

0365 at a
Healthcare Org



**A Migration
Story Told in
4 Chapters**

Richmond SharePoint User Group Meeting

July 29, 2020

About the Author

Tami Buckman

Midlothian VIRGINIA

tamibuckman.com

UX (User Experience) Design

Product Engineer

Technology Training & Support



Product Engineer
BON SECOURS MERCY HEALTH

These are a few of my favorite things:

- Graphic Design
- Branding
- Agile / Lean
- Business Process Automation
- Infographics
- Design Thinking

Table of Contents

Chapter 1:

The Back Story

Chapter 2:

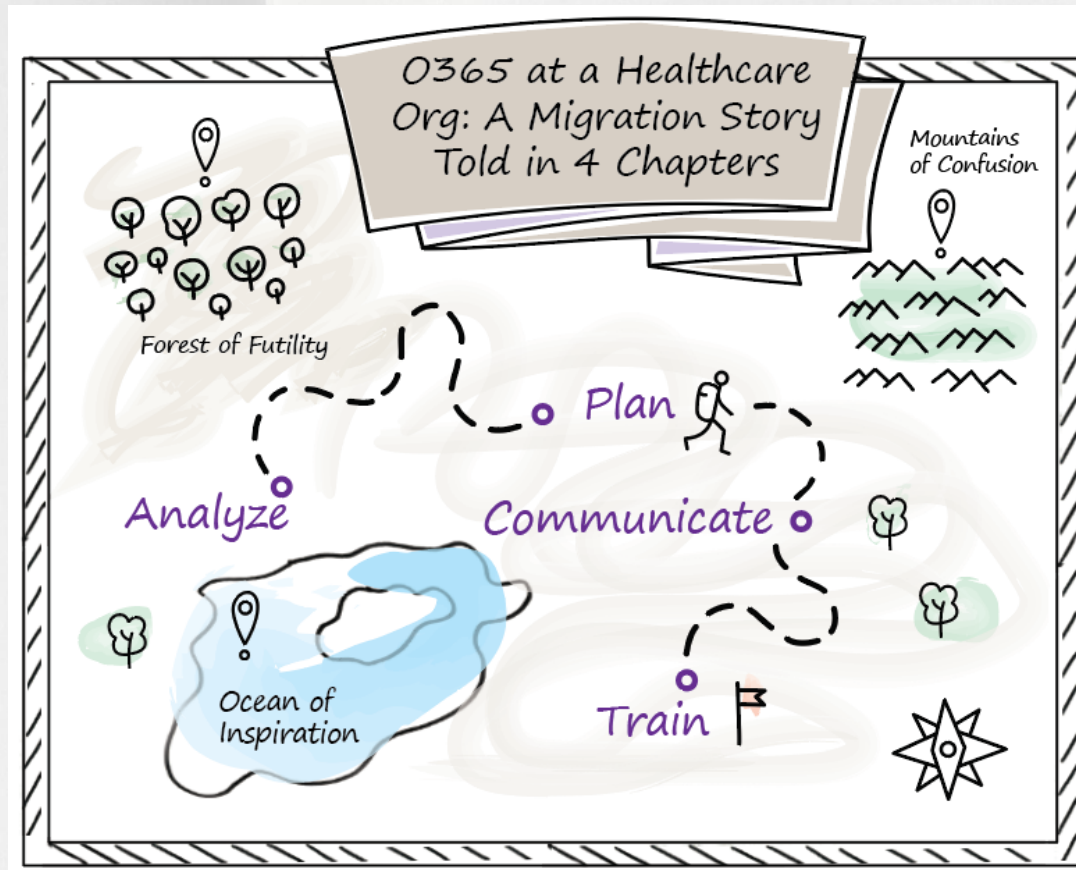
When an Apple Does
Not Equal an Orange

Chapter 3:

Power to the People

Chapter 4:

My Favorite Apps



Time to Poll the Audience!!

What summer treat best describes your company's transition to Microsoft 365?

- Popsicle** – We're melting in the sun! Please help!
- Watermelon** – Making progress but still picking out the seeds.
- Hot dog** – We're on a roll, and we're hot with our progress
- S'mores** – We've got the perfect combination, we want s'more!

<https://forms.office.com/Pages/ResponsePage.aspx?id=3OyEu1Ga60GIDBeMUVPVYeVvX4J8zi1KkQEVdMXweHFUNkVXSUXtUhtOUM0UFIVM0IJWkQzS1U1TC4u>

Chapter 1

The Back Story

Chapter 1

The Back Story



+



MERCYHEALTH

=

BON SECOURS MERCY HEALTH

Bon Secours Mercy Health by the numbers

ONE OF THE 5 LARGEST
Catholic health care systems in the US,
the LARGEST private provider in Ireland



MORE THAN **1,000** SITES OF CARE  IN THE US
AND IRELAND



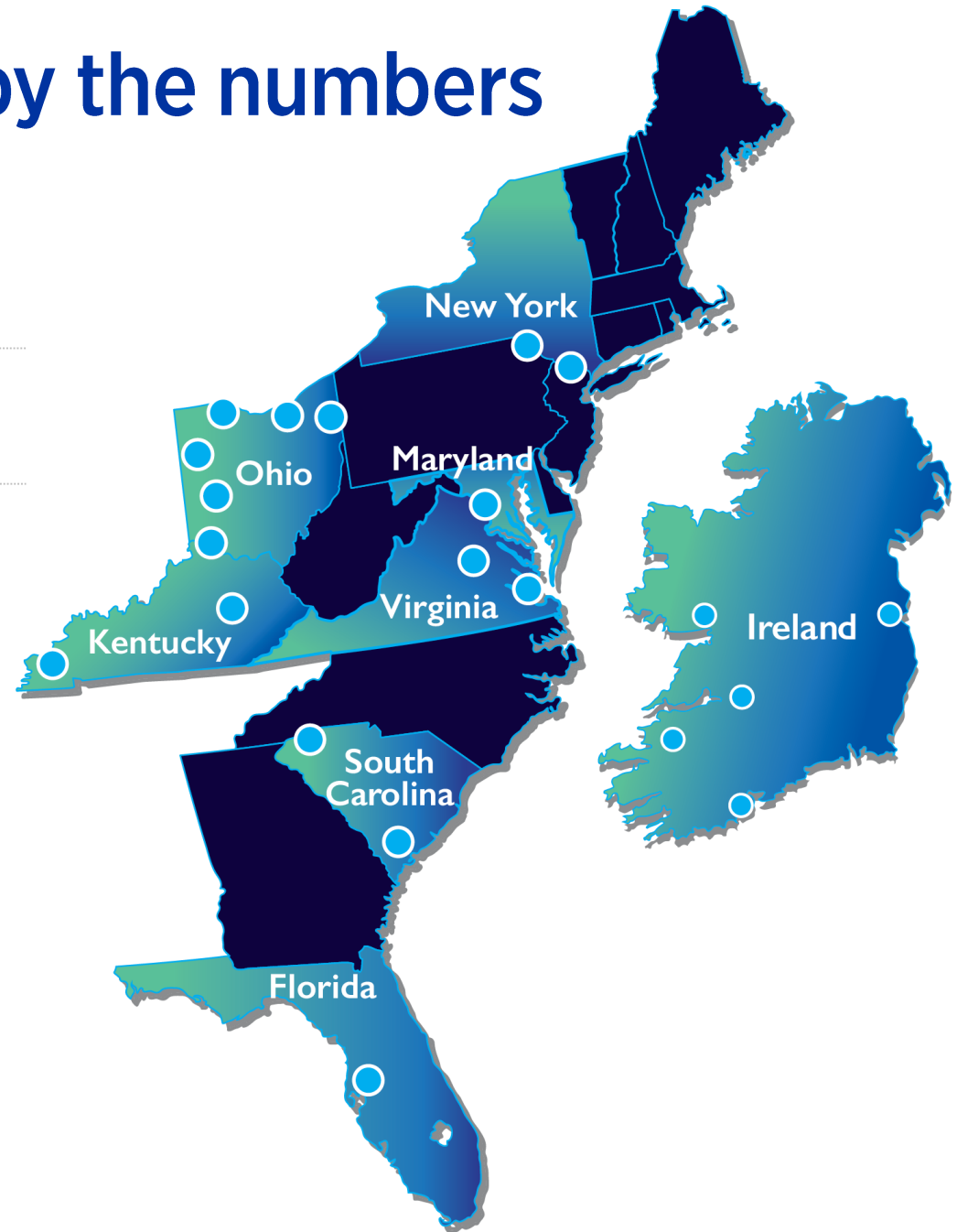
MORE THAN **\$10 BILLION**
in pro forma net operating revenue

MORE THAN **\$2 MILLION** A DAY
IN COMMUNITY BENEFITS 



50 HOSPITALS

2,600 PROVIDERS IN THE US
450 CONSULTANTS IN IRELAND
60,000 TOTAL ASSOCIATES



The Characters

Intranet Consolidation Workgroup



Tasks

Strategy

Implementation

Communication

Consultation

Training

Chapter 2

When an Apple Does Not Equal an Orange

Chapter 2

When an Apple Does Not Equal an Orange



SharePoint 2010



SharePoint 2013



SharePoint
2010/2013



O365

Chapter 2

When an Apple Does Not Equal an Orange

Intranet “public” sites or publishing sites for company wide communications, policies and reports:

The screenshot shows a SharePoint 2013 Public Site for Mercy Health Hub. The header includes the text "Mercy Health Hub" and "BON SECOURS MERCY HEALTH". Below the header is a navigation bar with links: HUB HOME, SUPPORT SVCS/DEPTS, SPECIALTIES/SVCS, REGIONS, POLICIES, and FIND A DOCTOR. The main content area features a sidebar with "Employee Quick Links", "Health & Wellness", "Manager Quick Links", "Integration News & Resources", "SafeCARE", and "Recent". The main content area has a "Mercy Health Hub" title, a "BON SECOURS MI" logo, and a "Our Mission" section with the text: "To extend the compassion. Improving the health and v and bring good help to the who are poor, dying and u". Below this is a news item titled "Bon Secours Mercy Health to purchase three hospi southeastern Virginia" dated "Oct 28, 2019".

SharePoint 2013 Public Site

The screenshot shows a SharePoint 2010 Publishing Site for IRIS. The header includes the text "IRIS" and "LOCAL SYSTEM: BSHSI". Below the header is a navigation bar with links: BSHSI, About Us, Resources, Departments, Human Resources, and Mission. The main content area features a "We need you!" announcement: "The AHRQ survey is open from Nov. 1-30." with the text: "Associates hired prior to Aug. 1 who work in a hospital setting in roles other than physicians, APC and residents can participate. You can access the survey here. If prompted for a Kiosk code, enter your Bon Secours Employee ID." Below this is a "Daily Reflection" section with the text: "An austere, dedicated, humorless, and uncompromising personality." An early biographer of St. Charles Borromeo St Charles was Bishop of Milan in 1576 when there was a famine due to failure of crops followed by a pl... Read More...". The footer includes "Ask HR" and "WEBSITE", "PHONE", and "EMAIL" icons.

SharePoint 2010 Publishing Site

Chapter 2

When an Apple Does Not Equal an Orange

Intranet community sites or **team sites** with restricted access such as project specific workgroup or department.

The screenshot shows a SharePoint 2013 community site for 'Data Capture' at Mercy Health. The top navigation bar includes 'HUB HOME', 'SUPPORT SVCs/DEPTs', 'SPECIALTIES/SVCs', 'REGIONS', 'POLICIES', 'FIND A DOCTOR', and 'PERFORMANCE'. The main content area features a 'Newsfeed' with three posts from users Dirr, Melissa; Huelsman, Sherry L; and Dirr, Melissa. To the right, there are sections for 'North Documents' and 'South Documents', each with a 'new document or drag files here' prompt and a list of documents with columns for Name, Modified, and Modified By.

SharePoint 2013 Community Site

The screenshot shows a SharePoint 2010 team site for 'BSHSI Organization Development'. The page title is 'Welcome BSHSI OD team!'. Below the title is a paragraph of introductory text. The main content area is a table listing 'OD Team Documents' with columns for Type, Name, Category, and Modified. The table lists several documents, including '2019 BSMH Change Roadmap Revision' and 'Change Roadmap'. A left-hand navigation pane lists various libraries and resources.

Type	Name	Category	Modified
	2019 BSMH Change Roadmap Revision		4/4/2019 10:56 AM
	Change Roadmap		8/4/2016 11:20 AM
	Facilitative Leadership		4/5/2016 1:29 PM
	Flawless Consulting		8/24/2016 12:53 PM
	Microsoft and Webex Tips		7/6/2018 2:46 PM
	OE Resources		12/9/2016 2:42 PM
	OE Team Meetings		12/29/2017 12:39 PM
	Org Design Toolkit		5/3/2019 3:31 PM

SharePoint 2010 Team Site

Chapter 2

When an Apple Does Not Equal an Orange

2018

Legacy Bon Secours Intranet
(SharePoint 2010)

Legacy Mercy Health Intranet
(SharePoint 2013)

Legacy intranet content will move to 2 distinct technology tools:

Future State



Ministry Intranet
(SharePoint Online)



Collaboration Platform
(MS Teams)

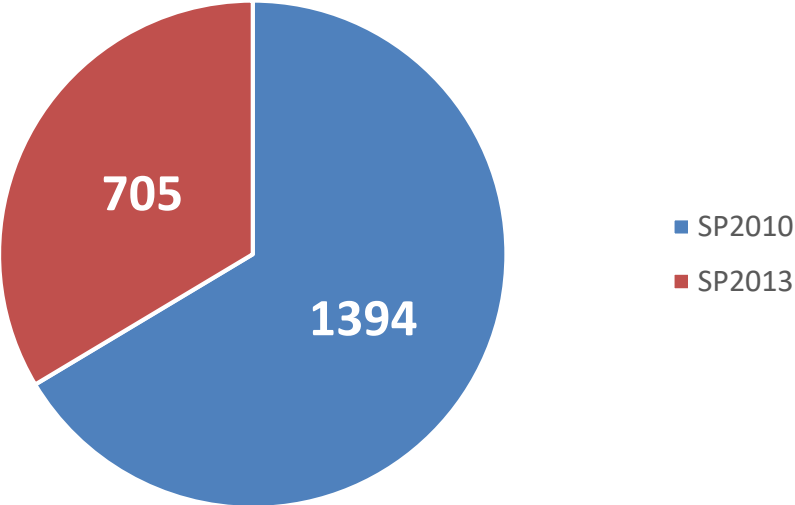
The Bon Secours Mercy Health Apposphere

Goal: Optimized Application Footprint

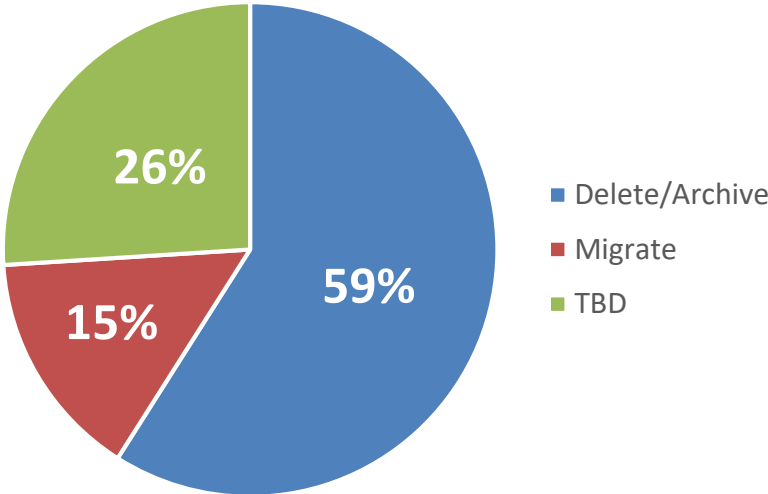
Distinct Use for Each App

Microsoft Teams	Service Now	Kronos	Networked Files Shares
SharePoint Online	Zoom	Workday	Salesforce

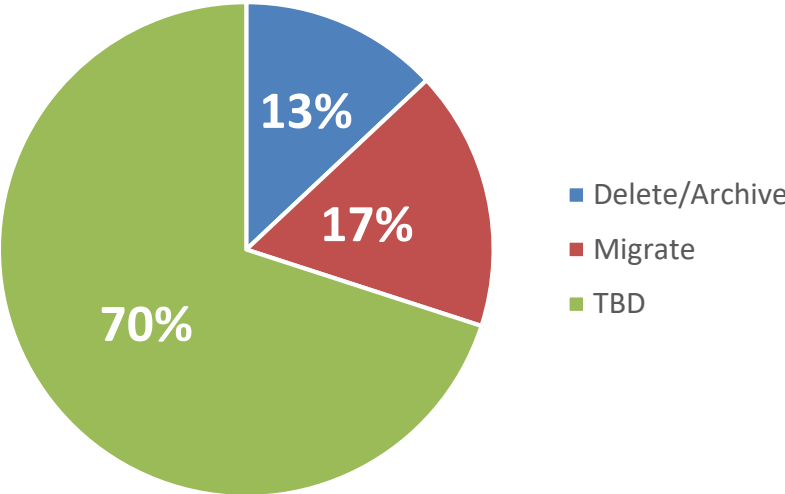
Team Sites to Move to Teams



SP2010 Progress



SP2013 Progress



Chapter 3

Power to the People

Chapter 3

Power to the People

The Phases of Migration

Plan

Where have we been and where are we going?

Prepare

What content is still relevant?

Train

How will we do things differently with these new tools?

Migrate

Move content over to new system.

Chapter 3

Power to the People

“I get paid to practice. I play the game for free ...”

-- Junior Seau



Chapter 3

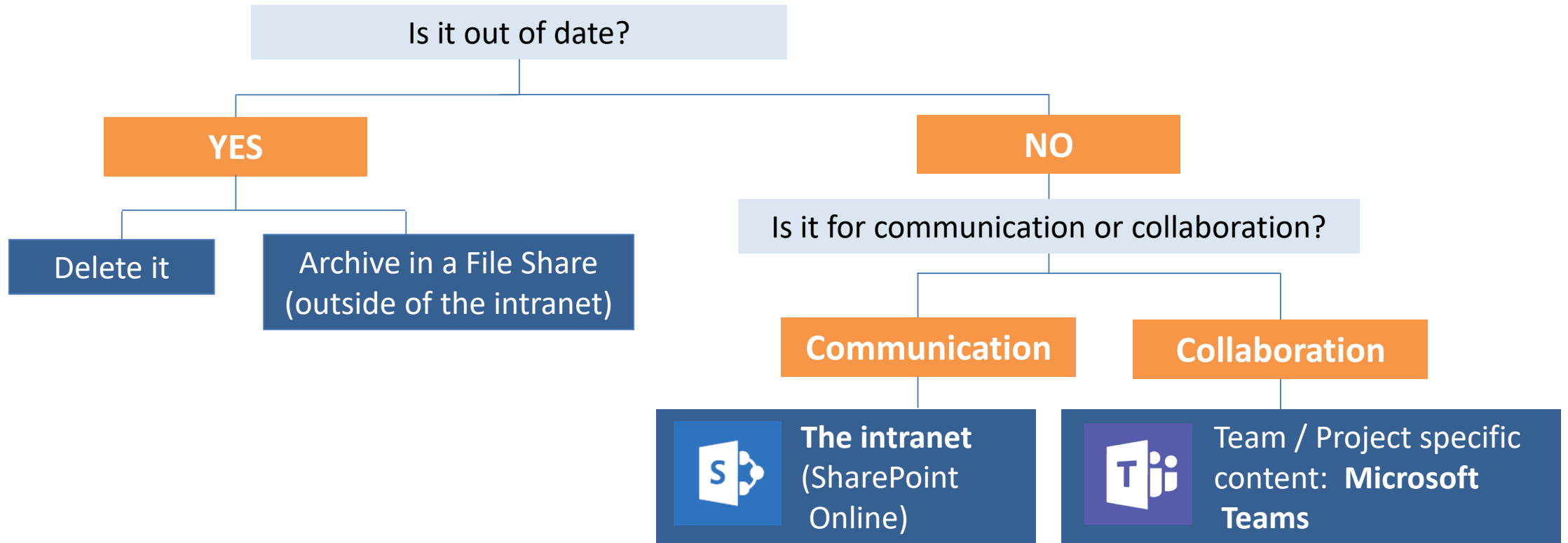
Power to the People

The Phases of Migration



Reviewing existing content, cleaning up, reorganizing

Content Analysis – Clean Up





Intranet Support

SharePoint Online Training

Ask questions and get help

Microsoft 365 Training

Site Pages

Site Contents

More options and Edit

Not following Share

New Send by email Promote Page details

Published 4/8/2020 Edit

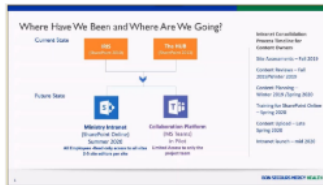
SharePoint Online training

Course 1: Certified Intranet Migration Ready

This training course will review how to prepare your IRIS publishing or Hub public site for migration to the new intranet built on SharePoint Online. After completing all the modules and your site clean up, you will be certified intranet migration ready.

During the Intranet transition: Submit any questions or requests to:

mailto:hubsupport@mercy.com



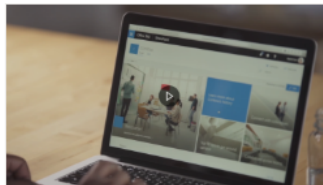
Intranet Project Overview Video



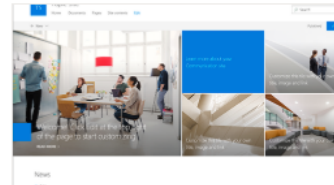
Intranet (IRIS and The Hub) Site Clean Up Video



Intranet Site Review Checklist



What is SharePoint Online?



What is a SharePoint communication site?

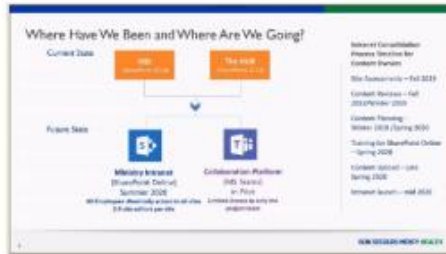
Intranet Site Build References [See all](#)

New All Documents

- Name
- IntranetSiteReviewChecklist.pdf

Course 1: Certified Intranet Migration Ready

This training course will review how to prepare your IRIS publishing or Hub public site for migration to the new intranet built on SharePoint Online. After completing all the modules and your site clean up, you will be certified intranet migration ready.



Intranet Project Overview Video



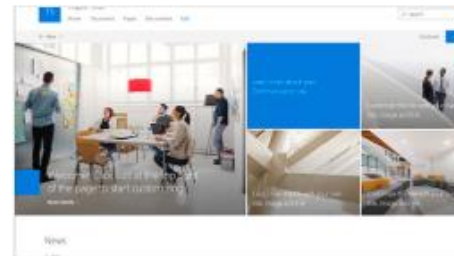
Intranet (IRIS and The Hub) Site Clean Up Video



Intranet Site Review Checklist



What is SharePoint Online?



What is a SharePoint communication site?

Strategy for Training

- Use as much Microsoft produced training as possible.
- Create short (5-8 minute) videos
- Clearly state learning objectives at the beginning of the video
- Start with the Why (What is the reason for this change? How does this project fit into the larger company vision? What's in it for them?)
- Include downloadable PDF guide
- End with Next Steps with deadline

Intranet Public / Publishing Site Owner Content Review

- ▶ Removing old content from our current intranet in order to be ready for our new intranet

Intranet Public / Publishing Site Review

SITE OWNER'S GUIDE

TASKS TO COMPLETE

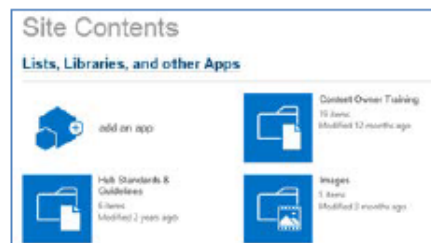
- Review Libraries:** Delete Old Documents, Archive Historic Documents, Delete Libraries 1
- Review Lists:** Delete List Items, Delete Old Lists, Export Historic Lists 3

Analyze Lists and Libraries to Remove Inactive Content.

Review every component of your site: each list, each library, and each document within each library. To see a list of your site content and last modified dates:


1. Click **Site Actions** → **View All Site Content (IRIS)**. Click **Site Contents** in the left navigation (the Hub). You'll see a list of the site's libraries and lists. It will show how many items are in the list/library and the last modified date.


Document Libraries	Items	Last Modified
Documents	0	8 months ago
Images	2	8 months ago
LS CRO Material New	8326	8 months ago
Pages	0	8 months ago
Shared Documents	1264	2 weeks ago

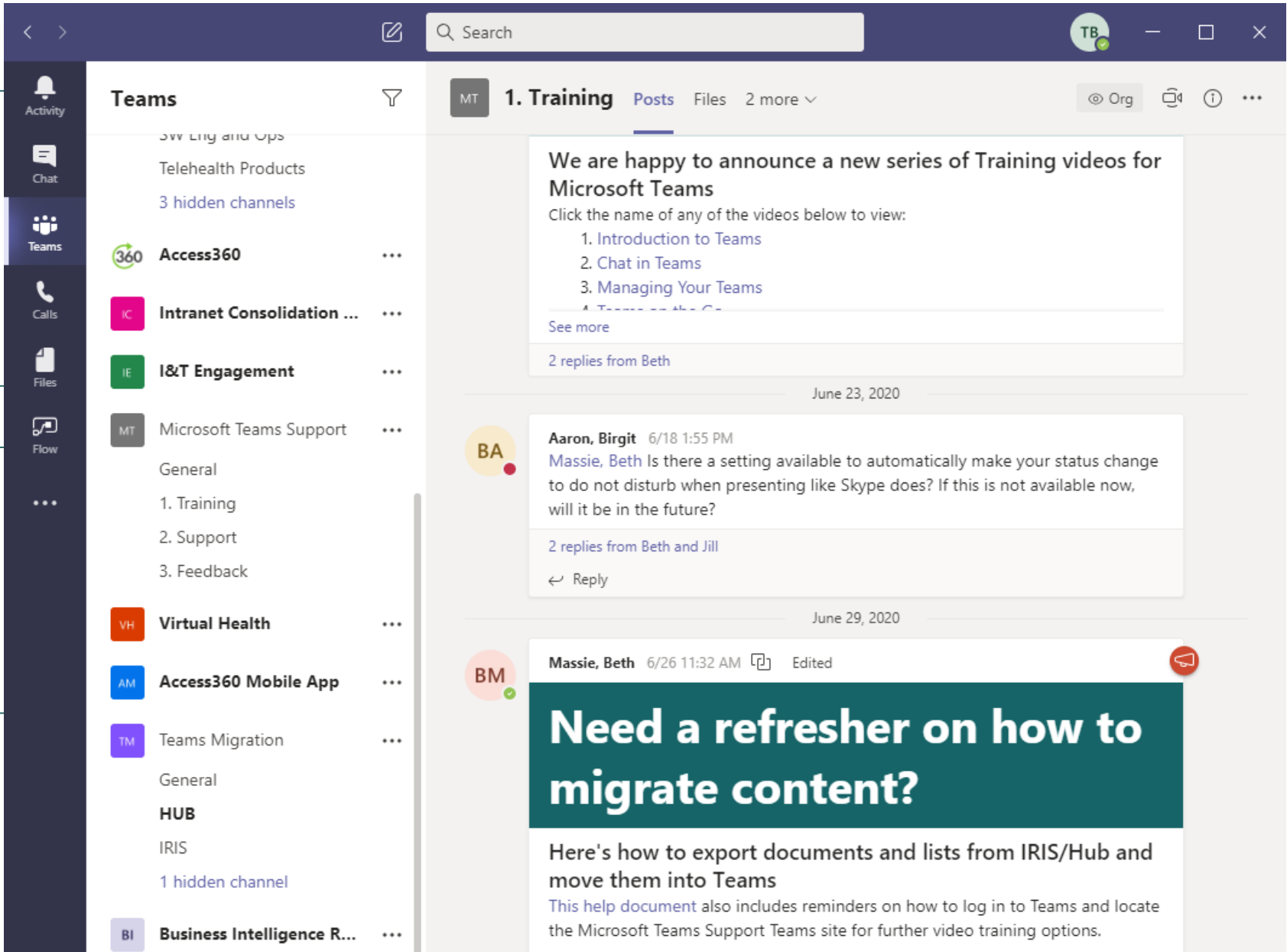


2. Click the name of a list or library to open it in full screen mode.
3. If you open the list or library and cannot see the **Modified date**, click **Modify View** in the List or Library tab. Place a checkmark to the left of the Modified column. Press OK.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Type (icon linked to document)	1 ▼
<input checked="" type="checkbox"/>	Name (linked to document with edit menu)	2 ▼









 Microsoft Teams Support
 General
 1. Training
 2. Support
 3. Feedback

 Teams Migration
 General
 HUB
 IRIS



Search TB

Teams

- SW Eng and Ops
- Telehealth Products
- 3 hidden channels
-  **Access360**
-  **Intranet Consolidation ...**
-  **I&T Engagement**
-  Microsoft Teams Support
 - General
 - 1. Training
 - 2. Support
 - 3. Feedback
-  **Virtual Health**
-  **Access360 Mobile App**
-  Teams Migration
 - General
 - HUB**
 - IRIS
 - 1 hidden channel
-  **Business Intelligence R...**

1. Training Posts Files 2 more

We are happy to announce a new series of Training videos for Microsoft Teams
 Click the name of any of the videos below to view:

1. Introduction to Teams
2. Chat in Teams
3. Managing Your Teams
4. Teams at the Core

 See more
 2 replies from Beth
 June 23, 2020

Aaron, Birgit 6/18 1:55 PM
 Massie, Beth Is there a setting available to automatically make your status change to do not disturb when presenting like Skype does? If this is not available now, will it be in the future?
 2 replies from Beth and Jill
 Reply

June 29, 2020

Massie, Beth 6/26 11:32 AM Edited

Need a refresher on how to migrate content?

Here's how to export documents and lists from IRIS/Hub and move them into Teams
[This help document](#) also includes reminders on how to log in to Teams and locate the Microsoft Teams Support Teams site for further video training options.

Chapter 4

My Favorite Apps

Chapter 4

My Favorite Apps

My Favorite SharePoint Features

- Ease of editing **Modern Pages**
- **Quick Links:** variety of style options
- Easy to **Feature Content:** Highlighted content, Recent Documents, File viewer

My Favorite Teams Features

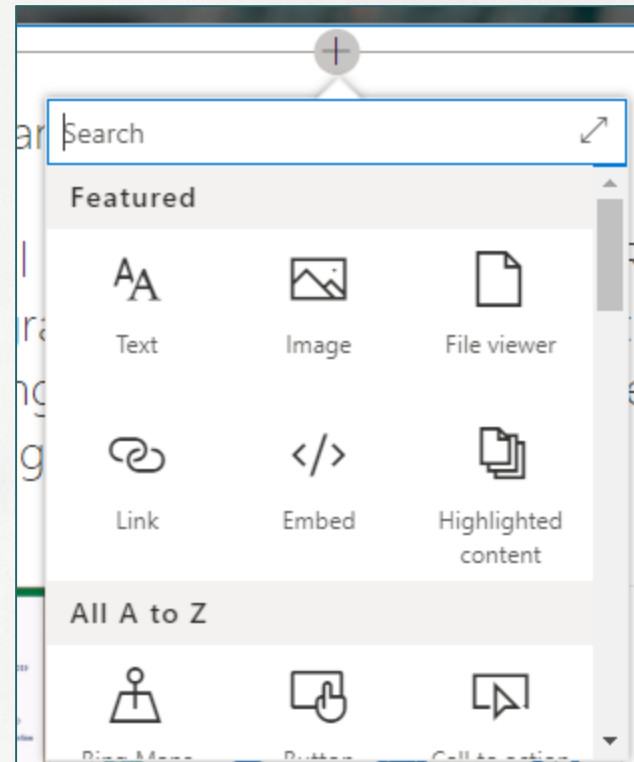
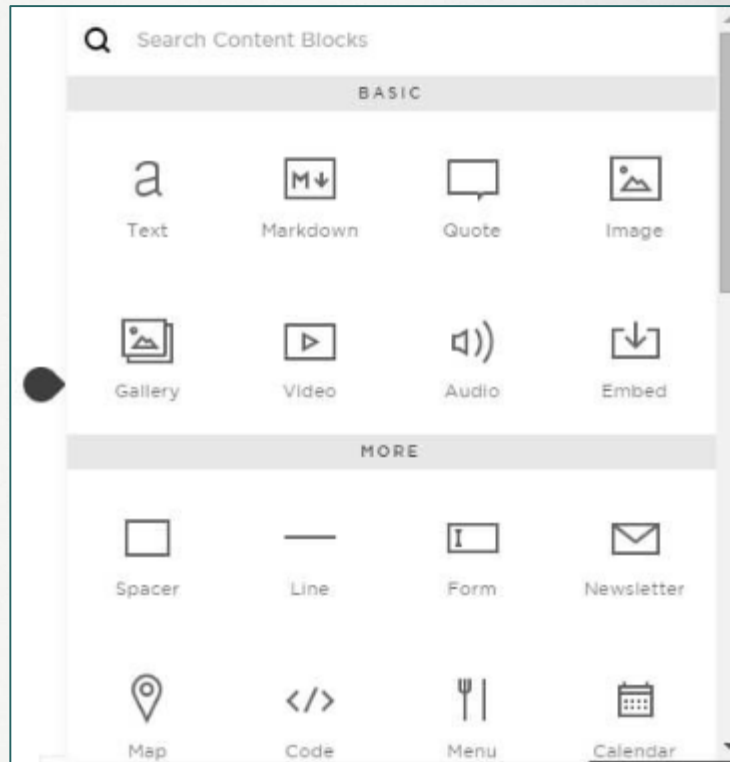
- Co-Editing a Document:
Conversations around a document
- **Quick Poll** in Conversations
- **Planner:** Task tracking color coding, charts

Chapter 4

My Favorite Apps

Ease of **Editing Modern Pages**, of course!

But I'm just saying... Has anyone seen Squarespace?









Chapter 4

My Favorite Apps

Quick Links: variety of style options

Layout options

 Compact	 Filmstrip	 Grid
 Button	 List	 Tiles

Show image in layout

Yes

Committee/Workgroup Directory - All

Committee/Workgroup Directory - Clinical

Committee/Workgroup Directory -
Legal/Risk/Supply Chain

Committee/Workgroup Directory - I & T

Committee/Workgroup Directory - Other

Chapter 4

My Favorite Apps

Quick Links: variety of style options

Which type below matches your request?



Application New to the BSMH Environment – Clinical



Application New to the BSMH Environment – Non-clinical



Application Expansion or Enhancement - Clinical



Application Expansion or Enhancement – Non-clinical



EHR Enhancement, Order Sets, Care Plans, BPA, Integrations wit...

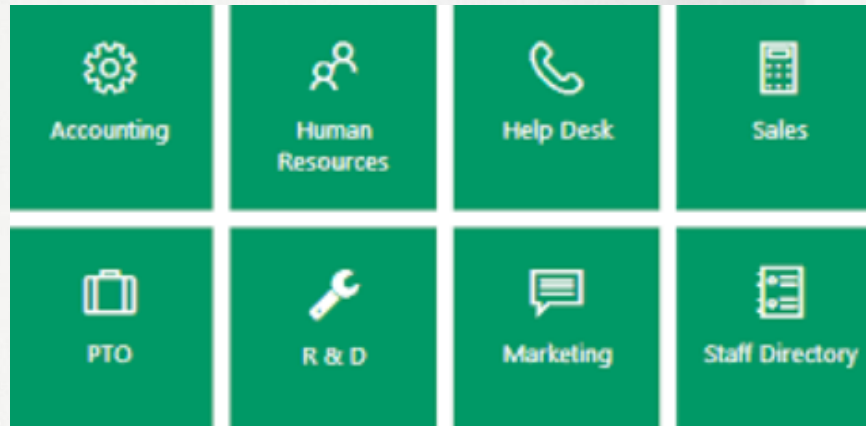


Medical Devices or Gadgets with Integration to our Systems

Chapter 4

My Favorite Apps

Quick Links: variety of style options



Other Resources



Sample Link

This is a description



Sample Link 2



Sample Link 3



Sample Link 4

Chapter 4

My Favorite Apps

Easy to **Feature Content**: Highlighted content, Recent Documents, File Viewer

Highlighted content ×

Select the content you want to highlight, and choose layout options.

[Learn more](#)

Use a basic filter to narrow search results, or use a custom query with CAML or KQL code.

Filter
 Custom query

Content ^

Source







Document library

Document type

[+ Add document type](#)

Filter and sort ^

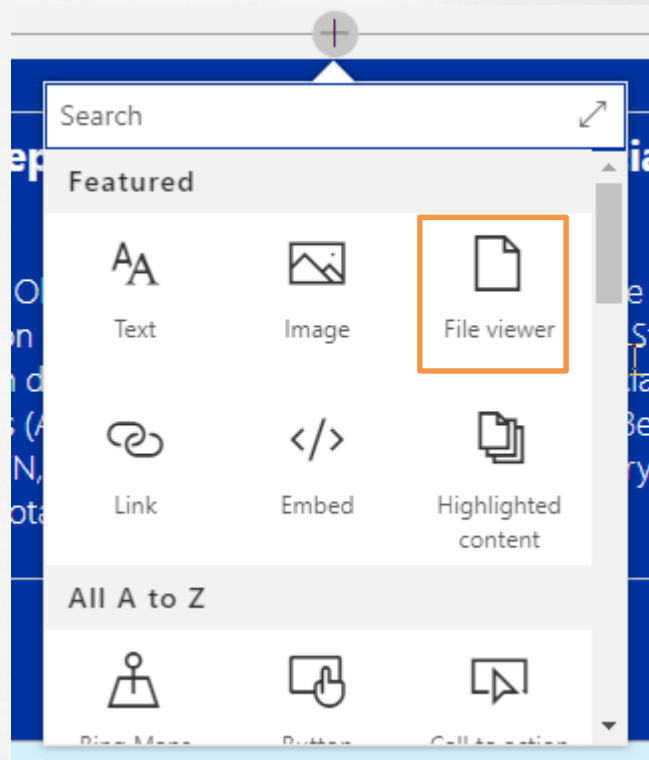
Recent documents See all

	Name
	IntranetI&T_EHR teams > ... > General
	Step 1 KPI Brainstorming teams > ... > ...asures of Success
	Goals of 84Sight pilot and other SDoH initi... teams > ... > 84sight
	BSM_UseCase_PH teams > ... > Perception Health
	TrainingPatientsHP sites > ... > ...e Expert Training

Chapter 4

My Favorite Apps

Easy to **Feature Content**: Highlighted content, Recent Documents, File Viewer



File viewer

You can display a specific chart, table, range or the entire workbook. To display a chart or a table, you'll need to enter its name.

Chart

Chart name

[How do I find the name of a chart or table?](#)

Change file

Easy to **Feature Content**: Highlighted content, Recent Documents, File Viewer

PB Physician Builder & Power User Programs ☆ Not following
Private group 👤 3 members

Home + New Page details Published 7/27/2020 Edit

Conversations
Documents
Notebook
Pages
Physician Builders & Pow...
Site contents
Recycle bin
[Edit](#)

Honor Roll Tracking

Program	Blue	Grey	Orange	Yellow	Total
CarePATH	19	3	0	11	33
ConnectCare	9	3	6	5	23

Documents [See all](#)

... ☰ All Documents

- Name
- AC Resources
- General
- Leadership Documents
- Meeting Minutes
- Physician Builder Security Class C...
- Physician Resources

Teams : Co-Editing a Document: Conversations around a document

The screenshot displays the Microsoft Teams interface. On the left is a navigation sidebar with icons for Activity, Chat, Teams, Calls, Files, and Flow. The main window shows a document titled "JourneyMap.pdf" with a search bar at the top. The document content includes a title "Customer Journey Map Care Management Referral Assignment" and two process flow diagrams: "CURRENT PROCESS" and "FUTURE PROCESS".

Worksheet Name Process to Map

Customer Journey Map Care Management Referral Assignment

HOW TO USE THIS WORKSHEET:

1. Document current workflow including people, processes, and technology involved, noting opportunities for improvement.
2. Map optimal process that addresses inefficiencies in current workflow.

OUTCOME: Clearly illustrate the problem we are trying to solve.

- Operational process working well. Do not alter.
- Indicates an issue with current process

CURRENT PROCESS - <include Market Name>

<p>RN identifies a patient who qualifies for Care Management based on Epic Risk Score. Assesses medical, functional, and psychosocial needs. Develops Plan of Care.</p> <p>Phone, Epic, websites?, binders?</p>	<p>Connects with Physician for plan of care agreement.</p> <p>Epic</p>	<p>Coordinates referrals to social workers and CBOs for SDOH.</p> <p>Email, Fax, Phone</p>	<p>Manages patient for 90 days and documents self-management goals that are met.</p> <p>● Time consuming, manual process to close loop with referrals.</p> <p>Epic, Phone</p>
---	--	--	---

FUTURE PROCESS - Pilot - Cincinnati Market

<p>RN completes targeted SDOH assessment in Epic in addition to existing assessment, plan of care, and interventions. Refers patient to Community Health Worker.</p> <p>Phone, Epic, websites?, binders?</p>	<p>CHW completes home visit.</p> <p>Epic ?</p>	<p>CHW connects to CBO(s).</p> <p>Email, Fax, Phone</p>	<p>CHW advocates for patient and checks in with patient. Closes the loop with referral by doing something???</p> <p>Epic, Phone</p>
--	--	---	---

Chat Conversation:

6/22 1:18 PM
JourneyMap.pdf

6/22 1:20 PM
Moore, Janine Wessels. Taylor Take a look at this first draft of a visual flow diagram. I'm hoping to include details about all the systems used (digital or otherwise) and see where we could optimize... note where things work well and where they do not.

I don't know all the details of the current or new flow but thought a visual flow diagram may help us more clearly define where we are making changes and why???

6/22 5:13 PM
Moore, Janine Personally. I think it looks great. I clearly understood what information is lacking and could follow the steps. The only thing I'd suggest (but you are the visual designer!) is possibly making the future state and present state flows different colors, so it jumps out that it's not just one long flow on two rows.

Teams : Quick poll

The screenshot shows a Microsoft Teams chat window with a poll. The chat title is "General" and it includes tabs for "Posts", "Files", and "Wiki". The poll was created by "Buckman, Tami" on 7/15 at 5:08 PM. The poll question is "Does anyone know you can add a Quick Poll?". There are two options: "Yes" and "No". A "Submit Vote" button is visible. Below the poll, a progress bar shows that 100% (1) person has voted "Yes" and 0% (0) have voted "No". The poll has 1 response. The date "July 16, 2020" is visible at the bottom right of the chat window.

TM **General** Posts Files Wiki

Forms 7/15 5:08 PM Updated

Buckman, Tami created a poll
Results are visible to everyone; Names recorded

Does anyone know you can add a Quick Poll?

Yes

No

Submit Vote

← Reply

Forms 7/15 5:08 PM Updated

Yes	100% (1)
No	0% (0)

1 response

← Reply

July 16, 2020

The screenshot shows the Microsoft Teams app store interface. A search bar at the top contains the text "Find an app". Below the search bar, a "Suggestions" section displays several app icons: "Forms" (highlighted with an orange box), "Power BI", "Azure Boards", "News", "Places", "Stocks", "Weather", and "Wikipedia Search". At the bottom right of the suggestions area, there is a "More apps" link with a right-pointing arrow. The bottom of the screen shows the Teams chat interface with a toolbar containing icons for attachments, emojis, GIFs, video, voice, and a hand icon (highlighted with an orange box).

Forms 7/15 5:08 PM Updated

Yes

No

1 resp

← Reply

Michel, S
Roney, A
teams m

8 replies f

← Reply

Start a n

Find an app

Suggestions

- Forms
- Power BI
- Azure Boards
- News
- Places
- Stocks
- Weather
- Wikipedia Search

More apps >

Hand icon

Teams : Planner: Task tracking color coding, charts

Milestone Workplan				
<input type="checkbox"/> Key Strategies / Areas of Focus	Expected Date of Completion	Status:	% Complete	<input type="checkbox"/> Assigned To
1.1 Test	3/31/2014		35 %	Kaline, Anna Grant
Align efforts with GPRO reporting to ensure submission of data is complete	4/2/2015			
Get Charter Signed			10 %	

Column name:

The type of information in this column is:
 Calculated (calculation based on other columns)

Description:

Formula:

```
= "<DIV style='font-size:12px; background-color:&CHOOSE (RIGHT(LEFT([Status Choices],2),1),"white","green","yellow","red","steelblue")&";'> </DIV>"
```

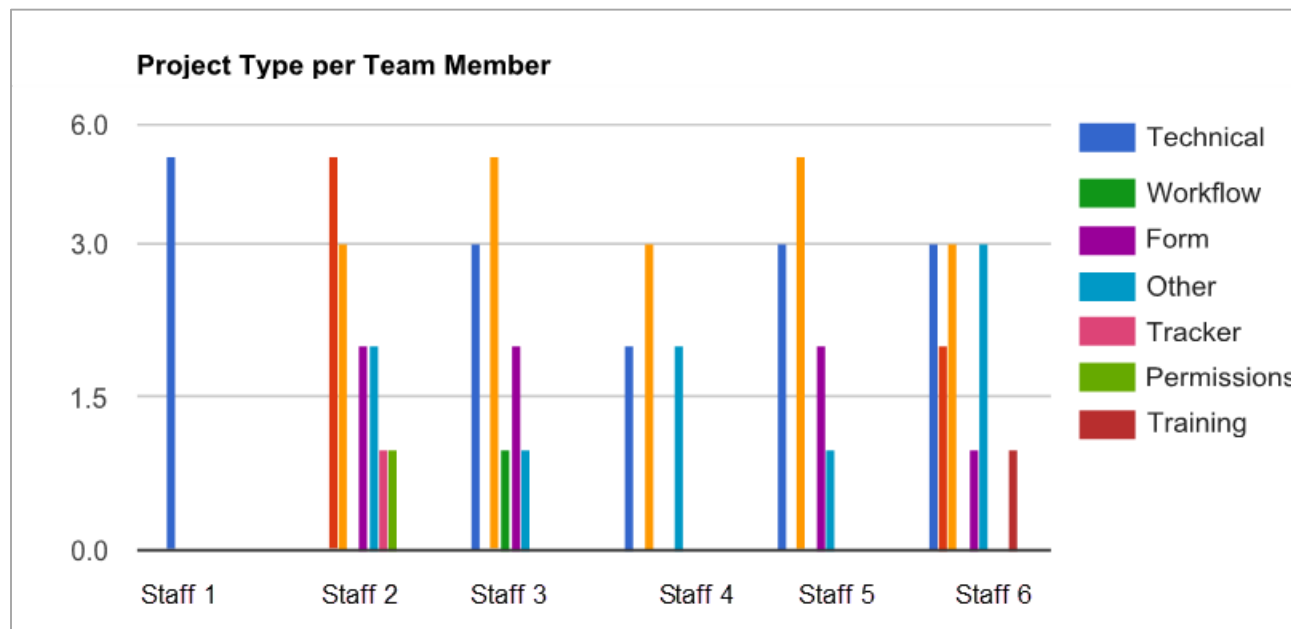
Insert Column:

- % Complete**
- Created
- Expected Date of Com...
- Key Strgtes / Are...
- Milestone
- Modified
- Priority
- Start Date
- Status Choices

[Add to formula](#)

The data type returned from this formula is:
 Single line of text
 Number (1, 1.0, 100)
 Currency (\$, ¥, €)
 Date and Time
 Yes/No

Number of decimal places:



Teams : Planner: Task tracking color coding, charts

The screenshot displays the Microsoft Teams Planner interface for a channel named "General". The top navigation bar includes "Posts", "Files", "Virtual Health Notebo...", "Wiki", "New Program Pipeline", "Test Board", and a plus sign. Below the navigation, there are tabs for "Board", "Charts", and "Schedule".

The main area is a Kanban board with three columns:

- Ready for Go-Live:**
 - Task 1: "Tele-Swing Bed at Tiffin/Willard/Defiance" (Urology and Pulmonology) assigned to Jonathan Barrille (BJ).
 - Task 2: "Telepsych at McAuley Nursing Home" (-Dawn McCall, -Austin Compton (RM), Utilizes classic clinic to clinic Vidyo software) assigned to Zoe A Morris (MZ).
 - Task 3: "Telepsych between Lorain BAC in ED and Nord Center" (Trying to identify best technology solution for circumstances, -Colleen O'Malley) assigned to Zoe A Morris (MZ). This card has a "New Tech" label.
- Ready for Pilot Review:**
 - Task 1: "Telebehavioral Health in Schools" (Live 10/30/19, -Liz Wilson and Lisa Sweeterman) assigned to Zoe A Morris (MZ).
 - Task 2: "Expansion: Telestroke to Youngstown" (Hoping to go-live January/December, contracting time-sensitive, Approved by VHOC in September, -Loubens Delice) assigned to Jonathan Barrille (BJ).
 - Task 3: "TeleInfectious Disease" (Looking to go live mid-October, -Mike Kokinda and Market Leaders) assigned to Zoe A Morris (MZ).
- On Hold:**
 - Task 1: "Inpatient Telepsych in Springfield" (Evaluating design of program in light of not being fully reimbursable- hoping to go to November Workgroup, -Debra Dozier) assigned to Zoe A Morris (MZ).
 - Task 2: "Telecardiology in Youngstown" (On Hold for provider engagement, -Keith Weisenberg) assigned to Zoe A Morris (MZ) and Jonathan Barrille (BJ).
 - Task 3: "Telepharmacy MyChart Video Visits" (On hold- waiting to go-live with telespecialty pharmacy, then telepharmacy in ambulatory clinic to clinic first, -Amy Kramer, Kerri Musselman) assigned to Zoe A Morris (MZ).

Teams : Planner: Task tracking color coding, charts



Chapter 4

My Favorite Apps

My Least Favorite Features

- **Versioning is buried** in the SharePoint site behind Teams
- **Terminology:** Teams has a SharePoint site underneath but SharePoint online is for our more widely accessible content. “I’ll post that to SharePoint”
- We don’t know how to **Hub**, we may be missing out, working to solve the navigation challenge



Questions! Comments!