Progress Note

Multi-County Enterprise EHR
Session 7
Attend our EHR Sessions

01 EHR Workgroup Orientation
   May 19, 2021 12:00 PM – Zoom Link Here

02 Pre-Admission Activities: Client Contact/Screening/Referral
   May 26, 2021 12:00 PM – Zoom Link Here

03 Assessments and other Measures/Questionnaires
   Jun 2, 2021 12:00 PM – Zoom Link Here

04 Authorization Processes: Prior, Concurrent and Retrospective
   Jun 9, 2021 12:00 PM – Zoom Link Here

05 Caseload Management
   Jun 16, 2021 12:00 PM – Zoom Link Here

06 Consent Management
   Jun 23, 2021 12:00 PM – Zoom Link Here

07 Progress Notes
   Jun 30, 2021 12:00 PM – Zoom Link Here

We are here
<table>
<thead>
<tr>
<th>Phase 1 Evaluation</th>
<th>Phase 2 RFP Creation</th>
<th>Phase 3 Vendor Selection</th>
<th>Phase 4 Implementation</th>
<th>Phase 5 On-Going Support</th>
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</thead>
<tbody>
<tr>
<td>Evaluate Analogous JPAs</td>
<td>Formalize Commitment w County Partners</td>
<td>Vendor Response Evaluations</td>
<td>Project Management</td>
<td>Centralized Application Administration</td>
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<tr>
<td>Confirmation of Interest by County BHOs</td>
<td>Define Scenario-Based CA Requirements</td>
<td>Coordinate Vendor Demonstrations</td>
<td>Subject Mater Expertise</td>
<td>Shared Technical Resources</td>
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<tr>
<td>Outline of Requirements to be Addressed via EHR</td>
<td>Release RFP</td>
<td>Vendor Selection and Contracting</td>
<td>Application/Technical Configuration</td>
<td>Standardized Training and End-User Support</td>
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</tbody>
</table>
CalMHSA’s EHR Project – Timeline

- **RFP Creation**: 5/19 – 8/31
- **Vendor Selection**: 9/1 – 12/31
- **Solution Development**: 1/1 – 6/30
- **Wave 1 Implementation**: 7/1 – 3/31

**Important Dates**

- **July 1, 2021**: CMS Patient Access API, CMS Provider Directory API
- **January 1, 2022**: CalAIM Documentation, 1115 and 1915(b) Waiver Renewals
- **July 1, 2022**: CalAIM Payment Reform
- **December 15, 2021**: ONC Info Blocking Testing Plans
- **December 31, 2022**: FHIR HL7 and other Cures Updates Due
- **January 1, 2022**: CalAIM Payment Reform
- **July 1, 2022**: CalAIM Payment Reform

**Notes**

-波浪1实施：7/1 – 3/31
Four Core Project Aims:

Enterprise Health Record

- Dynamic - Role Based User Interface
  - Rational Data Collection/One Time Right Place

- Data – Optimal Accessibility
  - Consistent "Joins" Between Tables
  - Data Meta-Tagging

- Developed for Complex CA Needs Beyond Medi-Cal

- Designed for - Interoperability
Progress Note is a core treatment function

Session 2 – Pre-Admission
Session 3 – Assessments
Session 4 – Authorization Process
Session 5 – Caseload Management
Session 6 – Consent Management
Session 7 – Progress Note
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Progress Notes—What we know

• Solution designed with CalAIM payment reform and documentation reform in mind
  • CalAIM requirements not fully baked
• Individual and group progress notes: Most-used forms in any EHR
• Clinical Progress Notes, Medical Progress Notes
• Substance Use Disorder Treatment
• Mental Health Treatment
Progress Notes: Proposed Functionality

• Core Aims for the Enterprise EHR
  • Dynamic - Role Based User Interface
    • Rational Data Collection/One Time Right Place
  • Data – Optimal Accessibility
    • Consistent “Joins” Between Tables
    • Data Meta-Tagging

• Confluence of other Enterprise EHR functions and CalAIM
  • Services, Billing, Authorization, Caseload, Payment Reform, Documentation Reform

• Clinical Shift toward “less is more”
  • More concise documentation linked to client problems.
Progress Note : Basic functionality

• CPT Codes or Procedure Descriptions
  • Description – “Psychotherapy” … duration of service determines correct CPT Code
    • CPT 90832 – Psychotherapy 30 min with patient
    • CPT 90834 – Psychotherapy 45 min with patient
    • CPT 90837 – Psychotherapy 60 min with patient

• Practitioner License determines procedure pick-list

• Still documenting duration
  • Face to Face / non-Face to Face

• Location of Service

• Care Plan?

• Link note to problem list

• Co Signature

• Dx? EBP?
Progress Note

• Clinical Notes
  • Individual Clinical Notes
  • Group Notes – Multiple Practitioner
  • Residential Daily Documentation Notes – Weekly Summary

• Psychiatry Notes
  • Intake Note or Assessment? Baseline?
  • Progress Note
Medical Progress Note: Dynamic Interface
Group Progress Note: Dynamic Interface
Progress Notes: What are we missing?

Share your thoughts regarding progress notes or other concepts from this session.
Thank You!

• All materials posted to our website
• Feel free to reach out, share ideas:
  • info@calmhsa.org
  • What’s Next?