

NSMHA IS REVIEW RESPONSE
February 4, 2009

Appendix B

	Response by Sound Data
<p>12. a. SDS should publish a description of :</p> <ul style="list-style-type: none"> i. What Constitutes an enhancement ii. What types of changes can be implemented quickly without getting group feedback iii. How/who prioritizes lists of enhancements iv. When should user call Raintree directly and when should they call Sound Data Services <p>b. Sound Data should publish a prioritized list of enhancements with expected completion dates, staff required, pre-requisites and have regular updates on-line and be discussed at</p> <ul style="list-style-type: none"> i. User Groups ii. Board of Director Meetings iii. Steering Group Meetings iv. Clinical Program Manager Meetings <p>c. SD should provide refresher trainings at no cost or a reduced one time cost – the User Group should assist SD in developing and providing refresher courses, training materials and documentation on the use of the system.</p> <p>d. Provider dissatisfaction with usability of screens, workflow between screens, need for more user prompts, the consultant recommends that a</p>	<ul style="list-style-type: none"> a. Sound Data is looking at ways to improve the Service Agreement that would address these types of questions. b. The enhancement request list is reviewed annually at the user group meeting. Currently, all enhancements are on hold until the completion of the MYSQL upgrade. c. The User Group discussed this recommendation and did not feel that refresher training was needed at this time. d. The SD in consultation with the members of the user group did not feel that major changes of the current screens or workflows were warranted at this time and would prefer to focus on improvements as the EMR is implemented. e. SD staff have made over 20 agency visits this past year to provide training and consultation as the request of an agency. SD staff are available for site visits as requested. f. Workflow will be reviewed as part of the planning phase for the EMR project.

<p>“usability study be performed”.</p> <ul style="list-style-type: none"> e. SD staff should visit user sites to answer questions and clarify best practices. f. Consultants recommend that we hire a independent consultant to review the software workflow at a cost of \$25,000 and 4-5 weeks time. 	
<p>13. Named User Login</p> <ul style="list-style-type: none"> a. The consultant recommends that SD change to named user logins to reduce end user confusion. 	<p>Please see response in Appendix A comments of this same topic.</p>
<p>14. Ability to make Corrections</p> <ul style="list-style-type: none"> a. SDS should work with agencies to make sure that correct users are allowed to make corrections. b. SDS should allow agency staff to make Name & DOB changes to the master record rather than have VOA and SD staff make these changes. c. SDS should provide staff with clear instructions how and when to make changes and and even consider “certifying” specific users in each office to make types of corrections after training and even passing a “certifying” test. If a agency or user changes data incorrectly they should be reminded and re-trained and worse case if they continue to make errors remove their ability to make changes. 	<p>Please see response in Appendix A comments of this same topic.</p> <ul style="list-style-type: none"> a. The agencies, not Sound Data, are responsible to decide who in their organizations should make data changes and authorize the appropriate security levels. b. Currently only SD staff can make changes at the Master Client Level (Name, DOB,SSN) related to a specific client id. Agencies make changes to these fields in their agency level records as well as they are able to add and change alias records. This was an intentional design issue to maintain data integrity and the User Group does not feel that this should be changed. c. SD is not responsible for monitoring the accuracy or completeness of data and its corrections. This is an agency responsibility.
<p>15. EMR Implementation</p> <ul style="list-style-type: none"> a. Host meetings to demonstrate the Raintree EMR and gather input regarding agency readiness and interest in an EMR project. As agencies are 	<ul style="list-style-type: none"> a. Several demonstrations of the Raintree EMR systems have been held and both NSMHA and provider clinical staff invited. Because of Clinical Staff and Agency Executives

<p>identified, a work group could be created to define a charter and plan for EMR implementation</p> <ul style="list-style-type: none"> b. A Project plan must be developed that includes a charter, scope, major milestones, project owner, project manager, stakeholders and budget. c. Project Leadership must come from an Agency or clinical need d. EMR project needs to come with an inventory of network capacity and load testing. e. Project plan should include a step that assesses the number and type of staff at each agency and their computer skills with regular updates f. Address the concerns and questions about how an EMR would work for staff that provide most of their services outside the office. g. Discuss how to share costs associated with the implementation 	<p>change over the year, Sound Data plans to present another demonstration of the Raintree EMR in the Spring of 2009.</p> <p>We agree that an EMR project would require project planning and management.</p> <ul style="list-style-type: none"> b. Agreed. c. Agreed, the current Raintree upgrade to version 9.4 is the initial step to being able to support an EMR module for our current user base. e. This type of assessment was performed prior to the initial implementation of Raintree and again at the time the EMR licenses were purchased and will need to be done again as part of the EMR implementation planning. f. Many CMHC's in this state have already implemented EMR's and have addressed the out of office services in various ways. Through ASD and direct on-going contact with these agencies both Sound Data staff and provider staff are evaluating what has worked well at other similar organizations and what has not. g. This is a model that we have used since 1993.
<p>16. Training – Consultants recommendations</p> <ul style="list-style-type: none"> a. Implement regular work parties(quarterly): reports, data entry, paper forms, replacing forms for direct data entry. b. Sound Data/Help Desk staff should visit each office at least once or twice a year to : answer questions, discuss enhancements and get input to what is working and what is not. c. Video training and improved Provider RT documentation available on-line d. Share a written plan of how all Raintree patches/upgrades, new features and new requirements will be released and shared with all users for timely implementation. 	<ul style="list-style-type: none"> a. User Groups fulfill this task b. Sound Data staff do visit agency sites during the year with an emphasis on newer providers or agencies who have recently hired new key RT staff. The Sound Data staff made over twenty site visits in the 2008 calendar year. c. Sound Data currently does not have the equipment needed to do Video training, we are however updating all of the documentation as we move to version 9.4. Current documentation is available online via the Sound Data Web site. d. We are not sure who this written plan should be shared

Include appropriate overview and specific training to maximize the new features and requirements. Consider use of webinars to reduce training whenever possible and make use of Raintree Webinars to introduce new functionality.

e. Agency staff could take ownership of training and schedule time to pull training materials from all agencies together so as not to leave everything up to Sound Data Services

f. Consider publishing a staff expertise inventory so that users can call each other about how different agencies do things.

g. Consider office to office training from one agency to another to reduce Sound Data Service Charges

h. SDS should make all agencies aware of Raintree training opportunities so that users can participate.

i. Make sure each agency knows how to use Mantis and to check the status of requests.

j. Encourage users to call SDS with questions. Often SDS can quickly answer questions and prevent data problems.

k. In preparation for the MYSQL upgrade, SD should schedule testing and prepare an implementation plan for the much anticipated Appointment Module. Dates should be well publicized with as many people as possible able to participate in webinars and any available RT promotional materials

with. Since our Raintree System is a custom system, SD and its user group control most changes made to the system. The one exception to this is when RT releases an upgrade to the fundamentals of the system. Those changes are tested and presented to the user groups prior to implementing. This was not always the case, but Raintree has changed their update releases to allow for testing prior to implementation. Most custom functionality changes are to support the transmission of data to NSMHA and the state or are the result of user requests. All changes to the Raintree System are presented at User Group and timeliness for implementation are worked out collaboratively. Sound Data has been using Go to Meeting webinar technology since the summer of 2008 for meeting and training. Raintree does not offer training materials for customized systems on their web site.

e. There are two levels of training materials, those produced by Sound Data that train on how the system works, the other is training materials that are produced at the agency level that incorporate agency policy and workflow procedures. We see no value in this recommendation.

f. We are not such a large region nor do we have that many providers that would require the time and cost to publish and maintain this type of list. We are also not clear on who the consultants felt should publish this list. Individuals that attend the user group meetings are very open to sharing and asking other for input, it happens at every meeting.

g. This is an option to any agency.

h. We are assuming that the consultant mean Raintree, Inc training opportunities. Raintree does not offer end user trainings on customized software such as we are running.

- i. Sound Data has had very positive feedback regarding the mantis system, particularly the ability to monitor the status of requests.
- j. Sound Data has requested that questions be put into Mantis unless the user feels that it is an emergency that needs to be taken care of quickly. Based on the feedback from the user group this method is working very well.
- k. The upgrade to version 9.4 MYSQL will not affect the user interface, however there are some significant user interface improvements in the client ledger. As with all changes to the system, the User Groups are updated at each meeting and members of the groups have been involved in testing. Final implementation planning will be worked out collaboratively with the user groups to allow for adequate planning at the agency level. The appointment module upgrades will be done as a separate project due to time constraints.

The work plan has asked SD to report on what they have done in regards to reports.

There are currently 141 reports in Raintree that can be run by any user with the appropriate security settings. At one time we had over 150 reports but in preparation for the upgrade to MYSQL several reports were combined and filters added which allow the users to customize the data request within a single report. In addition to the reports in Raintree, a Revenue Pro Forma Report and Clinician Caseload reports can be refreshed from the data warehouse.

Report Recommendation: Create a form to request reports. Initially a report request form was created and used to create the initial list of standard reports. The report request form became less useful and has been changed to a consultation model.

17. Reports: See page 23 of Appendix B

	<p>Consultation on report needs for agencies is covered in the SID service agreements. On occasion, a reporting need may require additional programming to add data fields so that the information can be captured and reported on. SD staff are available to work with agencies to determine how best to meet their reporting needs.</p> <p>Report Recommendation: Create a group to review and fine tune reports and help agencies determine which reports should be run on a regular basis. There are currently two groups that meet this need, 1) The Report Writers Workgroup which focus's on ad-hoc reporting needs and the User Group where standard reports can be reviewed. The User Group also acts a review point to discuss reporting needs that are common to all the agencies.</p> <p>Report Recommendation: Report Lists are updated and distributed at User Group meetings. There are plans to add the list to the SD web site in the near future.</p> <p>Report Recommendation: In response to the recommendation that SD and NSMHA host trainings on how to interpret dashboards and other reports. Currently, new reports are presented at User Groups or CIS meeting and agency representatives take these back to their agencies and determine the best and most economical was to train and use the reports at the agency level.</p>
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