	Meet with the Chief Nursing Officer and Magnet Program Director	Laura Pfeifer	Donna Kirker Laura Pfeifer	X	X	X
0800-0845 Click here to join the meeting	0800	0500	Interview CEO and members of the executive hospital leadership staff along with a member(s) of the Board of Governors, President Medical Staff, CNO	Donna Kirker	Senior Team: Donna Kirker, CNO; Dianne Shugrue, CEO; Paul Scimeca, COO; Tracy Mills, VP Planning; Howard Fritz, CMO; Patti Hammond, VP Physician Practices; Mitch Amado, CFO; James Marco, VP HR;	X*	X	X

Equipment Needed

- iPads on rolling stands for unit tours
- 2-3 laptops deployed to every unit in separate areas for staff to join in on group meetings & sessions such as Council sessions, lunches, breakfasts
 - Ensure good WiFi connectivity from all areas
 - Each laptop should have a microphone and camera
- Our intention was to hold no group meetings with multiple people in a room—we were at the height of a second COVID surge in February. If 2 people from one unit needed to be in a meeting, each was assigned a laptop in a separate area.
- However, people ended up buddying up sometimes anyway!

Clean up the House!

- Make sure the background behind their cameras looks good—we used EBP posters the units had created
- We had welcome posters on every unit in addition to our Brag Boards



Practice, Practice, Practice

- But know that no matter how much you practice, someone will inevitably have trouble getting on a session!
- At elbow support with informaticists ready to go to any units having difficulty
- We created a special IT hotline just for the Magnet site visit instead of using the regular help desk number for faster service
- Our unit tour groups consisted of a Magnet Champion and an IT professional at each session
- Magnet Champions monitored group sessions and took attendance



Attendance!

- We prefilled in our attendance sheets with names & credentials of those invited to sessions
- Magnet Champions were assigned to each session to verify attendance
- They marked anyone who may be absent and added any last-minute substitutions
- All staff were required to be onsite at the hospital in order to participate. No one was allowed to call in from home with the exception of the Board of Governors and our community stakeholders.
- All attendance sheets had to be sent to our appraisers at the end of the day



Reviewing Documents

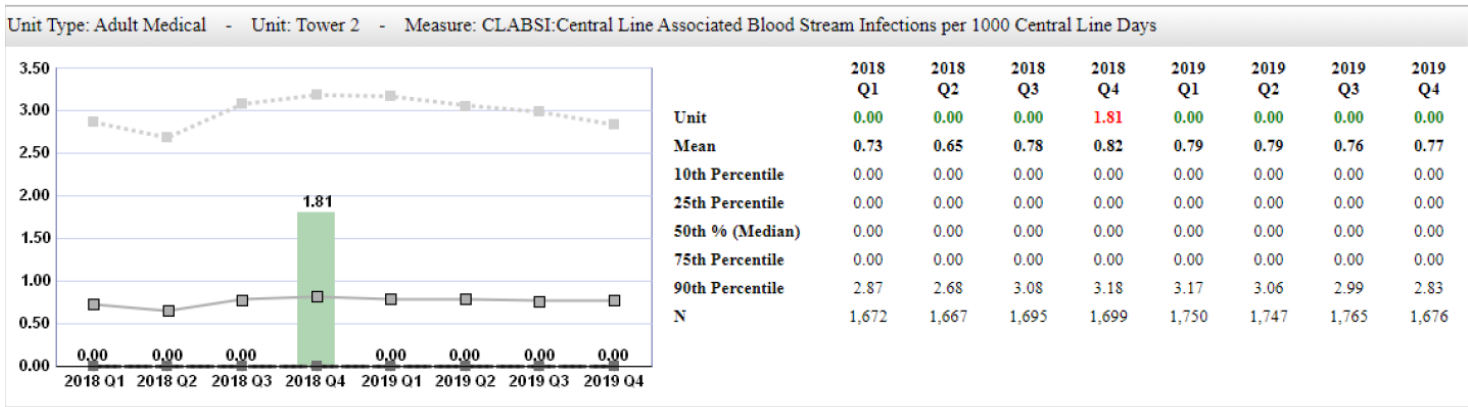
- For performance appraisals, they wanted to see self, peer, and professional development goals all together
- We created pdfs and linked them to an excel spreadsheet
- We did the same with our Nurse Leader Eligibility table—linked degrees and appraisal components to a spreadsheet for easy navigation

Last Name, First Name	Role	Notes	Self-Assessme	Peer Feedback	Professional Development Goal
Barber, Kathleen	Cancer Center		Self	Peer	Goals
Blair, Allison M	Cambridge		Self	Peer	Goals
Brumley, Pamela	IR		Self	Peer	Goals
Clark, Tonya	2OB		Self	Peer	Goals
DeWitt, Pamela	OR		Self	Peer	Goals
Dieffenbach, Richard	Ambulatory		Self	Peer	Goals
Eggers, Samantha	SCN		Self	Peer	Goals
Fowler, Katie	Education		Self	Peer	Goals
Heidorf, Donna	4W		Self	Peer	Goals

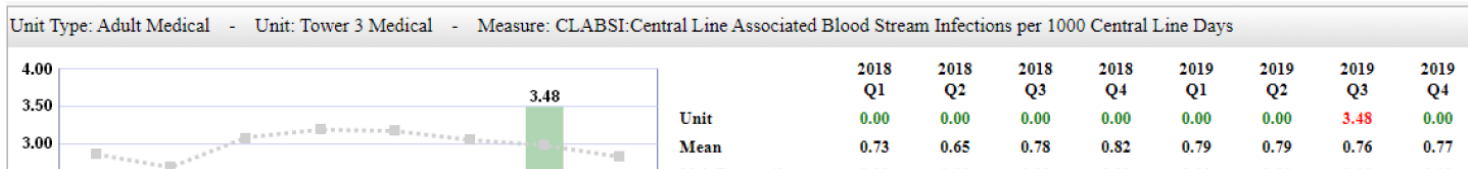


Verification of Quality Data

- All original graphs from the vendors for EP2EO, EP18EO, EP19EO, EP20EO, and EP21EO were uploaded into pdf format & I sat with appraiser virtually and clicked through all components for verification

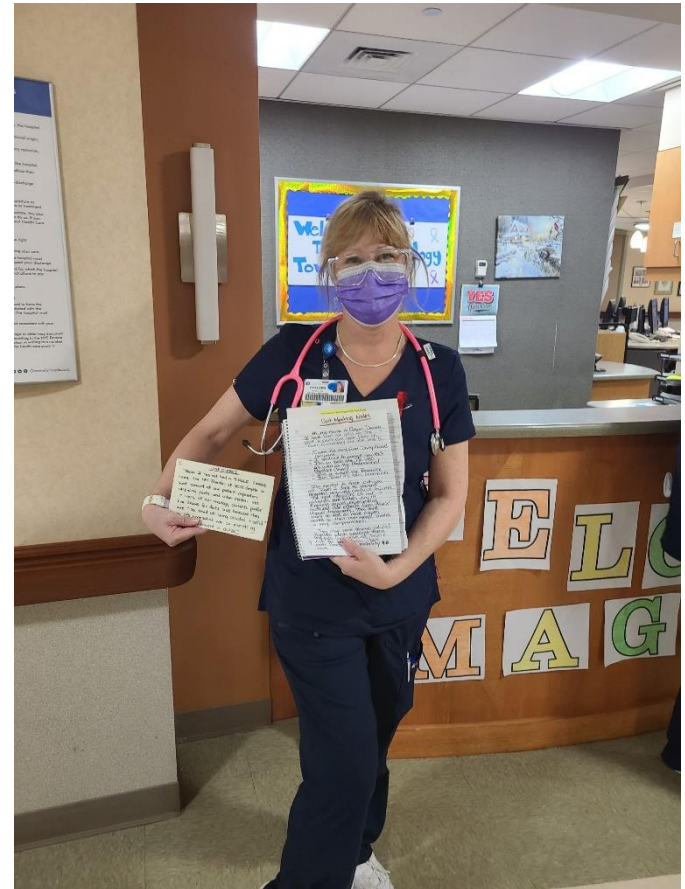


If the number of units or hospitals is less than five, comparison data are suppressed to maintain confidentiality. If the number of units or hospitals is less than 20, comparison data may vary



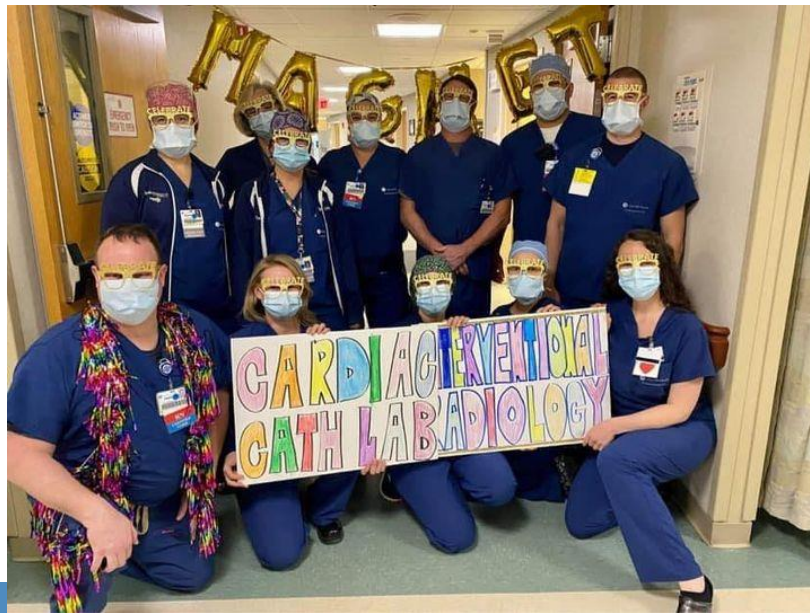
Other Logistical Essentials

- Set up a command center with snacks and drinks—a good place for Magnet Champions to gather between sessions
- You will have simultaneous sessions—we had 3 at a time—be sure to have a quiet place with a laptop so that a Magnet Champion can log in, take attendance, and stay in the background if there are any issues
- Take pictures during the site visit! We did not do enough of that



Pros of the Virtual Site Visit

- We had control over what the appraisers could see with the camera
- Staff reported feeling less intimidated
- Their sense of pride & accomplishment did shine through—we sent a welcome video ahead of time
- It was a much smoother process than we anticipated



Questions?

