

Meta House's Healthy Connections (TCE-TAC) Electronic Health Records Staff Survey Results

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As part of the Healthy Connections (TCE-TAC) project, Meta House has recently implemented an electronic health records (EHR) system throughout its outpatient and residential programs. In order to understand staff's early response to this change in the organization and in their day-to-day work, a staff survey was conducted by the external evaluation team from IMPACT Planning Council.

Where is Meta House in the rollout of its EHR system?

Meta House selected PsyTech Solutions' Epitomax as its EHR system and has gradually implemented it throughout the agency during 2013 / 2014. At each step of the implementation, relevant staff received group and/or individualized training. The staff rollout has progressed through the following timeline:

- August 2013 – outpatient counselors and admissions staff
- October 2013 – all outpatient staff
- November 2013 – all residential staff
- February 2014 – all remaining clinical staff

Who participated in the survey?

In May of 2014, 28 direct service staff who use the Epitomax EHR system were asked to complete an anonymous online survey about their experiences with the system. Given the rollout of the system, staff who completed the survey most likely had between three and nine months of experience as Epitomax users.

- The response rate was high, with 24 of 28 (85.7%) staff completing the survey.
- Survey participants included AODA Counselors (n=9); Child and Family Staff (n=9); and Case Managers, Vocational Education Counselors, or Other Staff (n=4).

In general, what was staff's response to the EHR system?

As expected, staff's responses to the survey demonstrated a range of perspectives about Meta House's migration to an EHR system.

- Many staff had responses that suggested generally positive experiences with Epitomax.
- For some items, a large number of staff (30%-50%) had a neutral response, neither agreeing nor disagreeing with the statement. Often, the neutral response suggested that while staff recognized the move to Epitomax as an organizational change, their experiences with it were either neutral or mixed.
- A small number of staff indicated strong dissatisfaction with Epitomax, experiencing it as both frustrating and inconvenient.

What was staff's feedback about the rollout of the EHR system?

The survey responses suggested that staff were generally fairly open to the transition to the EHR system, that the learning process has gone relatively smoothly, and that assistance with the system is available to them. Specifically:

- Only 33.3% of participants indicated that they had been "dreading the switch" from paper charts to Epitomax.
- 70.8% of participants said they received the training needed to learn how to use Epitomax.

- 62.5% did not think learning Epitomax was hard.
- 75.0% of participants reported they can get help with Epitomax if they need it.

What feedback did staff have about how the system works?

Survey responses suggested that few staff were dissatisfied with the overall functionality of Epitomax and most saw it as an improvement over the old charting system. However, a substantial number indicated that the system does not allow them to find information quickly and that it is challenging to correct any errors made when entering data. Specifically:

- 41.7% found the system's instructions and prompts helpful (with an additional 25.0% responding neutrally to this item).
- Only 29.2% indicated Epitomax lets them quickly find the information they need (with an additional 33.3% responding neutrally).
- 54.2% reported that correcting mistakes with Epitomax was difficult (with an additional 33.3% responding neutrally).
- When staff were asked to identify aspects of Epitomax they would change, staff responded:
 - Decrease the number of steps it takes to enter a record (e.g., "Way too many steps to get what I need. Too many clicks for each task.").
 - Simplify the process of correcting mistakes and errors (e.g., "Making it easier to make corrections to complete charting.").
 - Make group charting easier (e.g., "Group charting is harder than before.").

How has the system affected staff's day-to-day work?

The survey responses showed that for most staff, Epitomax had either not changed their day-to-day work substantially or had allowed them to chart more quickly and to be more informed and coordinated with other services the client was receiving. Specifically:

- Only 16.7% indicated that Epitomax had made charting and reporting services harder (while an additional 41.7% responded neutrally).
- 54.2% reported that they were able to get their charting done sooner with Epitomax (with 20.8% responding neutrally).
- 45.8% found that client services were easier to coordinate with Epitomax (with 41.7% of respondents responding neutrally).
- 50.0% responded that they found it helpful to be able to see other staff's notes about their clients (41.6% responded neutrally).
- Only 20.8% indicated they have more time for their clients with Epitomax, but 58.3% responded neutrally, suggesting that they have about the same amount of time for clients.
- When asked about ways Epitomax had changed their day-to-day work, staff had a range of responses, suggesting that the impact has varied between individuals. For example:
 - Some staff said Epitomax has allowed them to "have more time for service delivery," while others noted they now spend "more time charting."

- Some staff indicated that charting is “easier and more efficient” with Epitomax while others commented that they “have to refer to written instructions every time they use the system.”

Have staff been satisfied with the movement to an EHR system?

Overall, the survey responses indicated that most staff were either satisfied or neutral about the migration of the agency to an EHR system. A small number of staff, however, were quite dissatisfied with the Epitomax system and experienced it as making their jobs more difficult. Specifically:

- 52.2% would not go back to the old charting system if they could (with an additional 30.4% responding neutrally to this item).
- 34.8% indicated that Epitomax has made their job easier (with an additional 43.5% responding neutrally).
- 47.8% would recommend other treatment agencies move to an EHR system (and an additional 39.1% were neutral about whether or not they would make this recommendation).
- 56.5% responded that the benefits of switching to Epitomax had outweighed the challenges (and an additional 26.1% were neutral).
- 54.2% could see ways Epitomax will be helpful to Meta House in the future (with an additional 33.3% responding neutrally to this item).
- When staff were asked to identify aspects of Epitomax they liked, staff indicated that they had:
 - More information available to them about clients (e.g., “Having the ability to see other team members’ notes.”),
 - More time in their office, leaving them more available to clients (e.g., “Being able to chart from my desk, making me more accessible to clients.”), and
 - Experienced efficiencies in charting (e.g., “It helps me complete my charting quicker.”).

What kinds of recommendations emerged from the survey?

The survey responses suggested that there are several ways in which the next phase of EHR implementation can be helpful to staff. Specifically:

- Participants expressed an interest in continued training and/or technical assistance on the Epitomax system (e.g., optional refresher trainings every 3-6 months).
- Participants indicated that they were experiencing some frustrations in their day-to-day use of the system.
 - There was little uniformity in the challenges participants raised, suggesting that those challenges may be specific to individual staff’s role and the ways in which they need to use the system.
 - As a result, it may be helpful to conduct another round of one-on-one EHR meetings with staff to provide technical assistance and troubleshoot specific issues.
- While it may be possible to address some of the challenges staff experienced with targeted technical assistance, other challenges may be related to the design of the Epitomax system.

- In reviewing the specific problems experienced, it will be helpful to categorize them into challenges resolvable through technical assistance, challenges that may warrant a request for modification to the system, and challenges that may be endemic to Epitomax.

Summary

Overall, staff feedback during the early phase of Meta House's EHR implementation was generally positive or neutral. In addition, staff identified a variety of ways in which Epitomax had made their "paperwork" easier and had allowed them to more fully coordinate client care. However, there were a small number of staff who were experiencing considerable frustrations with the system. Another round of one-on-one technical assistance may address some of the challenges staff have encountered and will assist in identifying potential requests for system modifications. As additional experience is gained with the system and further technical assistance is provided, it will be useful to conduct an additional follow-up staff survey to note any changes in attitudes or areas for further development.