Implementation of Collaborative Documentation at EMQ FamiliesFirst

EMQ FamiliesFirst
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Presentation Objectives

After attending this session, participants will be able to:

• **Describe how note-sharing with the client is a vital component that makes collaborative documentation during treatment sessions collaborative in a manner that engages the client.**

• **Debate widespread concern among behavioral health clinicians that collaborative documentation may have deleterious effects upon the client-therapist relationship.**

• **Explain how electronic note-taking during the treatment session saves significant time.**
Project & Change Management: Processes and Tools

Initiate
- Determine Readiness
  - Select Business Owner
  - Select Project Manager
  - Authorize Budget
  - Proof of concept
  - Change readiness survey
  - BCA/Charter

Plan
- Prepare Leadership
  - Communicate with Leadership
  - SMEs selected
  - Meetings initiated
  - Project site developed
  - Kick-off announced
  - Sponsorship agreement
  - Project plan
  - WBS
  - Agenda

Execute
- Increase Readiness
  - Deliverables executed
  - Change resistance managed
  - Risk & issue log

Monitor & Control
- Manage the Message
  - Routine communication with stakeholders
  - Update project documents
  - Maintain project site
  - Dashboard report

Close
- Make It Stick
  - Reinforcement applied
  - Resources released
  - Communicate closure
  - Celebrate!
  - Close out questionnaire

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Phases of Collaborative Doc. Implementation

• Technology Testing/Change Management
• Planning/Program Training
• Implementation
• Maintaining/Sustaining Collaborative Documentation
**Beginning**
- Targets experience
- Ambivalence (want vs. fear)

**Neutral Zone**
- Targets experience
- Anxiety, low motivation, overwhelmed, confused

**Ending**
- Targets experience
- Sense of loss & grieving

**Targets need:**
- Detailed description of the change
- Identification of who is losing what
- Open discussions regarding the change
- Empathy

**Targets need:**
- Reorientation
- Short-term goals
- Risk-taking (Support to move beyond comfort zone)

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Adapted from Millie Bridges
Technology Testing/Change Management

• **Collaborative Documentation project launch meeting with managers/directors**
  – Project planning- scope, roles and responsibilities, develop the high level milestones and begin to assign tasks

• **Change Management starts with the first meeting**

• **Initial training**

• **Technology testing with IT participation- critical to the project- back up plans**

• **Continued change management planning**
Planning/Program Training

- **Change management**- begin meeting with direct service staff, developing ownership among the managers
- **Weekly meeting with technology testers with IT**
- **Continued project task completion**
- **IT and Privacy**- laptops, connection issues, phones
The Clinician/Manager Experience

- Thoughts sitting in the audience as the Clinician during staff meetings
- Training
- Testing
- Becoming a manager in the middle of the implementation
- First Session with Collaborative Documentation
  - Kiddo and family response
  - How did you get yourself organized
Training and Making it Stick

• Day of training
• Metrics to support/Recognition
• Reports
• Continued after training support- IT or more Collaborative Documentation coaching
Training and Making it Stick

- Manager perspective
  - Developing and delivering training
  - Supervision/Coaching
  - Metrics/Reports
  - On-going sustainability
  - Today
Questions?

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