

Contract Providers Transition Team (CPTT) Planning Meeting

Minutes of the April 10, 2007 Meeting

Attendees: **Contract Providers:**

Amy Turk	Angela Boyd	Beth Meltzer	Carolyn Chadwick
Crystal Perez	Demetrius Dansby	Donetta Jackson	Dr. Earle Charles
Erica Melbourne	Frank Chargualaf	Greg Levine	Jamie Gordon
Jay Myers	Jim Sorg	Joanne Buendia	Joseph O'Brien
Lee Ann Skorohod	Lisa Sumlin	Mariko Kahn	Miriam Gonzalez
Nancy Fernandez	P.L. Chavez	Paul Wright	Rachael Clausen
Raquel Ramirez	Sara Jimenez-McSweyn	Shronda Collins	Tanya Mendez
Teresa Quijano	Terry Suo	Ty Webb	Vatche Kelartinian
Vicki Lau	Wendy Wang	Yamil Kiwan	

LAC DMH:

Alex Camacho	Calvin Phan	Charlie Diaz	Karen Bollow
Lupe Maldonado	Moises Macedo	Rahul Doshi	

Not Present:

Ari Levy	Aurelio Enriquez	Christine Byrne	David White
Deidra Kearns	Dr. Eva S. McCraven Ph.D	Dr. Jeff Adler Ph.D	Fritz Czypull
George Bell	George Varghese	Helen Morran-Wolf	Holly Carman
James Adams	Jamie Faucher	Jan Nolan	Janet Llewellyn
Juan Piscione	Julie Skillington	Kari Thompson	Keely McGeehan
Kirlos M. Guerguis	Lupe Q. Rosales	Marisa C. Martinez	Michael Arnot
Pamela Bright	Pat Avery	Shaun Bourget	Sheri Strahl
Suh Chen Hsiao	Tim Bradley	Tina Harris	Vincent Roco

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Agenda Item	Discussion	Action Item
Welcome and Introductions	This was the first meeting of the Contract Providers Transition Team. All participants were asked to introduce themselves and identify their organization.	
Background for the EDI Transition	<p>The Contract Providers Transition Project (CPTP) Project Manager, Karen Bollow, presented a short overview of the Contract Providers Transition Project. The presentation described the following:</p> <ul style="list-style-type: none"> • Background • Benefits • What does this mean to me? 	Add presentation to the IS Website
Overview of CPTT	<p>Karen also presented an overview of the CPTT including:</p> <ul style="list-style-type: none"> • Objectives of the Contract Providers Transition Project (CPTP) • Role of the CPTT • Integrated Behavioral Health Information System (IBHIS) and Electronic Data Interchange (EDI) Transition Timelines 	Add presentation to the IS Website
Education Planning – What education is needed	<p>Karen led a discussion to identify what education activities will be needed to assist the providers during the EDI transition. The education activities were assigned the following categories: seminars and formal training classes, conferences, links to presentation materials, lists of resources and lessons learned.</p> <p>Seminars and formal training class topics:</p> <ul style="list-style-type: none"> • Basic computer classes – email, Microsoft Office products – Word, Excel, Internet use, basic computer 	Prioritize training and identify sources to provide training in the

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	<p>skills</p> <ul style="list-style-type: none"> • Introduction to Electronic Health Records (EHR) and EDI • Vendor Selection Methodology for EHR • Costs and Benefits of Electronic Health Records • Risks and Pitfalls to Avoid in Vendor Selection and Implementation • How to Budget for Electronic Health Records and EDI • Best Practices for EDI/EHR Implementation • How will EHR implementation impact our organization – staff roles, responsibilities, new procedures, new forms • How do we manage the impact of change on our organization • Steps to Assess Your Organization’s EDI/EHR Readiness • How to prepare for audits in a paperless organization • What security issues need to be addressed in an EHR such as electronic signatures, remote access to records <p>Conferences:</p> <ul style="list-style-type: none"> • CIMH Conference – April 11-12 – Brochure posted on IS Website (conference is full) • Other appropriate conferences will be posted on the IS Website <p>Links to Presentation Materials:</p> <ul style="list-style-type: none"> • EDI Certification Process for the Integrated System (IS) • CPTP Next Steps – Assessment Approach – April 5, 2007 • CPTT Kick-Off Presentation – March 21, 2007 • Contract Provider Presentation – September 11, 2007 • New materials for the CPTP will be added to the IS Website as the project proceeds 	<p>items defined.</p>

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	<p>List of resources:</p> <ul style="list-style-type: none"> • Hardware and software vendors currently used by the contract providers within the DMH network • Consultants currently used by the contract providers within the DMH network <p>Lessons Learned:</p> <ul style="list-style-type: none"> • Each CPTT meeting will include one or two examples of lessons learned. • Volunteers are welcome. 	
Implementation Support	<p>Karen led a discussion to identify what implementation activities will be needed to assist the providers during the EDI transition. The implementation activities were assigned the following categories: overall organization readiness assessment, vendor selection tips, and best practices for implementation.</p> <p>Karen presented the CPTP Next Steps – Assessment Approach slides that were used for a presentation to Service Area 3 on April 5. This presentation is on the IS Website.</p> <p>The key message presented was that the assessment process must be started now to meet the timeframes for the EDI transition. The providers do not need to wait for DMH's selection of their new vendor for IBHIS. Each provider should have their assessment conducted and a transition strategy prepared by the end of May 2007. This will be a key milestone in the EDI transition plan.</p> <p>The contract providers, prior to starting the selection process, are advised to conduct an internal assessment to determine their readiness for EDI/EHR. The transition to EDI/EHR is a fundamental change for an organization. This is not only an information technology project but primarily a change to the way of doing business. Following the slide presentation, Karen requested comments/suggestions on the implementation categories below:</p>	

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	<p data-bbox="772 233 1159 261">EDI/EHR Readiness Assessment</p> <ul data-bbox="821 269 1503 716" style="list-style-type: none"> <li data-bbox="821 269 1503 370">• Form an assessment team including key executive staff, clinicians, administrative staff, critics, skeptical staff, quality assurance and clients <li data-bbox="821 375 1503 402">• Executive buy-in is required for the project to succeed <li data-bbox="821 407 1503 435">• Define your business goals and expectations <li data-bbox="821 440 1503 467">• Look at the staff – are they receptive to change <li data-bbox="821 472 1503 500">• Define business needs not “wants” <li data-bbox="821 505 1503 578">• Evaluate and streamline your internal procedures/forms before looking at vendors <li data-bbox="821 583 1503 610">• Define your organization’s business rules <li data-bbox="821 615 1503 716">• Define staff and technical infrastructure resources to support EDI/EHR– IT technical staff, other IT staff, network resources, computers <p data-bbox="772 753 1045 781">Vendor Selection Tips:</p> <ul data-bbox="821 789 1503 1472" style="list-style-type: none"> <li data-bbox="821 789 1503 816">• Develop a vendor checklist for what questions to ask <li data-bbox="821 821 1503 889">• Ask for references of similar organizations that are using the vendor’s system or consultants <li data-bbox="821 894 1503 922">• Interview one or more of the references <li data-bbox="821 927 1503 995">• Ask how many dedicated staff are needed to implement the system <li data-bbox="821 1000 1503 1027">• How much time will be needed to train the staff <li data-bbox="821 1032 1503 1060">• Will the vendor help with training the staff <li data-bbox="821 1065 1503 1133">• What is the minimum and maximum system configuration required <li data-bbox="821 1138 1503 1206">• What type of support is provided by the vendor and what are the charges <li data-bbox="821 1211 1503 1279">• Does the vendor offer an Application Service Provider (ASP) option <li data-bbox="821 1284 1503 1352">• Keep it simple – do not add unnecessary menus/options for the clinicians or other staff <li data-bbox="821 1357 1503 1446">• Have they implemented systems in California and are State audit and claim generation rules built into their system <li data-bbox="821 1451 1503 1472">• Will vendor become certified under the Certification 	

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	<p>Commission for Healthcare Information Technology (CCHIT) standards once these standards are defined</p> <ul style="list-style-type: none"> • Ensure vendor will upgrade system as new standards are defined (HIPAA, HL7, XML) • Do not allow the vendor to drive the demonstration – use your own prepared scenarios of “real” situations within your organization • Include the right people in the vendor demonstrations not just the IT staff, include everyone from clerical staff to the physicians • Look beyond the glitz, bells and whistles – ask the difficult questions and the right questions • Tell the vendor what your needs are based on your assessment and do not only accept what the vendor system offers for functionality • Will your organization be willing to adopt the workflow processes in the vendor system or will your organization ask the vendor to modify their software to match your organization’s workflow processes <p>Best Practices for Implementation:</p> <ul style="list-style-type: none"> • Executive support is critical • Implement formal planning and project management methodology • Have a dedicated implementation team • Apply the 80/20 rule and do not try to automate everything • Automating a bad procedure will not make it better • Address staff concerns regarding changes, resistance to change • Develop a consistent message for the staff, executives and administration • Training is critical. Consider a computer lab for training. • Budget for initial and ongoing costs including technology • Try to quantify benefits and show a clear return on 	

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	investment (ROI)	
Communications Planning – What is important to communicate?	Karen indicated that the CPTP is working on setting up a CPTP Website as well as a CPTP Alert and a CPTP Issues mechanism. All of these should be available shortly. We are currently using the IS website and IS Alert to distribute information.	
Transition Progress – How to Track Progress	The CPTT will be responsible for tracking the progress of the EDI transition for all contract providers. We are looking into some alternatives to provide this information on a monthly basis. The transition progress reporting is extremely important in order to identify where there are issues with the transition so that immediate steps can be taken to address the issues.	
Lessons Learned – Discussion with EDI Providers	<p>Each meeting we will plan to have presentations and discussions with providers that are in transition or have completed their transition to EDI. Two organizations shared their experiences with the group:</p> <ul style="list-style-type: none"> • Carolyn Chadwick - Tessie Cleveland Community Services Corp. • Ty Webb – Five Acres – he was formerly with Hathaway-Sycamores <p>Carolyn discussed the implementation of an ASP solution to provide EDI transactions. They are currently using Clinivate with the Clinitrak product. Carolyn was very pleased with the implementation. Some pluses include a limited requirement for in-house support staff , hardware or network support, since these are provided by the ASP vendor.</p> <p>The implementation process involved defining the needs of the staff and working with the vendor to customize as needed. Carolyn indicated that clinician acceptance was good, however, some staff were more resistant to change. She indicated that younger staff had an easier learning curve on the</p>	Post presentation to IS Website.

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	<p>technology. The system is HIPAA compliant.</p> <p>Ty did a presentation on the work at Five Acres. They are working with TIER from Sequest Technology for billing. His presentation is available on the IS Website.</p> <p>Ty did offer some key suggestions for implementation success including have quality assurance staff on board, be focused on your needs, have regular meetings with staff to address concerns, plan for the projects to take more time and cost more.</p> <p>Ty also mentioned an excellent white paper on the SATVA.org website that discusses EHR Implementation for Managers. This will be posted on the IS Website. There is a link to the SATVA organization already posted.</p>	
Open Discussion	<p>An Open Discussion was held with the group. The following items were discussed. Any open items will be added to either the CPTP Issues log or the Frequently Asked Questions (FAQs) on the IS Website.</p> <ul style="list-style-type: none"> • Will providers be able to fund the EDI Transition using MHSA money? • Will standard guidelines for the EDI requirements be available and when? • What are the requirements for electronic or digital signatures? • What are the State requirements for audits and quality assurance? • What are the requirements for scanning and saving paper records beyond seven years? • Should medications module be included in a system? • What client information will be visible to contract providers via the IBHIS? • How will the contract providers obtain data from DMH for their conversion process? 	Add items to CPTP Issues Log or the IS Website Frequently Asked Questions (FAQ's)

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	<ul style="list-style-type: none"> • Is there an EHR Certification process? • How should contract providers include project costs on the cost reporting to the State? • When will the IS be phased out? • What are DMH's expectations of the providers? 	
Next Meeting	<p>Meetings will be held monthly on the third Tuesday of every month from 9:00 a.m.-12:00 p.m.</p> <p>The next meeting will be May 15, 2007 in Room 713 at DMH CIOB headquarters. The address is 695 South Vermont Ave., Los Angeles, CA 90005.</p>	Schedule meeting room.