

Woodland Centers, Inc.

Technology Plan

FY2008 – FY2012

WCI Mission

Woodland Centers, Inc. is a community behavioral health agency that provides comprehensive mental health and chemical dependency services to support and promote improvement of the quality of life for the residents of Gallia, Jackson, and Meigs counties.

WCI Vision

To make a positive difference in the overall behavioral health of the communities we serve by focusing on core programs and services; engaging in thoughtful outreach to our community partners; and managing our resources effectively and efficiently.

STRATEGIC GOALS

In order to accomplish that mission and move toward our vision, WCI has developed a Strategic Plan with the following agency goals:

1. To focus on our core programs and services: individual and group counseling, case management, crisis intervention, crisis stabilization, and med-somatic services.
2. To do thoughtful outreach to meet the identified needs of our community partners where it makes sense given our financial and human resources.
3. To manage our resources (fiscal, human, facilities) efficiently and effectively to support the goals identified above.
 - Continue to expand and integrate the use of technology in both service delivery and operations.

As WCI works toward achieving these goals, the organization is committed to the principles of continuous performance improvement in all our programs, services, and operations. WCI has developed a Technology Plan to support the collection and analysis of information for business improvement and service delivery improvement in the domains of **effectiveness, efficiency, satisfaction, and accessibility**. Data will be collected from a variety of sources including clients, community partners and other stakeholders, staff, and other resources including financial information, risk management reports, human resource reports, health and safety reports, the agency's accessibility plan, and other relevant reports to determine areas that should be addressed through our technology plan. The technology plan is based upon policy WCI-M-700-5 where minimum necessary provisions and access to PHI are defined.

A thorough analysis will be conducted on an annual basis in order to:

- identify areas needing improvement,
- develop an action plan to address the improvements needed to reach or revise established outcome measures and improve the quality of programs and services,
- facilitate organizational decision-making with regard to our progress toward fulfilling our mission and achieving our goals, and
- create a summary report that can be shared with our clients, staff, and other stakeholders in appropriate and meaningful ways.

The table in Appendix A identifies the direction of the agency's technology development and integration for FY2010-2012 with a focus on an electronic health record and associated efficiencies. Appendix B lists tasks accomplished and goals defined for fiscal years 2000 through 2008. Appendix C reflects the status of the plan.

Current Technology in use at Woodland Centers:

CMHC BUI (Netsmart) - Our comprehensive software can be configured with data sets and processes that enable our software with behavioral health best practices. It integrates multiple reporting formats into a system that can store data about the people and facilities served, inspections, certifications, reviews, demographics, clinical data, third-party eligibility, medications, and more.

Network – Woodland Centers utilizes a wide area closed network through Ohio University College of Osteopathic Medicine with broadband access to all three of our outpatient clinics handling voice, data, and video capabilities over secured T1 lines.

Disaster Contingency and Recovery Plan is maintained in our Safety and Disaster Manual and each component is scheduled to be tested regularly to ensure current applicability. All managers, directors, members of the Safety Committee and Risk Management Committee also have copies of the Plan.

Electronic communications – Secured FTP (File Transfer Protocols) are used with our local ADAMH Board and Quadax for data exchange in compliance with HIPAA regulations.

Security, Backup Policy, and Virus Protection

Norton software is in use for main servers with AVG software on each local machine to serve as an anti virus protection. Agency policy found in WCI-M-703, WCI-M-708, and WCI-M-713 serve to guide compliance in these areas. Backups are tested and disaster planning is in place with a peer provider in Athens, Ohio.

Staff Competency and Training with Technology – Individual or Group training on:

Email - Agency communication tool being used by all staff for internal and external exchanges

Intranet – Internal source of policies and information for staff at woodlandcenters.org, will include meeting minutes, forms, and all resources for staff

Internet access to our website www.woodlandcenters.org, portal to resources for staff and community partners

SOQIC – state sanctioned electronic forms as a base for electronic record – To be replaced in 2011 by the electronic client record system.

QUADAX – Third party billing software used by Finance

Microsoft Office Applications – Office tools such as WORD, EXCEL, OUTLOOK, and PUBLISHER

MACSIS – state wide billing system for Medicaid reimbursed services – to be replaced by MITS in 2011 as part of the Medicaid cost containment strategy and Health Transformation at the state level

HMIS – Housing data tracked for grants and continuum of care

HOPE – Housing assistance data tracked on the system

Classic Real Estate – HUD based projects and software used to track census

Video Conferencing Equipment – Used for Telemedicine, supervision, and administrative purposes

Computer Workstations – Tool for therapists and support staff to move toward electronic records and better efficiencies around service, currently PC's on two out three staff desks. In 2011, all clinical staff including case managers and crisis workers will have laptop computers purchased with ARC grant funds.

Technology Tools – An integrated approach will be utilized with technology tools to minimize data redundancy and maximize data integrity by coordinating various software applications and reviewing data elements to coordinate and normalize databases.

In addition, Woodland Centers is one of four provider agencies in southeast Ohio that are working with OUCOM on how to better utilize technology to remove barriers to service. Initially, the Southern Consortium for Children obtained a grant from Office for Advancement of Telemedicine to purchase videoconference equipment to improve access to services in our rural community by exploring the acceptance and benefits of doctors, nurses, and therapists providing services over video conference technology. As part of that grant, WCI engaged a psychiatrist in Columbus for services using the telemedicine technology. More psychiatric services will be delivered using telemedicine in the Meigs clinic in FY10. Clinical supervision can also be done using the video conference equipment if needed.

Going forward, the Technology Plan will have to address ongoing maintenance and replacement of videoconferencing equipment due to the closing of Southern Consortium for Children in June 2009. Discussions are currently ongoing with OUCOM and the other provider agencies to determine how to proceed and what options are available. In 2010, 3-year maintenance agreements were purchased for all videoconference Polycom equipment to give us time to develop a replacement strategy and secure the necessary funding.

Phone Technology – In 2010 both Jackson and Meigs were converted to VOIP systems. In 2011, Woodland Centers joined Southern Ohio Healthcare Network (SOHCN) which allowed us to purchase fiber optic connectivity at deeply discounted prices. This sets the stage for the Gallia Clinic to also convert to VOIP when we can purchase the necessary hardware (phones and server).

Supporting Policies and Procedures:

The following policies, found in Volume One of the agency's Policy Manual, are also considered to be part of the Technology Plan in that they (1) support appropriate use of technology in the delivery of mental health services, (2) protect data and equipment, and (3) ensure that the agency is in compliance with HIPAA regulations regarding the privacy and security of Protected Health Information, whether electronic or in other forms.

- WCI-M-701 Fax Policy
- WCI-M-703 Email and Internet Use
- WCI-M-707 Computer Equipment Reuse and Disposal
- WCI-M-708 Computer Work Station Use
- WCI-M-709 Use and Disposal of Computer Disks and CDs
- WCI-M-710 MIS Services
- WCI-M-711 Network Policy
- WCI-M-712 Videoconferencing
- WCI-M-713 General Security

Due to the growing popularity of social media and social networking, in 2011 Woodland Centers added language to several policies that address the use of social networking sites and HIPAA rules with regard to privacy and security of PHI.

Budget

Annually a review is made to determine what funds can be set aside to support technology investments to meet agency mission and goals. In addition to the base investment each year of 6% of the budget, funds will be allocated as available for technology projects.

FY2011 will see an increase in technology investment due to the Electronic Health Record project and videoconferencing equipment maintenance and replacement planning. The agency has applied for an ARC grant to cover 70% of the costs for eCET implementation including Front Desk Plus and Data Warehouse, the first year costs of Netsmart University, and 48 new laptop computers. Total project cost is \$156,225. The grant, if awarded, would cover \$109,358 of the total project cost.

Electronic Record Implementation

The ARC grant was awarded in April 2011. Woodland Centers engaged NETSMART to purchase the software necessary to implement the electronic client record including eCET and Data Warehouse. We decided to purchase mtSchedule instead of Front Desk Plus because it is more user-friendly, and with those savings, we were able to purchase an e-prescribing program, Infoscriber, which will replace RxNT. In addition, a new server to support the project was purchased and installed; 48 laptops have been purchased for staff as well as scanners for each clinic, and signature pads. The implementation has started and the following tasks are in process:

- A helpline has been established (x469).
- A helpdesk has been established (emrhelp@woodlandcenters.org)

- Computer labs are being set up at each clinic
- A “super user” is being identified and trained at each clinic
- All progress notes have been created and are in eCET.

The next step is to develop the treatment plan and the diagnostic assessment. Once these major clinical forms are available, staff training on the new system will begin.

**APPENDIX A
Technology Plan
FY2010 – FY2011**

In FY2010 the Technology Committee was expanded to include membership from clinical and support services. The current membership includes: Director of Operations, MIS Specialist, Fiscal Officer, Director of Clinical Services – Jackson, Lead Support Services Worker – Meigs, Secretary for Administration (Transcription), and Executive Director.

The purpose of expanding the committee was to be able to move forward with an Electronic Health Record. The scope of this project will impact all departments across the agency, involve staff training, purchasing hardware and software, and result in significant changes in the way we perform a number of functions including QI, scheduling, billing, and timekeeping. Therefore, input from across departments was both necessary and appropriate.

At the same time, as Southern Consortium for Children was forced to close due to state budget issues, we are now responsible for our Polycom videoconference equipment on our own without the grant support from SCC. Consequently, we are investigating our options for ongoing equipment maintenance, as well as replacement costs. Since we are dependent on videoconferencing for psychiatric services, it is essential we have an ongoing plan in place for this essential technology.

Finally, we will also need to consider plans for record storage of existing paper records, hardware and software upgrades and replacements, and the use of technology for staff CEU training.

The following table reflects the plan to accomplish the electronic health record by 2014 such that we can participate in state-wide electronic health information exchange including integration with primary care providers.

Action	Person(s) Responsible	Timeframe/Status	2011-2012
Identify next steps in process toward electronic client record.	Kevan, Legea	As part of 2010-2011 budget preparation. Expand Technology Plan to include: - medical record storage - schedule for hardware	Medical records are being moved to Building C. Purchased Netsmart electronic medical record system with ARC grant

		<p>replacement</p> <ul style="list-style-type: none"> - decision about CMHC and future investment - Jacob's role <p>Kevan signed up to participate in Technology Committee at Ohio Council. Committee to meet Dec. 3rd to develop plan for EHR and supporting technology.</p>	<p>funds.</p> <p>Purchased 3-year maintenance agreements for Polycom equipment. Still need to develop plan for replacement.</p>
Schedule vendors for review of EHR systems.	Mary Jo, Legea	Anasazi and Netsmart scheduled in January and February. Demos completed. Netsmart selected due to cost and ease of transition. Present to Board of Trustees March 2010. Begin implementation July 2010.	ARC grant awarded April 2011. Implementation began May 2011.
As part of EHR contract, utilize Netsmart University for staff training.	Technology Committee	Several committee members attended a webinar on NU, and recommended that WCI participate. Can provide both mandated and CEU training for \$24.95 per employee per year.	Purchased Netsmart University licenses in 2010. Staff began using Netsmart training modules in 2010 for mandated training. Began customizing our own training in 2011.
Investigate grant funding for EHR project.	Mary Jo	Submitted Project Proposal Summary to ARC on March 29 th . Review meeting scheduled for April 15 th with Gallia County Commissioners.	ARC grant awarded April 2011.
OTHER TECHNOLOGY ISSUES/ACTIONS – Using technology to reduce cost and increase efficiency			
Outsource payroll	Kevan, Louella	May 2010	Paychex selected as payroll vendor in 2010. Employees

			can now access their paystubs and W2s electronically.
Electronic bill pay	Louella	March 2010	Available; not fully utilized yet.
Expand use of Quadax	Louella	June 2010	Not done; restructured fiscal department June 2011.
Phone systems – VOIP	Kevan, Stan	Jackson – April 2010 as part of office move. Meigs – July 2010. Need to identify hardware needs including additional PCs.	Member of SOCHN and installed fiber optic capability in 2011.
Records storage	Kevan	2012 – Scanning records to eliminate remote site storage units	Moving records to Building C to eliminate off-site storage. Inactive client records will not be scanned. Decisions need to be made about scanning long-term active client records.
Mobile capability – case managers, on-call	Technology Committee	2011	Laptops have been purchased. Investigating “air cards” for mobile capability.
Videoconference capability for med-som services and staff training	Kevan, Stan, Mary Jo	June 2010 – Current maintenance agreements have expired. Need replacement plan. Work with OUCOM to develop plan. Follow up with TCMH and SMH executive directors as well since they also use this technology.	Renewed maintenance agreements for 3 years in 2010. Still need to develop replacement plan.
INFORMATION MANAGEMENT ISSUES/ACTIONS – Using technology to make decisions for service			

delivery and business operations			
Data collection, analysis, and utilization	Agency Committees	<ul style="list-style-type: none"> - What reports do we want/need? - What reports do we currently do that we don't need or could be changed to make more useful? - Who needs the data? - What do we do with the data for performance improvement? 	<ul style="list-style-type: none"> - Directors continue to work on this.

**Appendix B
Technology Plan
FY2001 – FY2008**

2001	2002	2003	2004	2005	2006	2007	2008
Upgraded UNIX server to improve response time for CMHC/MIS*	Added Voice Mail to Gallia	Added Voice Mail to Jackson	Improved access to CMHC/MIS* for use by clinicians	Expand CMHC/MIS* access for electronic client records	Expand CMHC/MIS* access for electronic client records	Computers less than 5 years old for each staff	Implement SOQIC as first step toward EHR
Changed Analog phone lines to T1 in Gallia	Use of laptops for school testing and diversion services	Expanded Gallia LAN from Finance to include Administration	Installed Network virus protection to support machines on network**	Test Disaster Recovery *** and Contingency Plan with partnering CMHC/MIS* mental	Add PCs to clinical offices	Maintain Norton anti virus on servers and update policies accordingly for protection	Maintain Norton anti virus on servers and update policies accordingly for protection

2001	2002	2003	2004	2005	2006	2007	2008
				health center			
Replaced video camera system for CSU	Moved computer room to improve security	Moved from 1978 Classic CMHC/MIS* system to Base Provider system for expanded applications	Expanded LAN to WAN with T1 access in Jackson and Meigs	Test serial connections to CMHC/MIS* when network** is unavailable	On Call access to CMHC data		Instant Messaging for youth crisis work Research better communications for youth
		Began using off site storage for data backups	Changed dumb terminals to PCs in front desk area to accommodate screen savers and improved security	Software to enhance dictation process in place for doctors, nurses, and clinical staff		Handicap door openers	
		Defined servers as file server roles for shared files and policy	Addition of new laser printer and PC in transcription area	Moved clinical records to offsite storage at VMH		Moved clinical records from VMH to storage units in Gallia	Add network printing to copier in Meigs
		Expanded access to clinical staff for data inquiry	Addition of new laser printer in Finance and administration area		Upgrade Meigs phone system with voice mail		Implement website for WCI
		Installed network** server to be used to backup laptop data	Expanded e-mail services to more staff Use of email for direct service	All policies and forms available online	Developed website for education and public relations Web access	Add committee information to intranet	Add committee information to intranet

2001	2002	2003	2004	2005	2006	2007	2008
			providers to better communicate with community partners		for mh education and resources		
		Laptops for emergency workers	Implement new transcription network**			Review backup procedures for computers and security for laptops especially those used by case managers	Review backup procedures for computers and security for laptops targeted for administration and finance, support
		Installed a CD Burner to make backups of laptop data for Dr and nurses	Remodeled front desk area in Gallia to improve data security issues	Replaced video camera system for CSU		Keep Norton protection updated for servers and AVG protection for workstations	
		Reviewed and updated access to data on CMHC/MIS* based upon job requirements		Began using T1 WAN to eliminate toll calls between offices			Attention to thumb drive security
		Automated Inventory of hardware on CMHC/MIS*					
		Automated intake process					Added online prescription

2001	2002	2003	2004	2005	2006	2007	2008
		and use laptop to help both consumer and staff					service (RxNT) for med-som staff
		Backup policy in place for CMHC/MIS* data and individual workstation data	Reviewed HUD software			Begin using HMIS	
		Cell phones as a backup system and for van drivers	WAN is secured network** through OU closed circuit, IP addressing scheme			New email provider to reduce spam	
		CMHC/MIS* training for directors	Policies on downloading or using outside data on company network**				
		Quadax ***** training and implementation of 3 rd party electronic billing system	OAT Telemedicine grant# that supports video conferencing and improved service to consumers	Delivered services to clients using video conferencing		Increase use of video conferencing for direct services	Increase use of video conferencing for direct services with therapists
		MS Word training MS Excel	Install UPS on phone system				

2001	2002	2003	2004	2005	2006	2007	2008
		training					
		Set up backup generator to handle phone system in the event of a power outage	Quadel Training for HUD software				New Staff Key Cards to replace ID badges in preparation for access control on exterior doors – cost prohibitive at this time
		Automation of Payee accounts					
			Implemented HIPAA compliant MACSIS	Implemented Automated Medicaid Remittance			Training survey to identify needs

- add medication and clinical notes to CMHC/MIS

Appendix C

Quarterly Status Report on Technology Plan.

Baseline update as of beginning of FY08:

Based on the tasks and goals in Appendix A, the following are extenuating/influencing factors that have had an impact on accomplishing those tasks and goals.

- HRS has upgraded their hardware and a test needs to be scheduled with them to confirm compatibility of contingency plans, and to complete the final steps for disaster recovery.
- Funding is being reviewed regularly to support the hardware/software upgrades and addition of PCs to support access to electronic client records. SOQIC forms are automated and production applications are to be implemented July 1, 2007.
- Outcomes access is being resolved for clinicians
- New scheduling system is being reviewed for clinicians
- Funding has also prohibited the access to CMHC/MIS data by on call staff. Resolution of the access to data while offsite is being reviewed.
- The www.woodlandcenters.org website is being updated with HR information.

As funds can be allocated priorities will be utilized to support these areas through grants or ongoing funds as available.

First Quarter FY08 Updates: SOQIC is in operation in each clinic for therapists, Med/Som staff have access top SOQIC and are also using RXNT an online prescription service. www.woodlandcenters.org has been released and accessed by community partners. A late calendar year visit with HRS to test recovery is scheduled.

Second Quarter FY08 Updates: The TOAD software is being moved to a server to provide for clinical access to reports. The same server will be used for the intranet site to be accessed by secure login from the woodlandcenters.org site. Training is being developed based upon survey collected December 14.

Third Quarter FY08 Updates:

Training has been given to all staff on the proper cleaning of electronics and computer screens. Access to the scheduling section of CMHC has been made available to clinical staff so that they can control their own schedule. A training has been completed on its proper use. A master referral source/ community partner list was created in electronic format on the Crisis Stabilization Unit. To date it contains 106 resources and 150 phone numbers.

Fourth Quarter FY08 Updates:

The printer at the Meigs clinic was networked to help accommodate the high work load caused by the SOQIC/CMHC printing. Additionally, the Gallia typing pool printer was networked to provide backup in case of a failure with the Gallia mail room printer used by clinicians. MIS and HR were trained in the usage of FrontPage software to help maintain the Agency website.

FY2009 Status Report

This fiscal year was marked by the resignation of the Executive Director in November 2008, which left a significant gap in the technology expertise in the agency. As the new Executive Director came on board, a variety of immediate issues took precedence over technology issues including a significant budget cut. Because the previous Executive Director had made significant strides in positioning the agency in the use of technology, no major changes or activities were planned or executed during FY2009.

It was noted that several items from FY2007-2008 had not been realized, including: Instant messaging for youth, On call access to CMHC, Handicap door openers, adding all committee minutes to the intranet, Use of videoconferencing for therapists, and key cards for staff. These activities will be reviewed by the Technology Committee to determine whether they are feasible with current budget realities, whether they are consistent with the current strategic plan, and whether they can be incorporated into the plan for the EHR.

FY2010 Status Report

First Quarter FY10 Updates: No activity. Focus on budget cuts.

Second Quarter FY10 Updates: Attended Ohio Council Annual Conference where the emphasis was on the implementation of an Electronic Health Record by 2014. As a result, vendors were invited to make presentations to the Technology Committee, which was expanded for the purposes of this project.

Third Quarter FY10 Updates: Two vendors made presentations and bids for an EHR. Netsmart selected because of favorable cost and

ease of implementation. Recommendation to the Board in March, which was approved. Applying for ARC grant to cover 70% of the cost. Implementation projected to begin November 2010. Also working on VOIP for phones in Jackson, then Meigs, then Gallia. Also discussing plans to maintain and/or replace polycom equipment for telemedicine.