Optimizing County Electronic Health Records for Game-Changing Workforce Satisfaction

October 31, 2022

Netsmart

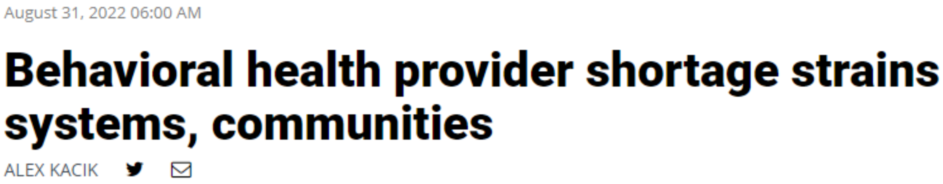
Tom Herzog

Chief Operating Officer, Netsmart

David Strocchia

VP & GM, Human Services, Netsmart

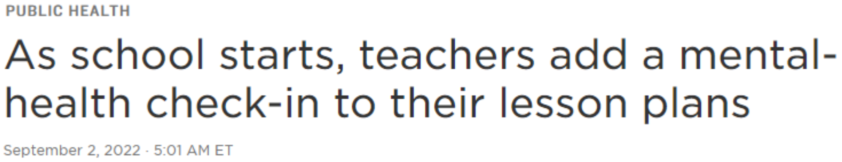
Behavioral Health in the News



August 31, 2022 06:00 AM

Behavioral health provider shortage strains systems, communities

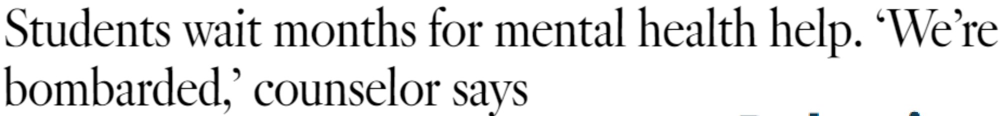
ALEX KACIK



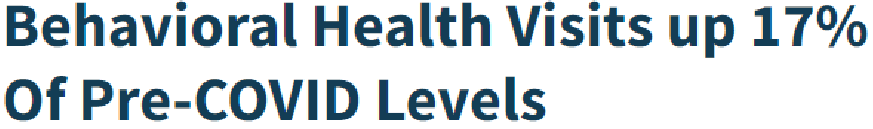
PUBLIC HEALTH

As school starts, teachers add a mental-health check-in to their lesson plans

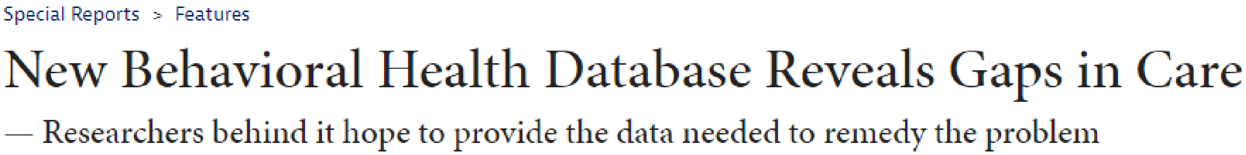
September 2, 2022 · 5:01 AM ET



Students wait months for mental health help. 'We're bombarded,' counselor says



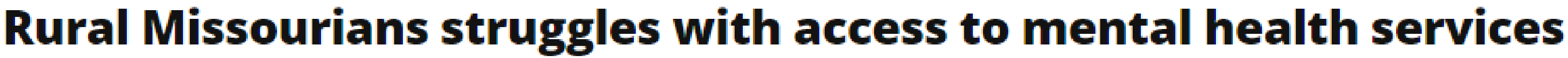
Behavioral Health Visits up 17% Of Pre-COVID Levels



Special Reports > Features

New Behavioral Health Database Reveals Gaps in Care

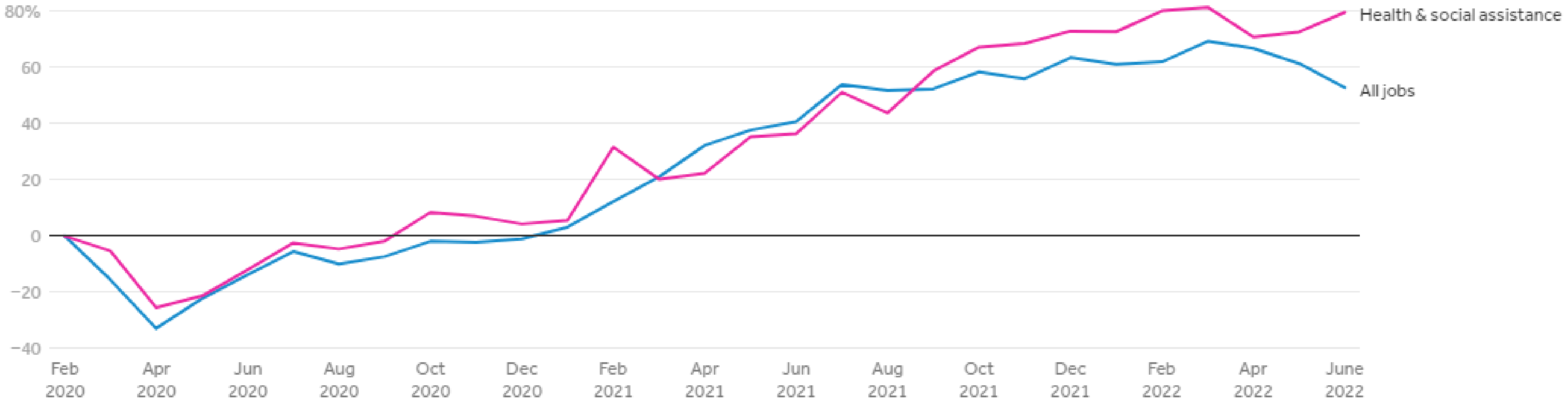
— Researchers behind it hope to provide the data needed to remedy the problem



Rural Missourians struggles with access to mental health services

Impact on Health Employment

Cumulative % change in job openings, February 2020 - June 2022, health & social assistance jobs and all jobs



Note: "All jobs" includes nonfarm jobs only

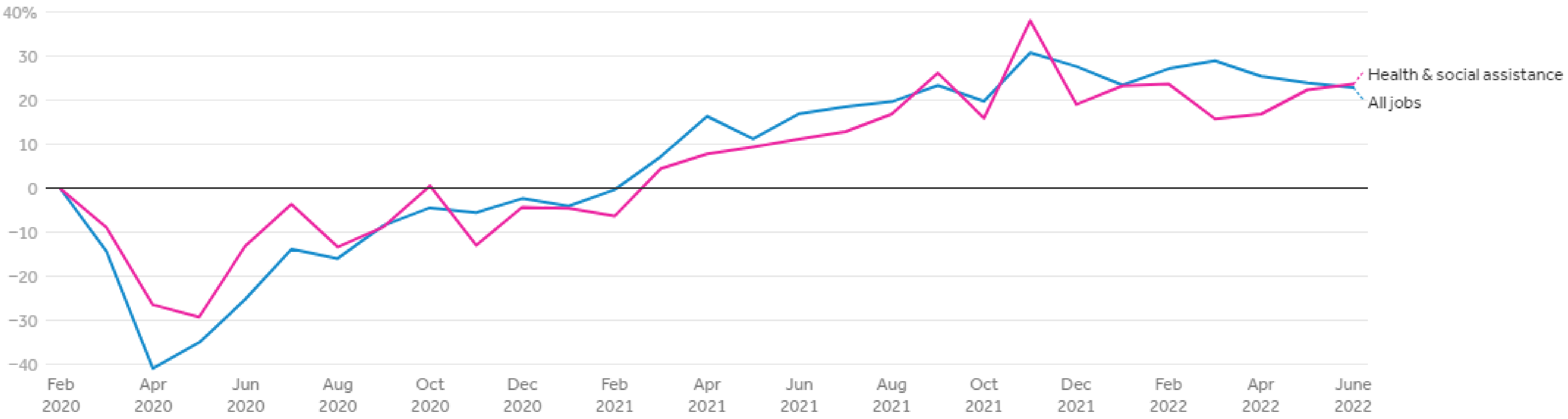
Source: Bureau of Labor Statistics Job Openings & Labor Turnover Survey (JOLTS) • Get the data • PNG

Peterson-KFF
Health System Tracker

Netsmart

Impact on Health Employment

Cumulative % change in job quits from February 2020 - June 2022, health & social assistance jobs and all jobs

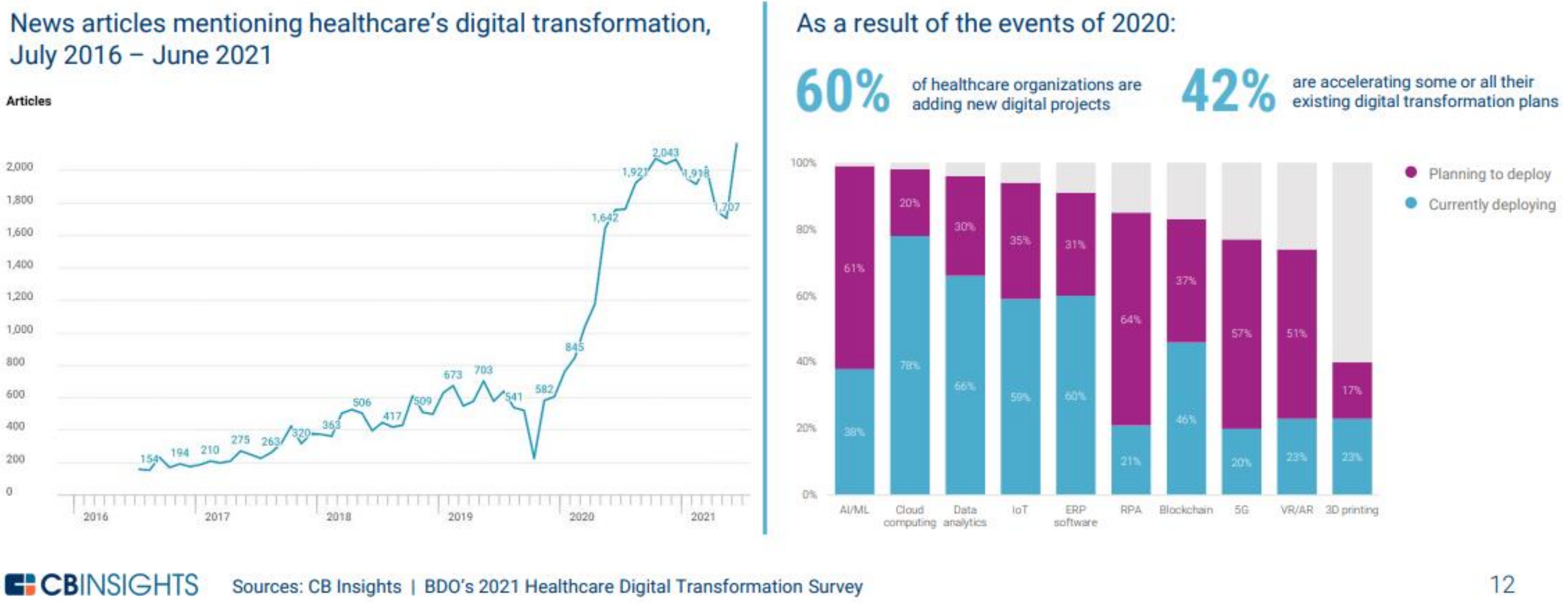


Note: "All jobs" includes nonfarm jobs only

Source: Bureau of Labor Statistics Job Openings & Labor Turnover Survey (JOLTS) • Get the data • PNG

Peterson-KFF
Health System Tracker

Digital Transformation Initiatives Continue to Accelerate Post-Pandemic



News articles mentioning healthcare's digital transformation, July 2016 – June 2021

As a result of the events of 2020:

60% of healthcare organizations are adding new digital projects

42% are accelerating some or all their existing digital transformation plans

Sources: CB Insights | BDO's 2021 Healthcare Digital Transformation Survey

Impact of Staff Satisfaction

Provider Impact

Increased Access to Care
Help more people with increased staff capacity

Improved Ramp Time
Faster ramp time for service providers doing clinical documentation

Better Morale + Less Turnover
Easier note-taking helps employee satisfaction

Less QA Headache
Catching errors on the front-end leads to less back-and-forth with QA and service providers

Organizational Impact

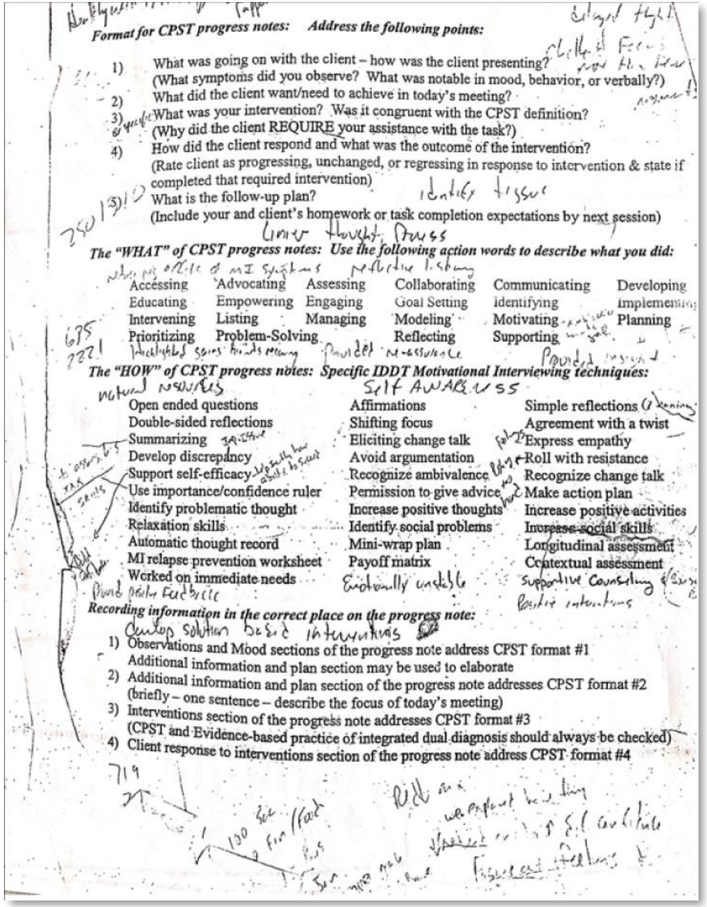
More Revenue
See more clients per week

Payroll Savings
Save hours per month per service provider

Faster Cash Flow
Cut days off payer reimbursement cycle

Reduced Risk of Recoupment
Better notes reduce the risk of recoupment

Innovation Through Deep Research



Format for CPST progress notes: ***Address the following points:***

1) What was going on with the client – how was the client presenting? (What symptoms did you observe? What was notable in mood, behavior, or verbally?)
2) What did the client want/need to achieve in today's meeting?
3) What was your intervention? Was it congruent with the CPST definition? (Why did the client REQUIRE your assistance with the task?)
4) How did the client respond and what was the outcome of the intervention? (Rate client as progressing, unchanged, or regressing in response to intervention & state if completed that required intervention)
5) What is the follow-up plan? (Include your and client's homework or task completion expectations by next session)

identify tissue

250

Linear thought process

The "WHAT" of CPST progress notes: Use the following action words to describe what you did:

reflective listening

Accessing Advocating Assessing Collaborating Communicating Developing
Educating Empowering Engaging Goal Setting Identifying Implementing
Intervening Listing Managing Modeling Motivating Planning
Prioritizing Problem-Solving Reflecting Supporting

675
722!

Highlighted ... Provided reassurance ... Provided insight

The "HOW" of CPST progress notes: Specific IDDT Motivational Interviewing techniques:

natural resources

Self AWARENESS

Open ended questions
Double-sided reflections
Summarizing
Develop discrepancy
Support self-efficacy
Use importance/confidence ruler
Identify problematic thought
Relaxation skills
Automatic thought record
MI relapse prevention worksheet
Worked on immediate needs

Affirmations
Shifting focus
Eliciting change talk
Avoid argumentation
Recognize ambivalence
Permission to give advice
Increase positive thoughts
Identify social problems
Mini-wrap plan
Payoff matrix

Simple reflections
Agreement with a twist
Express empathy
Roll with resistance
Recognize change talk
Make action plan
Increase positive activities
Increase social skills
Longitudinal assessment
Contextual assessment

Emotionally unstable

Supportive Counseling

Positive intentions

Recording information in the correct place on the progress note:

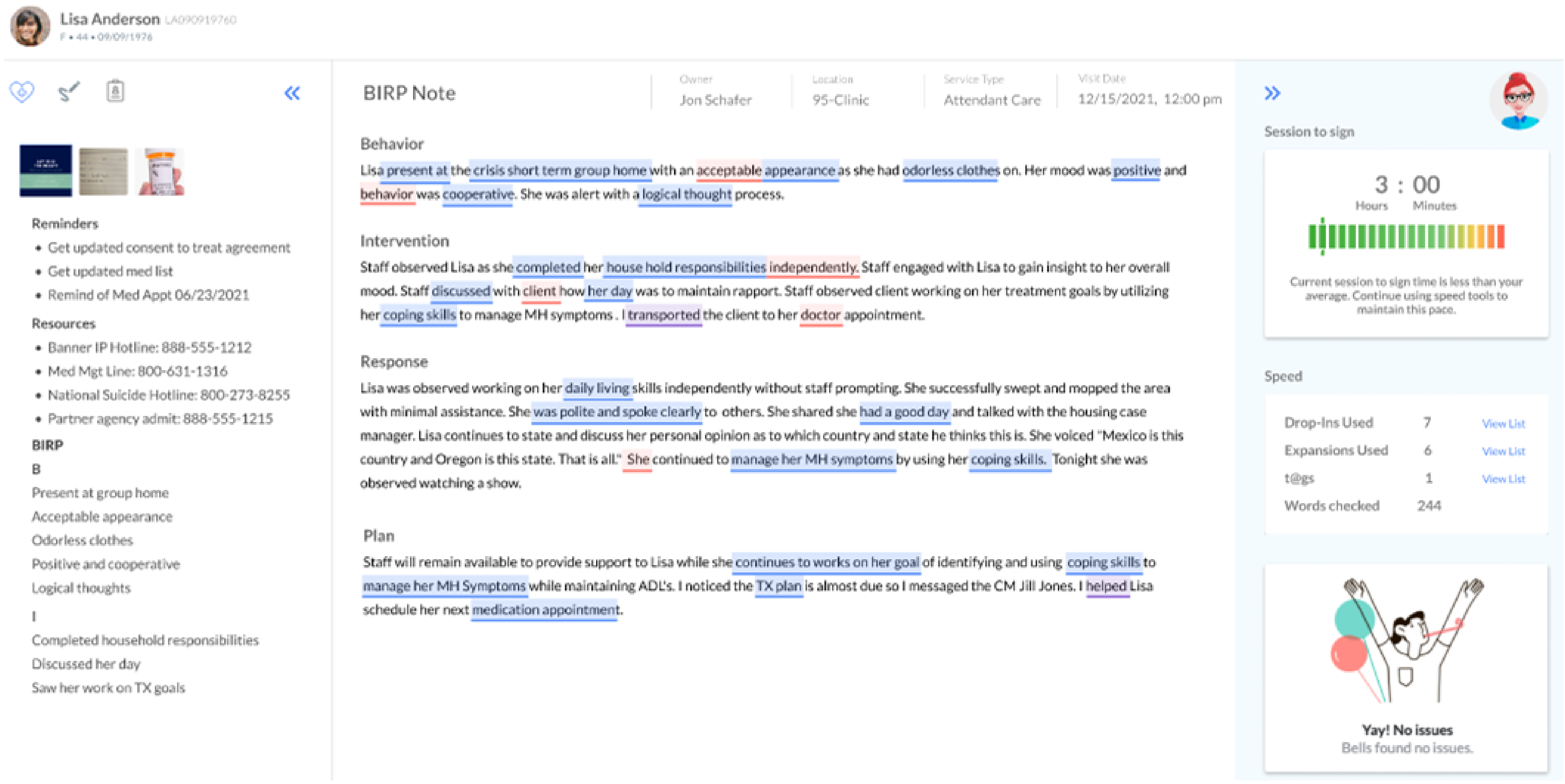
Develop solution based interventions

1) Observations and Mood sections of the progress note address CPST format #1 Additional information and plan section may be used to elaborate
2) Additional information and plan section of the progress note addresses CPST format #2 (briefly – one sentence – describe the focus of today's meeting)
3) Interventions section of the progress note addresses CPST format #3 (CPST and Evidence-based practice of integrated dual diagnosis should always be checked)
4) Client response to interventions section of the progress note address CPST format #4

719

Current State:

- Notes in Batches
- Highly Configurable
- Very Manual Process



Lisa Anderson LA090919760
F • 44 • 09/09/1976

Reminders

- Get updated consent to treat agreement
- Get updated med list
- Remind of Med Appt 06/23/2021

Resources

- Banner IP Hotline: 888-555-1212
- Med Mgt Line: 800-631-1316
- National Suicide Hotline: 800-273-8255
- Partner agency admit: 888-555-1215

BIRP

B

Present at group home
Acceptable appearance
Odorless clothes
Positive and cooperative
Logical thoughts

I

Completed household responsibilities
Discussed her day
Saw her work on TX goals

BIRP Note

Owner	Location	Service Type	Visit Date
Jon Schafer	95-Clinic	Attendant Care	12/15/2021, 12:00 pm

Behavior

Lisa present at the crisis short term group home with an acceptable appearance as she had odorless clothes on. Her mood was positive and behavior was cooperative. She was alert with a logical thought process.

Intervention

Staff observed Lisa as she completed her house hold responsibilities independently. Staff engaged with Lisa to gain insight to her overall mood. Staff discussed with client how her day was to maintain rapport. Staff observed client working on her treatment goals by utilizing her coping skills to manage MH symptoms . I transported the client to her doctor appointment.

Response

Lisa was observed working on her daily living skills independently without staff prompting. She successfully swept and mopped the area with minimal assistance. She was polite and spoke clearly to others. She shared she had a good day and talked with the housing case manager. Lisa continues to state and discuss her personal opinion as to which country and state he thinks this is. She voiced "Mexico is this country and Oregon is this state. That is all." She continued to manage her MH symptoms by using her coping skills. Tonight she was observed watching a show.

Plan

Staff will remain available to provide support to Lisa while she continues to works on her goal of identifying and using coping skills to manage her MH Symptoms while maintaining ADL's. I noticed the TX plan is almost due so I messaged the CM Jill Jones. I helped Lisa schedule her next medication appointment.

Session to sign

3 : 00
Hours Minutes

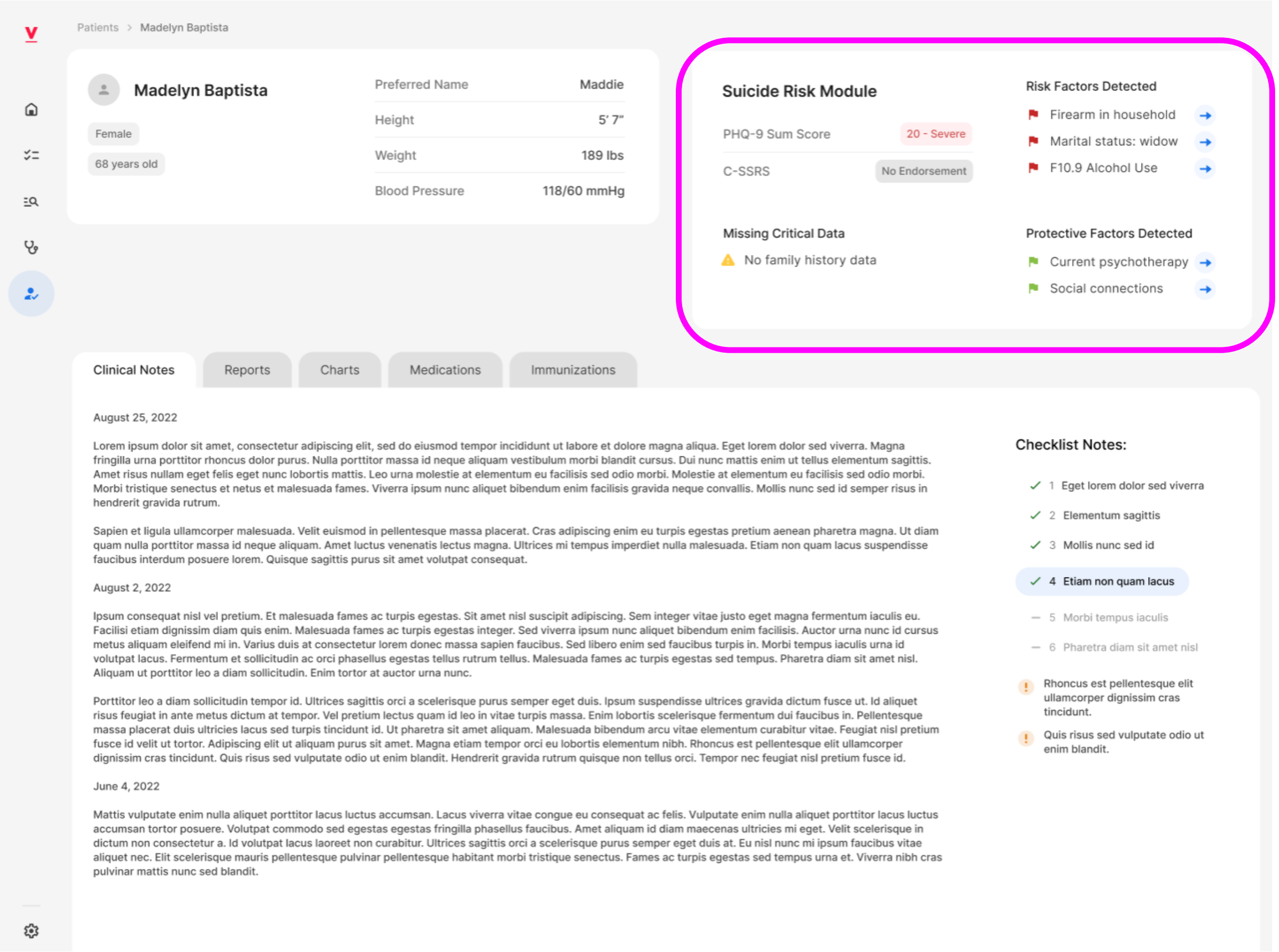
Current session to sign time is less than your average. Continue using speed tools to maintain this pace.

Speed

Drop-Ins Used	7	View List
Expansions Used	6	View List
t@gs	1	View List
Words checked	244	

Yay! No issues
Bells found no issues.

Netsmart



Madelyn Baptista

Female

68 years old

Preferred Name	Maddie
Height	5' 7"
Weight	189 lbs
Blood Pressure	118/60 mmHg

Suicide Risk Module

PHQ-9 Sum Score	20 - Severe
C-SSRS	No Endorsement

Risk Factors Detected

- Firearm in household
- Marital status: widow
- F10.9 Alcohol Use

Missing Critical Data

- ⚠ No family history data

Protective Factors Detected

- Current psychotherapy
- Social connections

August 25, 2022

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Eget lorem dolor sed viverra. Magna fringilla urna porttitor rhoncus dolor purus. Nulla porttitor massa id neque aliquam vestibulum morbi blandit cursus. Dui nunc mattis enim ut tellus elementum sagittis. Amet risus nullam eget felis eget nunc lobortis mattis. Leo urna molestie at elementum eu facilisis sed odio morbi. Molestie at elementum eu facilisis sed odio morbi. Morbi tristique senectus et netus et malesuada fames. Viverra ipsum nunc aliquet bibendum enim facilisis gravida neque convallis. Mollis nunc sed id semper risus in hendrerit gravida rutrum.

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August 2, 2022

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June 4, 2022

Mattis vulputate enim nulla aliquet porttitor lacus luctus accumsan. Lacus viverra vitae congue eu consequat ac felis. Vulputate enim nulla aliquet porttitor lacus luctus accumsan tortor posuere. Volutpat commodo sed egestas egestas fringilla phasellus faucibus. Amet aliquam id diam maecenas ultricies mi eget. Velit scelerisque in dictum non consectetur a. Id volutpat lacus laoreet non curabitur. Ultrices sagittis orci a scelerisque purus semper eget duis at. Eu nisl nunc mi ipsum faucibus vitae aliquet nec. Elit scelerisque mauris pellentesque pulvinar pellentesque habitant morbi tristique senectus. Fames ac turpis egestas sed tempus urna et. Viverra nibh cras pulvinar mattis nunc sed blandit.

Checklist Notes:

✓ 1 Eget lorem dolor sed viverra
✓ 2 Elementum sagittis
✓ 3 Mollis nunc sed id
✓ 4 Etiam non quam lacus
– 5 Morbi tempus iaculis
– 6 Pharetra diam sit amet nisl

! Rhoncus est pellentesque elit ullamcorper dignissim cras tincidunt.

! Quis risus sed vulputate odio ut enim blandit.

Netsmart

David Weden

Chief Administrative Officer,
Integral Care

Who We Are

- Founded in 1967
- Serve over 29,000 individuals per year
- Mental Health and Intellectual and Developmental Disability Authority for Travis County, Texas
- Support adults and children living with:
  - Mental illness
  - Substance use disorder
  - Intellectual and developmental disabilities
- Services include:
  - 24-hour helpline
  - Ongoing counseling
  - Drug and alcohol treatment
  - Housing

Integral Care

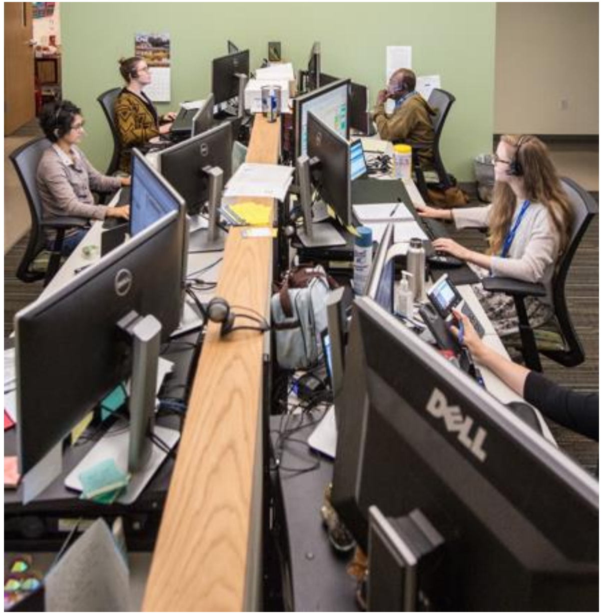
Current Workforce Challenges

- Increase in turnover
- Various challenges to overcome
  - Cost of living
  - Hazard pay
  - Work-life balance changes
  - Fear of pandemic
  - Safety in workplace
- Need to address on different levels
  - Pay
  - Experience
  - Perception

Integral Care

Employee Experience

- Incorporating artificial intelligence
  - Assist with notes and quality of documentation
- Automation of processes
  - Self-assessments
  - Established dashboards
- Ongoing support and education
  - Talk with the Techs



Talk with the Techs!

- New monthly series hosted by the Application Support team
- EHR forum to discuss:
    - Latest updates in myAvatar
    - Known issues, tips and tricks
    - Answer any questions regarding updates
    - Provide a look into the technology roadmap and overview of upcoming pilots
- Experts guide staff to smoother myAvatar user experience with a focus on ***extreme usability***.
- All sessions are recorded and can be re-watched anytime through a link in the Monthly EHR Newsletter.

Integral Care

Monthly EHR Newsletter

myAvatar Monthly

EHR Updates, New Functionality & Upcoming Releases

Technology alone is not enough.

What's NEW in myAvatar?

DSM-V Updates

NEW NOTES

Notable features include:

1. Checkboxes added to enhance content for intervention and progress
2. Case Management specific helptext
3. Case Management specific text boxes (example: Timeline for Reevaluating Needed Services)

NEW FORMS

1. NOMs Client Level Assessment – SAMHSA's National Outcome Measures (NOMs) Client Level Measures for Adults. **LIVE**
2. Child NOMs – SAMHSA's National Outcome Measures (NOMs) Client Level Measures for Child/Adolescent or Caregivers.
3. Admission Bundle – This includes a newly required form to capture consent for Telemedicine and Telehealth services. The **Telemedicine and Telehealth Services Consent** is also available as a standalone form to document revocations of consent. Reach out to your supervisor to learn more!

What is on the EHR roadmap?

Coming Soon

myAvatar Ticketing Dashboard

CHART MERGE REQUEST

We are moving away from TrackIT to receive duplicate chart reports; we will be using a new form in myAvatar called Chart Merge Request. The purpose of this change is to streamline the process within myAvatar and divide it in different steps to ensure the correct client information is merged.

This change will take effect on March 1, 2022. For more details or guidance on this new workflow, please refer to these two resources:

-**Chart Merge Request Workflow**

-**Chart Merge Request Video**

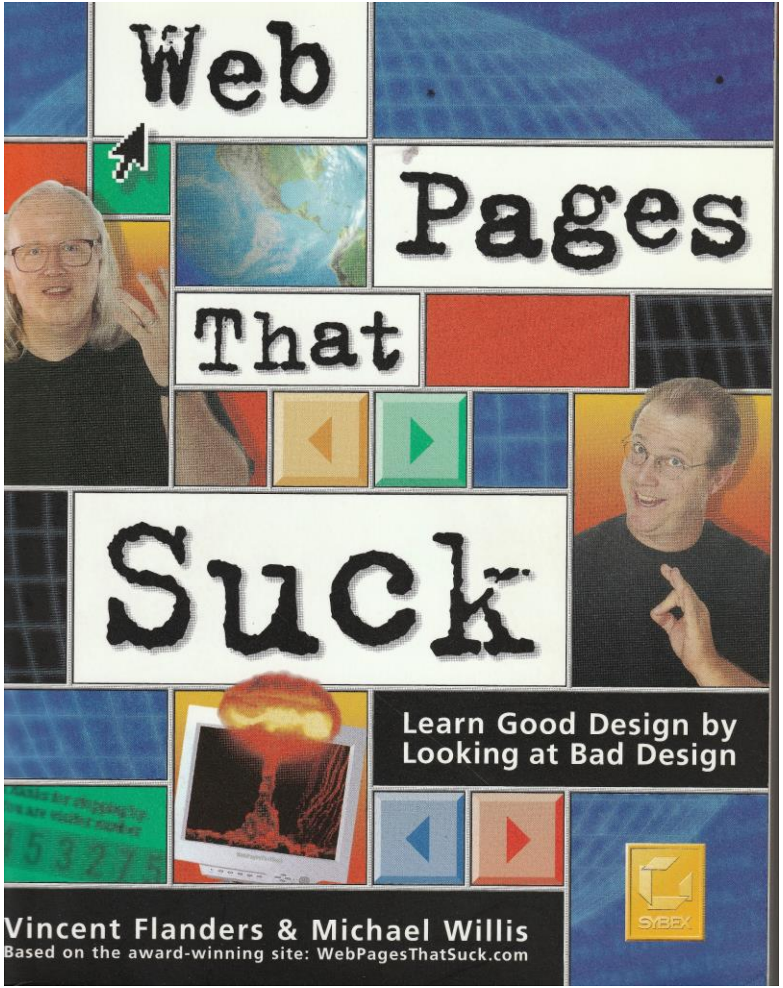
Denny Morrison, Ph.D.

Chief Clinical Advisor, Netsmart

I’m kind of an expert in this field

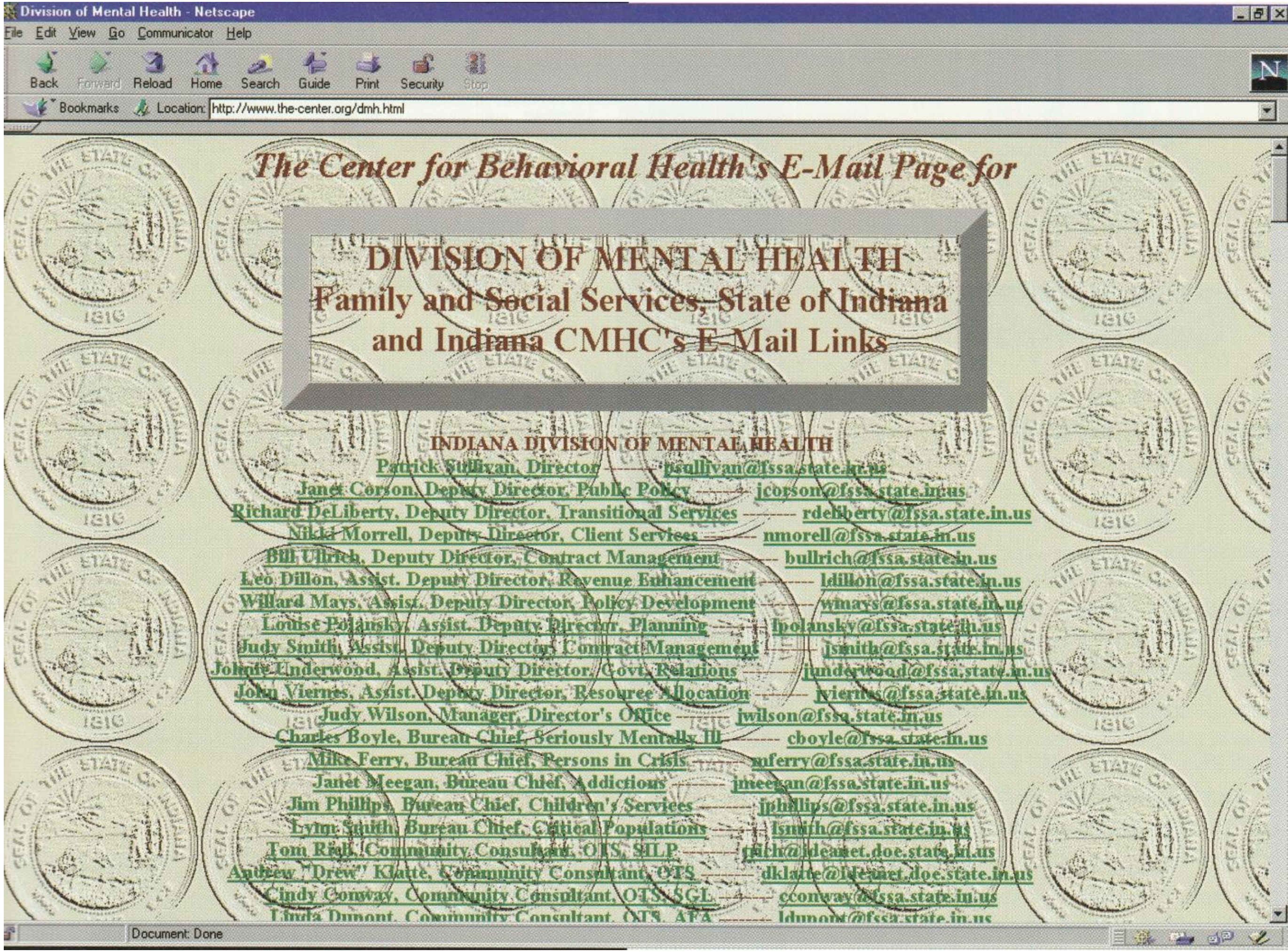
Recognition in a Book

- ~1996 Center for Behavioral Health stood up 1st website
- Developed in house by guy who liked doing websites
- ~ 1997 Informed by a friend that our website had been featured in a book
- We were very proud…



Web Pages That Suck
Learn Good Design by Looking at Bad Design
Vincent Flanders & Michael Willis
Based on the award-winning site: WebPagesThatSuck.com
SYBEX

What’s not to love about this?



Location: http://www.the-center.org/dmh.html

The Center for Behavioral Health's E-Mail Page for

DIVISION OF MENTAL HEALTH
Family and Social Services, State of Indiana
and Indiana CMHC's E-Mail Links

INDIANA DIVISION OF MENTAL HEALTH

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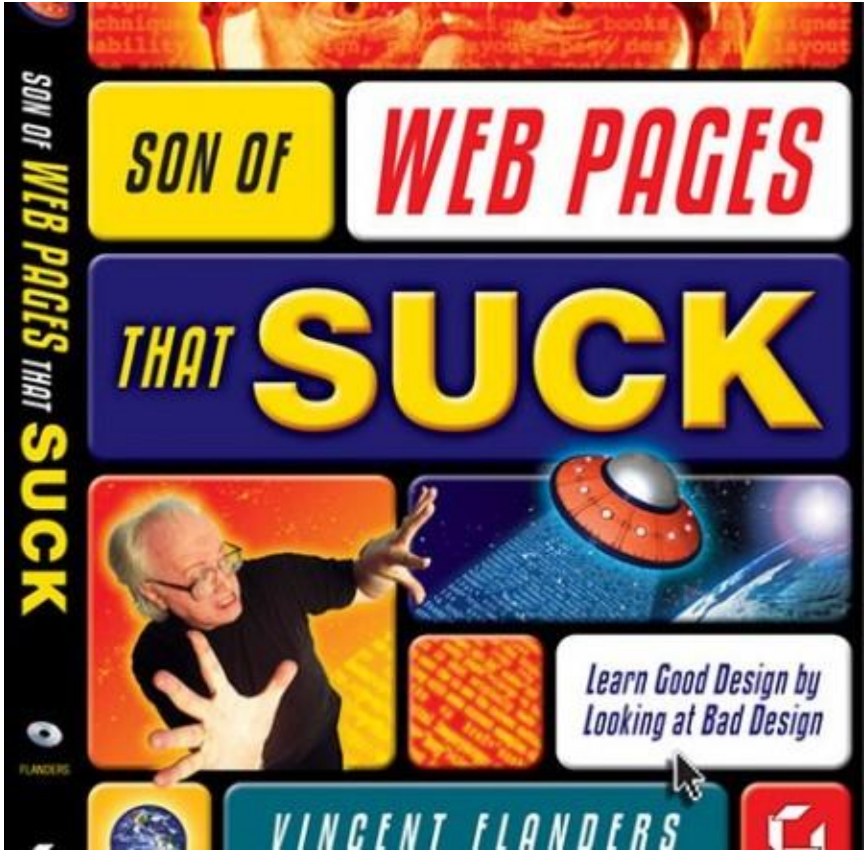
Cindy Conway, Community Consultant, OTS, SGL ------- cconway@fssa.state.in.us
Linda Dupont, Community Consultant, OTS, AFA ------- ldupont@fssa.state.in.us

You’re in luck…there’s more


SON OF WEB PAGES THAT SUCK
Learn Good Design by Looking at Bad Design
VINCENT FLANDERS

http://www.webpagesthatsuck.com/

Rightly or not,

government entities have a reputation of being hard to access.

What is “Good” Service?

Good service has nothing to do with what the provider believes it is;
it has only to do with what the customer believes is true.

Good service results when the provider
meets or exceeds the customers expectations.

Davidow, W.H., & Uttal, B. (1989, July-August). Service companies: Focus or falter. *Harvard Business Review*, pp. 77-85.

Online Issues

67% Customers have hung up the phone out of frustration because they could not talk to a real person

46% Online customers expect brands to provide customer service on Facebook (23% actually do)

70% Companies ignore customer complaints on Twitter

83% Complainants that received a reply on social media liked or loved the fact that the company responded

41% Consumers expect an email response within six hours

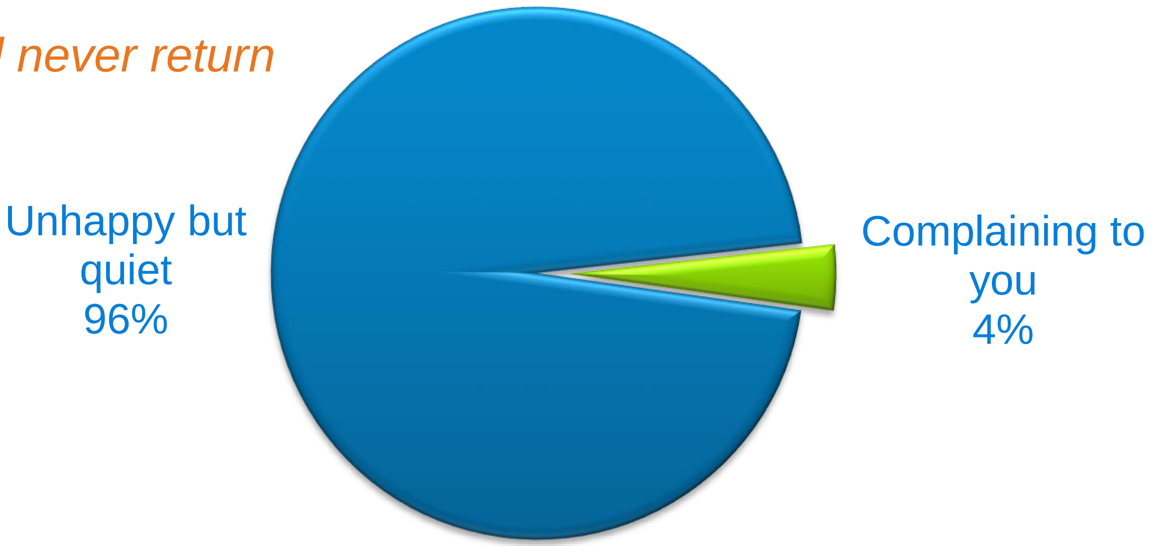
36% U.S. companies respond in six hours

14% Companies do not respond to emails at all

Forrester Technographics Customer Experience Online Survey

Unhappy Customers

91% will never return



Zemke, R. *Service America: Doing business in the new economy*
Tri-County Mental Health Foundation Forum Series, Indianapolis, 1988
Beal, A. 96% of unhappy customers won't complain to you, but will tell 15 friends [infographic]
https://www.andybeal.com/96-of-unhappy-customers-wont-complain-to-you-but-will-tell-15-friends-infographic/

Survey of people searching for a therapist:

For those who have taken the incredibly courageous first step of deciding they want to get help,

trying to navigate the mental health care system is kind of like finding themselves in the middle of a foreign city with no street signs or maps,*

where they don't speak the language,

and where they are being asked to find their way home again on their own.

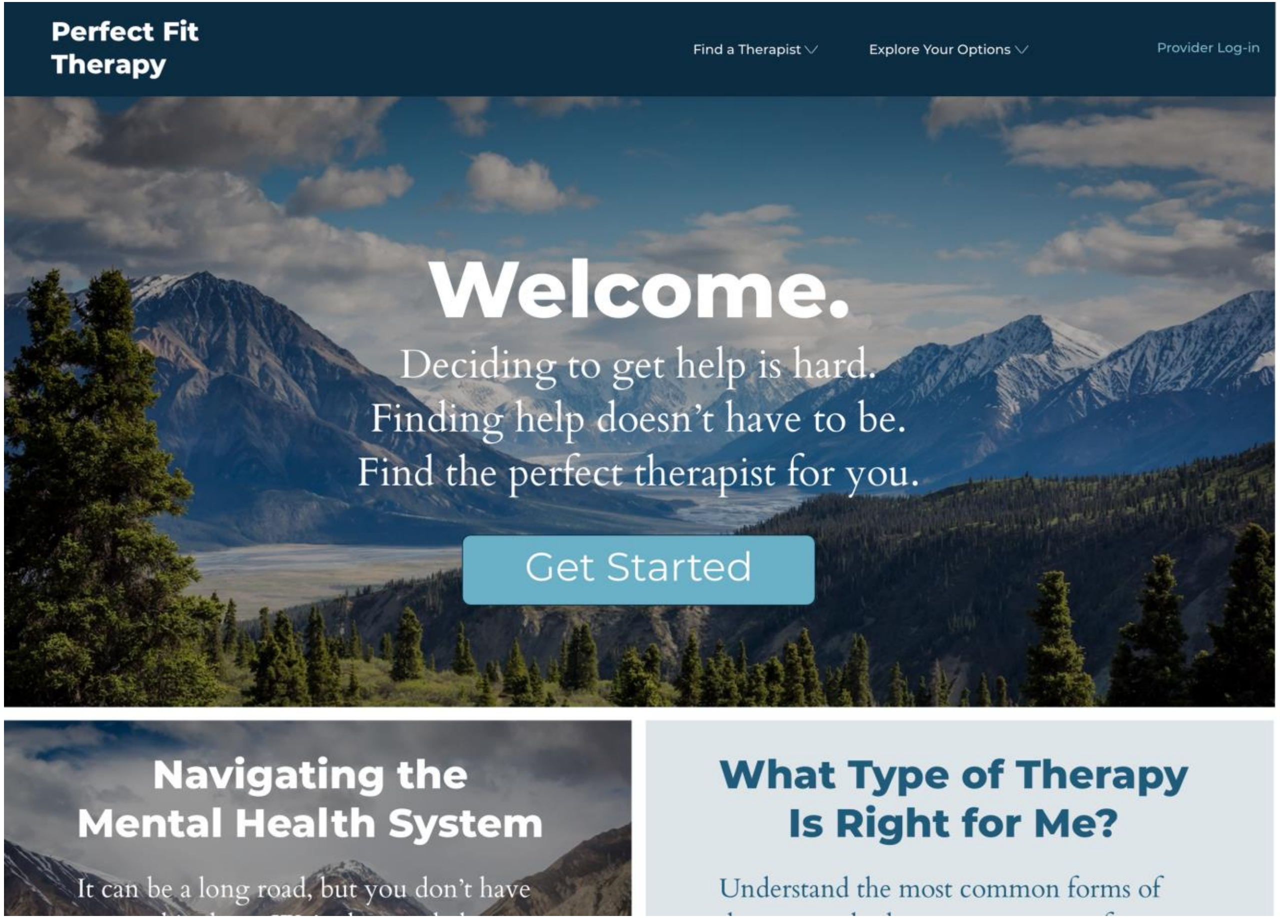
https://www.linkedin.com/pulse/user-experience-mental-health-needs-major-overhaul-i-pollacksmith/

Survey of people searching for a therapist:

- The search for a therapist was itself a stressor, on top of whatever pain, confusion, or distress the person was already experiencing.
  - No way to shop or compare.
  - Will my insurance pay for it?
- Most people are not familiar with the lingo of therapy
  - Therapist fit/CBT?DBT?/PhD?MSW?LCSW?MA?
- Subset of people didn't know what they wanted/needed
- Want to “try before you buy”
  - Everyone, at least once, invested a good deal of time and money seeing a therapist, only to discover that they were not a good fit after several sessions.

https://www.linkedin.com/pulse/user-experience-mental-health-needs-major-overhaul-i-pollacksmith/

Built a website to help people navigate “the system”


Perfect Fit Therapy
Find a Therapist
Explore Your Options
Provider Log-in
Get Started

Welcome.

Deciding to get help is hard.
Finding help doesn’t have to be.
Find the perfect therapist for you.

Navigating the Mental Health System

It can be a long road, but you don’t have

What Type of Therapy Is Right for Me?

Understand the most common forms of

https://projects.invisionapp.com/share/X6Q2LW2C3W2#/screens

Primary Takeaways

1. User Experience **(UX) design is hard**.
2. We need a **new language of mental health** to describe issues, diagnoses, coping strategies and possible outcomes that people can understand.
3. If we're going to fix the problem, we need to **co-create the solution** with both users *and* mental health providers.

https://www.linkedin.com/pulse/user-experience-mental-health-needs-major-overhaul-i-pollacksmith/

User Centered Design

User-centered design (UCD) is a collection of processes that focus on **putting users at the center** of product design and development.

User Centered Design Principles & Methods. https://xd.adobe.com/ideas/principles/human-computer-interaction/user-centered-design/

User-Centered Design Principles

- **Users are involved in the design process from the very beginning.**
  - Critical design decisions are evaluated based on how they work for end-users.
- **Importance of requirement clarification.**
  - The product team always tries to align business requirements with user's needs.
- **Introducing user feedback loop in the product life cycle.**
  - The product team collects and analyzes feedback from users regularly.
- **Iterative design process.**
  - The product team constantly works on improving user experience; it introduces changes gradually as it gains more understanding about their target audience.

User Centered Design Principles & Methods.
https://xd.adobe.com/ideas/principles/human-computer-interaction/user-centered-design/

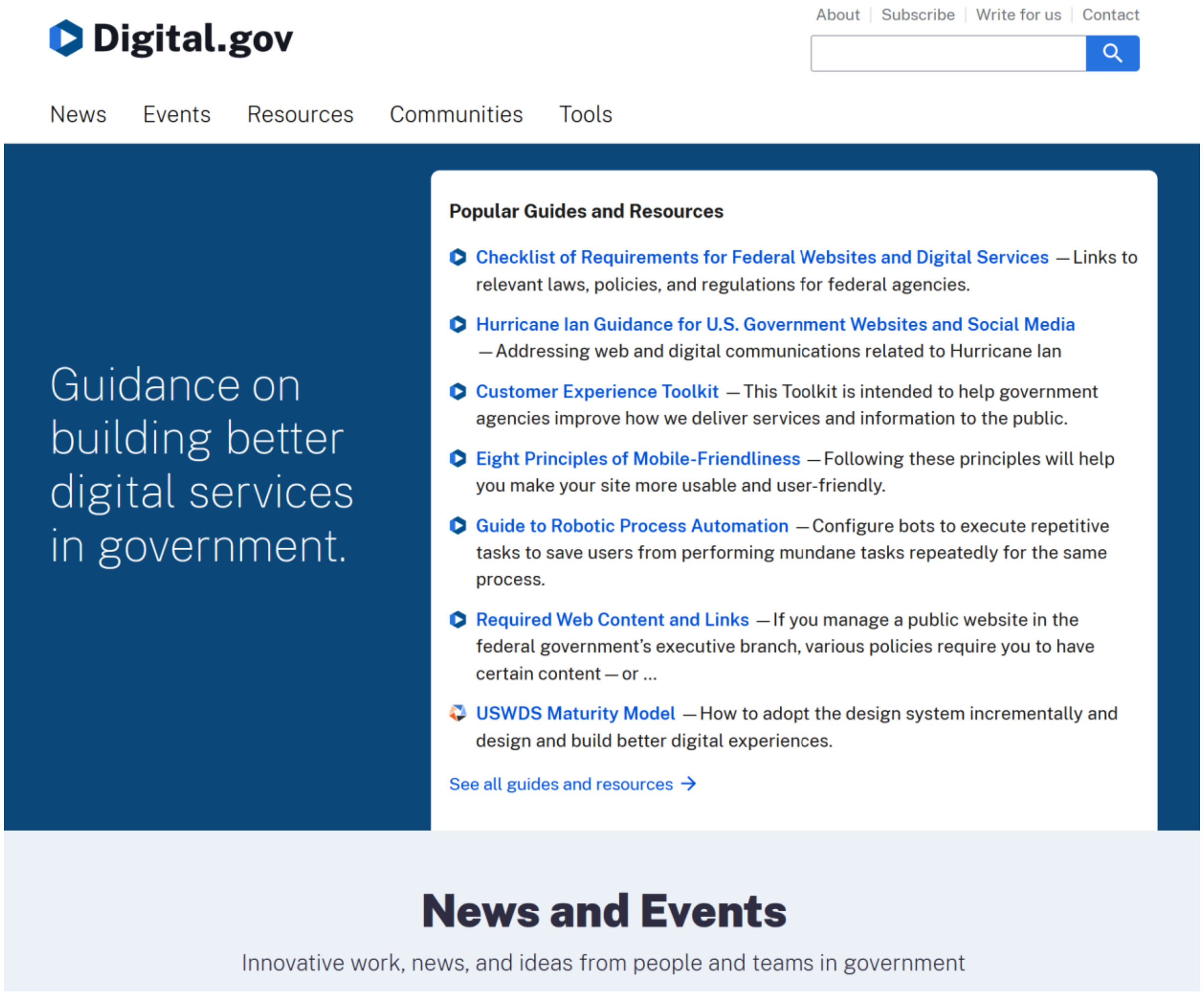
Rules of Thumb

Human Factors International (HFI) recommends following the “10%” rules of thumb:

- 10% of your IT staff should be user experience (UX) professionals
- 10% of your budget dedicated to UX.

Benefits of User-Centered Design.
https://www.usability.gov/what-and-why/benefits-of-ucd.html (**now digital.gov**)

Digital.gov



Guidance on building better digital services in government.

Popular Guides and Resources

- Checklist of Requirements for Federal Websites and Digital Services — Links to relevant laws, policies, and regulations for federal agencies.
- Hurricane Ian Guidance for U.S. Government Websites and Social Media — Addressing web and digital communications related to Hurricane Ian
- Customer Experience Toolkit — This Toolkit is intended to help government agencies improve how we deliver services and information to the public.
- Eight Principles of Mobile-Friendliness — Following these principles will help you make your site more usable and user-friendly.
- Guide to Robotic Process Automation — Configure bots to execute repetitive tasks to save users from performing mundane tasks repeatedly for the same process.
- Required Web Content and Links — If you manage a public website in the federal government's executive branch, various policies require you to have certain content — or ...
- USWDS Maturity Model — How to adopt the design system incrementally and design and build better digital experiences.

See all guides and resources →

News and Events

Innovative work, news, and ideas from people and teams in government

Digital Accessibility for Impaired Persons

- 2021 investigation showed that nearly all of the Covid-19 vaccine registration websites reviewed weren't accessible to people who are blind
- Digital accessibility - designing webpages that are inclusive of people who have visual, motor, auditory, speech, or cognitive disabilities.
- Nearly 1 in 4 Americans — and more than 1 billion people worldwide have one of these disabilities
  - Including 46% of people age 60 and older.
- Americans 65 and older projected to nearly double from 52 million in 2018 to 95 million by 2060, federal officials have already identified the accessibility of online health information as an urgent need.

Krupa, A, Roark, JB, & Barrett, K. (2022). Hospitals need to make their websites as accessible as their physical spaces. StatNews. https://www.statnews.com/2022/10/31/hospitals-website-accessibility-needs-work

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- The UX of mental health technology. https://www.nurau.com/post/the-ux-of-mental-health-technology
- Designing Experiences To Improve Mental Health. https://www.smashingmagazine.com/2018/10/designing-experiences-improving-mental-health/
- Designing and improving the UX of digital products for healthcare. https://www.editorx.com/shaping-design/article/healthcare-ux-design
- The user experience in mental health needs a major overhaul, or what I learned from a 10-week course in user experience design. https://www.linkedin.com/pulse/user-experience-mental-health-needs-major-overhaul-i-pollacksmith/
- Reimagining digital healthcare with a patient-centric approach: The role of user experience (UX) research. https://www.frontiersin.org/articles/10.3389/fdgth.2022.899976/full
- Healthcare UX—Design that Saves Lives. https://www.interaction-design.org/literature/article/healthcare-ux-design-that-saves-lives
- The Future of Healthcare UX Design. https://usabilitygeek.com/the-future-of-healthcare-ux-design/
- The Importance of UX Design in the Healthcare Industry. https://www.lionandmason.com/ux-blog/the-importance-of-ux-design-in-the-healthcare-industry/
- Design Standards to save lives – UX in Healthcare. https://www.lionandmason.com/ux-blog/the-importance-of-ux-design-in-the-healthcare-industry/
- Healthcare UX: How Better UX Is Improving The Patient Experience. https://mindsea.com/healthcare-ux/