Menorah Park: A Case History

In November of 2001 Menorah Park engaged the services of Edward Koscic & Associates, Maria Moen of HealthWare Consulting Services along with Kevin Winden and the team at K2HealthTech in preparation for the planned implementation of a complete enterprise-class information system. Well before system selection even began Kevin started a comprehensive investigation of all the information systems in use at Menorah Park to help determine the viability and benefits of converting data from those systems into the new system as well as assessing potential integration issues.

Menorah Park Center for Senior Living, located in Beachwood, Ohio, a suburb of Cleveland, is a not-for-profit Medicare/Medicaid certified health care provider that operates residential and outpatient services. These services include a 350 bed skilled nursing facility, the 200 unit R.H. Myers Apartments and an independent and catered living residence named Stone Gardens, which is a 100 room assisted living residence. They offer home health care services in three locations in Beachwood, Akron and Canton, Ohio. At the main campus they also offer outpatient rehabilitation services including physical, speech, occupational and aquatic therapy; adult day care services, grant-funded research activities and other community services.

The diverse nature of the operations at Menorah Park and its subsidiaries requires that a strong information infrastructure be in place. This is vital to monitoring the schedule, clinical and financial information for approximately 700 residents on the campus, 500 home care patients in the community and hundreds of outpatients that utilize the aquatic therapy center and other services. Menorah Park employs over 1000 employees who care for the residents and patients and work with over 1000 area physicians who manage their care.

Kevin Winden worked with the IT staff at Menorah Park to remotely connect to their Novell and Microsoft NT networks using pcAnywhere, Citrix and Microsoft Terminal Server over Menorah Park's VPN. He was able to run the applications remotely from his offices as well as obtain the actual data files themselves for analysis. What Kevin found was that over the years Menorah Park had implemented over fifteen different information systems, none of which communicated with each other. In addition there were numerous Excel spreadsheets used in many departments as well as a large Access database that the HR department had created to track employees and job applicants.

By February of 2002 Kevin had cataloged these diverse information systems and identified their file structures. The applications used file systems such as Advanced Revelation, Btrieve, Dbase, FoxPro and Visual FoxPro, DB/C ISAM, Sybase SQL Anywhere, Pervasive SQL and others. This information and the resulting content investigation using industry standard and proprietary tools allowed Kevin to plan and prepare for the data conversion that was to come in the months ahead.

In June of 2002 Kevin Winden traveled to Chicago, Illinois for a meeting with the principal software vendor that Menorah Park was investigating. While at the offices of Infosys in Schaumburg, Illinois, Kevin was able to learn the basics of the Homesys application as well as learn the system's capability for importing data into its Microsoft SQL Server database.

In July of 2002 Menorah Park selected the software packages that were to be implemented to replace the existing systems. In August Kevin traveled to Menorah Park to begin detailed work on the data conversion. Menorah Park chose their home health system, HMS+ from HCIS, as the first system to be replaced. This DOS system is written using Advanced Revelation and has limited data export capability, which requires significant knowledge of the internal working of the

application. Since working with the software vendor was out of the question, Kevin had to use a special export tool that allowed for complete export of all the data in an easy to understand format.

The data from the HMS+ system was then mapped to the data in the Infosys Homesys system and formatted according to Infosys specifications. Kevin then used the Homesys system itself as well as Microsoft SQL Server Query Analyzer to import, test and set up the tables. Over 100 megabytes of data was converted greatly reducing the amount of manual data entry that Menorah Park had to do to get the application up and running live by the 1st of November.

Home health data converted from HMS+ included procedure codes and billing rates, patient, caregiver, provider, guarantor, admission, diagnosis, payor, schedule and many other setup tables. Information for almost 500 patients, 200 caregivers and over 800 physicians as well as 11,000 scheduled events were brought into the system at the moment of switchover from the old system. All of the actual conversion work was performed using remote access via Citrix and Terminal Server over Menorah Park's VPN and was completed after hours so as not to interfere with the staff's normal duties during this critical phase in the project.

Immediately after the home health data was converted and the Homesys system was up and running live, Kevin turned to the next task at hand. Namely conversion of the payroll and HR data from Menorah Park's existing systems into the Abra Suite payroll and human resources application that Menorah Park had selected. This conversion had to be completed by December 2nd to allow for parallel processing during the month so that Menorah Park could go live on the Abra payroll beginning in January of 2003.

During the first week of November, 2002 Kevin began mapping the data from Menorah Park's Keane Care VistaKeane payroll system to the data in the Visual FoxPro based Abra system. This Keane Care DOS system formerly known as VistaCARE uses a DB/C ISAM system and has files that contain multiple record types. This is a file system that Kevin is highly proficient in using and of which he has advanced technical knowledge due to his 16 years of working with the system while at CARE Computer Systems before they were acquired by Keane, Inc.

Additionally, since Abra Suite's human resource capabilities far exceed those of the VistaKEANE payroll system, the conversion of payroll data needed to be combined with data from the Access database used by Menorah Park's HR department. Kevin also converted the job applicant information from the HR database into the Abra system as well as the vacation, holiday and sick time used by the employees. Basic information including direct deposit, dependents, deductions and tax status for over 1000 current employees, 2400 terminated employees and over 3000 job applicants was transferred into the new system. This allowed for successful parallel payroll processing and testing during the week of December 2nd.

Kevin also facilitated the importation of secondary job codes and pay rates for caregivers into Abra. The information for this was entered in the Infosys system by Menorah Park staff as part of the set up of that system. Kevin exported that information from Infosys's Homesys system and then mapped it and formatted it to the specifications required by the Abra system. This was vital to the ongoing interface that will occur between the Homesys scheduling system and the Abra payroll and was completed according to schedule.

Menorah Park has also asked Kevin Winden and the team at K2HealthTech to develop specifications for a two-way interface between the Infosys Homesys system and the VisitCall system from Ampersand International. VisitCall is a home health visit tracking system that uses caller ID to monitor the arrival and departure of home health caregivers at patients' homes. This interface will send patient and caregiver information from the Homesys system to the VisitCall

system. It will then, in turn, allow for the import of patient visits from VisitCall into the Homesys system where they can be audited and the information passed to the payroll and billing systems.

The importance of creating a detailed interface specification cannot be emphasized enough and Menorah Park understands its importance. Even though an interface between two different systems may seem simple or insignificant, it still needs to be thoroughly and formally documented. The K2HealthTech team has designed and developed interfaces, some of which are still in use nearly 20 years later. During that amount of time key employees who understand how the interface works will leave and need to be replaced. These new employees will need to be trained so that the interface can continue to function properly. Likewise, software vendors may go out of business over time and it is important that the interface be properly documented so it can continue to perform its task, at least until a new replacement system is selected.

Next up for Menorah Park during 2003 will be the conversion of outpatient and physician information from the SpectraSoft system used by Menorah Park's rehabilitation department into the Infosys system. After that Kevin will convert the VistaKeane accounts receivable, accounts payable, resident trust, general ledger and budget information into the Infosys system as well as the Great Plains system that Menorah Park has selected as their new financial application.

Early on in their transition to a new system Menorah Park decided to incorporate data conversion. Not only have they successfully deployed data conversion as part of the project, they have embraced it. They have demanded a level of completeness, thoroughness and accuracy that has eliminated countless hours of manual data entry as well as the potential overtime and stress that can sometimes kill a project as well as the staff involved in implementing it. Menorah Park has helped ensure the success of their information system project through wisely employing the data conversion services of Kevin Winden and the team at K2HealthTech.