

BUILDING OR ADOPTING AN ELECTRONIC HEALTH RECORD (EHR) FOR WRAPAROUND AND SYSTEMS OF CARE

A Resource Guide to Accompany the NWI Webinar on “Wrap and Tech”



From the National Wraparound Initiative

July 30, 2019

Key Points to Consider

- » **Understand that EHR is not simply a piece of software, it is a transformation of your business.** It will change the way you deliver services and can improve outcomes and increase efficiency. Do your research and choose carefully. You simply can't shop for it the same way you would other software.
- » **Know that the process is typically complicated, lengthy, and at least minimally disruptive to normal operations.** Patience and planning are key. A survey by the NWI indicated a wide range in the amount of time required for selection and launch of an EHR, with the majority of respondents reporting the process took over a year, and some reporting it took over two years.
- » **Establish a team/committee to guide the organization** through all the phases of EHR implementation. Include representatives from multiple divisions and levels of the organization: Executive, Administration/Operations, Clinical/Providers, Billing/Finance, Information Technology, and Quality Assurance. Select an overall lead, at least one champion, and a communications lead (for working with the vendor and staff).
- » **Plan to work through multiple stages of this ongoing process:** Planning/Assessment, Selection/Contracting, Adoption/Implementation, Maintaining/Optimizing, and eventually, Replacing the EHR. Take advantage of free online guides, videos, worksheets, and other tools/resources to help you through these stages (see “Additional Resources” beginning on page 4).
- » **Know your organization's needs and goals.** Identify which EHR features are “must haves,” “would be nice but aren't make-or-break,” and which features you don't want or need. Table 1 on the following page identifies the EHR functions/features most frequently identified as “absolutely essential” in the NWI Survey. The feature most often identified as needed (and regrettably, overlooked) was the ability of the EHR to handle “living”, dynamic, documents such as Plans of Care.

1. NWI SURVEY: The University of Washington's Wraparound Evaluation and Research Team (WERT) conducted a survey of Wraparound systems and organizations on EHR selection, use, and decision-making to inform the NWI community of practice. Interviews with leaders were also conducted to provide more detailed information. Results were obtained from 136 EHR users and deciders at 89 different organizations. For more information about this survey contact Lydia Andris at andris@uw.edu.

TABLE 1. ESSENTIAL FUNCTIONS/FEATURES

Most essential (ID'd by over 70%)	Somewhat essential (40-70%)	Less Essential (< 40%)
<ul style="list-style-type: none"> » Case/program notes » HIPAA compliance » Reporting capabilities » Document uploading capabilities » Dynamic care/service plans » Customizable user permissions 	<ul style="list-style-type: none"> » Billing invoicing functionality » Integrates/shared information with other internal systems » Built-in standardized assessments » Customizable workflows » Auditing features » Customizable language/wording » Dashboards » Captures free text » Scheduling functionality 	<ul style="list-style-type: none"> » Integrates and shares information with external systems » Meaningful use certification » Secure electronic messaging » Met interoperability standards (HL7, ONC, CDA etc.) » Mobile interface » Client portal

- » **Map out your organization’s daily workflows and resources.** Talk with staff, understand and document how each staff role would interact with the EHR.
- » **Compare vendors/products and select carefully.** Finding the right EHR is challenging. Many vendors exist, all claiming to be the best. Only you can decide which will work best for

your organization. Ask other organizations what they are using and how it is working out. Talk to vendors at conferences. Use online tools to compare vendors/products (see Additional Resources beginning on page 4). Table 2 lists the vendors most frequently used by WERT survey respondents – BUT – don’t just look into these.

TABLE 2. COMMONLY IDENTIFIED EHR VENDORS AND PRODUCTS

Vendor	Website
CareLogic (by Qualifacts Systems)	https://qualifacts.com/carelogic-ehr-platform
Cerner Integrated Behavioral Health EHR (acquired Anasazi)	https://www.cerner.com/solutions/behavioral-health
Credible	https://www.credibleinc.com
Fidelity EHR	http://www.fidelityehr.com
MyAvatar (by Netsmart)	https://www.ntst.com/Solutions-and-Services/Offerings/myAvatar
MyEvolv (by NetSmart)	https://www.ntst.com/Solutions-and-Services/Offerings/myEvolv
Remarkable Health (formerly known as “ClaimTrack”)	https://remarkablehealth.com

- » **Ask potential vendors questions.** WERT Survey respondents recommended asking:
 1. for confirmation that desired features are included in the base package (not add-ons or upgrades),
 2. about training and continued support/customer service,
 3. for references so you can request to see how the EHR will work in the real world,
 4. how data can be retrieved from the system in a worst-case scenario, and
 5. if they will help convert and transfer your existing data into the new system.
- » **Understand that there is no perfect EHR.** The WERT Survey showed that only 23% of respondents were very or extremely satisfied with their EHR, while 47% were moderately satisfied and 30% were not satisfied. Keep in mind this is an evolving science in a rapidly changing care/service environment. Select an EHR that is flexible and allows you to add functions or applications so it can more precisely meet your needs.
- » **Prior to launching the EHR, be sure to:**
 1. review and modify workflows as needed,
 2. test the new system using real data,
 3. decide what data to transfer over,
 4. develop written support materials (such as how-to manuals and FAQs) and consider setting up a help desk, and
 5. train staff. When training staff, expect a range of proficiency and identify early adopters that can help other staff. Pilot modules with small

teams before moving out and acknowledge that change is hard.

- » **Coordinate your background research and decision-making process with other organizations when necessary.** Wraparound and systems of care are increasingly being implemented in the context of managed care and/or state reform efforts. Wraparound provider organizations that work within such contexts (or may in the future) would benefit from talking with other organizations about their EHR decisions, and exploring state- or managed care-specific EHR initiatives and resources. Regional Extension Centers (RECs), relevant Managed Care Organizations (MCOs), and state Medicaid programs are other entities with which you may want to consult. As Wraparound initiatives and systems of care grow and become more complex, interoperability and the ability to produce “meaningful use” measures will become more critical.
- » **Anticipate challenges or pain points to implementation** and brainstorm how to approach managing the problem. Develop systems to readily learn what’s working and not working.

Above all, remind yourself that that adopting an EHR is a large, complex, and challenging undertaking. Making the right decisions is critical to achieving the proposed outcomes of EHRs, which include helping your organization improve patient engagement and coordination of services, manage and monitor services, improve outcomes, and reduce costs. Implementing an EHR is taking a big, important step forward in this increasingly digitized world.

Additional Resources

Below are resources available online from the Agency for Health Care Research and Quality (AHRQ), the American Medical Association (AMA), the American Psychiatric Association (APA), HealthIT.gov, the Substance Abuse and Mental Health Services Administration (SAMHSA), Stratis Health, and others.

GENERAL INFORMATION – FOR ALL STAGES OF IMPLEMENTATION		
Resource	Details	Website
Understanding the Value of Health IT	[HealthIT. PDF.]	https://www.healthit.gov/sites/default/files/playbook/pdf/educational-module-Behavioral-Health-Providers.pdf
EHR Boot Camp Series	Importance and value of EHRs – What are the real benefits? Topics include: 1) Importance and Value of EHRs, 2) Assessing Agency Needs and Capacity, 3) EHR Implementation, 4) EHR Testing and Training, 5) Privacy and Security, 6) Preparing for Success. [SAMHSA. Videos.]	https://www.youtube.com/playlist?list=PLBXgZMI_zqfS_UeLvOlRn5fA0zkXHkK_I
Health Information Technology Tool Kit	[AHRQ. Website.]	https://healthit.ahrq.gov/health-it-tools-and-resources/evaluation-resources/workflow-assessment-health-it-toolkit
Health Information Toolkit & Training Videos	Covers 6 steps (1) assess, 2) plan, 3) select, 4) implement, 5) maintain, 6) optimize) with resources available for 3 different IT experience levels. Includes surveys, assessments, samples, templates and tools. [Stratis Health. Web page(s), videos.]	http://www.stratishealth.org/expertise/healthit/behavioralhealth/index.html http://www.stratishealth.org/expertise/healthit/behavioralhealth/training.html
Playbook	Contains strategies, recommendations, and best practices. Section 1: EHR: Understand EHR contracts, Select an EHR, Adopt and implement your EHR, Optimize workflow, Migrate Data. [HealthIT. Web page(s).]	https://www.healthit.gov/playbook/electronic-health-records https://www.healthit.gov/playbook/specialists
EHR Software Selection and Purchase	Part of STEPSforward. Covers steps up to negotiating contract terms and includes Q&As. [AMA. Web page(s).]	https://edhub.ama-assn.org/steps-forward/module/2702748
EHR Frequently Asked Questions (FAQs)	[APA. Web page(s).]	https://www.psychiatry.org/psychiatrists/practice/practice-management/health-information-technology/ehr-faq

STAGE 1: PLANNING

Resource	Website
Creating a Leadership Team for successful EHR Implementation. [HealthIT. PDF.]	https://www.healthit.gov/sites/default/files/playbook/pdf/creating-leadership-team-for-successful-ehr-implementation.pdf
Defining Goals and Objectives for EHR Implementation. [HealthIT. PDF.]	https://www.healthit.gov/sites/default/files/playbook/pdf/defining-goals-and-objectives-for-ehr-implementation.pdf
Guide to Reducing Unintended Consequences of EHR. [HealthIT. Web page(s).]	https://www.healthit.gov/unintended-consequences
Planning Your EHR System. Guidelines for Executive Management. [Mental Health Corporations of America (MHCA) and the Software and Technology Vendors' Association (SATVA). PDF.]	http://lacdmh.lacounty.gov/hipaa/downloads/PlanningYourEHR-System.pdf

STAGE 2: ASSESSMENT

Resource	Website
Workflow Assessment. [AHRQ. Web page(s).]	https://healthit.ahrq.gov/health-it-tools-and-resources/evaluation-resources/workflow-assessment-health-it-toolkit/presentations
Health IT Readiness Survey; Practice Needs Assessment. [AMA. Word document downloads.]	https://edhub.ama-assn.org/steps-forward/module/2702748#resource

STAGE 3: SELECTION

Resource	Website
Advantages and Disadvantages of Three EHR Hosting Options. [AMA. Word document download.]	https://edhub.ama-assn.org/steps-forward/module/2702748#resource
Choosing the Right EHR. [APA. Web page(s).]	https://www.psychiatry.org/psychiatrists/practice/practice-management/health-information-technology/resources-choosing-the-right-ehr
EHR Demonstration Scenario, Evaluation and Vendor Questions Toolkit. [HealthIT. Web page(s).]	https://www.healthit.gov/resource/ehr-demonstration-scenario-evaluation-and-vendor-questions

STAGE 3: SELECTION [CONTINUED]

Resource	Website
Certified Health IT. Playbook, Section 2. [HealthIT. Web page(s), PDF.]	https://www.healthit.gov/playbook/certified-health-it https://www.healthit.gov/sites/default/files/understanding-certified-health-it-2.pdf
EHR Contracting. [AHRQ. PDF.]	https://healthit.ahrq.gov/sites/default/files/docs/medicaid/contracting-guidelines-for-ehr-vendors.pdf
EHR Contract Guide. [HealthIT. PDF.]	https://www.healthit.gov/sites/default/files/playbook/pdf/ehr-contract-guide.pdf
EHR Key Terms. [HealthIT. PDF.]	https://www.healthit.gov/sites/default/files/ehr_contracting_terms_final_508_compliant.pdf
App-enabled EHR RFP. [AMA. Word document download.]	https://edhub.ama-assn.org/steps-forward/module/2702748#resource
Comparing Vendors: Electronic Medical Records (EMR) Software. [Capterra. Web page(s).]	https://www.capterra.com/electronic-medical-records-software/
Comparing Vendors: American EHR Recommendations. [American EHR. Web page(s).]	http://www.americanehr.com/Home.aspx
Comparing Vendors: Certified HealthIT Product List. [HealthIT. Web page(s).]	https://chpl.healthit.gov/#/search

STAGE 4: ADOPTION & IMPLEMENTATION

Resource	Website
Chart Migration and Scanning Checklist. [HealthIT. PDF.]	https://www.healthit.gov/sites/default/files/playbook/pdf/chart-migration-scan-checklist.pdf
EHR Implementation: Ease the Transition from Paper to Electronic Health Records. [AMA. Web page(s).]	https://edhub.ama-assn.org/steps-forward/module/2702512
Change Management in EHR Implementation. [HealthIT. PDF.]	https://www.healthit.gov/sites/default/files/playbook/pdf/change-management-ehr-implementation.pdf
Change Package for Improving EHR Usability. [HealthIT. PDF.]	https://www.healthit.gov/sites/default/files/playbook/pdf/usability-change-plan.pdf
Post EHR Implementation Assessment. [AHRQ. PDF.]	https://healthit.ahrq.gov/sites/default/files/docs/medicaid/post-ehr-implementation-assessment.pdf

STAGE 5: MAINTENANCE/OPTIMIZATION

Resource	Website
Electronic Health Record Optimization: Strategies for Thriving. [AMA. Web page(s).]	https://edhub.ama-assn.org/steps-forward/module/2702761

Suggested Citation

National Wraparound Initiative. (2019). *Building or Adopting an Electronic Health Record (EHR) for Wraparound & Systems of Care: A Resource Guide to Accompany the National Wraparound Initiative (NWI) Webinar on “Tech and Wrap”*. Portland, OR: National Wraparound Initiative.