Electronic Health Record Adoption in SBHCs

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Learning Objectives

- Understand the EHR Adoption Roadmap
- Identify specific EHR requirements needed to support an SBHC
- Discuss communication strategies for articulating SBHC needs to organization leadership, IT staff and EHR vendors
- Think about how to move your organization further along in the EHR Adoption process

Introductions

- **Outlook Associates**
  - Health IT and Process Improvement Consulting
    - Founded in 1991
    - Headquartered in Irvine, CA
    - Consulting division of Qualis Health, a non-profit Quality Improvement Organization (QIO) and REC for Washington and Idaho
  - Founding Goal
    - Improve healthcare through:
      - The effective use of systems and technology
      - The availability of reliable data on which to base sound medical and business decisions
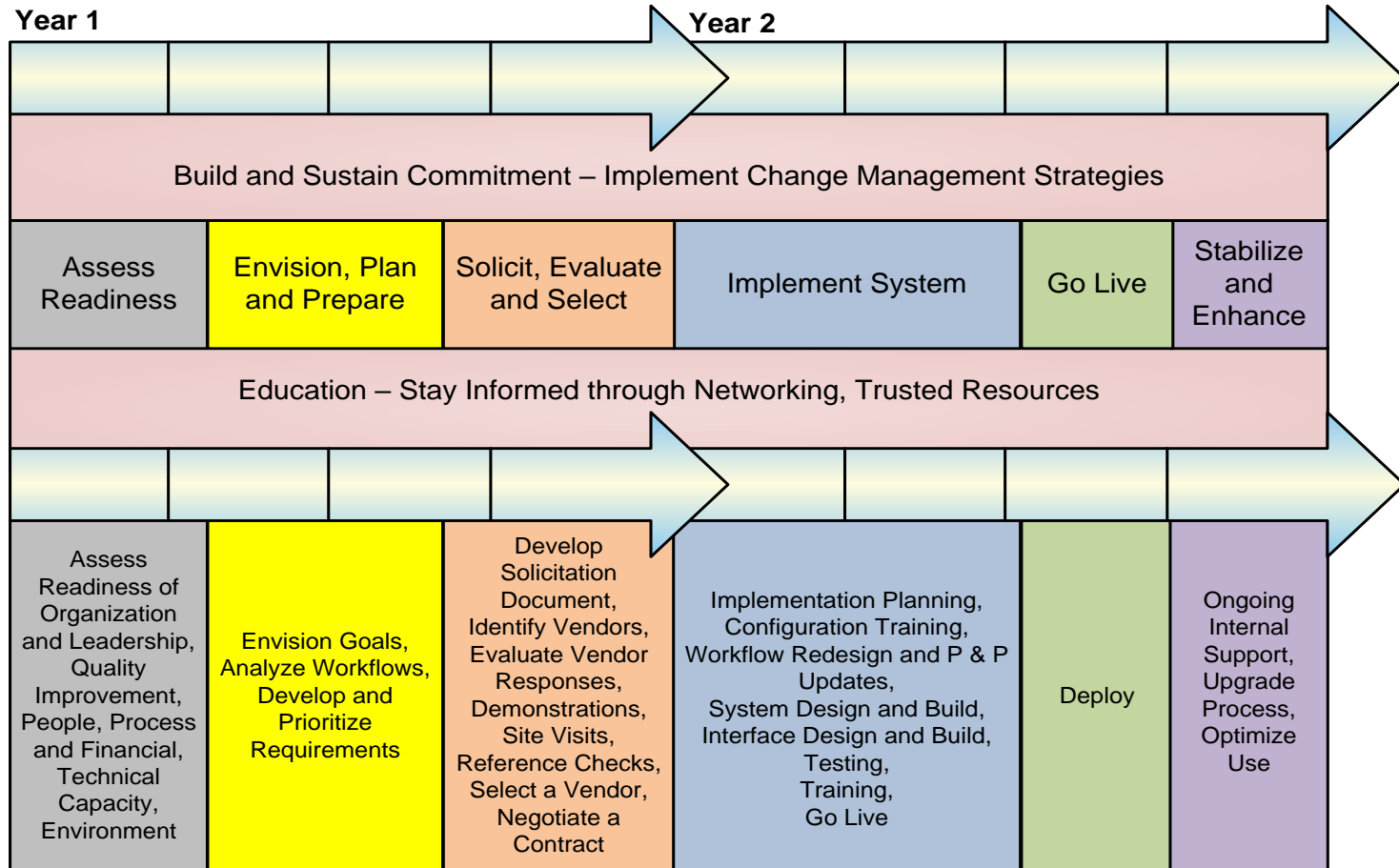 - Commitment to Safety Net Providers and Payers

CSHC EHR Adoption Project

Objective:

Provide technical assistance to school-based health centers (SBHCs) to assist them in moving forward with implementation of an electronic health record (EHR) and, if eligible, receiving federal incentive payments.

EHR Adoption Roadmap

Year 1   **Year 2**

Build and Sustain Commitment – Implement Change Management Strategies

Assess Readiness	Envision, Plan and Prepare	Solicit, Evaluate and Select	Implement System	Go Live	Stabilize and Enhance

Education – Stay Informed through Networking, Trusted Resources

Assess Readiness of Organization and Leadership, Quality Improvement, People, Process and Financial, Technical Capacity, Environment	Envision Goals, Analyze Workflows, Develop and Prioritize Requirements	Develop Solicitation Document, Identify Vendors, Evaluate Vendor Responses, Demonstrations, Site Visits, Reference Checks, Select a Vendor, Negotiate a Contract	Implementation Planning, Configuration Training, Workflow Redesign and P & P Updates, System Design and Build, Interface Design and Build, Testing, Training, Go Live	Deploy	Ongoing Internal Support, Upgrade Process, Optimize Use

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Assess Readiness

Assess Readiness of Organization and Leadership, Quality Improvement, People, Process and Financial, Technical Capacity, Environment

- Make sure everyone is on the same page of the same book

- Establish an EHR Committee and make sure the SBHC is represented
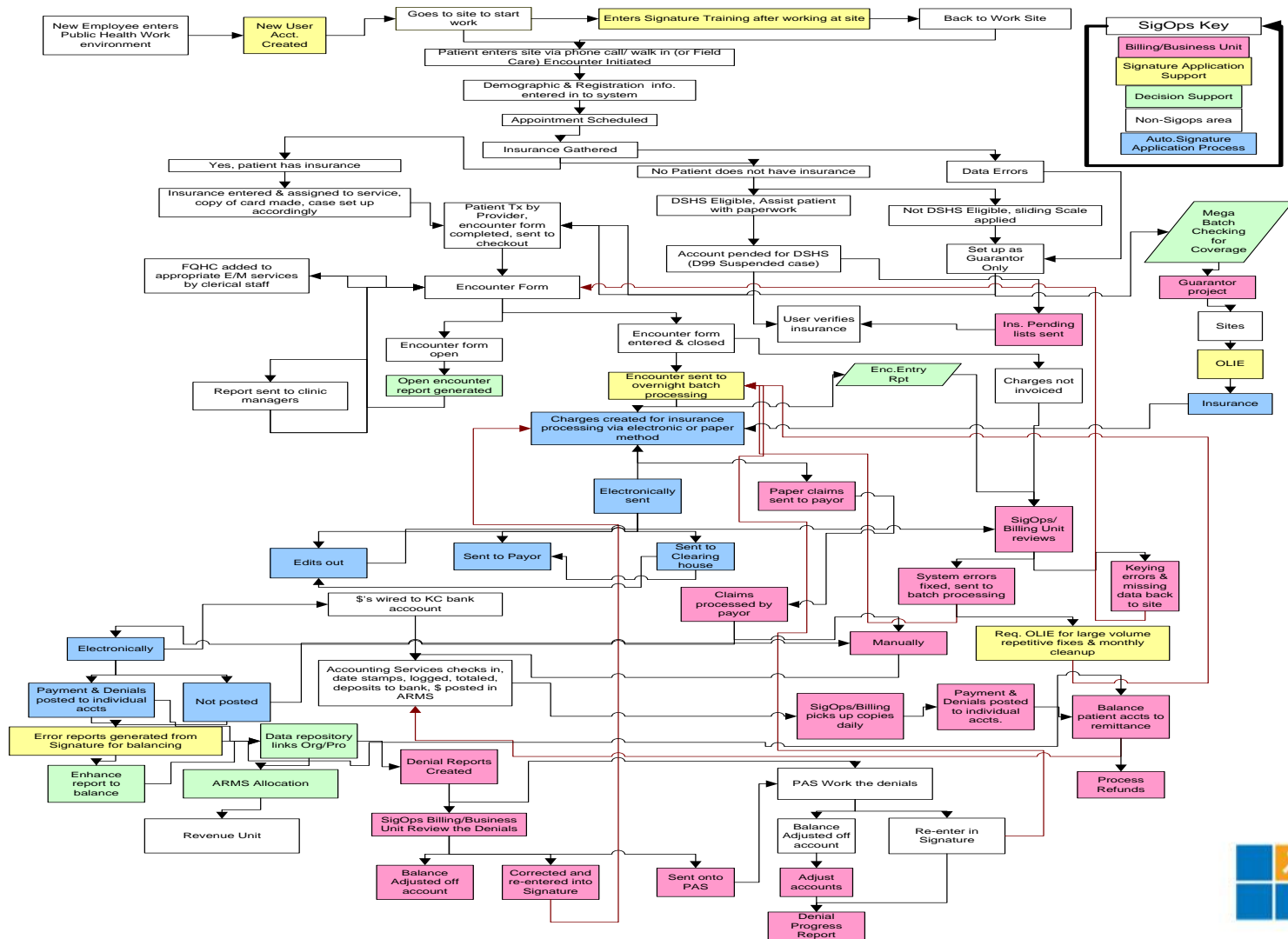
Envision, Plan and Prepare

Envision Goals, Analyze Workflows, Develop and Prioritize Requirements
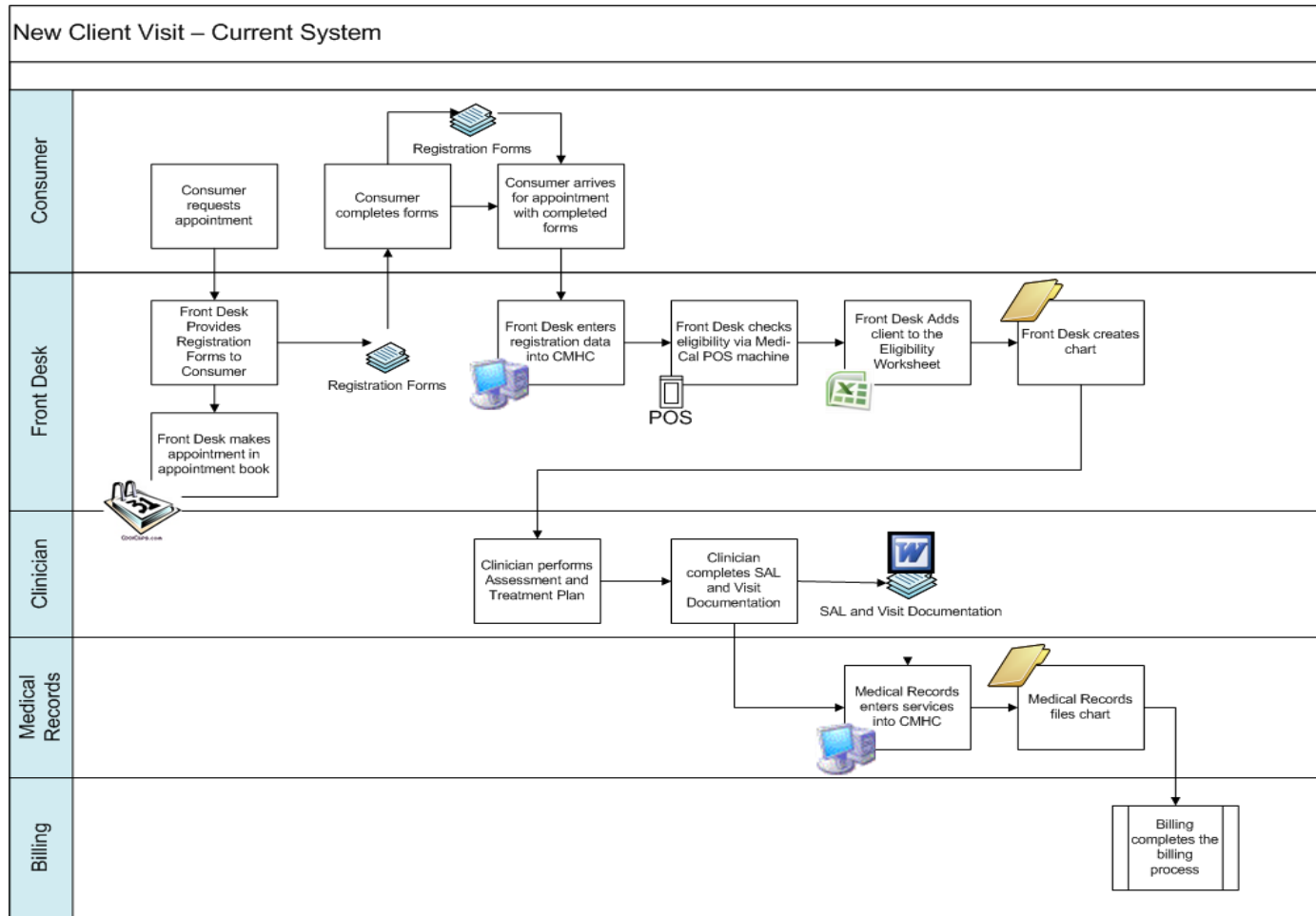
- **Goals:**
  Know and articulate why you are doing this

- **Workflow**:
  Do not automate inefficient manual processes

- **Requirements**:
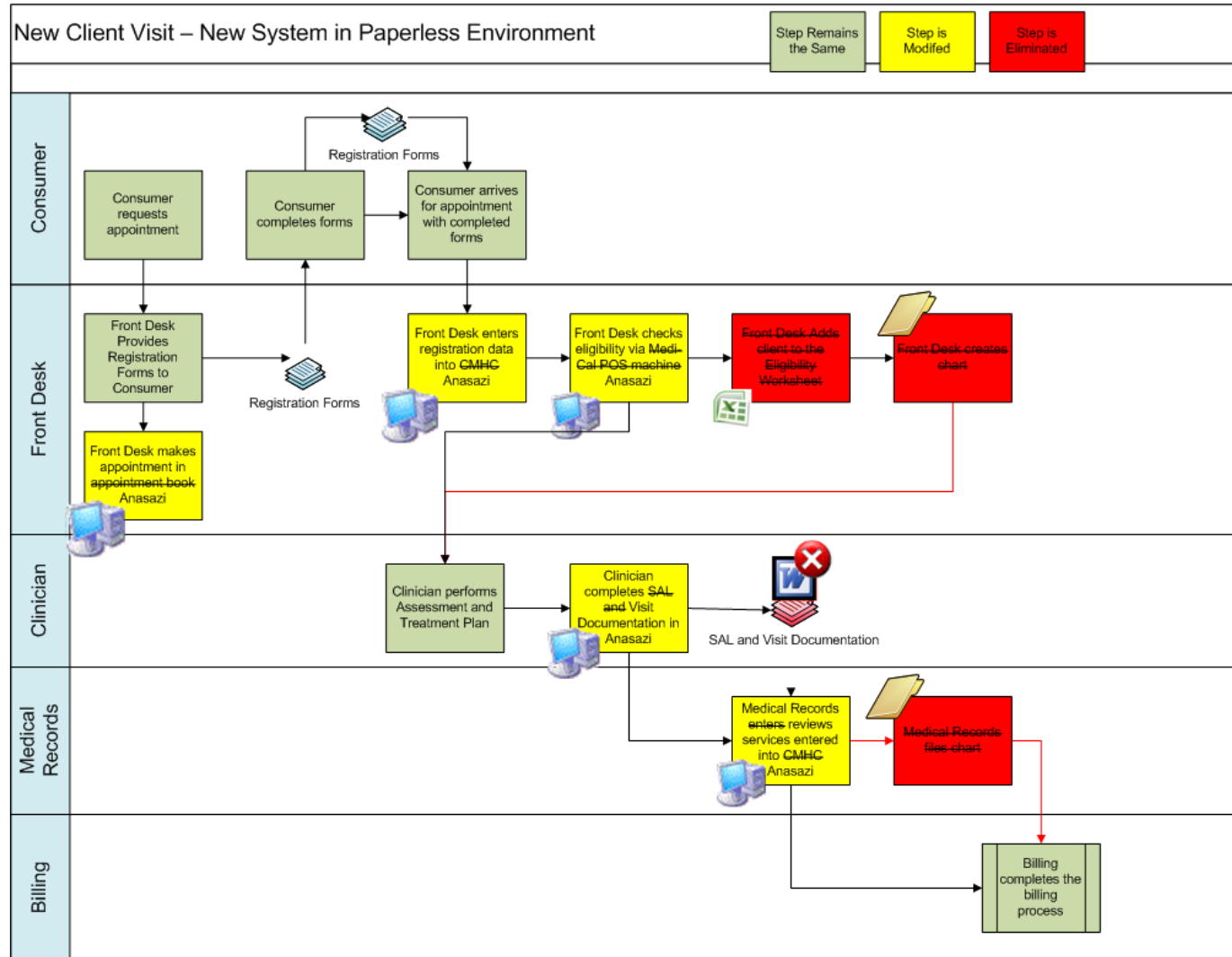 Know what you need and what is most important

Workflow

Sample Current State Worklow

New Client Visit – Current System

Sample Future State Workflow

New Client Visit – New System in Paperless Environment

Legend:
- Step Remains the Same (green)
- Step is Modifed (yellow)
- Step is Eliminated (red)

Consumer
- Registration Forms
- Consumer requests appointment
- Consumer completes forms
- Consumer arrives for appointment with completed forms

Front Desk
- Front Desk Provides Registration Forms to Consumer
- Registration Forms
- Front Desk enters registration data into ~~CMHC~~ Anasazi
- Front Desk checks eligibility via ~~Medi-Cal POS machine~~ Anasazi
- ~~Front Desk Adds client to the Eligibility Worksheet~~
- ~~Front Desk creates chart~~
- Front Desk makes appointment in ~~appointment book~~ Anasazi

Clinician
- Clinician performs Assessment and Treatment Plan
- Clinician completes ~~SAL and~~ Visit Documentation in Anasazi
- SAL and Visit Documentation

Medical Records
- Medical Records ~~enters~~ reviews services entered into ~~CMHC~~ Anasazi
- ~~Medical Records files chart~~

Billing
- Billing completes the billing process

EHR Requirements for SBHCs

- **General EHR Functionality**
  - Clinical History Documentation
    - Medical Hx, family, and social history
    - Allergies
    - Current medications
  - Clinical Visit/Encounter Documentation
    - Vital signs, including height, weight, calculated BMI
    - Well visit and sick visit templates
      - SOAP notes
    - Problem lists via ICD-9 or free text
  - Medication Management
    - ePrescribing – Electronic transmission of prescriptions to pharmacies and information about other filled prescriptions
    - Alerts – Drug/Drug, Drug/Allergy, Drug/Disease

EHR Requirements for SBHCs

- General EHR Functionality (continued)
  - Orders and Results Management
    - Online lab, diagnostic testing, screening order and results entry
    - Interfaces – Labs, medical devices
    - Referrals, including referral tracking
  - Charge Capture
    - Online generation of charges for services
    - Send to billing system
  - Workflow Management
    - Provider desktop/dashboard
    - Tickler system with tasks
    - Communication with other EHR users
  - Reporting
    - Most systems can report on any data collected discretely
    - Some can do population management (i.e., look at all my patients with asthma that have not been seen in the last xx months)

EHR Requirements for SBHCs

- General EHR Functionality (continued)
  - Scanning
    - Scan consents, outside reports, insurance cards
    - Elimination of paper charts
  - Patient Portal
    - Patient/parent access to information
    - Provider can decide what can and cannot be seen

EHR Requirements for SBHCs

- Pediatric Content
  - Well child exam templates
  - Sick visit templates for common pediatric complaints
  - Immunization management
    - Interface to immunization registries
  - Growth charts
  - Asthma flow charts/action plans
  - Weight-base dose calculators
  - School and camp forms management
  - Mark documents/services as confidential for adolescents
  - Consent management

EHR Requirements for SBHCs

SBHC Requirement	EHR Configuration
Collection of information about student status, such as grade level, home room teacher	User-defined fields Templates
Health education, smoking cessation, mental health, nutrition programs	Templates
Groups for the above programs	Group management functionality – add patients to group, document for group as a whole once, then add detail for individuals
Visit disposition, such as sent back to class, sent home	Add field to visit templates
Risk assessments	Templates
Dental services	May need EDR (electronic dental record)

Solicit, Evaluate, and Select

Develop Solicitation Document, Identify Vendors, Evaluate Vendor Responses, Demonstrations, Site Visits, Reference Checks, Select a Vendor, Negotiate a Contract

- **Demonstrations:** Scripted demos, NOT Sales demos

- **Reference Checks:** Conduct reference calls, as many as possible

- **Site Visits:** Conduct Site Visits, as many as possible; not just during the selection process
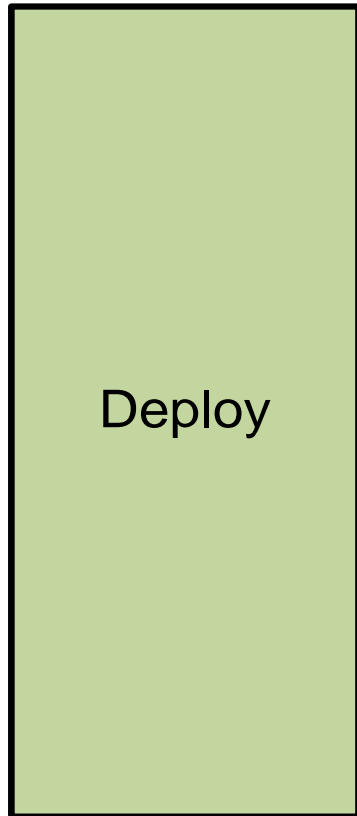
Implement

Implementation Planning,
Configuration Training,
Workflow Redesign and P & P Updates,
System Design and Build,
Interface Design and Build,
Testing,
Training,
Go Live

- Build
- **Test**
- Train

Go Live

Deploy

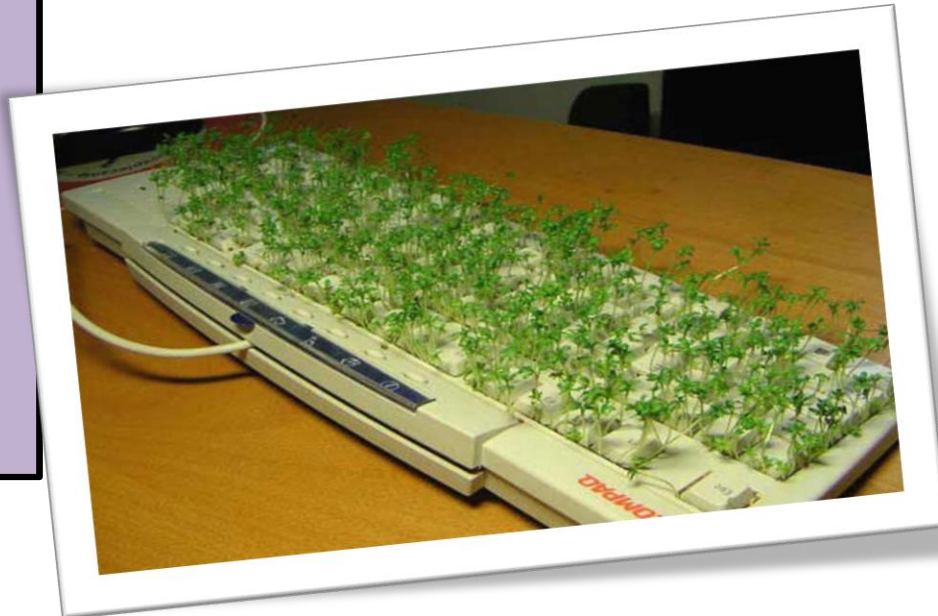- Provide appropriate resources to Go Live

Optimize

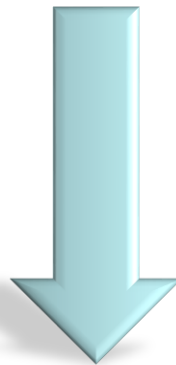Ongoing Internal Support, Upgrade Process, Optimize Use

- Regular re-evaluation of system use

- EHR Forever Committee

Build and Sustain Commitment

Build and Sustain Commitment – Implement Change Management Strategies

- Same Page, Same Book
- Address change management from the beginning

Change Management

Vision	+	Skills	+	Incentives	+	Resources	+	Action Plan	= **Change**
		Skills	+	Incentives	+	Resources	+	Action Plan	= **Confusion**
Vision			+	Incentives	+	Resources	+	Action Plan	= **Anxiety**
Vision	+	Skills			+	Resources	+	Action Plan	= **Resistance**
Vision	+	Skills	+	Incentives			+	Action Plan	= **Frustration**
Vision	+	Skills	+	Incentives	+	Resources			= **Treadmill**

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The Change Management Lifecycle

Begin Executing Change Plan

End of Old Way

Climb to Productivity

Change Plan?

Train Key Personnel in Change Leadership Skills

Valley of Despair

Training

Pity City

Severity of Reaction to Change

Duration of disruption due to change

⊙ Bridges, Enhancements From Val Larson 2002
⊙ iSixSigma LLC 2002
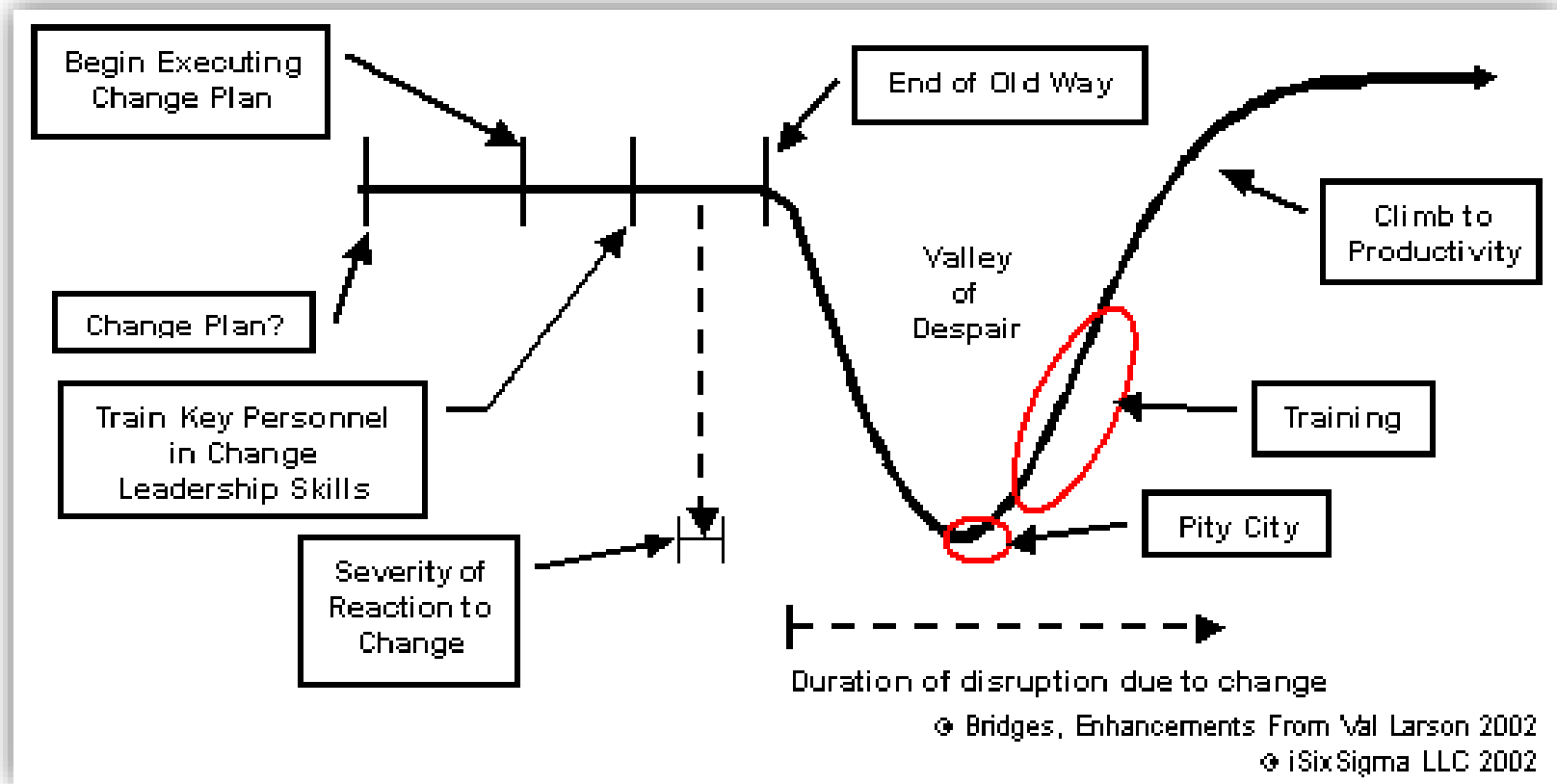
Education

Education – Stay Informed through Networking, Trusted Resources
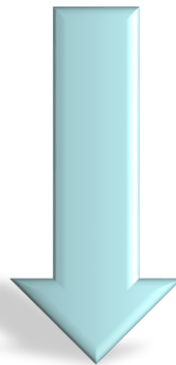
Networking
– CSHC
– CPCA

References
– Websites
– Publications

Communication Tools and Strategies

- How do I communicate my EHR needs to my organization leadership, my IT staff, and EHR vendors?

  - EHR Committee

  - Articulate needs/requirements

  - Look for commonalities rather than differences

Advancing Adoption

- How can I move my organization forward in the EHR Adoption Process?
  - Next Steps
  - Barriers

Questions?

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