



PHSS's Digital Revolution: Improving Care and Efficiency with 3000 Redirected Hours & 75,000 More to Follow

A Case Study by INVORG



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Introduction & Background

PHSS is a non-profit charitable corporation that was founded by a group of families seeking services for their children with medical and complex needs. Prior to the creation of PHSS, the options for long-term supports for individuals with developmental, medical, and complex physical needs were limited to institutional care homes or staying at home with their families, neither of which allowed for a full and independent life within the community. PHSS was established to provide support and services for people with these needs, so they can live in their own homes and fully participate in their communities alongside their loved ones.

This year PHSS celebrates 35 years of service to the community. From humble beginnings supporting just three people in one location, PHSS has grown significantly, now providing services to over 300 people across 70 locations. This growth has allowed PHSS to expand its reach and become a provincial organization and a multi-system service partner, receiving funding from multiple government ministries.

“This has created its own complexities and its own benefits. When we were just a

couple of locations, operating paper-based worked well. As we expanded into more regions and ministries, we encountered different reporting mechanisms, different expectations, and a growing payroll. We started to think about how we could do this more efficiently.” says Brian Dunne, President & CEO.

“In the end, the little things can end up being the biggest”. Shannon Riley, Executive Lead – Services.

A Drive Toward Innovation

As a paper-based organization with hundreds of employees located in various geographical areas, PHSS faced numerous challenges in its management and operations. One of the most significant challenges was the inefficient and labour-intensive process of recording and sharing information on paper, both internally and externally with partners, government ministries, hospitals, primary care, Home and Community Care, and families. This reliance on paper-based systems made reporting particularly difficult and time-consuming.

PHSS struggled to effectively connect its various locations and central office, relying on fax and email as the primary means of communication and information sharing. This process was inefficient and prone to miscommunication, as well as the risk of lost documents and outdated information. According to Leslie Giesbrecht, Executive Lead of Growth and System Development,

"There were gaps in communication and the looming possibility of losing paperwork. There was usually only one copy, and it was a struggle to determine if that copy was even up to date." In recent years, when onboarding younger employees, PHSS struggled to introduce a digital generation to the analog past of fax machines.

Donnie Antony, now the Executive Lead for New Directions and Opportunities at PHSS, has held various positions within the organization, starting as a part-time staff member and eventually becoming a Coordinator and Senior Coordinator. From his experience on the front lines and in management, he recalls the frequent difficulties of relying on faxing as a communication tool: "It was common that you would fax something in, and it wouldn't go through. You wouldn't know until the next day, and by then it was already too late."

The inefficiency of paper-based systems was particularly evident in the time-consuming process of staff payroll. With limited funding for administrative functions, PHSS struggled to manage the large workload of payroll with limited resources. Every two weeks, staff members would complete their time sheets on paper, which Coordinators would then fax to the payroll office. The payroll team would then have to manually review and enter the data from over 600 paper time sheets into an excel spreadsheet before importing it into the payroll system. This was a resource-intensive task that required the full attention of the payroll team.

Leslie recalled, "As we grew, there was a lot more paper and a lot more reporting. There was more that needed to happen, and our

dated ways of using pen and paper took a very long-time."

PHSS recognized the need for change in order to improve its services and better utilize modern technology. The organization faced increasing pressure to digitalize from the ministries, and the healthcare system around them, as hospital referrals were moving away from paper-based systems and there was a growing emphasis on privacy and interconnectedness in the healthcare industry.

Funding – A Barrier for Change

The transition to digital systems presented a challenge for PHSS in the form of funding. As a non-profit organization, PHSS has limited resources and must allocate its funding towards directly serving the people they support rather than investing in technology. Katie Coughlin, Executive Lead, Corporate Services, explained, "Our funding is very limited, and our administrative funding specifically is very limited. As a not-for-profit, we always allocate our funding towards people we serve directly, as opposed to technology."

Despite the funding challenges, PHSS remained committed to its goals of digital transformation to improve the quality of care and supports it provided. Brian stated, "Funding is always an issue for technology because nobody wants to fund it. So, an organization must determine that there is value added to them and find the resources to make the investment. Otherwise, it is easy to use funding as a barrier. That's why when we started this journey, we looked to see who might be able to do it with us."

“A lot of energy, effort, time, money.” Brian Dunne.

The Road to Transformation

PHSS began engaging with a company out of the West, after being reassured by a plethora of promises. They continued to engage with them over the course of two years, “A lot of energy, effort, time, money. And to find out that in the end, they couldn’t do it for us because we're more complex than some other organizations because of the different rules and the way we provide support to people is very individualized.” Explained Brian. As a result, the project fell through, and the hopes of a technological renaissance faded in the organization, “we thought that we just didn’t have the resources to try again” explained Brian.

Years later, PHSS’ leadership team was once again excited by the possibility of a technological revolution after encountering a tech-savvy company at a health focused conference. In 2017, PHSS began its second transformation initiative, engaging with the company and investing a significant amount of time, effort, and money. However, the company's system and modules were not flexible enough to accommodate PHSS's multi-location, individualized approach to care, and the organization was not willing to compromise its support model to fit the predetermined technological mould. As a result, PHSS abandoned the system, using it only for the bare minimum, and returned to paper-based processes for a few years. Brian described the experience as “jading” and costly for the organization and its staff.

PHSS was frustrated and felt that it would always struggle to achieve its goal. Brian remarked, “I had a thought that if we do this again, it'll be our last shot at it. So, it must be right.” Despite this, the organization continued to face challenges without a successful solution in sight.

The sudden onset of the global pandemic made it evident that PHSS's digital transformation was more necessary than ever. As the government ministry system accelerated its push towards digital innovation in response to the crisis, PHSS recognized that technology was no longer a future necessity, but a present one.

Engaging INVORG

In the fall of 2020, PHSS was introduced to us through one of its service partners, who was already a client. We engaged with PHSS to understand their challenges and shared our approach to digital transformations. Leslie recalls, “Right off the bat, at a high level, we all felt that your philosophy really meshed with ours.” The potential for a partnership between PHSS and our company was clear, with both organizations sharing similar missions and values. As Brian explained, “Other companies may be more interested in creating a system or product for you, rather than aligning with the values of your organization. It was a very important distinction for us to find a company whose philosophy aligned with ours.”

“It didn't sound like a typical marketing pitch.” Donnie Antony

We continued to explore PHSS’ needs, grounded in a shared purpose. It became

evident that an out-of-the-box solution would not meet PHSS's needs and a custom approach was necessary. A predetermined mould would not work for the organization. By the end of 2020, we officially began our digital transformation partnership with PHSS.

Marshall Dunn, Digital Transformation Consulting Lead at INVORG, observed, "By fitting into a predetermined technological mould, you run the risk of losing what makes you unique. You may have to change your operations or processes, and seemingly small changes can have a ripple effect. It was clear that PHSS's desire to leverage technology and drive innovation was not centred on being the coolest or most advanced organization, but rather on providing the best care and supports for the individuals they serve. PHSS recognized that by using technology effectively, they could enhance their current operations and provide even better care and supports. Our approach really resonated with PHSS because it allowed them to continue providing excellent service without having to conform to a predetermined mould. Technology, when used effectively, can function as a nervous system throughout the organization, but adapting to existing products can feel like using a technological prosthetic – it attaches to you, but it's a foreign body that can be difficult to operate the same way as before. PHSS understood the value in not changing their service and support model to fit a predetermined mould."

The Transformation Journey

Achieving this, was going to be a significant undertaking. Our team was united in our common goal and shared vision, determined to make it work. Leslie emphasized, "We're building something from the ground up that is going to be unique to us and meet all of our nuanced needs. It was a huge deal for us to not have to change processes for over 600 staff."

We followed an agile methodology in our transformation, resulting in a highly collaborative and dynamic process. PHSS was actively involved in the development of its digital transformation, providing regular feedback and making decisions along the way. This allowed for the solution to be tailored specifically to their needs and for any issues or challenges to be addressed in a timely manner. The agile approach also allowed for flexibility and the ability to pivot when necessary, ensuring that the final product met PHSS' expectations and was truly fit for purpose.

"A partnership approach" Katie Coughlin.

As with any digital transformation, there were challenges and obstacles to overcome. Katie remarked, "We've encountered numerous problems over the past two years, but you have never once told us that we have to change our process. Instead, you have always come up with other solutions to make it work for both of us. It really demonstrates a partnership approach." During our 2-year partnership with PHSS, we have made significant progress. We decided to use Microsoft Power Platform as our open architecture

foundation and build a portal on top to reduce licensing costs and increase user-friendliness. We started by completely replacing the system that PHSS had attempted to implement in 2017, which required migrating all staff data to our new system, called "Digital by Design."



We have successfully migrated the staff data and created individual profiles for each member of the PHSS team. These profiles, accessible through the portal, provide staff with the ability to review and update their personal information, including demographic details, emergency contacts, consents and waivers, and employment history.

Our next focus was addressing PHSS's most pressing issue: time sheets. We developed a comprehensive time sheet entry system that offers a customized user experience based on an employee's role, locations worked, hours worked, and more. This interface automates 187 business rules to streamline data input and provide detailed, personalized information for payroll based on a variety of employee, location, regulatory, and client inputs. This solution has greatly improved the efficiency of PHSS's payroll process. PHSS saves over \$11,000 annually on paper and toner costs. Furthermore, they no longer struggle with having to find storage space for 52,000 sheets of paper per year.

With the new timesheet entry system in place, we also developed payroll reports

that provide PHSS with targeted payroll data at the touch of a button. These reports are fully customizable and can be adapted to meet changing payroll needs. Our system also automates the tracking of staff entitlements, including vacation, sick time, bank time, and overtime. STAT holiday reimbursement is seamlessly integrated into the system and reflected in all payroll reports, streamlining the process even further. As a result of the payroll management system, PHSS is able to redirect 3000 hours toward value added activities annually, rather than processing payroll.

We've also enhanced staff management by tracking staff skills and training within our system and cross-referencing them with a location management function to ensure that the right staff with the necessary skills are always at the appropriate location. With our most recent deployment, Consumer Management, we can now track people supported data within our system. This lays the foundation for future care-centred capabilities, such as care plan management, progress note tracking, online medical forms, medication tracking, and more.

Meeting the needs of the people supported by PHSS requires careful scheduling, and with 600 staff to coordinate for 24-hour coverage at over 70 locations across Ontario, it's no small task. That's why we're currently developing a scheduling solution that will provide an online platform for Coordinators and Senior Coordinators to schedule staff across locations using scheduling templates and rotating shifts. This capability will allow staff members to easily alter the schedule, switch shifts, fill open shifts, and request time off, streamlining the scheduling process and

ensuring that the needs of people supported are always met.

Future functionalities include a digital risk and incident management system, progress note management, care plan management, compliance and daily tracks management, health, and safety management and streamlined training and onboarding.

PHSS faces increased training and onboarding costs due to shortage of PSW and DSW certified applicants. The process now takes 100 hours compared to 40 and includes a paper-based orientation package that can lead to lost paperwork. Shannon Riley, Executive Lead, Services, explains, “The problem is, sometimes they’ll hand it in, but they may not have done a few things. As a result, the things that were missed get handed in on a loose piece of paper which gets lost. It’s nobody’s fault and it could be in so many different places.”. Once the employee is onboarded, the paperwork does not stop there. The coordinator must continually track skills and certifications.

Digitizing care binders offers a huge opportunity to increase efficiency, and mitigate the risk of lost paper, Shannon explains, “We have a lot of things in these binders that are important. It’s people’s history.”. All these transformation initiatives

will limit manual resource intensive tasks and allow staff to focus on what matters most; the individuals they serve. We, alongside PHSS, project that when these capabilities are completed, we will have redirected over 75,000 hours annually to the care of people supported.

Conclusion

PHSS has come a long way since its humble beginnings as a group of families searching for care and support options for their children with medical and complex needs. PHSS has truly made a difference in the lives of so many. Despite facing challenges and setbacks in their efforts to digitalize, PHSS has persevered and is now well on its way to achieving a fully-fledged digital transformation. With our help, PHSS has been able to overcome their previous difficulties and implement a custom solution that fits their unique needs. From automating 187 business rules for streamlined timesheet entry to tracking staff skills and training, PHSS has seen tremendous success in their digital journey so far. And with even more exciting innovations on the horizon, there’s no telling what this compassionate and forward-thinking organization will accomplish next. We’re proud to be a part of PHSS’s journey and can’t wait to see what the future holds.

“I think this journey is not just about making us more efficient as an organization. It’s also about promoting technology so people can be more independent and more in control of their lives, in their community and in their homes. And so, I think any organization that’s really living their mission needs to be looking at all of this, all the time. It’s not about whether I have a better payroll. It’s about that person we’re supporting, is their life better if INVORG can say “Hey I can do this piece of technology to help that person communicate better” or whatever it is. I think that’s the power of working in these environments.”

Brian Dunne, President & CEO