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Critical Features of an EMR System

*Addressing major agency challenges
through strategic functionality*

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Introduction

This document was put together by a team of Human Services and Information Technology professionals who develop and implement the Evolv-CS EMR solution. The intention is to share some of our industry expertise with agencies interested in adopting electronic record systems and to educate prospective adopters about the wide range of features and functionality offered by these systems.

With more and more human services providers nationwide in some stage of the EMR adoption process, the issue of quality and effectiveness in software systems has become more prevalent than ever. The options, which range from basic document imaging to full-service enterprise databases, can be difficult to sift through, and even more complicated to align with agency needs and procedures.

With over 25 years of experience designing, implementing and maintaining electronic record systems in the human services industry, we've learned a great deal about what human services providers need to overcome their biggest challenges: increasing worker efficiency and the quantity of services provided, maximizing revenue and improving cash flow, increasing the efficient use of technology among agency personnel, satisfying regulatory and funder compliance requirements and increasing the quality of services by supporting best practices.

In this paper we have attempted to briefly address steps needed to overcome each of these major challenges and identify relevant key features to look for when purchasing an EMR system.

1. Agency Challenge: Increase Quantity of Services / Increase Worker Efficiency

One of the most vital functions of an EMR system is the improvement of overall operating efficiency – a daunting task at best. First and foremost, the system should be a full Electronic Medical Record, managing the entire continuum of care and allowing for tracking of any and all client information. It should also provide “anywhere, anytime” access to needed information, allowing personnel to work from home or remote computers. Moreover, it should provide helpful, real-time management of day to day tasks and tools to assist in managing workloads.

Critical System Features:

- Web-based application
- Browser based interface and navigation
- Worker Calendars

- Task Management Tools
- Worker Specific Dashboard
- Worker Role based interface
- Customizable design, allowing for custom forms/screens, data elements
- Support for the management all types of data: education, medical, health, legal, employment, relationships, collaterals, previous treatment history, substance abuse, other agency involvement, documentation
- Worker Productivity Reporting

2. Agency Challenge: Maximize Revenue & Improve Cash Flow

In order to fully automate and simplify an agency's financial management processes, the EMR application should act as a sub-ledger to the general ledger system, streamline remittance processing and claim adjudication procedures, and provide for the management of all contract/funder rules and requirements. A sophisticated system will support all types of claim formats and contract logic, streamline re-billing procedures, and maintain all client funding sources over time.

Critical System Features:

- Tight integration between clinical management and finance management
- Comprehensive and historical benefit assignment and funding source tracking for clients
- Extensive and sophisticated management of contract rules and rates
- Validation of service data against contract requirements
- Required fields on forms to ensure the integrity of all data
- Automatic identification of service records that do not meet contract requirements
- Prompts to "revise" or complete data to ensure the creation of valid claims
- Held Claim feature or mechanism for preventing inaccurate claims from being sent to funder
- Alerts to identify users of potential problems with service data or claims
- Electronic claim submission

- Electronic remittance processing
- Electronic funding eligibility and verification

3. Agency Challenge: Increase Technology Usage throughout the Agency

In order to cultivate the use of a new electronic record system among your staff and take full advantage of its features, the system must be user-friendly, support the needs of all agency programs, and be accessible from all agency sites. The interface should be adaptable to different employees and working styles, and allow for flexibility according to agency operations and structure. A high-quality system will be able to handle a diverse array of agency programs, have the ability to address all client populations and provide for agency-wide standardization of processes where needed. In addition, system security should allow for different levels of access to client data according to user permissions.

Critical System Features:

- Web-based - accessible at all agency locations
- Enterprise-wide design - supports all agency programs and client populations
- Comprehensive feature set – supports the continuum of care, tracks all client-related activity
- User Tools – allow for agency-customization of system interface, forms, data elements, etc.
- Multi-tiered Security – restricts access to data based on a combination of characteristics including direct staff assignment, program, facility, unit, worker role, workgroup, etc.
- Centralized scheduling – provides access to all agency personnel resources for the scheduling of client appointments
- Staff Availability Search – allows for the searching of available personnel based on specific criteria including language, credentials, location, program, etc.
- Duplicate Person Search – integrates client records between agency locations/programs and bridges episodes of care, allowing for one centralized record per client containing all relevant history

4. Agency Challenge: Satisfy Regulatory & Funder Compliance Requirements

A true enterprise system will help to streamline compliance with mandated requirements as defined by regulatory bodies and agency funders. It will also help organizations monitor conformity with HIPAA and accreditation mandates.

Critical System Features:

- Authorizations Management – tracks and manages information regarding all authorized services, periods, unit, rates, etc.
- Workflows and Event Ticklers – allows agencies to automatically generate due dates for all required activities, services and/or paperwork
- Alerts and Messaging features – notify and alert staff and their supervisors of upcoming and/or overdue activities
- Compliance Reporting - allows for the review and analysis of agency adherence to regulatory requirements
- Satisfaction Surveys – contains features for designing, administering and reporting on client and stakeholder satisfaction surveys
- Supervisory Review & Approval – provides a process for supervisory oversight of staff activities and service provision, and approval of accompanying documentation

5. Agency Challenge: Increase Quality / Support Best Practice

A sophisticated EMR system will help the agency monitor progress or regression of client response to treatment. It should support the administration and tracking of client assessments and tests over time, assist with development and review of client treatment/service plans, and track completion of all services provided in support of treatment goals.

Critical System Features:

- Multi-tiered agency-designed Treatment/Service Plans – with goals/objectives/methods libraries for clinical decision support
- Unlimited agency-defined Assessments, Test and Surveys – with automated domain scoring and results interpretation

- Assessment / Treatment Plan / Service link – allows for identification, addressing and service provision support of identified client problems/needs
- Outcomes Reporting – supports the monitoring and analysis of program and service effectiveness

The above list of features is by no means exhaustive. When evaluating EMR systems and agency needs, there are vast numbers of organization and system-specific requirements, considerations and available features. This document is based on conclusions drawn from years of industry experience, having witnessed large numbers of EMR Implementations, both failed and successful. Our intent with this paper is to share what we have come to regard as some of the most important features to look for when exploring an investment in an EMR system.