TOPICS

- Innovation and Improvement through Data (IITD)
  - eBHS
  - Implementation
  - Feedback Informed Treatment
- Effectiveness Research
- Training Protocol
- Implementation Planning
What is IITD?

Improvement and Innovation Through Data (IITD) is a newly developed three-pronged approach created by CIBHS to assist county behavioral health systems’ abilities to collect, improve and analyze client data and to use it in a meaningful way for client improvement.
What is included in IITD?

• (1) a uniquely flexible, web-based data system
• (2) a robust implementation method
• (3) training on use of data in behavioral health settings
Electronic Behavioral Health Solutions (eBHS)

- eBHS is a flexible platform that enables custom development to support unique organizational needs for data gathering, data management, and organizational work flow application development, individual and aggregate statistical reports with dynamic graphing and custom reporting

- Developed by Steve Weatherbee, Ph. D., founder of eCenter Research, Inc. – specializing exclusively in Software as a Service for mental health and addictions treatment providers
eBHS: a uniquely flexible, web-based data system
County Outcomes Report

• Connect to EHR
• Aggregate System-wide Report (i.e. State-wide compliance)
  ✓ Collection of real-time data
  ✓ Immediate reporting
• County-wide Dashboard (CPS data, FFT data, Assessment completion rates.)
Evidence-based Practice – Functional Family Therapy
Community-defined Practice – Emotional Emancipation Circles
## Clinician Page

### Table:

<table>
<thead>
<tr>
<th>Client ID</th>
<th>Client Username</th>
<th>First Name</th>
<th>Last Name</th>
<th>Active Program/Service</th>
<th>Next Assessment Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1Client</td>
<td>1Client</td>
<td>One</td>
<td>Client</td>
<td>Individual Therapy</td>
<td></td>
</tr>
<tr>
<td>2Client</td>
<td>2Client</td>
<td>Two</td>
<td>Client</td>
<td>Care Coordination</td>
<td></td>
</tr>
</tbody>
</table>

**Organization Management**

**Client Management**

**Outcome Reports**
Individual Client Dashboard Report

Baseline Results

Global Functioning Assessment Date: 12/02/2016

YOQ-SR Total Scores

- Total Score: 148
- PhQ-9: 7
- GAD-7: 18
- BD: 3
- SD: 11
- SP: 23
- IR: 28
- S: 37
- ID: 148

Baseline: 12/02/2016, Most Recent: 02/16/2017

Session Notes

- Previous Data Review Notes
- Previous notes will display here

Current Data Review Notes

Current notes will display here

Actions Required:
- Actions will appear here

Progress Report

Treat-to-Target

PHQ-9 Assessment Date: 12/02/2016

GAD-7 Assessment Date: 12/02/2016

YOQ-SR Domain Scores

- Total Score: 57
- Domain Scores: 28, 11, 18, 17, 15, 11

Baseline: 12/02/2016, Most Recent: 02/16/2017
State-wide data – Consumer Perception Survey Data
Implementation Defined

Implementation is defined as a set of activities designed to put into operation a practice, program, or initiative. The importance of implementation to achieving desired outcomes is illustrated in the following formula:

Effective practice + effective implementation = good outcomes
Implementation Defined

Implementation is about creating change in three areas:

1. **Individual behavior**, such as increased knowledge and skills of staff within the organization who are carrying out a specific practice.

2. **Organizational structures and cultures**, both formal and informal (values, philosophies, policies, and procedures) that support the changes in individual behavior.

3. **Relationships** among clients and system partners.
Community Development Teams

- A training and technical assistance, dissemination and implementation process, to promote selection, installation and model-adherent sustainability of evidence-based intervention models

- Informed by implementation science

- Development of internal (organizational) structures controls and processes

- Designed for public mental health system, bringing EBPs to scale, with focus on late-ish adopters

- The goal is model adherent and sustainable programs
Why CDT?

• Implementing and sustaining innovative programs is challenging

• Deliberate (focused) ongoing organizational support is needed to establish/sustain programs and achieve the full benefit of research informed practice

• Development Teams are particularly useful when first establishing a new program
  – If an agency has relatively little experience sustaining EBPs
  – Would like some help in planning, starting, supporting, sustaining
CDT Phases

• Pre-Implementation
  – Engagement
  – Planning
  – Training protocol

• Implementation
  – Training
  – Practitioner competence
  – Achieving model adherence
  – Program performance evaluation

• Sustainability
  – Internal controls for insuring model adherence
  – Quality improvement activities linked to program evaluation
Development Team Features

• Training
  – *Provided by eCenter and CIBHS*

• Organizational supports
  – *Provided by CIBHS*
  – Implementation planning
  – Administrators calls
  – Program performance evaluation supports
  – Individualized technical assistance

• Peer-to-peer assistance
Feedback Informed Treatment

• Creating a culture of feedback by routinely soliciting feedback from clients regarding alliance and outcomes

• Two key factors have proven useful in predicting and improving treatment outcome:
  1) The quality of the alliance between clinician and client
  2) Early change in treatment (Miller, 2012)
Performance in Clinical Practice

- Establishing a baseline performance level
- Engaging in deliberate, reflective practice
- Obtaining ongoing feedback and coaching
Data:
Feedback Informed Treatment

• Clinical data use training – interpreting treatment trajectories

• Treatment adjustment based on progress

• Outcome and therapeutic alliance measures to maximize treatment

“Clinicians routinely fail to identify clients who are not progressing, deteriorating, and at most risk of dropout and negative outcomes” (Miller, 2009)
Article: “Benchmarking Outcomes in a Public Behavioral Health Setting: Feedback as a Quality Improvement Strategy”

• Large-scale study of over 5,000 clients in public behavioral health setting

• Compared outcomes between feedback versus non-feedback approaches

Training Protocol
Phase I – Year One

• Phase I of IITD is designed to offer pre-implementation planning, implementation, and sustained implementation support to improve and analyze client data and to use it in a meaningful way for client improvement. Additionally, to effectively navigate the data system, understand how to interpret and utilize in-vivo outcomes data to improve behavioral health treatment, and sustaining the use of data long-term so that it becomes a systemic part of clinical practice.
Training Protocol
Phase I – Year One

• IITD Introductory meeting (2 hours)
• IITD Pre-implementation Planning (weekly calls until planning is complete)
  – Integrating into Agency services
  – Staffing
  – Administrative Oversight
  – Data Crosswalk meeting with eCenter
  – Develop Program Performance Dashboard Outcome Report Template
  – Develop Individual Client Dashboard Template

• Implementation:
  – eBHS (one-half day of training)
    • eBHS technical assistance calls monthly for six months
  – Booster Training (one-half day of training)
  – Use of data to inform clinical practice (One day of training)
    • Data use calls (monthly calls for practitioners)
Training Protocol
Phase I – Year One

• “Go Live”
  – Site licensed for use of eBHS

• Monitor and support
  – Administrator calls (monthly 1 hour calls for administrators)
  – Individual technical assistance
  – Booster training (one-half day of training)

• System help desk
Training Protocol
Phase II – Year Two and Ongoing

• Phase II of IITD (and on-going), is designed for the continuance of client data to be used for client improvement, to effectively navigate the data system, and understand how to interpret and utilize in-vivo outcomes data to improve behavioral health treatment. Sustainability of the use of data long-term becomes a systemic part of clinical practice.
Training Protocol
Phase II – Year Two and Ongoing

• Site licensed for use of eBHS
• Program Performance Dashboard Report Updates
• Monitor and Support
  – Administrator calls *(monthly 1 hour calls for administrators)*
  – Individual technical assistance
• System help desk
## Implementation Planning

### Improvement and Innovation Through Data (IITD)

**IMPLEMENTATION CHECKLIST AND PLAN**

| County/Agency        |  
|----------------------|----------------------|
| County/Agency Lead   |  
| CIBHS Lead           |  
| Implementation start date |  
| Contract Dates       | From:  
|                      | To:  

**CIBHS.Org**
# Implementation Planning

## INTRODUCTORY IN-PERSON MEETING:

**When:** Before agreement is initiated

**Meeting Date:**

<table>
<thead>
<tr>
<th>Document(s):</th>
<th>REVIEW OF:</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Introductory Meeting PowerPoint</td>
<td>- IITD Overview (eBHS DEMO, Implementation, FIT)</td>
</tr>
<tr>
<td>- Site Visit Agenda</td>
<td>- Effectiveness research overview</td>
</tr>
<tr>
<td>- Research Article (Reece, Duncan, et al)</td>
<td>- Training protocol overview</td>
</tr>
<tr>
<td></td>
<td>- Implementation planning overview</td>
</tr>
<tr>
<td></td>
<td>- Next steps</td>
</tr>
</tbody>
</table>

**Follow-up:** If not discussed in meeting, contact county/agency after the meeting to complete the eCenter Information Form. Email to eCenter two weeks prior to preliminary meeting with eCenter. (See below)

**Purpose:** To provide a comprehensive overview of IITD, its research foundation, the training protocol, and implementation planning – so the site can make an informed decision about whether to move forward

**Meeting Notes:**
## Implementation Planning

<table>
<thead>
<tr>
<th>PRELIMINARY MEETING WITH eCENTER:</th>
<th>Document(s):</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>WHEN:</strong> Before agreement is initiated</td>
<td>- eCenter Information Form</td>
</tr>
</tbody>
</table>

**Meeting Date:**

**REVIEW OF:**

- eCenter Information Form
- Scope of Work

**ACTIVITY:**

- Discuss county/agency collections request with eCenter
- Review each new collection requested

**Purpose:** To review scope of work and data collection request to develop accurate cost estimate for the county/agency

**Meeting Notes:**
# Implementation Planning

**CONTRACT AGREEMENT**

*WHEN: After introductory meeting, before pre-implementation*

**Date contract was signed**

**Contract dates:**

**Document(s):**
- IITD Contract/Agreement
- eBHS Agreement
- Schedules
- HIPAA Business Associate Agreement (BAA)
- Phases/Costs Sheet

**REVIEW OF:**
1. Contract/Agreement documents
2. BAA

**ACTIVITY:**
- Contract and BAA signed by County/agency and CIBHS.
- Year-one up-front payment received
- First Weekly Implementation Meeting scheduled

**Purpose:** To have contract/Agreement signed by both site and CIBHS so project can commence

**Meeting Notes:**
# Implementation Planning

## PRE-IMPLEMENTATION (First Meeting)

**Purpose:** Helping site identify implementation team, understand roles and responsibilities and get team members committed and excited

**WHEN:** After contract/agreement is initiated

Pre-implementation

Start Date:

<table>
<thead>
<tr>
<th>Document(s):</th>
<th>ACTIVITY: Identify:</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Overview Current &amp; Future Services</td>
<td>- Primary contacts(s), Identify Implementation team</td>
</tr>
<tr>
<td>- Implementation Toolkit for sites</td>
<td>- Discuss Responsibilities of Implementation Team</td>
</tr>
</tbody>
</table>

Primary Contact(s): Name (s):

<table>
<thead>
<tr>
<th>Staff</th>
<th>Implementation Role</th>
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<tbody>
<tr>
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</tbody>
</table>
## Implementation Planning

**PRE-IMPLEMENTATION - Organizational Strengths and Barriers**

*Purpose:* To identify and discuss common organizational barriers so sites can assess their own system and make changes if they choose.

<table>
<thead>
<tr>
<th>Question</th>
<th>Notes:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Where will eBHS fit into service system? <em>(Define what you do and what you want to measure. Define what measures will be used and how they fit with other work you are doing.)</em></td>
<td></td>
</tr>
<tr>
<td>Who will participate in the first phase? If unit, will all staff participate?</td>
<td>Notes:</td>
</tr>
<tr>
<td>How will you select which staff to start?</td>
<td>Notes:</td>
</tr>
<tr>
<td>Will they be required to use all measures/collections identified?</td>
<td>Notes:</td>
</tr>
<tr>
<td>What engagement strategies will you use to engage staff in a positive way?</td>
<td>Notes:</td>
</tr>
</tbody>
</table>
### Implementation Planning

**What are possible barriers to implementation? (Check all that apply)**

- Staff are nervous about technology
- Time Restraints (i.e. high case load, productivity requirements)
- Staff not used to review data
- Other (Explain)

**Other Barriers:**
### Implementation Planning

<table>
<thead>
<tr>
<th>Question</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who from implementation team will participate in peer-to-peer support calls?</td>
<td></td>
</tr>
<tr>
<td>Who at the administrative level will be responsible to make sure that eBHS is implemented?</td>
<td></td>
</tr>
<tr>
<td>Who at the administrative level will review data quality and outcome reports and oversee any needed corrections?</td>
<td></td>
</tr>
<tr>
<td>How will staff attrition be managed? How will new staff be trained? Who will train staff?</td>
<td></td>
</tr>
<tr>
<td>Identify an IIID champion.</td>
<td></td>
</tr>
<tr>
<td>Meeting Notes:</td>
<td></td>
</tr>
</tbody>
</table>
Implementation Planning

| COLLECTIONS OVERVIEW – TRAINING NEEDS, WORK FLOW, COLLECTIONS REVIEW |
| Purpose: To review each collection to ensure understanding of what collections will be used, who will complete them, and how data will be used in practice |

<table>
<thead>
<tr>
<th>DATA COLLECTION</th>
<th>Document(s):</th>
<th>ACTION ITEMS:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measures/Collections</td>
<td></td>
<td>Identify collection training needs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Acquire licenses for measures (if applicable)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>COLLECTIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global functioning outcome measure</td>
</tr>
<tr>
<td>Treat-to-target measure(s)</td>
</tr>
<tr>
<td>Alliance Measure</td>
</tr>
</tbody>
</table>
# Implementation Planning

<table>
<thead>
<tr>
<th>DATA REPORT TEMPLATES:</th>
<th>Document(s):</th>
<th>REVIEW OF:</th>
<th>COMPLETED</th>
</tr>
</thead>
</table>
| Purpose: To develop customized report templates for each collection for eCenter | - Dashboard Report Examples  
- Outcomes Report Examples  
- Data Crosswalk Document | - Dashboard Examples  
- Outcomes Report Examples | Complete |
| WHEN: Concurrent with Pre-implementation discussions | | | |

<table>
<thead>
<tr>
<th>ACTIVITY:</th>
</tr>
</thead>
</table>
| - Develop customized dashboard report(s) templates  
- Develop customized outcomes report templates  
- Complete Data Crosswalk document  
- Develop customized report templates  
- Discuss training dates |

Meeting Notes:
# Implementation Planning

## REVIEW MEETING WITH eCENTER

**Purpose:** To provide all necessary information to eCenter so collections can be programmed successfully in eBHS and plan for linkage to EHR can begin

<table>
<thead>
<tr>
<th>WHEN: after data reports have been developed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date documents were emailed to eCenter:</td>
</tr>
<tr>
<td>Meeting Date:</td>
</tr>
</tbody>
</table>

### Document(s):
- Data Crosswalk document
- Data Report Templates

### REVIEW OF:

**NOTE:** Documents emailed to eCenter two weeks prior to meeting
- Data Crosswalk document
- Data report templates
- Implementation Checklist and Plan

### ACTIVITY:
- Send user information to eCenter: (Name, Role/system permissions, Email Address)
- Schedule supervisor testing
- Schedule staff training
- Schedule meeting between eCenter and Implementation leads/IT staff

### Meeting Notes:
## Implementation Planning

### eCENTER ACTIVITIES

**Purpose:** For eCenter to complete necessary steps for linking eBHS to EHR and planning for training

<table>
<thead>
<tr>
<th>WHEN: after eCenter Review meeting with CIBHS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document(s):</td>
</tr>
<tr>
<td>• List of technical expertise staff/EHR representatives</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>eCenter Activities</th>
<th>Complete</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Discussion with implementation Leads</td>
<td></td>
</tr>
<tr>
<td>• Training plan development</td>
<td></td>
</tr>
<tr>
<td>• Discussion of customization needs and linkage to EHR</td>
<td></td>
</tr>
<tr>
<td>• Set “Go Live” timeline with site</td>
<td></td>
</tr>
<tr>
<td>• Follow-up:</td>
<td></td>
</tr>
<tr>
<td>• eCenter meets with EHR technical staff</td>
<td></td>
</tr>
<tr>
<td>• eCenter does in-person training of use of eBHS</td>
<td></td>
</tr>
</tbody>
</table>

### Meeting Notes:

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# Implementation Planning

**IMPLEMENTATION “Go Live” CHECKLIST**

**Purpose:** To ensure readiness for “Go-Live”

<table>
<thead>
<tr>
<th>“Go Live” Date:</th>
<th>Notes:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Staff Trained</strong></td>
<td>[ ]</td>
</tr>
<tr>
<td>Participation in ongoing data use consultation – CALLS SCHEDULED</td>
<td>[ ]</td>
</tr>
<tr>
<td>Participation in Administrator’s calls – CALLS SCHEDULED</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

**Notes:**
For More Information:

Rikke Addis
raddis@cibhs.org

Pam Hawkins
phawkins@cibhs.org