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Behavioral Health Practice Automation

ESSENTIALS

for **SUCCESS**

Unmanaged complexity has long been considered a major roadblock to sustainable progress toward excellence. Internationally famous executive coach and motivational speaker Tony Robbins teaches,

"Complexity is the enemy of execution."

Successful leaders have the ability to reduce highly complex issues down to their most simple core elements in order to execute well on what matters most.

For a busy behavioral health professional, the challenge of growing and improving the practice isn't a lack of options, but managing the fragmented complexity of ideas, solutions and technologies that are constantly thrown at you — particularly regarding office automation. And the world doesn't stand still. Important developments like telemedicine and rural therapy delivery add additional levels of complexity to deal with.

The reality is, sorting through all the competing recommendations, details and opinions is extremely time consuming and potentially overwhelming — particularly since it's not your full-time job. It's hard work getting to the heart of the issue. 17th Century mathematician Blaise Pascal crystalized that challenge in the closing line of a letter to a colleague: "I'm sorry this letter is long. I did not have time to make it short."

The Heart of Medical Office Automation

Our objective in this eBook is to help bring clarity to the challenge of selecting and executing a mental health office automation strategy that addresses all the complexities of behavioral health practice and allows you to simply and effectively deliver great outcomes for your clients, therapists and owners.

Drawing on decades of experience across tens of thousands of independent practices, we've distilled the complexity of private practice office automation for behavioral health to a few simple core elements that make the biggest difference in metrics that matter most. Each element summarizes a depth of underlying detail but acts as a guiding star or touchstone to help keep decisions on track and focused on highest priority options.

Last 10% = 90% Boost

While many fine behavioral health office automation systems are on the market today with a dizzying array of features, claims and capabilities, at the end of the day, unrelenting focus on four essential elements can make the difference between a practice bogging down in frustratingly persistent average performance, and breaking through to the next level of efficiency, client outcomes and satisfaction, and practice profitability.

These four elements sound deceptively simple. Many commercial solutions offer 80-90% of what each element encompasses, particularly when isolated from the overall system. But in our experience, the last 10% makes 90% of the difference.

Systems that are pieced together, that lack critical elements, don't communicate and interoperate, and are earthbound can get you part way there, but will never achieve truly world-class capability. Cutting corners on any of these elements essentially cuts off the opportunity of achieving geometric improvements and hard-to-explain synergies.

4 ESSENTIALS for SUCCESS

These four elements form the foundation for the type of improvement behavioral health practices aspire to. The four are:

Complete | Unified | Smart | Cloud

Don't be fooled. While they may seem overly simple, fully understanding and relentlessly executing on these core elements over time will make all the difference. We will explore each in more detail related to both general best mental health office automation practices, as well as to behavioral health-specific application.

ELEMENT 1
COMPLETE

This element refers to providing a complete roster of specialized tools for each role within the practice, including [scheduling] practice management, charting, claims and billing, and client relationship management. A broad spectrum of capability within each functional area is essential to achieving high levels of efficiency and accuracy individually and overall.

The Present Capability Trap

Because each behavioral health practice enters and progresses along the office automation continuum at a different point and pace, it's easy to be trapped into focus on a technology that addresses the current pressing challenge, but lacks additional tools and expansion capability to keep pace when the practice matures to the next level of sophistication. Essentially, the current crisis obscures the bigger picture of what the practice will require at the next level, and the next, and the next.

This can result in costly 'hopping' from one EHR to another, for example, or 'bolting-on' missing pieces as the practice grows into more sophisticated needs, erasing the gains delivered by a unified system (see Element #2).

Best Practice Examples

Beyond coverage of all functional areas of practice office automation, a complete system includes a depth of specialized tools ready for implementation as the practice and clients require them. Take, for example, an online client portal and client experience. A robust, user-friendly portal is a required starting point for any practice wanting to seriously interact with clients in a way that wins loyalty and delivers a highly positive self-service interaction.

The next level up is client experience or managing the practice's online reputation and virtual interaction with clients. This added capability is crucial to attracting and retaining today's increasingly consumer-oriented client. Efficient management of this function requires sophisticated online tools. A practice focused on mastering the portal may not recognize the importance of having client experience tools 'on deck,' integrated and optimized for the next phase of their growth.

The same could be said of telehealth. Who could have predicted the lightning speed, pandemic-induced adoption of teletherapy technology? In the heat of the battle, practices with automation systems that included a native telehealth option were able to easily ramp up an expanded capability within their familiar framework, rather than scrambling to glue together disparate systems and learn new platforms and interfaces.

CONNECTING THE DOTS

A complete tool set for behavioral health includes tools engineered for the specific workflow of behavioral health professionals and their practices. This would include functionality such as:

Configurable behavioral health EHR notes, subnotes and client forms utilizing the DSM—5 severity disorder measures. A library of at least 250 items should be included.

Templates that align with the American Psychiatric Association (APA) severity disorder measures and DSM-5 personality inventory measures.

Deidentified notes for group sessions captured for all clients, then pushed to individual client records for specific charting to be amended.

Automated tracking of behavioral health MACRA and MIPS compliance elements.

Treatment plans designed by the clinician for specific mental health disorders to document client progress using a variety of progress note types.

Claims and billing tools fine-tuned to maximize first-pass claims acceptance rates of behavioral health-coded bills. This can dramatically reduce the revenue drain of re-submitting a claim (average cost of $25) or failing to rework it at all — which is the case 65% of the time for the average practice.

ELEMENT 2
UNIFIED

In a unified system, workflow elements work seamlessly together, passing key information to staff throughout the continuum of care. While this type of capability seems pretty self-evident, in reality it's quite difficult to pull off, and less common than you might expect.

Here's a quick example. Client A Googles your clinic, likes what they read and decides to book an appointment. They go to your website or portal and book a new client appointment for the following week with Therapist Z. The system recognizes a new client appointment and sends a welcome email with portal login instructions, populates the portal with required and personalized intake forms, and creates automated reminders workflows. Client A doesn't access the portal immediately, so automated reminders (text or email) go out at preset intervals until the pre-visit tasks are complete.

Billing and insurance information goes to your billing system. Demographics go to the scheduling and practice management, and clinical information automatically populates their new chart in the EHR. The day before the appointment, insurance eligibility is checked electronically – oops! no longer covered. An automated message alerts Client A to contact you and your designated staff is alerted to resolve the problem before the client walks through your door (or magic telemedicine screen).

Okay...time to check in on your practice: In this automated example, how many manual hand-offs and non-automated steps would be involved in your current system to accomplish the same tasks?

Rural Health Litmus Test

The growing urgent need for improved rural therapy highlights the crucial role a unified system plays in highly effective behavior health delivery. In rural environments where manual, high-touch workflows aren't an option, bringing telehealth, charting, medications, staff and therapist messaging, client portal, education and scheduling, automated reminders and online client onboarding together in one unified system allows each member of the delivery team to be fully engaged and integrated into a smooth, coordinated continuum of care.

Whether you are delivering remotely or in the clinic, unified workflows are a game-changer in optimization, efficiency, client satisfaction and cost improvement.

CONNECTING THE DOTS

Examples of unified elements specific to behavioral health practice might include

The system provides suggested E&M codes for the office visit based on the documented client encounter plus a picklist of related mental health ICD-10 codes that are populated to the problem list. This automatically triggers web links to educational information for you or other providers to share during visits and are posted to the online client portal.

Group therapy sessions are jointly scheduled for all group members with automated, personalized appointment reminders sent to each member at specified intervals.

Clients complete intake documentation online in the privacy of their homes, including key information like current complaints, medical and psychiatric history, and structured clinical interview questions. Responses auto-populate onto the client chart/therapist's template for use during the initial office visit or therapy session.

Unified messaging and task management between clients, staff and providers for handling prescriptions and refill requests, completing outstanding notes, reviewing documents and other provider input, and managing interoffice and client messages.

Consolidation of complex treatment plans including various therapy modalities, medications, input from other providers and encounters in different locations including teletherapy.

SMART

As technology discussions increasingly gravitate to artificial intelligence, autonomous vehicles and smart everything, it may appear that technology advances are passing the independent practice by.

While these innovations will no doubt make their way into the mental healthcare system over time, at a fundamental level, smart mental health office systems provide processes and dashboards that are automated, reducing labor and improving information accuracy.

Put another way, the best systems make smart providers and staff smarter by automatically collecting, aggregating, tracking and visualizing information crucial to their jobs, and automating labor-intensive tasks.

Easy-to-use dashboards provide customized views of tasks, workflow steps, handoffs and communications. Visual elements like task 'donuts', priority alerts and simple one-click drilldowns simultaneously boost efficiency and accuracy.

Automated processes eliminate manual tasks and significantly improve staff efficiency. Examples include direct submission of charge sheets to the billing system, automated payment posting, and automated posting of lab results to an online client portal.

Analytics and Reporting

A smart platform can provide insights that may significantly improve a practice's focus and profitability. For example, tapping the unified database with easily customizable analytics tools and reports could identify highest profitability treatments, and match them with growing populations and most successful reimbursement plans in a way that benefits both therapists and clients.

Note that this element relies on element #2 to provide unified workflows and comprehensive, easily accessible data in order to take smart processes and analytics to the next level.

Connecting the Dots

In behavioral health, these examples of specific smart features can make a difference in your overall practice performance:

Utilize auto-calculated diagnostics where the clinician can make a single selection to calculate a score, for example, of a personality inventory measure the client electronically submitted which auto-populated into the chart.

Track provider efficiency and profitability contribution by therapy, location, payor, or other key metrics to improve accountability and return.

Utilize analytics and tracking to determine highest and lowest profitability therapy modalities and why.

Send automated follow up, educational and reminder messages to specific segments of your client population by age, diagnosis, risk factor, group membership or other key factors for optimum client care.

ELEMENT 4
100% CLOUD

A true cloud-based system is foundational to building a consistently high-performing practice. A cloud platform lets you and your staff access all the key information and functionality needed to provide stellar patient service simply and securely through a browser or iPhone from virtually any location with Internet or data service.

Additionally, a cloud platform provides the highest levels of data security, speed and performance, unified storage, and automatic backup and updates – which means you get the latest edition of the software every time you log in.

A cloud-based system is the essential underlying technology that enables delivery of the potential benefits in all the other elements.

100% Gotcha

This is an area where meshing systems – part cloud, part server-based – can stymie performance and agility. Say a client has a crisis while the therapist is at a child's soccer game. The provider accesses the system from a mobile device, pulls up the client's chart, and has an updated view of histories and any medications.

However, inventories, which are crucial to this particular case, are managed in a server-based system which doesn't interface with the mobile EHR. Getting 90% of the information needed still results in a sub-par encounter – or an unplanned trip back to the office.

When evaluating system fundamentals, thoroughly explore whether all key functionality is what is called 'native' cloud-based, meaning it was built from the ground up for the cloud. Systems that were converted from non-cloud-native software code often experience unanticipated and unexplained compatibility glitches that are productivity killers.

On-the-go and Growing

As practices grow and clients and therapists are more on the go, the importance of a fully cloud-based system becomes more apparent.

Providers who practice at multiple clinics will find a cloud-based system gives them a completely identical experience no matter where they are working that day. And clients interfacing with therapists and staff remotely find their seamless encounter compares favorably with other online shopping and service experiences they've become accustomed to.

Also, a cloud-based system is the most accurate and economical way to manage multiple locations. Many growing practices find that managing multi-location scheduling, billing, charting and security with a server-based system can be extremely challenging if not impossible. And IT management costs are typically significantly lower in a cloud system that eliminates servers, maintenance, updates and additional on-site security technology.

CONNECTING THE DOTS

Behavioral health-specific benefits of a 100% cloud-based system could include:

Seamless, accurate and identical experience for therapists and staff between facilities or rotation schedules

Highest levels of security and ease of access from any remote location.

Automatically and continuously updated software and code sets, particularly those related to optimized coding and billing for behavioral health and related payors, and MACRA and MIPS compliance.

Secure, HIPAA-compliant and time-sensitive teletherapy capability from virtually anywhere, including complete access to the client chart with real-time updates, and HIPAA-compliant prescription history (if applicable).

Lower cost, fewer technology headaches. The elimination of onsite servers and related equipment reduces overall IT cost and removes update and security issues.
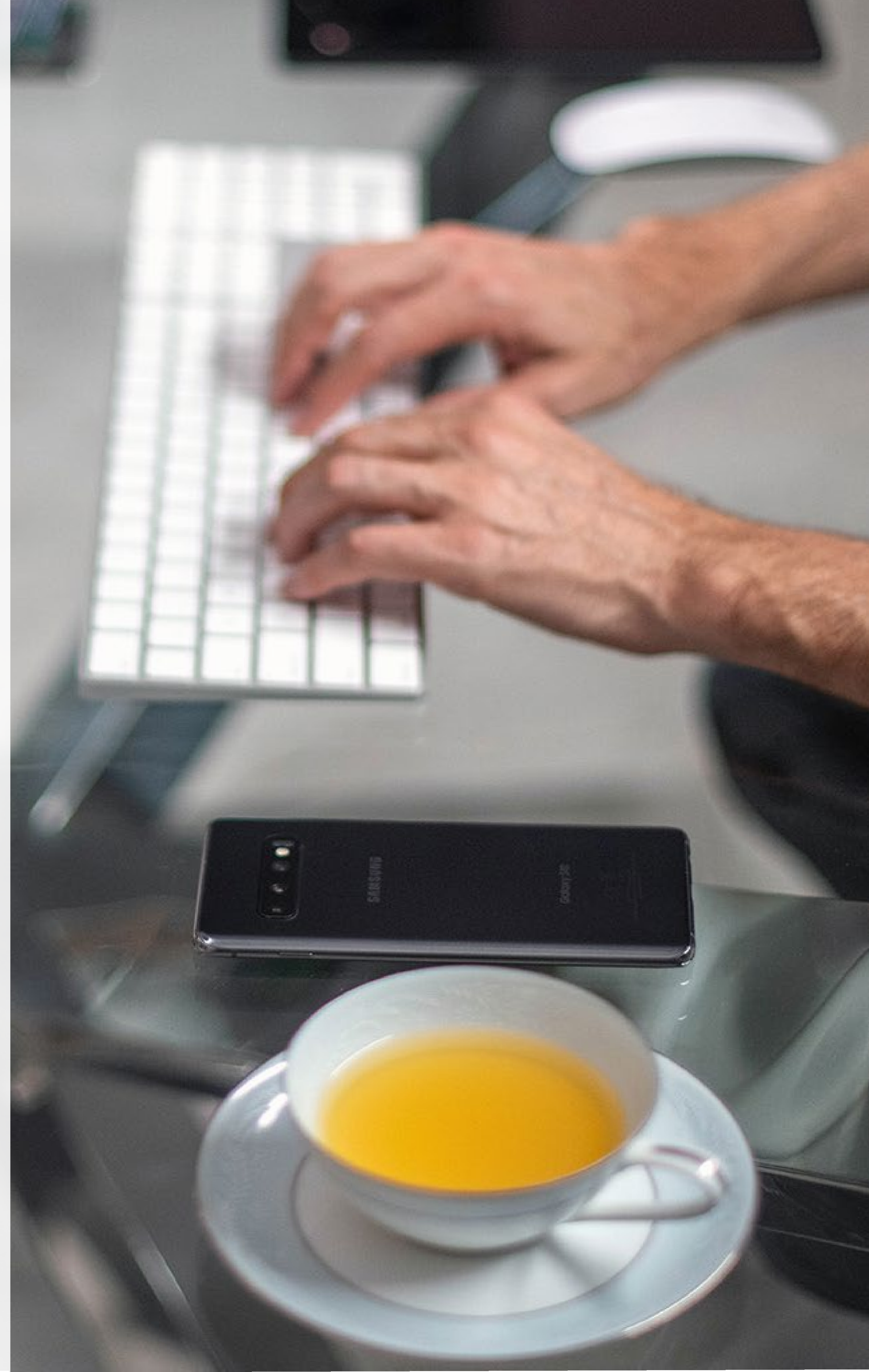
Complex to Simple

Regardless of how complex or frustrating your practice office automation challenge may be, dedicated focus on these four deceptively simple elements will help ensure significant improvement in your behavioral health practice results. Apply them carefully in vendor selection and you will find a solution that is simple, manageable and well suited to you and your clients.

AdvancedMD offers every feature and capability outlined in this eBook. To learn more, schedule a demo.

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