



Virtual Magnet Survey *Lessons Learned*

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FEBRUARY 26TH 2020I – NY/VT CONSORTIUM

Upstate University Hospital

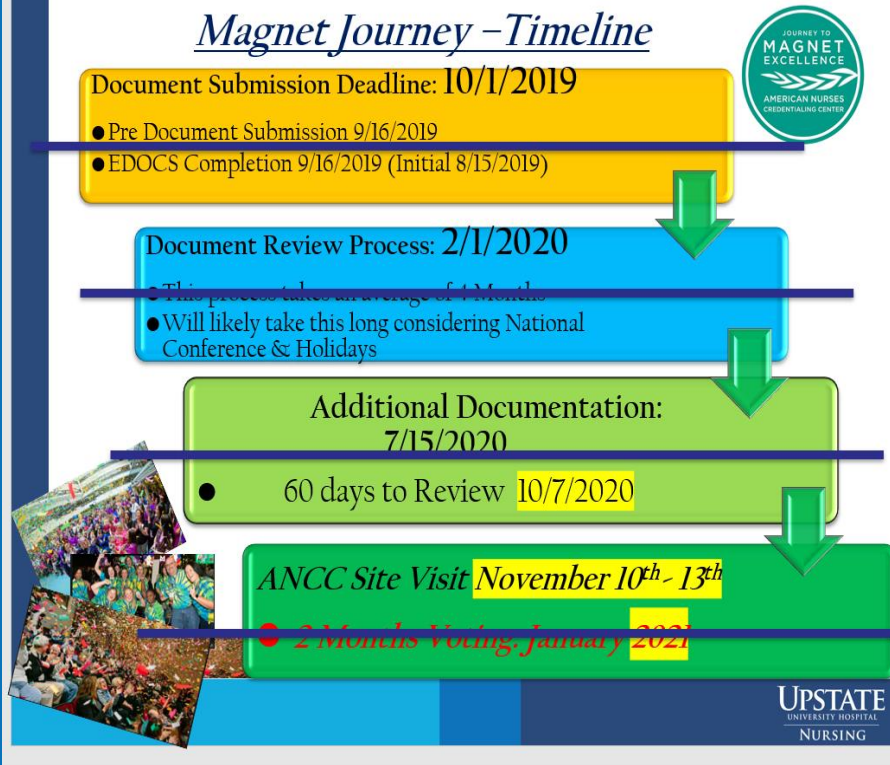
Who we Are ...

- We are a State Medical University comprised of both an Academic Medical Center with a Teaching Hospital at our Downtown Hospital and a Community Hospital with a total of **734** combined beds.
- We represent 45% of hospital beds in Syracuse and are considered the principle safety net provider in CNY.
- Level 1 Trauma Center, Golisano Children's Hospital, Designated Stroke, Burn and Poison Control Centers.
- We have over 79 specialty clinics
- Region's largest employer; nearly 9,900 employees and approximately 3000 of these are Registered Nurses
- We are a unionized environment!



Upstate University Hospital Journey to Magnet Designation....

Magnet Journey – Timeline



- Never previously designated..
- We submitted our documentation on 10/1st!
- Received word on 2/5th that we had additional documentation requested
- We submitted the additional documentation on 7/15th
- We learned 9/3rd that we made it to site survey without any deficiencies
- We awaited word as to determine what the site visit options were–
- Identified 11/10th- 11/13th as our Magnet Survey
- 4 days, 4 appraisers, 10 hour/day schedules

Magnet Virtual Survey

Lessons Learned

- Use the virtual platform as *an OPPORTUNITY!* – rather than a barrier!!
- *Prepare* your internal stakeholders for a virtual process!
- Find your **CIO** & IMT stakeholders!
- Create a **PLAN B** (potentially PLAN C, D, E... etc..)
- Prepare for modifications **PLAN A4, B8, ETC..**
- Prepare **COMMUNICATION** PATHWAYS!
- **Recognize, recognize, recognize-** this was never the plan – but that is ABSOLUTELY where nurses rise!

Virtual Survey

It is an Opportunity!

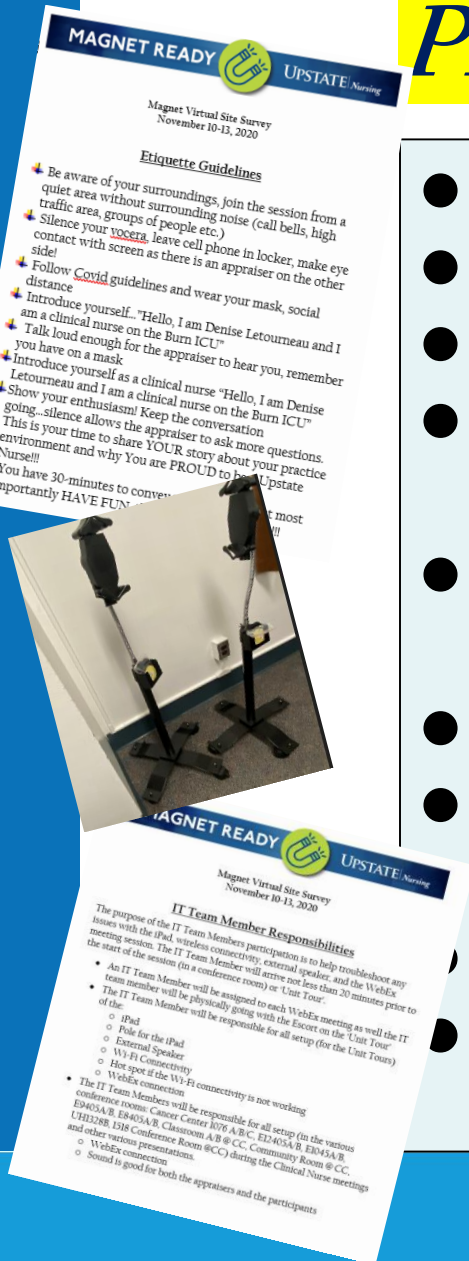
- Use creative backgrounds!!
- Emphasize Welcome Video!
- Showcase your Incident Command response to COVID surge and your organizations adaptability to this experience!
- Invite those who may not have been available!



Virtual Survey

Prepare for this Platform!

- Used a tip sheet to emphasize etiquette!
- Social distancing rules!
- Prepare who will share, and a back up to share!
- Be mindful of audio and speaking- test IPADs on wheels, etc. to ensure they work-
- Do you need rooms, how many, and external links, etc.. – how will you get this info!
- Trial your technology!
- Labeled names appropriately on Zoom/WebEx so appraisers would know who is who!
- Plan for your Rosters!
- Create role/responsibilities for Survey Team (Hosts, Escorts, IMT, Administrative Support)



Virtual Survey

IMT is everything!

- IMT lead regular meetings and planning sessions
- IMT team members at all locations to manage in person IMT challenges
- IMT 'behind the scenes at all sessions'
- Determine your plan to communicate with them IMMEDIATELY with any challenges!



Virtual Survey

Map out all Plans!

Task	Assigned	Deadline	Complete	Contact(s)	Date Scheduled to meet	Device	Participant(s)	Comments - Follow up
Weekly meetings w/Steve Harris & Rachael Kim (ECComm)	Denise Collette		ongoing				Steve Harris Rachael Kim Denise Letourneau Collette H. Fay	Meeting day/tim: Thursdays @ 9:00 a.m. 9/17: Steve Harris to supply 6 IT people for site visit day; will coordinate with Matt Zeman's group for staff and iPads, additional power supplies; will also coordinate a network assessment in all units/areas. 9/18: Steve complete list of addresses to SURK
Need to decide on what platform to use: Zoom or Webex	NPS/DL	9/25/2020						Confirmed WebEx 10/16/20
Magnet public notice posters/postings printed and posted	Denise Collette	9/25/2020	10/19/2020					Public Notice signs up and confirmed in all locations-evidence in Map, Exec. Folder Staff notices on banner page, and email sent out 9/30. DL walking on evidence of Update email. Will post to notice board
Reserve CC and 2 OT conference rooms for actual virtual site visit dates 11/10-11/13/20	Collette		10/28/2020					10/21-1: Denice at CC placed a hold on the Community Room and the Classroom for the dates and times needed for the survey. Emailed Sue Murphy (Compass) regarding the rooms needed for the site survey. 10/22- Community Room & Classroom AB have been reserved for dates/times needed at CC. Tower rooms have been scheduled per Michelle Loney. There was one ID having a problem but before she resolved it. Waiting on Cancer Center Rooms at this time.
Contact Eric with Daystate for additional info (see comments)	Denise		10/19/2020					Follow up gpts warm-up group- or was this escorts role did he have an email listing phone call group etc. for survey day? any gpts for participants and any party at the door? did he do any additional mass communication or count down in lobby- epic screen saves etc? Email sent 10/17 @ Response card and shared 10/18
Find out who is on the Ethics Committee- need list of names and credentials	Denise		10/28/2020	Sandra Nott or Chris Lopez				10/22 DL emailed Chris Lopez: NP and S. Nott for information
Need 8 IT Team Members (names and contact information)	Collette	10/28/2020		Steve & Rachael				See Help/Excel/Tax
Need 8-12 Escorts (4 backstays, names and contact information)	Denise	10/28/2020						

Day 1_ 11-10

Day 2_ 11-11

Day 3_ 11-12

Day 4_ 11-13

EST Time Zone	CST Time Zone	Host/Escort/IT	Topic	Attendees	Appraisers
7:15-7:45	6:15-6:45	No Host IT Member Virtual	Opening meeting with CNO and Magnet Program Director (MPD) and Appraisers UIH Magnet Welcome Appraiser Video, Review Agenda	Nancy Page, MSN, RN, NEA-BC, Chief Nursing Officer Sarah Fries, MSN, FNP-BC, Deputy Nursing Director, Advanced Practice Denise Letourneau, DNP, RN, NEA-BC, Associate Director Magnet, Quality & Safety Pamela Johnson-Carlson, DNP, RN, NE-BC Susan Huerta, PhD, MS, BS, RN Carol Payson, MSN, RN, NE-BC Jennifer Bonamer, PhD, RN-BC, AHRN-BC	TM1 TM2 TM3 TM4
				Or, go to https://upstate.zoom.us/join and enter meeting ID: 996 9964 2292 Join from: https://upstate.zoom.us/join	X X X X
12:10-12:40	11:10-11:40	Lunch	Appraiser Meeting Time Magnet Site Survey, Appraiser Meetings Time	Organization to schedule Zoom Entire Appraiser Team Or, go to https://upstate.zoom.us/join and enter meeting ID: 977 6625 6943 Join from: dial in phone line Dial: +1 646 876 6923 or +1 312 628 6799 Meeting ID: 977 6625 6943 Participant ID: Shown after joining the meeting	X X X X
			Appraiser 1 Pamela Johnson-Carlson, DNP, RN, NE-BC Unit Team 11E Peds Med Surg	Appraiser 2 Susan Huerta, PhD, MS, BS, RN Unit Team 8F Neuro ICU	Appraiser 3 Carol Payson, MSN, RN, NE-BC Unit Team 8F Cardio-Pulmonary/CCU
				Appraiser 4 Jennifer Bonamer, PhD, RN-BC, AHRN-BC Unit Team 8H Med ICU	

Magnet Virtual Site Survey Participation - November 10-13, 2020

Instructions:

Enter the full name(s) of the Clinical Nurse(s) and all Interprofessional Colleagues that will be participating during the Unit Tour.
Enter the location where the unit tour will take place (i.e., conference room, hallway, in front of the Magnet board in the hallway)
Enter the building and room number if applicable (i.e., UHCC, 4th Floor, Crouse POB 308)



** Nursing Leaders or Management cannot participate in this portion of the Magnet Site Visit. **

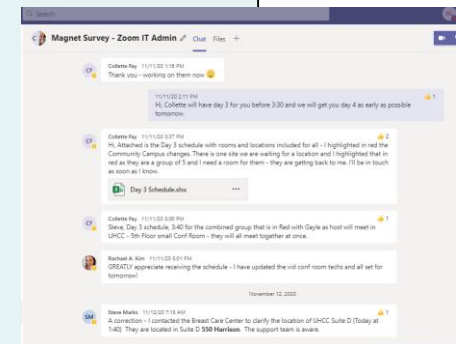
Unit	First & Last Name of Clinical Nurses or Interprofessional Colleagues	Where will you be 'holding' the unit tour?	Building/Floor Location/Room Number	If the 'unit tour' is not on the unit, have you reserved your identified room location?
Sample Unit - 14E	John Smith, Jane Miller, Eva Lane	@ the Magnet board located at the end of the main hallway of the unit	UHCC 5th Floor, large conference room	Yes, reserved
10E Adult Oncology	Michelle Merrill, Kevin O'Keefe, Michael Casey, Lauren George	At Magnet Boards	UH-East Tower Room 10417 BMT lounge	Emailed 11/7/2020 & DL Left VM on phone
10G Adult Med	Yelena Tkach, Amanda Sacco, Megan Rota	At Magnet Boards/ Nurses station	UH-East Tower 10419 BMT lounge	Emailed 11/7/2020 & DL Left VM on phone
10H Bone Marrow Transplant	Megan Lewis Kelly Mulvana	Magnet board in side room on 10e	UH east tower 10H on the unit in a side room/private space	Emailed 11/7/2020 & DL Left VM on phone
10I Hemapheresis	Deb Willison, Connie Capone, Amy Bielicki, Vicki Money, Michele Weber	@ Nurse Station room which is quiet; back up location is conf room 10417	UH 10417	
11E Peds Med Surg	Sue Law, Arthur Guercio, Jessica Baker, Elizabeth Sapio, Emily O'Toole, Kayla VanBroeklin	@ Quality Board, on 11E-1, then move to Family Lounge (11414)	CHET 11th floor	Emailed 11/7/2020 & DL vm left on phone
11F Peds Med Surg	Courtney Truworth, RN; Lena Reggrell, RN; Christine Hodgkinson, SW; Brooke Fraser, NP; Sarah Beth Baxter Woznowicz, Pharm; Elizabeth			

- Excel worksheets to manage internal process
- Individualized Agenda (14) Word then Excel
- Zoom (check Licenses – 15, 157 discrete zoom links)
- Back up Conference Lines

Virtual Survey

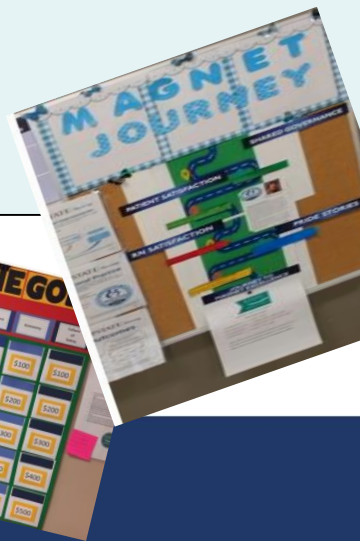
Communication Plan!

- Use existing platforms
 - Magnet Executive Team
 - Magnet Champions
 - Nurse Informational Sessions
 - Website Links & Videos
 - Management Forum
 - CNO Vlog
 - Met repeatedly with all teams on the agenda!
- Command Center (Hosts, IT, Escorts & Magnet Survey Incident Command)
 - Gift Bags
 - Food
 - Joy Shared!
- Microsoft Teams
 - Documentation Review
 - Survey Team
 - Magnet Survey IT Team
 - CNO Cab Team
- Vocera- Magnet



Virtual Survey Recognition!

- Be sure to say THANK YOU!!
 - Your work isn't done after the survey!
 - Recovery & Congratulations!
 - Magnet Jackets for all RNs
 - CEO to join in the acknowledgement!
 - President Magnet Executive Steering, etc.!~
- And the plan is to continue!



In the words of Nancy Page, CNO:

This is not one person's story... one person didn't make this happen, it took this **incredible village**.

You all have taken part in creating the region's jewel for nursing and for that, myself and our 3000+ nursing staff will be forever grateful!



Magnet Welcome Video



Thank You!

