Automating Turnover, Vacancy and Loss Analysis Reporting at Lahey Clinic

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You've just turned off your computer and you're heading out the door to be on time for a soccer game, dinner with friends, or an evening with your husband or wife. The phone rings. "Oh, good, you're still here, I need a turnover report for the last two years of all our lab technicians, and I need it tonight so I can review it in time for an 8:00 a.m. meeting tomorrow morning."

How many times have you been called with a last minute request for a report? The HRIS department of Lahey Clinic (Burlington, MA) was successfully providing or pushing data out to their end users in the form of static PDFs, but wanted to implement a new strategy that would allow end users to pull reports based on their data selections. A pull strategy would put the information within reach and make analysis of turnover and vacancy data quick and easy for the end user.

Lahey Clinic employs more than 480 physicians, 4,600 nurses, therapists and other support staff to provide care for over 3,800 outpatients daily. They staff two hospitals and are a teaching hospital for the Tufts University School of Medicine. They maintain residency and fellowship programs for more than 130 new physicians in multiple subspecialties. Like many medical institutions, turnover and vacancy is an extremely important function for HR. Knowing at all times what positions need to be staffed and when is crucial to providing quality patient care.

Lahey Clinic's HRIS department had a manual process of creating and distributing monthly turnover and vacancy reports to HR management, executives and managers. The manual process was time-consuming and didn't provide drill-down analysis capabilities for end users. When HR management needed loss analysis reporting, they requested specific reports from the HRIS department. These ad-hoc reports were based on 8 key indicators* and each report depended on how the end user wanted to review and analyze the data.

*8 Key Indicators for Loss Analysis include:

- Voluntary/Involuntary,
- Years in Job,
- Years in Department,
- Years at Clinic,
- Regular/Per Diem/Temporary,
- Shifts,
- Full/Part time, and
- Adds versus Losses.

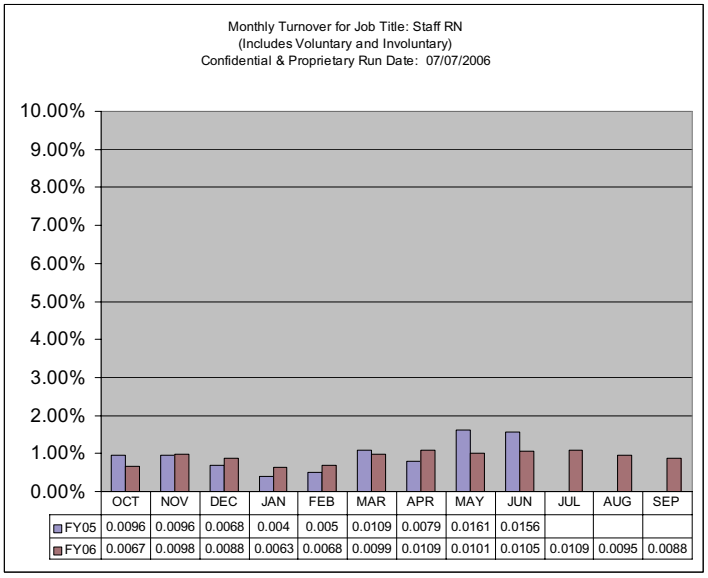
Lahey's HRIS department knew the solution to this problem was automating the process through existing technology. They had been using Nuvosoft's Rwiz to develop simple and complex reports for a number of years. Lahey knew they could use this technology to deliver a tool to their end users to run their own reports in minutes. In theory, it sounded simple, but the project required a little extra work to get the data in shape.

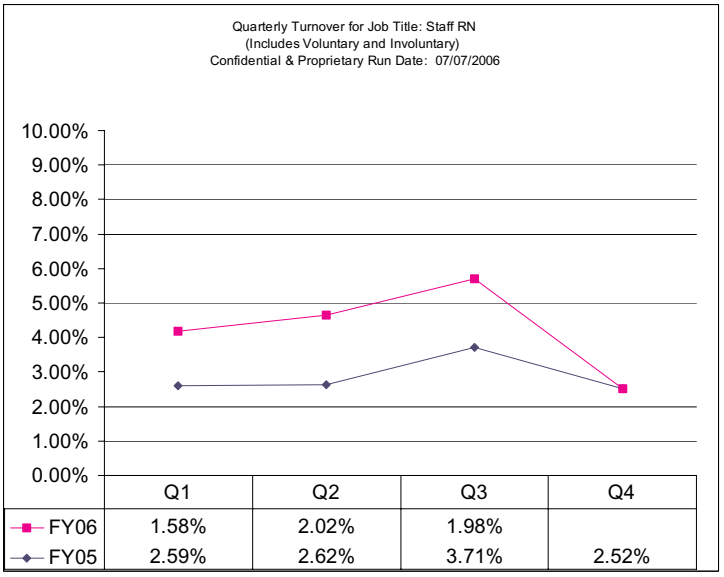
Lahey Clinic runs Oracle 9i Enterprise Edition Release 9.2.0 with PeopleSoft HRMS, Financials, and Enterprise Learning Solutions (Versions 8.X). Before automation, the turnover and vacancy reports weren't standard across the organization and they lacked total integration with their PeopleSoft System. In the past, HRIS exported the data from PeopleSoft to a Microsoft Access Database to create the reports. Then, they updated a drill-down reporting structure and calculated the reports and graphs. These static reports and graphs were published as PDFs on a secure server and available only to HR staff. Employment managers reviewed them quarterly with the vice presidents and their staff and any ad-hoc analysis was by request only.

Lahey produced and published, on a monthly basis, 24 detailed reports, which included 12 graphs showing total company, physicians and staff RN turnover and vacancy, and loss analysis. This process was time consuming and it didn't provide the managers and HR staff what they needed – 24/7 access and analysis capabilities. In addition, Lahey wasn't taking advantage of PeopleSoft's security.

Lahey's Solution – Automation: Turning Data into Instant Information

Like all successful IT projects, Lahey began with a well thought-out plan. They leveraged what was working well,





in this case, turnover and vacancy formulas and reports. Working with Nuvosoft to develop the reports, Lahey began gathering requirements and analyzing the existing Microsoft Access application (turnover database) and interviewing knowledge experts at Lahey. They decided to develop 10 standard reports that would draw data from 13 dynamic columns, held in 122 fields of turnover data from the PeopleSoft application.

After the requirements were set, the next step was to set the parameters for the users. A new reporting tree was created and the security was defined to accommodate Lahey Customized Security in PeopleSoft. Then they began to work with the existing data.

A mini Turnover Data Warehouse was created in PeopleSoft, as well as one major SQR query to load the warehouse with monthly data from many PeopleSoft tables in a standardized format for reporting purposes. This table contains 122 turnover reporting fields, is automated, and is run once a month. After Lahey converted five years of turnover data, an SQR was created to load historical data into the turnover data warehouse.

The new reports give Lahey Clinic's HR executives and managers real-time access to information to hire more efficiently and strategically. For example, using the loss analysis report, an HR staff member can select a department, a time period and a job title. Then, they can drill down through the top-8 indicators. This information provides facts such as the reason an employee left, how many employees were full or part time, the number of years in the job, years in a department, etc. Armed with this information, Lahey could potentially reduce their turnover by hiring more strategically and by planning ahead for expected vacancies.

Human Resources staff members at Lahey can now run turnover/vacancy reports at any time. (Once HR is comfortable with running these reports, they will be rolled out to managers and to the VPs.) For example, they may select dates, see the data at a summary level, drill down to detail or view the data in a graph. By selecting a year for trend analysis, the report automatically generates four graphs comparing the current to the previous year. The two graphs show turnover/vacancy month-by-month and quarter-by-quarter.

Lahey's HRIS team is now able to maintain, write, and implement new reports without support from Nuvosoft. They can change the current reports and their formats (PDF, Excel, charts or Tab Delimited). The new Lahey reports allow managers to review turnover and vacancy results by VPs, managers, service lines, departments, job titles and analyze the causes through drill-down or detail, available 24/7. Only HR staff members are allowed to review loss analysis reports and drill-down to the key indicators.

Lahey's end users will have access to the reports, depending on their security level. Managers will access the reports through single sign-on (through manager self-service in PeopleSoft). PeopleSoft row-level security will ensure that data availability is in accordance with Lahey policy.

In the future, Lahey intends to use this tool to add other reports, such as: Retention, Time-to-Fill and Affirmative Action Reporting.

About the Authors

Genice Turner was, until recently, an HRIS project manager at Lahey Clinic. She has 15 years experience supporting HR and payroll departments and implementing and upgrading PeopleSoft HCM modules.

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