



PE Tours Case Study

Background

Mercy is a not-for-profit Catholic health system inspired by the Sisters of Mercy, dedicated to compassionate care and exceptional service. Guided by its mission to “get health care right,” Mercy delivers high-quality, faith-driven care rooted in dignity, justice, service, excellence, and stewardship.

The Challenge

The Mercy Health Environment of Care team oversees compliance across many facilities. While their teams were diligent and structured, much of the compliance tracking process was manual, relying on paper forms, spreadsheets, and phone recordings. This approach made it difficult to ensure consistency and efficiency across multiple sites. Mercy Health identified an opportunity to enhance their compliance efforts with a digital tool designed to simplify rounding and improve survey readiness that could also integrate with their existing work orders system (CMMS).

“The time saving is huge and the speed at which things get handled cuts days off of the process!”

- John Lochner, Environmental Safety/Emergency Management Specialist



Quick Facts

- ✓ Campus Location: Baltimore, MD
- ✓ Campus Beds: 1,162
- ✓ Ownership: Non-Profit
- ✓ System Size: 6 academic and community hospitals, 4 suburban health care, and surgery centers with over 40 patient care locations, a home care group, and an international division.
- ✓ Solution Chosen: PE Tours
- ✓ Customer Since: 2017





The Solution

Mercy Health implemented Soleran's PE Tours (formerly EC Tours) application, a tool that digitizes facility compliance rounding and directly links observations to reporting and automated follow-up. With PE Tours, rounding became more consistent, and compliance issues were easier to track, escalate if necessary, and resolve. The application allowed staff to replace paper checklists and Excel spreadsheets with a streamlined digital platform, improving data accuracy, and reducing preparation time for surveys. **Brandy Kary, Data Systems Coordinator**, explained, "Now, when they're doing an PE tour, and they find something that has to go to facilities, they just click, and it goes straight to the right person, versus the facilities admin getting an email to create a work order. It's been huge!"

The Soleran team provided strong support during rollout, with Kary noting the benefits of Soleran's Learning Management System (LMS). "I love the function of the Learning Management System. That's another great piece of the puzzle that we can use! It's a great additional resource."

Performance

The results of using PE Tours were immediately clear - major time savings and efficiency. The faster response time was a clear indicator that the new software was working. **John Lochner, Environmental Safety/**

Emergency Management Specialist said, "On the back end, I'm speeding up the implementation of repairs. I'm getting that work order in the hands of the technician faster from our rounds, so the repair is made. And if it's a critical repair, then that could save lives. The sheer speed at which things get handled now cuts days off of that process."

It has also given staff more standardization and confidence in their reporting, which in turn will improve survey readiness and reduce future findings. The whole team is looking through the same lens while doing tours. "Now I can go into the ICU and tour with everybody. We get it entered and before we walk out, I can say, 'Okay, is everybody satisfied with what they've reported?' If 'Yes', then I hit complete and it's in the department leader's inbox before we walk out the door. When I'm done, I'm done," explained Lochner.

The software has allowed for more accountability across departments, shedding light on trends in the facility which allows executive directors to make even more strategic decisions. **Lochner said,** "I'm getting feedback from department leaders that they're pleased and enthusiastic about the process now! They get that email. They just click 'Resolve', type in their note or how they resolved it, hit submit, and they're done!" Kary added, "We are using this best practice now to help us reduce findings when Joint Commission comes for a survey."

Mercy Health has also benefited from Soleran's Support team. "From a customer service standpoint, the ease with which Soleran has made themselves available to us has been phenomenal! They are right there to help us out," stated Lochner

By adopting Soleran's PE Tours and collaboration between facility teams, Mercy Health transformed its compliance operations - saving time, improving survey outcomes, and empowering staff with a reliable, easy-to-use digital tool that ensures safer, smarter facilities. **Kary shared,** "I love what we've purchased, like 100%!" Lochner agreed, "I would definitely recommend Soleran."

Quick Facts

No. of Users

674
& growing!

PE Tours Completed
in 6 Months:

846