

# Implementation of Collaborative Documentation at EMQ FamiliesFirst



*EMQ FamiliesFirst*  
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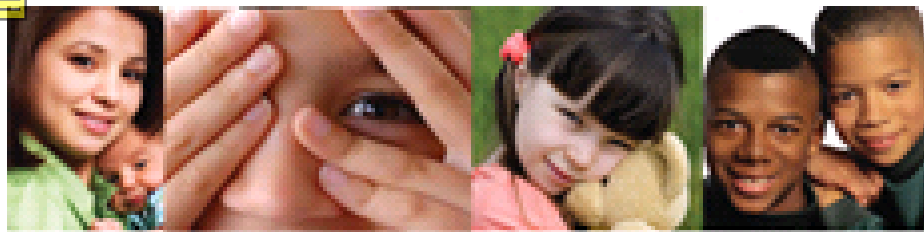
# Presentation Objectives

*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.*



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# Project & Change Management: Processes and Tools

## Initiate

**Determine Readiness**

## Plan

**Prepare Leadership**

## Execute

**Increase Readiness**

**Monitor & Control**

**Manage the Message**

## Close

**Make It Stick**

- ✓ Select Business Owner
- ✓ Select Project Manager
- ✓ Authorize Budget
- ✓ Proof of concept
- ✓ Change readiness survey
- ✓ BCW Charter

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

- ✓ Deliverables executed
- ✓ Change resistance managed
- ✓ Risk & issue log

- ✓ Routine communication with stakeholders
- ✓ Update project documents
- ✓ Maintain project site
- ✓ Dashboard report

- ✓ Reinforcement applied
- ✓ Resources released
- ✓ Communicate closure
- ✓ Celebrate!
- ✓ Close out questionnaire



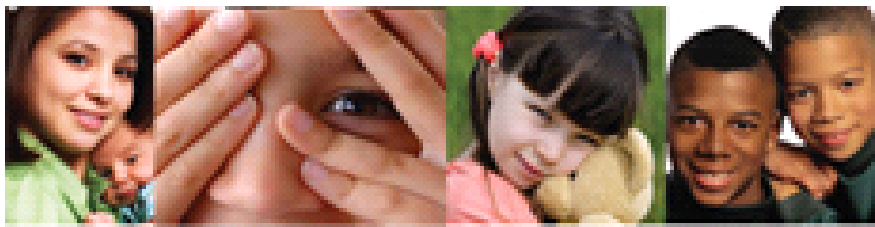
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# Phases of Collaborative Doc. Implementation

- *Technology Testing/Change Management*
- *Planning/Program Training*
- *Implementation*
- *Maintaining/Sustaining Collaborative Documentation*





## Beginning

Targets experience  
Ambivalence (want vs. fear)

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

## Neutral Zone

Targets experience  
Anxiety, low motivation,  
overwhelmed, confused

- Targets need
- 2-way communication
  - Involvement
  - Nurturing of creativity
  - Refined systems/roles

## 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





# 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*



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# Training and Making it Stick

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





## Questions?

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