






So Now What?
Making the Most of Your EHR




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Goals for effective EHR use

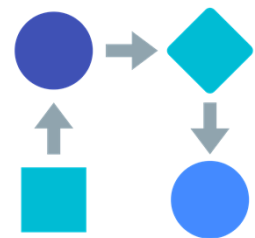
		
Streamline Documentation	Use Reports Well	Develop Support Structures
Understand your workflows for better record-keeping	Ensure high quality services and increase efficiency	Enhance agency success

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Know your Workflows

But be ready to change them!

- Think about who collects what information, when and from whom
 - Walk through staff day to day activities, both clinical and operational
 - Take careful note of critical triggers and information that are needed
- Walk through the journey of care from a client's perspective
 - Referral/Intake through Discharge/Aftercare
 - Include all variations
- Agencies rarely get their workflows right in initial implementation
 - Don't be afraid to update your system to accommodate better processes



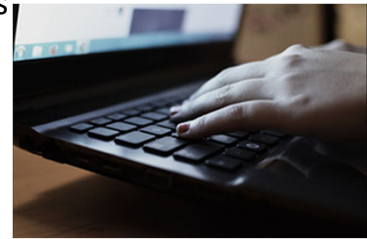
Streamline Documentation

- Simplify forms
 - Get rid of anything not absolutely needed
 - Consider only making "required" fields where it's critical to do so
 - The data field is necessary in a mandatory external report
 - Without the information, billing can't be completed
 - The information is critical to ensuring safety
 - Use conditional logic when possible
 - Reduces clinician overwhelm on long forms
 - Makes questions feel more valuable



Streamline Documentation

- NEVER enter information twice in the system
- Compare documentation to make sure modules/sections are structured the same way across documents
 - Enables data flow across system when using dynamic fields
- Make sure the correct person is entering information
 - Don't have clinicians enter demographic data - use admin staff
 - Use nurses to check medication lists and medical information
- Make data entry less onerous
 - Ability to tab through or use keyboard shortcuts to reduce "clicks"



Coordinate Care



- Determine how your system can help staff communicate with each other about clients
 - Automatic alerts from incident documentation or key Progress Notes
 - Ability to send notes to staff about client care
 - Documenting tasks and warnings if something is being duplicated
- Use system across program types if possible to fully leverage information sharing across the organization
- Implement as many modules as possible to streamline communication and reduce redundancies (e.g. residential and mental health)

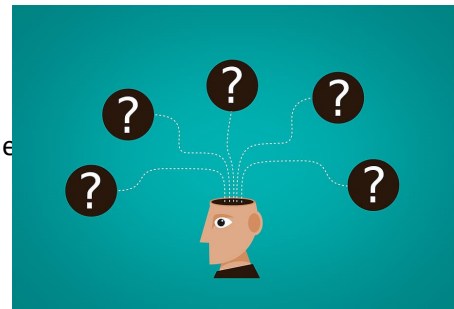
Reporting

- Know what data is in your system and how to get it out
- Map each report from the system – name, who has access, what it can tell you
 - Know how it calculates the data, where the information pulls from
 - What does the report include and what does it exclude?
- Be prepared to hire/contract for help to extract data in usable ways if needed
- Identify data quality gaps – and the reason!
- Identify key questions and the corresponding reports

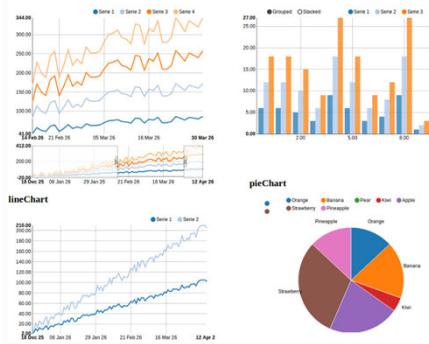


Reporting

- Prevalence
 - Who are the clients we serve?
 - What are their needs?
 - Are there clusters of needs we commonly see together?
- Outcomes
 - Are clients improving?
 - Are they improving in the areas we anticipated?
- Workload and Services
 - Do clinicians have similar intensity levels on their caseloads?
 - Are clients getting the appropriate amount of services based on their needs?
 - Are staff providing enough services to make the program fiscally viable?



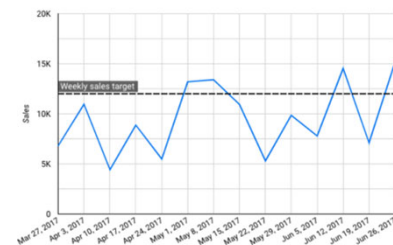
Reporting



- Train clinical supervisors on the reports they are expected to use in their work
 - Clinician activity/ case load/ productivity reports
 - Client outcomes reports
- Train leadership team on key program reports
 - Contract utilization
 - Program productivity and outcomes
 - Service intensity

Quality Assurance

- Develop mechanisms to verify & validate data in the EHR
 - Chart reviews
 - QA data
- Establish a cadence for running key reports
 - Clinician productivity reports
 - Client services activity reports
- Train QA staff on basic data/statistical analysis
- Clinical and QA management meet regularly to review reports



Quality Assurance



- Validate the EHR setup
 - Confirm the service rates for each MH contract each year
 - Confirm mapping between activity codes, service function codes, and Medi-Cal billing codes, by county
- Use a “test” account with clinician-level access to make sure the clinician reports match the manager/director reports
- Create reports and process for supporting CQI activities

IT Infrastructure

- Often, complaints about the EHR aren't really about the EHR
 - Inconsistent WIFI looks like a “saving” issue
 - Slow/old computers struggle to load pages
 - Some EHRs don't perform well across browsers
- Consider two-factor authentication for increased security
- Provide good document scanner for paper document uploads
- Have backup computers to minimize clinician downtime



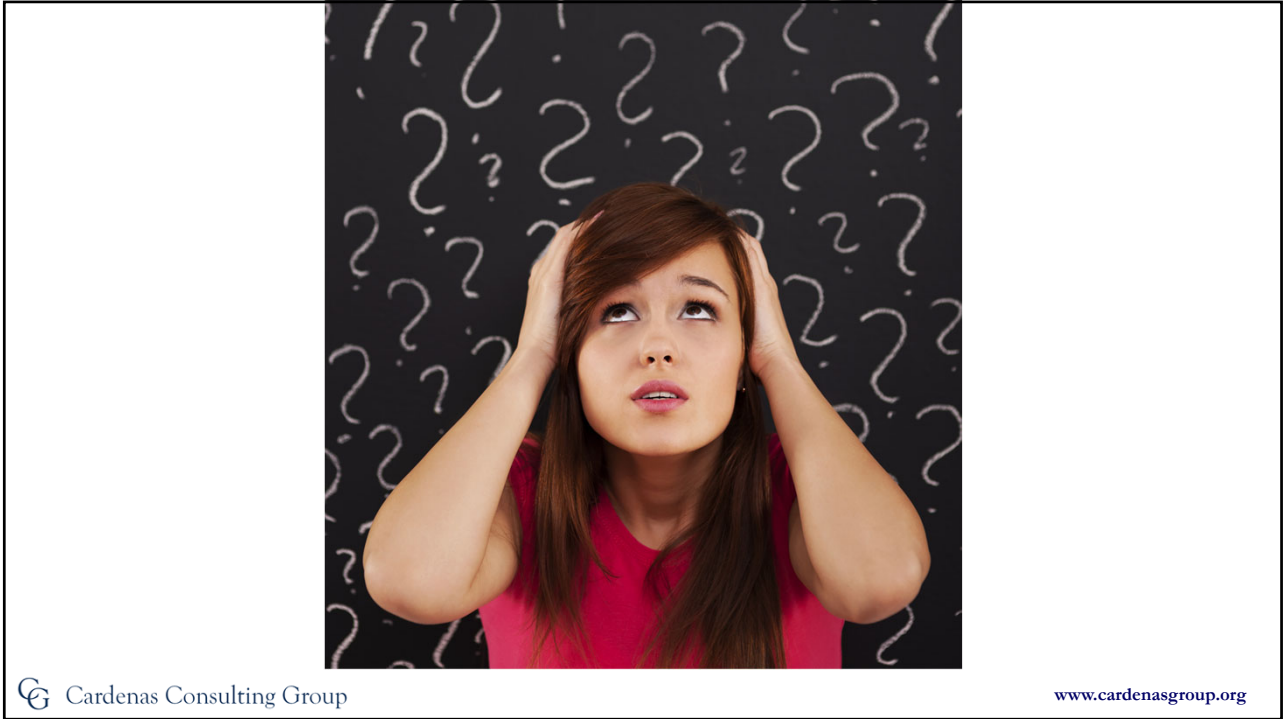
Support

- Ongoing, readily available internal support is key
 - System administrators and program super-users
 - Must have a direct understanding of the workflow, clinical documentation and expected outputs based on county and state regulations
 - Need to understand the work done by staff and the organization's priorities
 - Collect information on common issues to inform training and support
 - Weekly Q&A or Brownbag type calls for mental health staff to join with their questions, issues, feedback



Support from Exym

- Use the Exym Help Desk
 - Make sure Exym truly understands your program needs/workflows/standards
 - And push back when needed!
 - The answer you get from the EHR help desk is not always right or acceptable. Work to get what you need from your system.
- Utilizing the Exym Knowledge Base
 - Make sure staff sign up for an account - this is separate from their Exym account and it has SO much great info and video tutorials!
 - Request new features and support those requested by other agencies.
 - Take time once a month to review other agency's feature requests and you can vote/comment on them if you would find them useful.



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