

***Division of Services Improvement, Clinical Technical Assistance Project***  
**Targeted Capacity Expansion: Technology-Assisted Care (TCE-TAC)**  
**The Centers, Inc.**

**TA 4085: Information Technology Strategic Development Call**  
**September 8, 2014 • 2:00 pm ET**

**Submitted to:** Tim Cowart

**Date of Submission:** September 10, 2014

**Participants:**

**The Centers:** Tim Cowart

**JBS International (JBS):** Dave Wanser, Iris Chai, and Leslie McElligott

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**Meeting Purpose:**

The purpose of the call was for The Centers' chief executive officer, Tim Cowart, to speak with Dave Wanser (JBS) about the organization's efforts to develop a health information technology strategic plan.

**General Discussion:**

Integrated Care Model

The Centers is considering moving to an integrated care model. They have been working closely with local Federally Qualified Health Center (FQHC) – Citrus Care Network (CCN) – to learn about their delivery model and explore collaborative opportunities. CCN's medical director is affiliated with the MyHealthStory health information exchange.

The new healthcare landscape necessitates a holistic approach to patient care. This changes how healthcare professionals typically see and work with patients. CCN has integrated medical compliance into their therapeutic interventions. Increased expectations for quality reporting provide an added incentive for collaboration because behavioral health issues often impact compliance with primary care treatment plans.

Tim's next step with the FQHC transition process is to isolate mutual clients, review treatment plans, and start conversations with staff at both organizations to make sure patient needs can be met.

Technology as Part of the Organizations' Fabric

The Centers has experienced considerable change in a short amount time – marked by the passing of Charles Powell earlier in the year. The Centers is one of many organizations adapting the role of technology to help achieve its goals. Dave's primary recommendation is for The Centers to develop a plan that incorporates policy, business, and workflow considerations. Organizations that struggle most are the ones that isolate technology to the auspices of the IT department instead of incorporating it throughout the organization.

Alma Rosario (The Centers) is focused on making sure that TAC grant activities align with organizational goals more broadly than a singular focus on the grant project. The grant can leverage where the Centers

wants to be in the future. To get there, the organization needs to chart the business and clinical strategies that will make the most sense. For example, what are the implications for aligning with an FQHC? How will changes to Medicaid/third party payment approaches impact the organization? It is essential for The Centers' to understand the integral role that technology will play in influencing healthcare delivery and the financing changes associated with payment reform.

Tim wants to spend more time educating board members about the importance of technology. He plans to educate his team internally about where the healthcare industry is heading and what elements should be the focal point for the agency's strategic plan (revisions to which will begin in October). The plan will emphasize IT, marketing, and clinical performance measures. A regularly produced scorecard will help to monitor the areas the organization thinks are most valuable. Technology will play a central role.

Dave mentioned that a critical focus should also be placed on sustainability and the extent to which the grant becomes an organization-wide asset. Telehealth becomes a tool in your toolbox to help with patient engagement (e.g., portals). The Centers can view the TAC grant as a learning opportunity that can be integrated into the fabric of the organization. The Centers will also need to work on internal and external policy changes and address issues associated with workflow and reimbursement.

### Best Practices

Tim inquired about best practices among current TAC grant programs. Dave reported that the most successful programs are those with executive leadership buy-in. Tim's investment is a critical success factor for The Centers as is the involvement of the chief information officer as integral to the leadership team's strategy development activities. Other effective strategies include:

- Working with the State's Medicaid office to identify reimbursement opportunities and remediate policy barriers.
- Engaging partner organizations and behavioral health agencies in collaborative approaches to care.
- Collecting and sharing data to measure if the organization is achieving desired outcomes.
- Generating an information plan.

The Centers is moving in the right direction. It is a matter of balancing tasks and making sure that workflow is sufficiently aligned. Behavior change is not an easy task.

### Data

A large component of the TAC grant is based on delivering telehealth services. Performance outcome expectations for the grant per se only measure the number clients seen. Tim wants to be able to capture meaningful data to align with clinical health home and pay-for-performance models. Data will help to demonstrate that technology is yielding favorable outcomes. The Centers' current data analyst has been focused on navigating through the State's data reporting system. It is hoped that this person can shift focus to identify clinical, financial, and operational performance measures.

### Workflow

Workflow processes must be carefully designed to optimize efficiency and effectiveness, and all staff must take responsibility for adopting change and improving quality and efficiencies; it is a top down and

bottom up effort. When implementing a new workflow, consider using the rapid change cycle process (i.e., adjust, measure, and adjust as needed). Behavioral health organizations moving to an integrated model often find the workflow adjustments to be challenging (e.g., 15-20 minute office visits). It is essential to strike a balance between delivering comprehensive patient services and adopting new approaches to patient engagement and adherence to treatment plans. Technology (such as portals) can help make this possible.

### Planning Session

Dave advised The Centers to carve out time for planning. He emphasized getting staff together (face-to-face) to generate a framework where changes are clearly outlined and responsibilities and expectations are set. The same should be done with the board. This activity could be facilitated as part of a technical assistance request.

The meeting could happen before or after the strategic plan is considered. In advance of the planning session, some preliminary work is needed to make the best use of everyone's time.

The Centers will need to consider a timeline to engage the most individuals as possible (perhaps around an upcoming board meeting). The Centers' board meets once a month for 1—2 hours. The next meeting is scheduled for October 27.

### Affiliation Agreements

The Centers is considering the possibility of affiliating with its sister agencies to assist with payer contract negotiations (i.e., creating a sole-membership arrangement with a parent company). Tim is interested in ways to negotiate contracts under one umbrella without losing decision-making authority. Dave said that organizations have attempted this in a number of ways. Ultimately, you can affiliate without diminishing autonomy so long as your agreements sufficiently accounts for risk.

### **Next Steps**

JBS will work on approving an onsite meeting as part of the current TA request (TA 4085).

Tim will confirm possible dates/times to host the onsite meeting.