VOICES

Lisa Conrad, Manager-Clinical & Compliance, Yardi

In this interview, Senior Housing News sits down with Yardi Manager-Clinical and Compliance Lisa Conrad. Lisa works closely with internal teams and clients to implement electronic health record solutions and best practices for optimizing charting workflows. This interview explores how Lisa applies her background as a registered nurse to her senior living management perspective, some of the best practices she recommends for implementing technology in senior living and how the industry is changing permanently in some respects due to the COVID-19 crisis.

Senior Housing News: Talk us through your experience leading up to joining Yardi. With a clinical background in nursing, how does that come into play in your current role?

Lisa Conrad: I am a registered nurse. My career started in hospital nursing, and I then transitioned to the administrative side and became a director of nursing in a nursing home. I worked for some very progressive owners, and they were very early in the adoption of electronic medical records — that was back in the early 2000s. The director of nursing role led into my role today at Yardi working on the vendor side in electronic medical records.

Generally speaking, how do you apply that clinical background to the technology in your day-to-day work at Yardi?

My role is on the clinical compliance team, which focuses on supporting our implementation and customer service teams. We interact in the background with the various departments, whether it be assisting with a sales demo or working with an account manager on client workflows. We develop and do the quality assurance check on all the clinical software to make sure that it meets federal and state regulations.

We keep up with federal and state requirements to make sure the software is always compliant. The team itself is composed of health care professionals from different specialties. It's a really unique group in that we have team members from a variety of backgrounds who bring their own specialized skill sets to the projects we work on.

What are the challenges and solutions that you provide when it comes to implementing technology to help with operations? Can you share any best practices?

The best piece of advice I would offer is when any client is looking to either change a process or integrate more technology, it is important to get a clear picture of why they're making a change. So, what part of the process is either cumbersome, inefficient or just not working so that we have a clear idea of what they're trying to accomplish. We can then work with them through that change process.

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In addition, getting the managers and staff to buy in is critical. There's nothing flashy about it, but in reality, that's what you need to do in order to really make lasting change. The successful facilities are the ones that are open to the change and start using the data right away to help them make decisions. They're right there with the staff, showing them how they're using the data that the staff is now capturing to move up the adoption curve and really get the benefit out of the software.

When you implement the platform for a community for the first time, where does the light bulb go off for them in terms of what data they're using to drive decision making?

If it's a client that's coming from a paper-based system, which is really inefficient, once they start seeing the data that's available to them in a usable format, they really begin to see how they can take that data and utilize it to drive change.

Oftentimes in some of the more paper-based or not really well-connected systems, you spend a lot of time trying to put the data together, and you don't really have a lot of time left to analyze it and pattern it and trend it. It's really exciting to see clients actually take a look at that data and say, "This has allowed me now to do this, and I didn't realize how inefficient my old system really was."

As a DON, even back in the early 2000s, it really hit me in a quality assurance meeting one day. We'd been using the software for almost a year, and all of a sudden it just hit me. I was actually asking questions and analyzing this data in ways that I would've never been able to do in the old system. It was really exciting.

From a care perspective, where do you see these technologies providing the biggest benefit in your experience? Is it time saved? Is it flexibility of the workforce?

In today's world it's actually multiple things. Absolutely it's going to be efficiency, especially in health care and the challenges recruiting nurses. But also, as the technology and the interoperability matures, it's being able to integrate all these peripheral devices that a client or resident interacts with on a daily basis.

With wearables or external blood pressure machines or temperature machines, [the benefit is] being able to integrate all that information from all these peripheral devices into the medical records, and bringing it all together so that it's efficient and interoperable so you not only capture that data but also pattern, trend, and analyze it.

What are you seeing right now with respect to compliance, particularly with COVID-19 and the pandemic?

Obviously, it's the biggest challenge, and it's impacting every provider. But what's really interesting is that senior housing facilities have had to adapt to a lot of the same problems or challenges that the hospitals had, such as supply and testing challenges, but senior living providers also have the challenge of isolating the most frail part

of our population. They're trying to keep these residents safe and healthy, and oftentimes they are challenged by not having adequate supplies or testing.

Facilities are learning to optimize. They're taking a look at the technology that they have in place to improve, for example, communication with families. There may be software features they've never utilized. We've seen a lot of interest from clients to make sure that they are taking full advantage of the tools they have available. Some examples might be making sure they know how to operate all portals — whether they be payment portals or family portals — and making sure they know how to utilize all that functionality.

This functionality is important so the family of the resident can feel like they know what's happening in the building, because they can't come in and visit right now.

Are there other ways Yardi is supporting communities through the pandemic-related challenges?

Yardi is providing a multipronged approach. We've put up several reference pages with all kinds of COVID reference material. Our teams have been all transitioned to work from home so that they are available to help our clients. We've done a lot of webinars and training sessions on the different parts of the system that they may not have utilized.

Additionally, as we're reaching out and touching base with our clients, we're learning about things that don't exist in the software today but would make things easier. For example, our temperature trend report. We quickly got together with our developers, and we were able to produce a report for clients that would give a 10-day pattern and trend of a resident's temperature so that they could quickly monitor multiple residents at one time.

Additionally, they can easily identify any residents whose temperatures were missed for any reason. We're listening to what the customer needs are during this time, and we are doing everything that we can to try to meet them.

Do you envision any permanent changes as a result of the COVID-19 crisis? How is Yardi preparing for them?

At least initially, I think we are going to see some changes in the way health care information is captured and focused on. For example, right now the hot topic is infection reporting and how we are going to accomplish that. I do think that a lot of the focus right now will be incorporated long term into the survey process, but I also think as an industry itself [the focus should be on] how we deliver care. Right now [the category is more] institutional. Whether in a CCRC or a nursing home or a memory care unit, it really is congregate living.

It will be interesting to see if that model survives long term after we've emerged from this pandemic. It wouldn't surprise me to see differences in the way we deliver care to groups of elderly people in the future. At Yardi, what are we doing to prepare for that? Again, we are keeping up on all of the trends and making sure

that our software offerings will meet those needs. An example of that is a module we recently released called Yardi At Home Care. If a senior wants to age in place at home, we have a software line that will help senior living providers support them and allow them to do that.

Are there ways that you see senior living coming out of this crisis for the better?

I'm encouraged by what I see and hear happening where the providers are working together. Even competitors are working together on things like staffing patterns, keeping staff healthy and relieving as many stressors as they can from those staff members.

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For example, at one facility the staff decided they were going to shelter in the facility. They didn't want to risk going out into the community. At another, the facility is helping staff buy groceries, so they don't need to go to the grocery store and unnecessarily expose themselves.

Senior living has always had a hard time being recognized for the good work they do to keep the lives of the frail and aging in our society dignified and meaningful. I am encouraged by the stories of all the good things happening in the buildings and am hopeful the general public will begin to recognize the senior living caregivers as the dedicated heroes they are.

Editor's note: This interview has been edited for length and clarity.

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