

Managing Accreditation Documentation with SharePoint

CDC Performance Improvement Managers Network Call

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- Today's Speakers:**
- Tamara Bannan, County of San Diego Public Health Services
 - Allison Hawley, Minnesota Department of Health
 - LuAnne McNichols, Minnesota Department of Health

Moderators: Melody Parker, CDC/OSTLTS

Sherry (Operator): Welcome and thank you for standing by. All participants will remain in listen-only mode for the duration of the conference. As a reminder, today's conference is being recorded. If you have any objections, you may disconnect at this time. I would like to turn the meeting over to your host today, Melody Parker. You may begin.

Melody Parker: Thank you, Sherry. Greetings everyone and welcome to the August Performance Improvement Managers (PIM) Network webinar. I am Melody Parker. I'll be your host today. I'm with the Office for State, Tribal, Local and Territorial Support (OSTLTS). I am joined here on the line today by colleagues from OSTLTS. So thank you for joining us today for our seventh call of 2013. The PIM Network is a community that supports all NPHII performance improvement managers in learning from each other as well as from partners and other experts, and these calls give members of the Network yet another venue to learn about each other and share information about resources and training opportunities related to our work in quality improvement and performance management. Our topic today deals with the success some health departments have had managing the flow of their documentation for public health accreditation. Before we dive into it, let's first review some of the technological features of today's call.

We'll be seeing those guided tours on the LiveMeeting site today, and you can see other sites with us that are participating by looking at the attendees link under the link at the top left of your screen. Additionally, we'll have two ways to facilitate the discussion today. First, we strongly encourage you to type in your questions and comments as we go at any time using the Q&A box, which you can find by



clicking Q&A in the toolbar at the top of your screen. Second, we'll open the lines for discussion after our performance managers have finished. So please mute your phone now either by using your phone's mute button or by pressing star-6 on your phone's keypad.

Please note that we will announce the identity of those submitting questions via LiveMeeting. If you prefer to remain anonymous to the group in posing your question, please type "anon" either before or after your question. Today's call is going to last approximately an hour. The call is being recorded, as our operator noted, and we will be archiving that on the OSTLTS PIM Network web page.

We'll be conducting just a few polls today, both our usual demographic polls and also some informational polls to assist our presenters in meeting your needs on today topic. Our first poll will give us an idea of who's participating on the call, so indicate your affiliation, if you're a state health department, a tribal health department, a local health department, a territorial or US-affiliated Pacific Island health department, a national public health organization, or other. The poll is open. Please cast your vote by clicking. It looks like we're running about 69% of states, we're about 21% of you are local health departments, 6% are national public health organizations and 3% are other. Thank you.

Now for the informational polls. Where is your health department in the accreditation process? If you are indeed participating in that process. Are you at the pre-application phase, the application phase, the document selection and submission stage, are you waiting for your site visit, or are you accredited? Thank you for that. Roughly about 76% of you are still in the pre-application phase, 3% have applied, 9% are in the document selection and submission phase, 6% of you have had a site visit, and 3% of you—congratulations—are accredited.

The last informational poll. What is your familiarity with SharePoint? SharePoint, what's that?, or have you viewed or downloaded materials from the SharePoint site, have you uploaded materials or created content on the SharePoint site, or have you been . . . are you a SharePoint administrator? It looks like roughly 11% of you are unaware of SharePoint, 22% have viewed or downloaded materials, 38% have uploaded or created content, and roughly 29% have been a SharePoint administrator. Thanks for that.

So now let's dive in. Last month on the NPHII PIM Network listserv, there was quite a flurry of activity and interest in using SharePoint for managing your accreditation documentation. Our kind, wonderful individuals from the Network itself have decided to share this information with us to see if we can't help everyone along their way as they continue this path towards accreditation and accreditation preparedness. So, without further ado, I will pass this on to Allison Hawley March from the Minnesota Department of Health. Allison, would you like to take it away, please?

Allison Hawley March: All right, Melody, I just want to confirm that you can see my screen.

Melody Parker: I can see your screen, Allison, thank you.

Allison Hawley March: Awesome. Hi, everyone. My name is Allison Hawley March. I work in communications for the Minnesota Department of Health (MDH) in the Office of Performance



Improvement. The Office of Performance Improvement coordinated the accreditation process at MDH, and I am the site owner of our accreditation documentation collection site in SharePoint, mostly because I had the most experience with it coming in. Let me give you just a little background before we start on our process.

We started collecting documentation nearly two years ago for the state agency. We officially applied for accreditation last September. We submitted our documentation this past April, and our documentation is currently under review by PHAB and then we'll schedule a site visit. In order to collect documentation from across MDH, which means from over 1,500 staff members across ten divisions and six offices, we appointed two leads per domain from across the agency at large and also one accreditation specialist from our own office, the Office of Performance Improvement. The leads recruited team members, and the leads and team members actually uploaded and gathered the documentation. Staff from the Office of Performance Improvement served as specialists to answer TA questions, to consult with PHAB if necessary, and we also met monthly to discuss those practices.

Before I start, I just want to quick talk about why we chose SharePoint. We wanted a structure that was accessible to everyone across the agency, and our internal shared network is not. It's partitioned off by divisions, and so each division staff can only see their division's documents. We also liked in SharePoint that everything would be housed in a single location rather than having copies scattered across the agency, and you never knew which was the most recent, which was the most correct. And third, we liked being able to see more information about the document than just the document itself, such as who uploaded it, when they uploaded it, and we'll see more in a minute.

Let's start with the MDH accreditation documentation collection site on SharePoint. We run in SharePoint 2010, and we built this entirely online, we didn't import it from anywhere or any other Windows program. The home page probably looks a bit different than the generic SharePoint starting page. We tried to go in with the philosophy that we wanted to make it as user-friendly as possible because a majority of our users were a low level of familiarity with SharePoint. My philosophy for web sites in general is if someone can't find it in about ten seconds, they're going to start getting frustrated and just click anywhere, and they could end up anywhere at that point.

We tried to finesse the layout of our home page quite a bit by removing some of the navigation options including the calendar and standard shared documents library. We also added important information to the home page. For example, like "Help, where do I start?" This was important for us to have in case team members came in halfway through the process and weren't familiar with SharePoint, or if people just needed a refresher if it had been a while since orientation and they were just getting back into SharePoint. We also have the name of the site owner, me, listed on the home page. The was important so that if someone had an urgent question about SharePoint that the content manager, which is LuAnne, couldn't answer they could get in touch with me directly. Quite often a lot of sites will list the content manager online but the best content manager doesn't necessarily know SharePoint, and the best SharePoint administrator doesn't necessarily know the contents. We found it helpful to include



both of those names. We also added some helpful links for people so that they wouldn't have to rely on bookmarks, and an at-a-glance list of our domain team leads and their contact information.

For the actual documentation collection, we decided to use a single SharePoint site and then divide the documentation into 12 identical domain libraries that you see on the left side of your screen. This allowed our documentation to be assessed as a whole for each domain without becoming overwhelming, like if there were one library for all 12 domains, and without making things difficult to find, like if there were a library for each standard or each measure. We also gave teams space in a single project management document library, also on the left side of your screen, that was intended for documents that weren't specific documentation, but that team members still wanted to have on hand.

I am going to jump to Domain 8. As teams gathered documentation for their domain, they started to upload the documentation into their respective domain libraries. Here we are in Domain 8. We set up SharePoint's organize uploaded documents by measure within each domain. We purposely did not allow folders in our domain libraries for a couple of reasons. The primary reason is that one of the strengths of SharePoint is that you can see a lot of information about a document aside from just the document. If things are hidden in folders or you have folders within the folders, that information isn't visible. There's a lot more hunting around which would defeat the purpose of SharePoint anyways.

As users uploaded their documentation, we asked them to fill out certain properties for each document. We put together a list of categories that we requested them to fill out for each piece of documentation which was based on cover sheet recommendations from PHAB. We figured if we asked for this information up front, we wouldn't have to go hunt for it later. Everything starred in red is what's mandatory, although we did ask people to add as much information as possible.

I'll talk about a few of those categories. We divided things by standard and by measure. We asked people to include the program that had originally offered the content, because it might not be that person's specific program, so that if we had further questions or we needed a newer draft or a final version, we knew exactly who to go to. The same goes for relevant pages. Having that on hand made it much easier to scan the documentation for both us and hopefully for our reviewers at PHAB. The rationale is pretty self-explanatory. Why was the document important? Why do you think it meets this measure? We asked people to include the creation date, or an approximation of it, so that we could help assess the documentation's ability to meet the required time frame of five years, two years or this year. We also added a category called meets all PHAB requirements, and that was our way to have an at-a-glance indicator to assess whether the documentation was suitable, whether it needed revision, whether it was incomplete, so that very quickly we could see where we still needed to work on each domain.

As you can see, each document contains a lot more information than what is necessarily shown on the document library home page itself. That's one of the strengths of SharePoint is that it allows you to customize what you'd like to see on that screen. This is important because we didn't allow folders, so we had to come up with a way to make the documents easy to find. SharePoint allows you to show the



information grouped and sorted in different ways in order to make a lot of information easy to navigate and easy to understand.

I'll show you, without this sorting and grouping by measure, what it might look like to just have all of the documents in one spot. You can see, there's just rows and rows of documents, big white spaces because some of the categories are quite lengthy, and information bleeds off the right side of the screen. Again, if you can't see the information at-a-glance that you want to see it defeats the purpose of SharePoint. These different views allow us to see different information, again at-a-glance.

You can also sort within SharePoint in a number of different ways. Let's say, for example, I wanted to see all of the documents for which one of my team members, Natalie, was responsible. We go up to created by (SharePoint's way of saying this is the person who uploaded the document) and I'll choose from the drop-down menu Natalie. And now you can see, these are the documents that Natalie was responsible for. This is helpful for a number of reasons and you can do this for any of the columns across the top. In this case, it allows us to pass Natalie's workload on if she leaves, or if we're having trouble remembering a certain document but we know Natalie worked on it, this is another way to narrow it down.

Specific views can also be created for different stakeholders, which is really nice if you have, say, a division director or someone high level that you want to show just one certain thing. You don't want them to have to click around. You can simply send them a link to this specific view that you've created for them. I can show you a view I created for myself because I was the office liaison for Domain 8. I put together a view, just for myself, that allowed me to quickly see my domain's final documentation, including who was responsible for the content and the responsible program, who is responsible for uploading the document, sometimes it was me, sometimes it was my co-workers, and then whether we felt it was ready to go. You'll notice most of these are ready to go because I haven't pulled out that I want to see the final documentation.

I'm going to return back to where we were before in Domain 8. When it came time to select our final documentation, we also used these categories to sort and to filter out our final documents. We wanted to be able to keep all of our documentation on hand even if it wasn't a final choice, just in case that final choice ended up not working for some reason. So, for every single domain library we went back in and added this final choice category, which wasn't there at the beginning. It was there by the time the teams were ready to select their final documentation.

When it came time for LuAnne, who is our accreditation manager, to upload the documentation to ePHAB, it became much easier for her to assess where the final choices were. There were no emails or crossed lines. She could just go in and could choose to filter out everything that wasn't a final choice. Now you can see here are all of our final choices for Domain 8, and that's what she would want to upload directly to ePHAB. Obviously there were a few interim review steps in between when we selected our final documentation and when LuAnne updated it, but you get the gist.



We also built an additional document library for teams to store documents that were important to have on hand but weren't actual documentation, and that's this project management library on the left side of the screen. For example, I'll show you Domain 8 again. Here we stored our meeting minutes, our work plan, and specific assignments for each team member. We also stored a crosswalk of different standards across different frameworks. The Office of Performance Improvement also preloaded each domain's section with the PHAB standard and measures chapter that pertained to their domain so they had it on hand and they didn't have to sift through the entire 150–200 page document. Some domain teams really used the project management library, while some others didn't. They just found a different way to handle their project management tools.

Another SharePoint feature that we used was SharePoint's list function. For example, we realized a lot of the different domains had the same questions about the accreditation process, and so we put together a question and answer list categorized by subject matter so that we could see the common questions that we all had rather than reinventing the wheel each time an issue came up. We could see whether a question was common to a specific domain or whether it was common to all domains. We could see who initially asked the question, the question itself and the answer. That allowed us to follow up with the original person if we had some follow-up questions ourselves.

We also kept a roster of all of our domain team members in SharePoint, and we did this rather than in Outlook or on a spreadsheet. One of the reasons that we did this was to ensure that the contact information were in one single, again, central location. You knew it was always updated. We could avoid multiple copies scattered across different drives or multiple Outlook lists that would be hard to reconcile with each other. This allowed us to also see the roles of different people on the team, whether they were lead, a domain member, what division that they were in and their contact information. If you were in a specific division and you wanted to see who else from your division was working on accreditation, you could quickly filter it out and find other people to collaborate with, even if they're not specifically on your domain team.

Furthermore, in this you can also mass email out of a SharePoint list like you can out of an Excel spreadsheet. There are a couple of different ways to contact a large amount of people at once in SharePoint. The easiest way is to sort your list, or view it in the data sheet view where it looks just like an Excel spreadsheet might, then you can copy and paste your various cells into an Outlook email.

Before I hand it over to Nora, I just want to talk about the lessons we felt we learned from using SharePoint to collect our accreditation documentation. SharePoint has a lot of strengths, and I have become more of an advocate of SharePoint as I use it more. It provides a more holistic view of your documentation. It allows team members to view potential documentation as a whole, in order to recommend which they feel is most appropriate to meeting the measure. Each measure might have 10 different pieces of documentation that were uploaded and that meet the requirement, but by collecting them all in one place and looking at them as a whole, team members can choose which best meets those measure requirements. It also allowed access to documents across the entire agency rather than stashed in different spots that someone might not be able to get to.



Lastly, I saw this as a really good pilot at MDH. Like I said, a lot of our users, when they first came in, had never used SharePoint, had never even seen SharePoint. This allowed a lot of staff at different levels of the organization to become familiar with SharePoint as a collaboration tool, from students to staff to supervisors to managers and directors. We really built a good network of people who were familiar with SharePoint, who had used it, and who could bring it back to their office or their division and talk about how they might be able to use it in their day-to-day work within their office.

I would say the biggest weakness of SharePoint is that there can be a learning curve for staff that are new to SharePoint, especially those who are used to working on PCs in Microsoft Windows and are used to seeing folders and storing things via folder. SharePoint also has a few quirks that in accreditation documentation collection, became more apparent. If, for example, a piece of documentation met more than one measure within a single domain, even though it was in the domain library once already for one measure, in order to get additional information to describe how the piece of documentation applied to a different measure, you would have to upload it twice. So that you could say, for Measure 8.1.1 page 3 is the best, but for Measure 8.2.1 page 5 is the best. That was a little difficult to explain at first, although people got it after a while.

I really felt strongly that the first impression was important, especially because we had so many new users. Getting that first impression right was important to me, just to make it easy and intuitive to navigate, as I felt the easier it was to use, the more buy-in we would have from the people that we really wanted to use SharePoint to upload their documentation. Which meant buy-in from staff and buy-in from higher level managers, supervisors and directors at the agency.

A great deal of up-front planning was required for us because we built this on the web in SharePoint itself, although I suspect it would be the same if you imported it from somewhere. It takes a lot of time and a lot of back and forth to decide what categories you want to collect within the document library, or what different functionalities you want available to your users. Also, if you want to change it after the fact, for example, if we wanted to add more categories after people already started uploading documentation to their domains, it can get pretty time-consuming to change it.

We also found it was helpful to have a SharePoint champion, or a lot of SharePoint champions, and we have hopefully turned our users into SharePoint champions. We wanted these champions to be present, especially in the supervisory capacity to help lead by example, and to be able to encourage its use among their staff members.

We also found it extremely helpful to have someone on call for SharePoint technical assistance, if not someone fully devoted to SharePoint. It was especially helpful to have someone who knew both the system and the project and could speak a common language between all of the users collecting the documentation and IT. You can guess, maybe working with your own IT department, that sometimes it seems like everyone's speaking a different language. Having someone within the accreditation documentation collection process knowledgeable in SharePoint turned out to be more helpful than we knew that it would be. Again, having that person available on the home page, and having them be able



to quickly respond and provide appropriate help, really increased the buy-in and the incentive to use SharePoint. To that end, we found that SharePoint administration is very different from the everyday use of SharePoint. We thought it might be helpful to send SharePoint administrators to some further training, and we also found it helpful to set up Sandbox sites. We didn't necessarily do this within the accreditation team, but for MDH we set up Sandbox sites for site owners to play around and to get a feel for what SharePoint could do, because when you're a new site owner, sometimes you don't know what you don't know. It's helpful just to get your feet wet and jump right in.

Finally, we thought it was really important to provide training to our users, and this was for a couple of reasons. It becomes really easy in SharePoint for users to get frustrated with the system, I think with any documentation collection system, and just end up sending it to one person and that one person ends up uploading 200 pieces of documentation. We really wanted to avoid that from the start. On the very first day, all of the team members and all of the leads got together and we talked about scopes and domains and standards and measures. We gave them a half hour to hour long orientation on SharePoint. I think that helped prevent everything from being sent to just one person on each domain team or one person in the entire accreditation process.

I think regardless of the system you use to collect documentation, whether it's SharePoint or whether it's another system, it's nice to provide an orientation right off the bat, to learn how to add and edit documentation within the system.

LuAnne is on the call for a few questions at the end of this entire webinar about scope or about uploading to ePHAB, but in the meantime, I am going to turn things over to Nora, and she can take it from here and talk about her accreditation documentation system.

Tamara Bannan: Actually, this is Tamara Bannan. Good afternoon, everyone. I wanted to just kick it off because I'm the accreditation coordinator here in San Diego. I wanted to talk a little bit about our use with SharePoint as a data test site. We were 1 of 30 beta test sites about three years ago, and we were also novice SharePoint users in our health and human services agency at that time. After going to accreditation coordinator training for the beta test, I came back realizing that this was a good system to use for collecting our documents, for all the same reasons that Allison had mentioned.

Anyway, we had originally set up our SharePoint site like a glorified share drive with folders. We were learning how to use SharePoint as an agency, and when we instituted SharePoint we created a steering committee and a users group. This was throughout our entire health and human services agency, not just within our public health services division. When we began our self-assessment against PHAB Standards 1.0 at the beginning of this calendar year, we realized that we could be doing it better.

We did something very similar to what Minnesota did. However, we approached it a little differently. We had created an Excel spreadsheet which we were going to use to track the documentation for each of the domains, and we learned that we could actually import that to provide that framework for each



of the Standards and Measures. I'm going to turn it over to Nora Bodda, who has been my assistant throughout this entire process. She's also the one that set up our SharePoint site.

Nora Bodda: We can see the main page for our SharePoint site. Allison created libraries which were on the left-hand side but we actually created sub-sites, so each of the domains has their own sub-site. If you click on this tab, you'll see the sub-site for Domain 1. We also added an introduction which has a link to the domain lead and then users can contact the lead or Tamara further for any questions. Each of the sub-sites are set up this way. They have links to the PHAB Standards and Measures.

Moving into what Tamara mentioned for the imported Excel files, I created a test site here for us today. We imported Excel files, and that can be done through a list. So if you click here, this is actually the imported Excel files. You can't actually see the lines, but these were all the measures that required documentation, this whole row. They're all organized in rows that we created on Excel, so each of the measures has a row and we put the required documentation and a description that was pulled from the PHAB Standards and Measures. We created columns for each of the measures to insert the sample documents into the program. I think this was mentioned by Allison as well. We also wanted to mention strengths, weaknesses, recommendations for each of the measures that we submit for accreditation and then also the percent complete.

This is just an example of some things that we've done. It's not final. I'd like to show you how you can use this Excel sheet. Something to note is you can't see everything until you scroll over. You can click on this sidebar to add things into each of the columns. You just click on edit items, and a box appears with additional details. This would be the same for all the required documentation. We had our domain leads and their team members go ahead and insert information in the row below here. For example, to insert documents, they would just write the name of the document here, and then actually attach the file. They would write the program, the strengths, weaknesses, recommendations, and then the percent. You can actually see the attached document right here, because that's a file I added already.

The great thing about this Excel file is that you click on data sheet view and you can actually sort through this. When you click on these arrows pointing down you can sort through and filter. I had put some attachments in Domain 4 for local health departments, there are four measures. I put three attachments for these measures, so you can see if you click on "yes," that will show you all the attachments that you put for each of the measures. These little paper clips, the images, that means that you attached a file. So you can see all the measures that have attachments. You can also search percent complete by clicking on this arrow pointing down. Right now I'm showing everything, but maybe you want to see what's 60% complete, so you can sort by percentages. You can also filter through what the weaknesses are or other categories.

We created this for all the domains but we also had folders for each of the domains. Inside this folder, teams could store additional information such as team meetings minutes, recommendations or sign-in sheets. For each of the measures we also created folders. This domain has folders for each of the examples that they had submitted but we actually wanted them to use Excel files to start putting this



information and then writing the narrative with the strengths, weaknesses. Also on our SharePoint site, we also created a site for future needs with lists of questions that the domain leads have had throughout the process and room with areas for further development.

Tamara Bannan: And the reason for doing this is because we are still in the pre-application phase here in San Diego, so we're doing a self-assessment right now. We actually are planning to submit our formal application to PHAB in November. Right now we're just going through everything to get an inventory and see what we have and what would best fit each standard and measure. We're creating this list that I can take with me to accreditation coordinator's training this fall or winter, and have the questions ready to ask. This will help us hit the ground running and get the submission part of the documentation done in a fairly rapid time frame.

We are using SharePoint across our entire health and human services agency with a staff of over 5,000 employees. Like I said, we have a formal steering committee and a user's group. We developed an online training program that we put on our learning management system, and required all of our site administrators to complete the program. This was so that they could feel confident enough in their ability to manage their site.

We're all still learning, and our site probably isn't as sophisticated as Minnesota's. None of us are really computer programmers or web site designers, so there's a lot of things we could still do with this, but it has really helped manage the volume of documentation that we go through. If you haven't already started doing this process, it really is quite a bit of documentation. I would like to leave enough time for questions, so I'll just go ahead now, and turn it back to Melody.

Melody Parker: Well, thank you, thank you so much, Tamara, Nora, and Allison. And also LuAnne as well. This is amazing and wonderful. We have been making excited little geek noises while we watch you do this, and this is just some fantastic work. It's functional work that you guys are into, and that's the important part.

Questions indeed have been coming in to us on LiveMeeting. I'll start with a very simple one that I can answer. Torney Smith from Washington wanted to know if we were going to have access to the screen shots after the webinar. You will not have static screen shots, but you will have this video. We will be posting this webinar to the PIM Network web site as soon as we possibly can. Usually we can get it up then through our processes within about a week. Of course, we'll let you know as always when it's posted.

So I will turn to Allison. There is a question for you that several people have asked. The query is, is there a shell or a template or a requirements document, a site map, some sort of framework that you could share from the development of how you developed your Minnesota SharePoint site?

Allison Hawley March: Yes. I know we've shared screen shots with different local and state departments. We certainly can put something together that's maybe a little more user friendly than just the screen shots.



Melody Parker: Okay. I will definitely follow up with that and see if we can't put something together to share with the group.

Allison Hawley March: Sure.

Melody Parker: That's a very popular question. Turning to you, Tamara and Nora, there was another query that I actually had as well. In looking at the particular section where you were focusing specifically on individual documents, there was a particular column that rated the percentage of completeness. Can you tell us, or perhaps even show us, how that level of completion is determined?

Tamara Bannan: Yes. We have really been allowing the domain champions and their teams to make that determination. For example, if a measure requires two documents and we have one of the documents that meets all of PHAB's requirements in that particular measure, then that would be pretty clear it's 50% complete since we need to have another document to meet this measure. Or, if we have a document, and there are maybe 10 elements that need to be included in that document and we only have 8 in that are included . . . It depends on what you're looking at and what the measure says within the standard.

Melody Parker: Okay. Another popular question that we have from LiveMeeting is, what has been your costs that were associated with SharePoint? Can you share those with us? Either Allison or Nora and Tamara?

Allison Hawley March: This is Allison. We have a contract with Microsoft at the state level, and so that includes all of the state agencies, not just health. I know there has been some outline of what the costs were, but we wouldn't know that, at least at our office level or at the state level. We'd have to investigate more.

Melody Parker: Okay. So yeah, that wasn't an individual purchase, it was probably a state license. Is that the same for you guys?

Nora Bodda: Yeah. That's the same for us here in San Diego. We actually contract out our IT, and Hewlett Packard holds that contract right now. I think it was part of the package that they offered to us as part of a standard package. But it's challenging to be able to parcel out how much it costs and then how much of it is being used for public health accreditation because it is used across the entire county.

Melody Parker: That makes sense. I have question for both of you, but Tamara, you answered this question as you were telling us about your training. So Allison, were there formal training sessions for this, and if so, were they broken into any other designations, like for program areas or domains or level of user experience, or was it all one broad sweep?

Allison Hawley March: We started out our process with an initial meeting that was about a half hour to hour long as an orientation to SharePoint. We made sure that there were handouts available to staff detailing exactly how to upload a document or how to add something to a list. For the agency level, the department of health has a user group and a team that's putting together training for SharePoint but



has not implemented those yet, and so we have yet to see how detailed those trainings are going to be for users versus site owners.

Melody Parker: Okay, all right. All of our lines are now open, so remember to use star-6 or your mute button. We are ready to take questions from the group at large. Please, by all means, jump in and let us know your thoughts.

Torney Smith: This is Torney Smith in Spokane.

Melody Parker: Hi, Torney.

Torney Smith: I just wanted to say how impressive this work is, and we're thrilled to see it. I think it would be a tremendous thing to share at national conferences. We have been using SharePoint 10 here, but looking at these designs is very helpful.

Melody Parker: Indeed, agreed. Another question has come in, and this can be for both or either of you. Can you share a little bit about your development timeline, you know, from ground zero to actual live unveiling implementation. What has that looked like for you?

Allison Hawley March: This is Allison, I can go first.

Melody Parker: Okay.

Allison Hawley March: Our team initially started meeting in January to kick off the accreditation documentation process. I would say the thing that took the most time was just setting that initial domain library up, specifically, what categories did we want and what did we want to ask people. Once we got that set up, it was fairly easy to replicate for the rest of the domain libraries. It was just a copy and paste deal. I suspect it's this way for a lot of web development, it takes being really clear with your content experts and going back and forth as many times as you need to get something set up that is going to be useful for the user. I have my own ideas of what's useful and that may or may not be what the end user thinks is useful. That back and forth can take a bit of time, and it just depends on your team.

Tamara Bannan: Here in San Diego, we've used SharePoint for other things besides accreditation, so I will let Nora talk about how we actually got the idea to improve our site.

Nora Bodda: Well, at the county level we have a monthly call with all the SharePoint administrators. I had seen a demo like what we presented today to everybody, showing the use of the tools. Afterward, I mentioned it to Tamara, and started researching how I could search fields or import files. I work part-time, because I'm in school, so it took me about a month to develop everything. I was also transferring all the documents from our previous SharePoint site to the new one. Once everything was transferred, I presented it at our monthly accreditation team meeting. They've been able to use the folders, but using Excel files has taking them a little bit longer, even with an orientation.



Melody Parker: I think we have a question for LuAnne. Are you still with us, LuAnne?

LuAnne McNichols: Yes, I am.

Melody Parker: All right. They want to know how did your SharePoint system facilitate moving that documentation into ePHAB? What was that process like for you?

LuAnne McNichols: Yeah. I was actually just going to bring that up, because there's a few things when you build your site that you keep in mind. You don't see ePHAB until you apply, so knowing how to translate from the SharePoint world into ePHAB is important. One thing in particular it's very important to put where the site reviewers can find information inside the documentation exactly, for example, the page number and also the rationale. When you go into ePHAB, you upload the document and then you have to write a description. The more succinct and easily translatable that little description is, including details like, "go to page 6 for this," the easier it will be for the reviewers.

If you have your people who are uploading documents into SharePoint, share this information, you have more than half the work done when you upload in ePHAB. Uploading into ePHAB is a series of steps that I can't possibly tell you over the phone. Basically, you go into ePHAB and you upload the document and if you have all the details in a good format in SharePoint then you actually can cut and paste the rationale into the description. It saves a lot of time to have all that done ahead of time.

Additionally, SharePoint becomes a great backup to all your documentation, that you can keep that even though you have your documentation in ePHAB. So it was great for us and Allison made the process simple. This was all new to all the people in our domain. We kept the process simple enough that with that first training and then a little help along the way, we won people over to SharePoint. It really worked great for us as a repository. We did not do any editing there, it just a repository for documentation. Another thing to remember is with ePHAB, you have to give people permission to upload into ePHAB. So even though lots of people put stuff into SharePoint, we only allowed a few people to upload into ePHAB.

Melody Parker: How do you see long-term functionality for SharePoint use bleeding over into both of your agencies? Obviously, you've created this specifically to address this accreditation need, but do you see this becoming part of the DNA of more general work or QI? Could other efforts find usefulness in this particular application of SharePoint?

Allison Hawley March: This is Allison. For sure. We are working to try to put something together to track performance measures and how we're meeting them. First, within the Office of Performance Improvement, but then we really hope to extend it agency-wide. The goal would be to have a department of health-wide performance measurement tracking system that can be customized to a unit-level versus an agency-level which would show the top five agency performance measures. So we're working on it, and I know other teams and divisions are using it for short-term projects, for long-term projects. We're waiting to see what MDH thinks we should have on SharePoint.



Tamara Bannan: Here in San Diego, we've actually created a SharePoint site to track and monitor all of our Live Well San Diego progress as well. It's used throughout the whole county. We use it to collect monthly reporting on progress towards our Live Well San Diego strategic goals.

Melody Parker: All right. Well, I think we have time for about one last question. Did either site consider any other documentation tools, and if you did, why did you end up going with SharePoint?

Allison Hawley March: This is Allison. I think LuAnne can probably speak to whether we considered other tools. I know we found SharePoint useful partly because it was already part of our Microsoft package, so we had it on hand which was a definite strength. But also its functionality, once we taught it to people, could be easily used.

LuAnne McNichols: Yes, this is LuAnne. SharePoint was just introduced to MDH right at the beginning when we were starting this, and we really didn't look very closely at anything else. Allison was very experienced with it, and we just went with it. We're very happy with it.

Tamara Bannan: I have to say the same thing, because our agency started going with SharePoint right around the time we were participating as a beta test site in 2010. Recently we have acquired a software system called PolicyTech, which basically can be used from cradle to grave on policy. People are able to collaborate, go through the review process, do a final sign-off and approval and even disseminate it to the staff that need to read it. It even has a built-in tickler system to let you know when something is ready to expire, to remind you to actually do something to revive it and keep it fresh. Our health officer here, Dr. Wooten, has asked me to look into using that system to be our accreditation tracking and monitoring, but I'm not sure how that would work yet.

(Unidentified female): I have a question for Allison. We just recently quit using PolicyTech because we want to build some of policies in SharePoint. But I was curious, Allison have you built in any work flows for approval on these documents, and are you using versioning, which gives you a little bit of what PolicyTech does?

Allison Hawley March: Sure, that's a great question. We definitely used versioning in our document libraries for each domain. We found it really helpful, if the document moved from one draft to another, to be able to look back and see what had changed. As far as work flows go, MDH was in a bit of a unique position. When we first started collecting documentation, we were working in SharePoint 2007 in a test site. Because our IT department was going to migrate our information from 2007 to 2010, we were encouraged not to use any functionalities that were really complex, like work flows. I have used them in a previous position, and I think I would like to see them used at MDH more.

Nora Bodda: Hi, this is Nora from San Diego. I have a question for Allison. You said you created libraries instead of folders? Our documents are put into SharePoint, then we import them from Internet Explorer and then move them over somewhere else. Are you able to do that with libraries? Can you still easily export it somewhere else?



Allison Hawley March: Yeah, sure. Melody, is it okay if I share my screen one more time?

Melody Parker: Sure, one more time. We're almost at the end of our hour, though.

Allison Hawley March: Okay, so in Internet Explorer, one of the things you can do is view things as you would in Windows Explorer itself. You can see I'm going to click on this little button that has a file pointing to a computer. That allows you to see your documents as if they were just on your computer in your shared drive. It looks like it's taking a long time to open, but that allows you to drag and drop from SharePoint to your desktop or from your desktop to SharePoint. It really mimics the Explorer view, but we didn't necessarily advertise that, because sometimes it could be hard to find and right now it's very slow. Does that answer your question?

Nora Bodda: Yes, it does. Thank you.

Melody Parker: Well, thank you, Allison, and thank you, Nora, and thank you Tamara, and thank you, LuAnne for offering yourselves up to share with everyone today. That was a very, very fruitful hour in my opinion. And of course, remember that the dialogue doesn't have to end here. Feel free to continue this conversation online with each other. So, of course, I want to thank everybody else for being on the call today, for assisting us, and for generally being fabulous.

Before we leave today, of course, the last poll. Please let us know how you'd rate the webinar over all. If you'd like to give us any additional feedback on the call, or again, suggest topics like you did for today, email us at PIMNetwork@CDC.gov. Don't forget to join us for our next call, which is scheduled for September 26th. In the meantime, remember again that you can view and download these calls and the materials from any PIM Network webinar on the OSTLTS PIM Network web site. So, thank you so much. We'll see you in September. Have a great rest of your day.

