ClinicTracker Success Story

The Bridge Family Center

With only a 60 day window to go live, The Bridge Family Center and JAG Products worked together to meet the ClinicTracker implementation deadline.

Clinic Snapshot

Name
Bridge Family Center

Location
West Hartford, CT

Website
BridgeFamilyCenter.org

ClinicTracker Implementation
January 2011

Number of Users
15

The Bridge Family Center of West Hartford, CT was founded in 1969 to meet the needs of the West Hartford community youth who were engaged in high-risk behavior. The Bridge has expanded since then to include outreach efforts, multiple shelters for runaway and homeless youth, transitional living programs for young people, an outpatient psychiatric clinic, and direct work with local schools. This regional nonprofit agency offers a broad range of services to children, youth, and families, particularly those at risk.

For their Youth & Family Services division, The Bridge needed to replace their three-year old management system because their vendor was going out of business. Since their web-based system would be shut off on April 1, 2011, they had to act quickly.

After extensive market analysis of eight different systems, in February 2011, they selected ClinicTracker from JAG Products, to provide their EHR, Scheduling, and Billing requirements.

With just a sixty day window to go live, they worked with the JAG team to do a complete Discovery of their daily processes, forms, and requirements. Together they laid out a detailed implementation plan to cover migration of current system data, customization requirements, server installation, individual departmental training, and "go-live" support.

Once the April 1st date arrived, every part of the implementation plan was on track, on time, and fully functional. The JAG data migration support team moved all the demographic information into

ClinicTracker so that the intake process could continue seamlessly.

On the billing side of the agency, the initial claims submitted through BillingTracker were accepted after just one test cycle. Everyone in the Finance department was surprised and thrilled.

The entire staff was amazed at how easy it was to use ClinicTracker compared to their old system.

The JAG team provided numerous system changes to support The Bridge's unique needs. According to Hildee Fontanella, Director of Finance and Administration, "The JAG team was very responsive to any request we made. We'd send them a request before leaving on Friday and the change would be implemented by Monday morning. With our old vendor it would have taken months, if it got done at all." She added, "Many of the changes we can handle ourselves quickly through the system set up menus. The entire process is extremely fast and easy, in part because, unlike most other systems, CinicTracker is specifically designed for agencies like ours, not general medical practices."

> "We've had only positive comments by the entire staff and everyone is extremely happy with the ClinicTracker purchase."

The Bridge also uses Sage MIP Fund Accounting that is fully integrated with ClinicTracker. This integration will make it much easier and faster for the Finance department to capture all their claim and billing information efficiently and accurately without having to re-enter any data.

According to Hildee, "We've had only positive comments by the entire staff and everyone is extremely happy with the ClinicTracker purchase."

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ClinicTracker Success Story

Family Counseling Services

Clinic Snapshot

Name
Family Counseling Services

Location
Cortland, NY

Website
FCSCortland.com

ClinicTracker Implementation
January 2006

Number of Users
49

By eliminating hand written forms, Family Counseling Services was able to decrease paperwork, increase clinic efficiency, and improve staff satisfaction.

Family Counseling Services is located in the upstate New York community of Cortland. They focus on substance abuse treatment services for individuals, families, and couples.

FCS Clinical Director, Pat Mellberg, maintains a clear vision for the future of her clinic: top quality patient care and a highly efficient staff. Of the many challenges that confronted her in achieving those goals, few were as daunting as those posed by all the requirements for paper forms and documentation. Maintaining compliance with all the NY state regulations took too much time, effort, and paper. It also could take days to prepare reports and analyses of the clinic operation.

Because of the special needs of running a substance abuse clinic, Pat's search for a software solution to improve her operation led her to ClinicTracker. One of her goals was to eliminate as much duplicated effort and time on paperwork as possible. "The reason we selected ClinicTracker for our facility was that all the components of scheduling, intake, document management, reporting, and billing were in one integrated package," says Pat.

Since many of the twenty counselors on staff were not computer savvy, Pat worked with the ClinicTracker staff to build a "conference room pilot" to train staff on how to use the integrated system and become knowledgeable about the entire array of features. She paired counselors together so they could help each other learn the system. What seemed to work best was to simply enter the data they had gathered from their last client intake. They all quickly became familiar with the system.

The benefits of using ClinicTracker have exceeded Pat's expectations. "We've decreased our paperwork by over 30% and improved employee satisfaction by 100% over the old paper process," she reported. "By eliminating the hand written forms, we're able to quickly retrieve any information required which is easier and more efficient".

The supervisors now have an alert mechanism for determining which paperwork needs completing and other clinical statistics. The built-in Messaging function allows any of the staff to "instant message" anyone on the system and provide supervisors with links to documents for their review and approval. With over 100 standard reports built into ClinicTracker, any aspect of the operation can be viewed immediately. For example, if a warning is issued about a medication, Pat can instantly generate a report that shows all the patients using that drug. Notifying them and their prescribers becomes an easy task.

> "We've decreased our paperwork by over 30% and improved employee satisfaction by 100% over the old paper process."

Pat sees the next step in her use of the ClinicTracker system with signature capture of patient forms. This will get her closer to her ultimate goal of eliminating paper. The ClinicTracker team has already developed the integration with signature capture devices and is ready to support that need when Pat is ready. She also is going to study all the remaining paper documents in the practice and look for other ways to incorporate them into the document management capabilities of ClinicTracker. Looking forward, Pat sees that using the Evidence Based Protocol function in ClinicTracker will add higher level treatment instruments as well as enhance the quality of the care provided by her counselors.

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ClinicTracker Success Story

Community Health & Behavioral Services Division of Upstate Cerebral Palsy

Clinic Snapshot

Name
Upstate Cerebral Palsy

Location
Utica, NY

Website
UpstateCerebralPalsy.org

ClinicTracker Implementation
July 2007

Number of Users
31

By implementing ClinicTracker, Upstate Cerebral Palsy becomes instantly compliant with local and state regulations.

Located in Utica, New York, Community Health & Behavioral Services (CHBS) is an Article 31 Clinic that offers continuing day treatment, crisis intervention, vocational rehabilitation, and outpatient mental health services for children and adults.

Clinic Director, Gordon "Gordy" Dunham, was searching for an EMR solution that would help him with all the complex issues involved in managing compliance with Medicare/Medicaid as well as the NYS Office of Mental Health requirements. That meant ensuring that treatment plans were completed on time for roughly 1700 open cases. Of critical importance was tracking that each billed appointment was matched to a signed progress note. Gordy had to protect his agency from the serious penalties that can ensue when those notes are missing. As an experienced clinic manager, he knew that his operations would be in trouble if he couldn't identify a rock solid system for maintaining regulatory compliance.

When Gordy did his research, he found only one program that was designed specifically for mental health clinics – ClinicTracker. Other EMR solutions only offered add-on modules that didn't provide the comprehensive views and reporting that he needed for his agency. "Most of the other systems were designed for primary care practices, not a Mental Health Clinic like ours," said Gordy. He added, "ClinicTracker fits our needs so perfectly. It's like we designed it ourselves. And the program is incredibly easy to use."

CHBS implemented ClinicTracker in July of 2007. By all accounts, the results have exceeded expectations. According to Kim Pecor, training coordinator, most of her clinicians had no prior experience using an automated system. Yet they quickly took to ClinicTracker because they foundit easy to enter and access the information they needed on a daily basis. Clinicians love that the program's templates speed them through the paperwork tangle that they had come to despise. They appreciate all the time ClinicTracker saves them when organizing and writing reports.

Kim relates that one of the therapists called her recently to get a listing of all of the patients that had a specific diagnosis. In the past they would have gone to the records department and searched through thousands of paper records to compile the information into an Excel spreadsheet. Kim showed the therapist how to generate that list within seconds from his own desktop. What would have taken days to accomplish was completed instantly with ClinicTracker's built-in reporting system.

> "ClinicTracker fits our needs so perfectly. It's like we designed it ourselves."

CHBS is extremely happy with the assistance they've received from the remarkably responsive support desk. By allowing remote access to their system, all program updates are automatically applied with no intervention on their part and troubleshooting is a breeze. They have also taken advantage of the custom report service that's included in their software maintenance agreement. CHBS plans to expand ClinicTracker by adding the fully-integrated BillingTracker financial system. It will completely automate and streamline their billing process.

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ClinicTracker Success Story

United Health Services

Clinic Snapshot

Name
United Health Services

Location
Binghamton, NY

Website
uhs.net

ClinicTracker Implementation
August 2004

Number of Users
37

United Health Services uses ClinicTracker to keep up with paperwork demands and scheduling requirements, fostering better patient care and improved client satisfaction.

Serving the Southern Tier of New York State, United Health Services is the Mental Health clinic associated with Binghamton General Hospital.

Ed Rivera, Manager of Outpatient Behavioral Health Services at UHS, has been using ClinicTracker since 2005 to manage an outpatient clinic that offers individual and group psychotherapy. UHS recently upgraded their version of ClinicTracker to take advantage of the many new features and performance enhancements provided as part of the ClinicTracker support agreement.

Before ClinicTracker, the staff was constantly forced to pull charts and records for reference and billing. Checking on unsigned progress notes, treatment plans, and medication records was always a challenge. They even had to print out billing sheets nightly in order to generate billing.

With ClinicTracker, Ed's staff now has complete access to all the patient information they need. It has also become easier for them to keep up with their paperwork and scheduling. Because ClinicTracker was developed by clinicians and administrators in the mental health field, it knows how to lead users through all the routines that are required to complete treatment plans, progress notes, and other documentation. Ed has no doubt that the program helps foster better patient care regardless of the type of service his clinicians provide.

Ed likes the benefit of having all the necessary documentation available when meeting with auditors. When the New York State Office of Mental Health arrives for unscheduled compliance visits, the system provides all the critical information immediately and from one source.

While Ed was concerned that his staff might balk at changes implemented with the upgraded version of the system, he found that he had no need to worry. His clinicians embraced the newer version because it made their jobs even easier. They also appreciated that they had more time to generate billable hours and spend with their patients. UHS is considering the expanded use of ClinicTracker to other parts of their facility so that they can integrate additional applications and continue to improve their efficiency.

"We were blown away by the speed and new functionality in the product."

According to Ed, "ClinicTracker has made my life much easier, especially when sitting with the auditors." He added, "We see the documentation it provides as essential to good patient care. Our missed appointment rate is down due to our ability to view the on-line reports provided. We're able to quickly re-fill appointments and keep our revenue stream higher."

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ClinicTracker Success Story

Compass Clinical Associates, PLLC

Clinic Snapshot

Name
Compass Clinical Associates, PLLC

Location
Urbandale, IA

Website
CompassClinicalAssociates.com

ClinicTracker Implementation
October 2011

Number of Users
40

Compass Clinical Associates Sets the Right Direction with ClinicTracker Connect

Compass Clinical Associates is a dynamic multidisciplinary team that serves the mental health needs of clients ranging in age from 4 to 90 years. In addition to sophisticated assessment, psychological testing, therapy, and medication management, they also offer specialty treatments, such as Transcranial Magnetic Stimulation (TMS). Their professional staff includes over 30 clinical social workers, psychologists, mental health counselors, psychiatrists, and nurse practitioners – all working together to provide the best in mental health care. The information and quotes below are based off an interview with partner Bruce Buchanan, LISW, BCD.

System Search and Selection

Because they were frustrated with their EMR program, Compass Clinical Associates went looking for one more suited to their needs. They conducted that search systematically, by first analyzing what their services required by way of tracking and workflow management. What they wanted most was a program that was extremely stable and well-supported by a responsive and knowledgeable team. After a careful search, they chose ClinicTracker and went live in October of 2011.

"We selected ClinicTracker because we found them to be extremely responsive to our questions during early discussions. Even before we bought the software, they helped us think through how best to tackle implementing a new EMR. During one demo, we made a suggestion that we felt could make it a better system. Two days later they let us know that the idea was so good, they had already included it in their weekly program update. From the moment we entered into discussions, it felt as though they were focused on helping us be successful."

Key Results of Implementing ClinicTracker

"We have become much more effective in providing quality treatment with excellent documentation. Because of the large number of clinicians, our daily kept appointments average well over seventy-five people. In the past six months we've had over approximately 12,500 kept appointments and this has allowed our front office staff to be much more efficient with such heavy volume. Because of the efficiency improvements, we are now able to spend more time developing a better understanding of our clients' needs."

Staff Efficiency

"We've probably seen the greatest improvement in the fact that billing our services have become much more effective along the entire process of invoicing, insurance submissions, and collections."

Patient Care

"I believe that our patient care is better in that the templates allow for quicker responses by our clinicians."

Reduced Paper Use

"We have reduced our use of paper substantially, more so in the last six to eight months, but generally over the past two years we've used ClinicTracker."

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ClinicTracker Success Story

Family & Children's Society

Achieving Efficiency and Meaningful Use with ClinicTracker

Since 1941 the Family & Children's Society (FACS) of Binghamton has been a leader in providing a broad range of services to families. Beginning as a family counseling service caring for residents of Broome County, New York, their programs and services have grown to include mental health, general counseling, adolescent services, sexual abuse treatment, home care, and school-based services (including after school programs).

FACS implemented ClinicTracker in February of 2008. With over 60 current users, they have adopted the full complement of modules including BillingTracker, Insurance Verification, and Call Reminder Services. They also schedule and track the activities of another 45 staff members who provide in-home services.

The Executive Director of FACS, Mr. Fred DuFour, offered these observations:

System Search and Selection

"We had to replace our old DOS-based CMHS system with a Windows-based solution. After considering many options, we chose ClinicTracker because it was easier to use and a great value."

Key Results of Implementing ClinicTracker

"ClinicTracker has simplified our intake process, made formulating client Treatment Plans much more efficient, and streamlined our scheduling. The Automated Reminder Call System has saved hours of staff time."

"Implementing and customizing any new software requires hours of consultation and training. It's a process just getting staff to accept the change. The ClinicTracker support staff has always been responsive to our requests for adjusting the system to the complexities of our operation."

Staff Efficiency

"Sophisticated scheduling capabilities, tracking client contacts, and instituting automated reminder calls have greatly improved our efficiency. The load-forward feature for notes and drop-down menus help to speed the process of recording client information. Eventually we would like to see more staff use CT in sessions to set safety and treatment plan goals."

"Former employees have commented that they miss ClinicTracker's easy to use system for navigating through templates."

Patient Care

"Because our staff spend less time typing notes, they can devote more time to client care."

Reduced Paper Use

"All notes are stored within ClinicTracker. Scanning documents into the client record is a great feature we will be utilizing even more in the future. Our plan is to ultimately do away with the paper file entirely."

Reporting System

"The built-in Compliance features in ClinicTracker have made it possible to stay compliant with the NYS Office of Mental Health paperwork requirements."

Meaningful Use

"We applied for and received our first incentive check for the Electronic Health Record (EHR) government reimbursement (HITECH Act). We will be upgrading to the newest version of ClinicTracker soon so that we can continue in the process of meeting the 2014 criteria for Meaningful Use Stage 2."

Expansion of the System

"We're working on educating our staff on features of the system we would like them to use so that they'll be more efficient. We also see ClinicTracker as central to our plans for expanding into satellite school-based clinics."

Overall Impression

We would highly recommend this software to any organization. It's intuitive and feature-rich. The support staff is remarkably capable and accessible."

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ClinicTracker Success Story

The Healing Connection

Clinic Snapshot

Name
The Healing Connection

Location
Fairport, NY

Website
TheHealingConnectionInc.org

ClinicTracker Implementation
October 2009

Number of Users
15

Achieving Continuity and Efficiency with ClinicTracker

The Healing Connection is a nonprofit 501(c)(3) organization that offers hope and treatment to adolescents and adults seeking recovery from an eating disorder. Located in the Village of Fairport (near Rochester, NY), The Healing Connection is home to a comprehensive, evidence-based partial hospitalization outpatient day program for both females and males. Their treatment model promotes stable, lasting recovery by providing structured support for seven hours each working day. To foster continued recovery, this multidisciplinary team works with patients to develop a variety of skills and connections.

The Healing Connection has been using ClinicTracker since October 2009 via the JAG hosting service.

The President of The Healing Connection, Mary Tantillo, Ph.D., offered these observations:

System Search and Selection

"We needed an electronic health record to help us launch our program. I wanted us to be progressive and use an electronic medical record instead of relying on a paper chart. I also anticipated that we would need to link our system to those of other programs (which is what New York State is advocating through its version of the Medicaid Redesign initiative). We felt we would get a good return on our investment. The cost seemed reasonable compared to what other agencies reported they were paying. JAG sales staff were very helpful in guiding us to anticipate what would be involved in implementing the program. It also sounded like we would receive timely and helpful guidance if we needed assistance in the future. Having JAG host and maintain our EMR was also appealing because it would take the responsibility away from us. That was helpful because we did not have the money to hire IT staff."

How effective was the Implementation?

"I felt the implementation went well and the training was well-designed and executed. My only concern was that a face-to-face orientation might have been better for a few of my new staff who were anxious and not computer savvy. Regardless, the training was effective. Hearing about the features and having someone walk us through during web-conferences was more informative than trying to read a manual. Realistically, staff don't read manuals."

How do new employees learn the system?

"It was not that hard for most of our staff. It was perhaps a little more challenging for those with less computer/EMR savvy. You can do most of what the program requires with a single mouse click. Also, JAG helped us customize the program by designing a daily billing note and comprehensive assessment that contained all the important information staff would need to document patient care. New employees (especially younger ones) are not intimidated by the system. They find it pretty easy to use. New staff are encouraged to review the Clinic Tracker Training slides when they are hired and are oriented to the system by our Clinical Coordinator."

What are the key results of implementing ClinicTracker?

"Key results include fairly quick completion of group notes, daily billing notes, and collateral contacts. We have standardized documents with our logo that we can print out and send to

> ### "(ClinicTracker) promotes efficient, coordinated, and continuous care."

other providers. We can update the system on our own with new goals, services, etc. We can perform compliance checks that help with meeting a variety of regulatory requirements, e.g., corporate compliance requirements and site visit regulations. It's also excellent that BillingTracker is closely integrated with ClinicTracker so we have one unified system.

ClinicTracker helps us stay on top of required paperwork. It promotes efficient, coordinated, and continuous care."

Staff Efficiency

"ClinicTracker has reduced the time staff spend generating documentation. Aside from the fact that they can use pre-stored templates, they also like that they can log in from anywhere and complete paperwork on a laptop or home computer."

Patient Care

"The software allows us to ensure coordinated care because we can keep on top of the treatment. For example, the therapy staff and psychiatrist can quickly access each other's notes to check on any diagnostic or treatment plan changes, ensuring that care is delivered in an integrated and coordinated way. Having electronically entered data also ensures that notes are legible and accessible in a timely way. Outside providers appreciate our accessibility."

Have you seen reduced paper usage?

"Yes, definitely. The only paper document we store is correspondence from other providers. While I know ClinicTracker allows us to scan those documents and add them to the patient chart, we haven't done so yet."

Reporting

"The reporting features are great, especially those related to compliance. We have generated all kinds of reports from ClinicTracker, e.g., by patient, staff person, insurer, etc."

Expansion of the System

"At present we're considering ePrescribing, including prescribing of controlled substances."

Support

"Support is excellent. The staff are reliable and helpful. Inquiries are responded to in a timely way. It is important for us to know that support is always available, even after the initial implementation."

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"Automate Your Agency"

the company in 2000. ClinicTracker EHR's powerful software empowers your agency to succeed. ClinicTracker will automate all of your clinic routines, boost staff productivity, increase billing efficiency, and provide the tools you need to manage your clinic effectively. While mental health and substance abuse agencies are the most common group of users, foster care agencies, social services, equine assisted therapy programs, university clinics, academic counseling systems, family counseling services, and eating disorder clinics also take advantage of our powerful software.

ClinicTracker Success Story

Oregon Community Programs

ClinicTracker's customizability was pivotal in helping Oregon Community Programs (OCP) develop highly effective workflows, documentation management, and reporting.

Clinic Snapshot

Name
Oregon Community Programs

Location
Eugene, OR

Website
www.OregonCommunityPrograms.org

ClinicTracker Implementation
July 2013

Number of Users
80

OCP is a private, non-profit corporation in Eugene, Oregon. Committed to evidence-based treatment for children and families, their mission is to provide training, consulting and outreach services to promote a positive family life. In addition to outpatient mental health treatment for children and families, the organization's programs include early intervention foster care; monitoring for troubled youth; individual counseling and skills training; and psychiatric medication management. Their internationally recognized Multidimensional Treatment Foster Care program, a behavioral treatment alternative to residential placement for adolescents, has been shown to be effective for both boys and girls.

We interviewed Dr. Peter Sprengelmeyer, executive director, to better understand his agency's experience with ClinicTracker. We asked him about topics including their EHR search and selection process, implementation, and staff efficiency as well as patient care, green initiatives, and customization.

Selecting EHR Software

OCP began searching for an EHR in 2013 because of emerging federal mandates requiring adoption of computerized records and demonstration of Meaningful Use. ClinicTracker fit the bill because it has always been geared specifically for clinics and agencies that serve patients with mental health conditions. OCP purchased ClinicTracker in July 2013 to meet the various deadlines that the government established. They have been loyal and satisfied customers ever since.

Implementation

Dr. Sprengelmeyer acknowledged that implementation took staff longer to accomplish than anticipated. "This was due to our inability to plan and structure our workflows," he told us. "This was a valuable lesson for us and is crucial to anyone who is implementing an EHR." His experience is indeed a common one for agencies.

EHR/practice management software works best when agencies have first thoroughly considered their workflows, from intake to discharge. It's the organization that should determine their processes, not the specifications of a software program. Our implementation staff worked diligently with OCP to tailor the software to fit their exact needs.

Training

The learning curve for staff at OCP has been fairly short for most people. "We provide two hours of initial training as part of the onboarding process," Dr. Sprengelmeyer says. Since they've been using our software, OCP has not suffered the frustrations and inefficiencies that so many organization experience when they adopt an EHR. "ClinicTracker has had no adverse effect on patient care," he says.

Documentation Management

Like most agency directors, Dr. Sprengelmeyer appreciates how ClinicTracker organizes and facilitates the paper flow: "ClinicTracker has consolidated all our clinical paperwork in a single location," he says. Eliminating paper and tying documents into workflow and compliance routines have made for an efficient operation.

Revenue Management

Getting full control of revenue cycle management is crucial to the viability of behavioral health agencies. To keep monies flowing, the clinical and financial arms of the operation have to work in sync, whether that's making sure progress notes are signed or clinicians know about insurance authorizations. And billing people need to have a system that knows about all the many complexities of billing for mental health services. Dr. Sprengelmeyer is especially pleased that, since implementing ClinicTracker, OCP has experienced fewer denied claims than in the past.

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