

Rough Notes 11/19/18
NextGen Demo: Behavioral Health Templates
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Dr. Eboni Winford did a demo of six NextGen templates for behavioral health that were designed for clinical decision-making in the moment. These templates included the Behavioral Health Intake (adult and peds), the Patient Centered Comprehensive Care Plan, the Behavioral Health progress note, the Behavioral Health Consult (for use when a visit focuses on a medical diagnosis and for which a health and behavior code is utilized), and the Behavioral Health Consult follow up (linked to a medical diagnosis and a health and behavior code).

These notes were captured by CCI during the demo. Please be mindful that these notes may contain errors.

1. Adult Patient Behavioral Health Intake Template:

- Built into the template the common symptoms -- checkboxes and open field text for notes
- Limited to a selection of up to 4 diagnoses (maintains clinical integrity)
- Built in adverse childhood experience scale - select checkboxes, and it gives total score automatically
- Dropdown boxes for other SDOH - vocational, educational questions
- More drop-down boxes for smoking; radio boxes for health behaviors like tobacco/drug use
- All clinicians are trained on motivational interviewing. They listen for a lot of “yes, but...” to determine motivation toward goals/objectives

2. Pediatric Patient Behavioral Health Intake Template:

- Similar template to the adult one
- Include more options around diagnoses that are more appropriate/common for children (like autism, ADHD, etc.)
- Similar boxes for symptoms as the adult template
- Boxes for ACES and it includes total score
- More social information for children (who they live with, living environment, free text the name of their school, options for how they're doing in school)
- Same health behaviors and warning signs as the adult template.
- Do substance misuse screening - NIDA quick screen - for everyone age 12 or older

3. Comprehensive Person Centered Care Plan -- treatment plan:

- Auto-populates with info from intake plan
- Drop-down list of goals and objectives:

- They dug through literature around differential diagnoses, recommended treatment plans, etc. and included it all automatically into their template. Gives top 5 evidence-based recommendations for goals based on diagnoses and then common evidence-based objectives.
- Did a recent literature to make sure they stay current and then update the goals and objectives.
- Ask patients directly what goals they have and write that in their own words in a free text location.
- Type of Intervention: dropdown list of groups they collaborate with frequently for interventions.
- Scale of progress toward reaching goals/objectives. Use radio buttons here to select along the scale. That selection carries forward to the next visit. That way the provider can see if the patient is progressing on their goal/objective. If the patient continues to stay in a not progressing place, need to re-evaluate the goals/objectives to something that might work better for the patient.
 - Free text space is a place the provider could write a note about changing the plan and why.
- Some elements of the plan move forward automatically to the next encounter, but other free text areas must be newly typed.
- Free text components help with making each plan individualized for the patient (meeting requirements for this)
- Elements of the care plan are shared with the PCP where appropriate (ie; some goals/objectives may not be relevant, but there may be things you want the PCP to reinforce in their PCP visit, or information with medications that they need to know about).

4. Behavioral Health Progress Note

5. Behavioral Health Consult Template:

- Linked to behavioral health billing codes (not useful if your organization doesn't have BH billing codes)
- More free text than the other templates

6. Behavioral Health Consult Follow-Up Note Template:

- Linked to behavioral health billing codes (not useful if your organization doesn't have BH billing codes)
- More free text than the other templates

PCMH components in the different templates:

- Free text the changes the patient wants to make
- Free text steps to achieve the change
- Free text what difficulties the patient may face
- Radio buttons to mark whether it's a short-term vs. long-term goal
- Confidence in achieving goals is a drop-down number scale

- Free text goal statement

Themes of templates:

- Lots of buttons, drop down boxes and radio buttons to reduce documentation burden and make selection more standardized/efficient
- Limit use of free text, but there are always options for free text to customize the plan if you don't like the dropdown options

Process of developing these templates:

- IT and clinicians don't speak the same language, so they started meeting together weekly to start learning each other's language and understanding the needs from the clinicians and the capabilities of what IT could design/implement.
- IT team and clinical team worked together to make changes to meet clinical efficiency and IT security
- The templates were prototyped using a piece of poster board and tape -- ordered and re-ordered features/components to make it make sense.
- Involved chief strategy officer, COO - \$\$ is a factor in these conversations.
- Efficiency and effectiveness + saving money -- put resources/time/\$ into the front-end of designing will allow for more time/\$ saved later.
- It took months to develop the templates - well over 6 months - lots of beta/alpha testing
- Cherokee has a NextGen representative trainer on staff as part of EHR team. They were able to build the templates internally, but paid for NextGen customization feature.
- Customizing means they are responsible for their own updates.
- These templates are integrated into every patient's EHR.
- Had to advocate with medical directors of insurance companies
- Auditors hate it because it's not 12 pgs like normal, but it meets all CMS requirements.

Additional Follow-Up Available for PHLN Teams:

- PHLN teams may follow up with Andy Rhea, Chief Information Officer at Cherokee Health Systems.
 - If you would like to be connected with Andy, please email Megan O'Brien, mobrien@careinnovations.org, who will help you get connected.
 - Please note that:
 - These behavioral health templates only work in NextGen (no EHR cross-over)
 - Cherokee's templates are available for sale. They do not collaborate with other IT departments to set up the templates, but you can reach out to Andy for further information and a quote about pricing and what is offered.
- Dr. Parinda Khatri, Chief Clinical Officer at Cherokee Health Systems will be attending and presenting at the PHLN January In-Person convening. While the focus will not be on this topic per se, you have this opportunity to ask more questions and learn more about the work that Cherokee Health Systems is doing.