Improving Timeliness, Productivity, and Quality of Documentation with Real-Time Data

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CQI Conference: October 9, 2024

Introduction

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Nexus Family Healing

Our Services

We provide community mental health services, residential treatment, and foster care/adoption services to help children, families and adults struggling with emotional and behavioral health issues.

Our Mission

To change the course of a child's life by stabilizing families and strengthening mental health.

Our Vision

Healing the past. Breaking the cycle. Changing the future.

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Restoring Hope. Reshaping Futures.
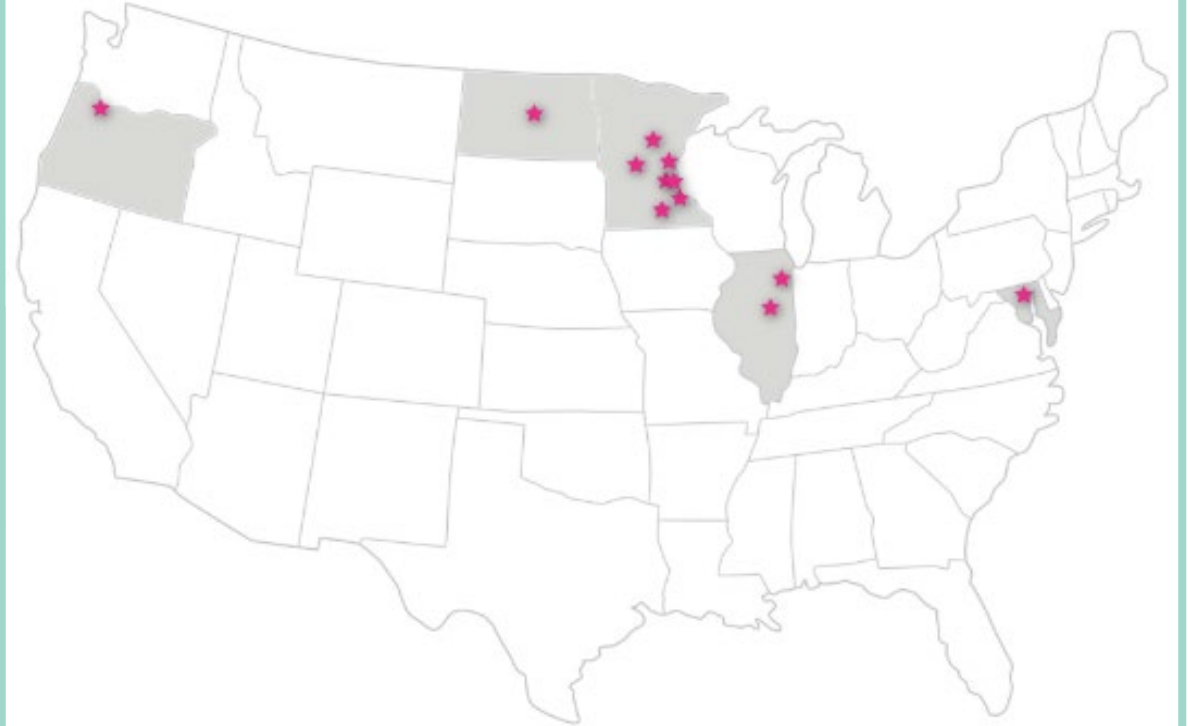
Why are we here?

Improving Timeliness, Productivity, and Quality of Documentation with Real-Time Data

Learning Objectives

- Understand the importance of setting clear and rigorous expectations for staff productivity.
- Leave with strategies on how to improve buy-in with staff to use data.
- Review examples of data presentations to help improve staff metrics using real-time reports.

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Agenda

▶ Identifying the Problem

▶ Sharing information and Creating Buy-in

▶ Executing the Plan

▶ Deliverables and Results

▶ Sustainability

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Identifying the Problem

Unclear Expectations

Identifying the Problem

Unclear Expectations **+** Inconsistent Tracking

Identifying the Problem

Unclear Expectations **+** Inconsistent Tracking **+** Competing Priorities

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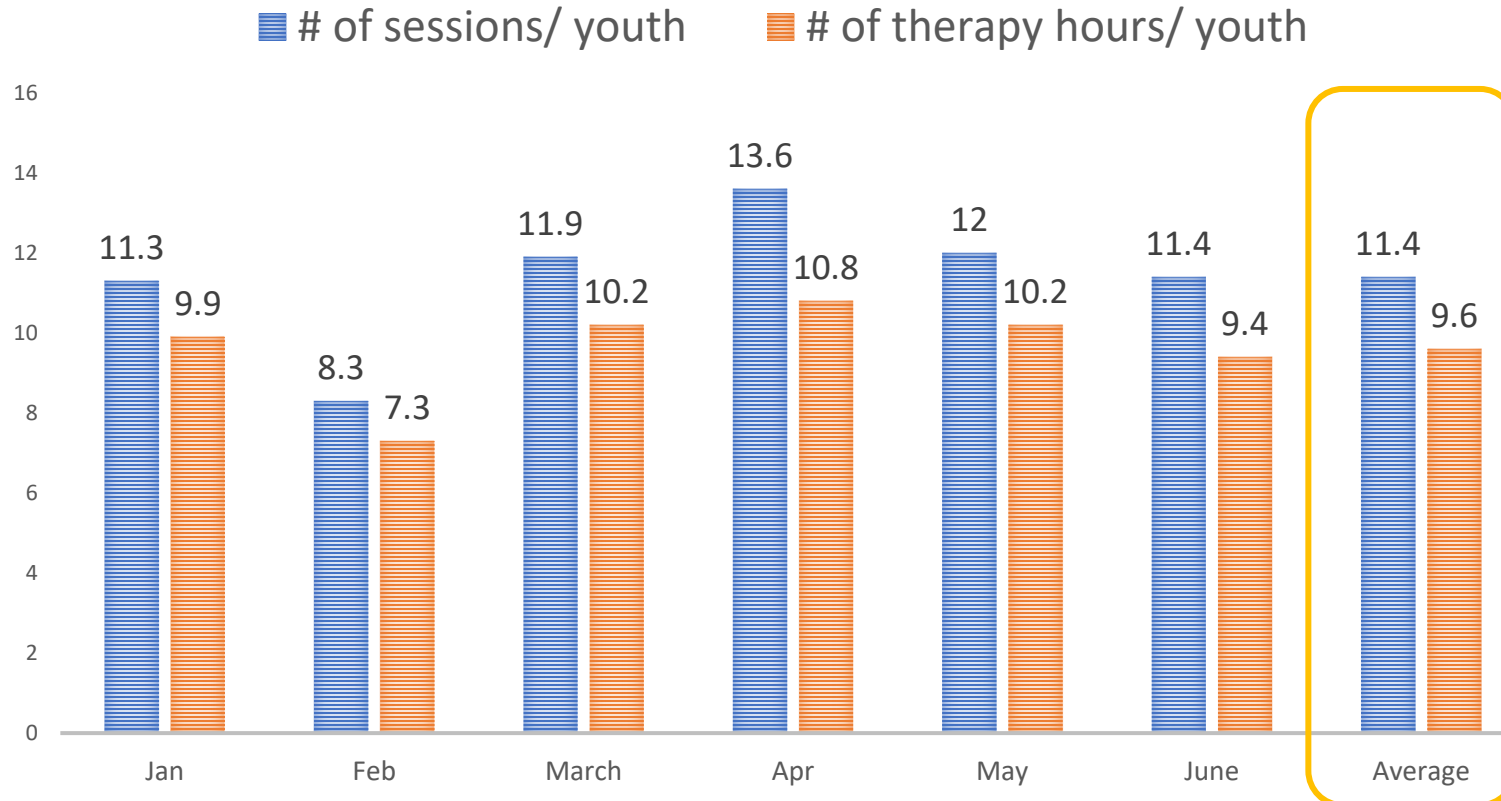
Sharing Information & Creating Buy-in

- Review data
- Identify opportunities in the data
- Project Management Framework
- Generate goals and set plan

Sharing Information & Creating Buy-in

- Celebrate successes

- Contextualize the data
  - It's not QI's data, it's everyone's

- This is where we establish the why!

- Strategies when sharing data
  - Compliment sandwich
  - Unique data visualizations

- Review data
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The following chart details how many sessions on average each youth receives each month and the number of hours this equates to.

SERVICE HOURS BY YOUTH

■ # of sessions/ youth   ■ # of therapy hours/ youth

| Month	# of sessions/ youth	# of therapy hours/ youth
Jan	11.3	9.9
Feb	8.3	7.3
March	11.9	10.2
Apr	13.6	10.8
May	12	10.2
June	11.4	9.4
Average	11.4	9.6

- Review data
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Each dot represents a therapy session. It's place on the chart details the date of service and date of submission for a clinician.
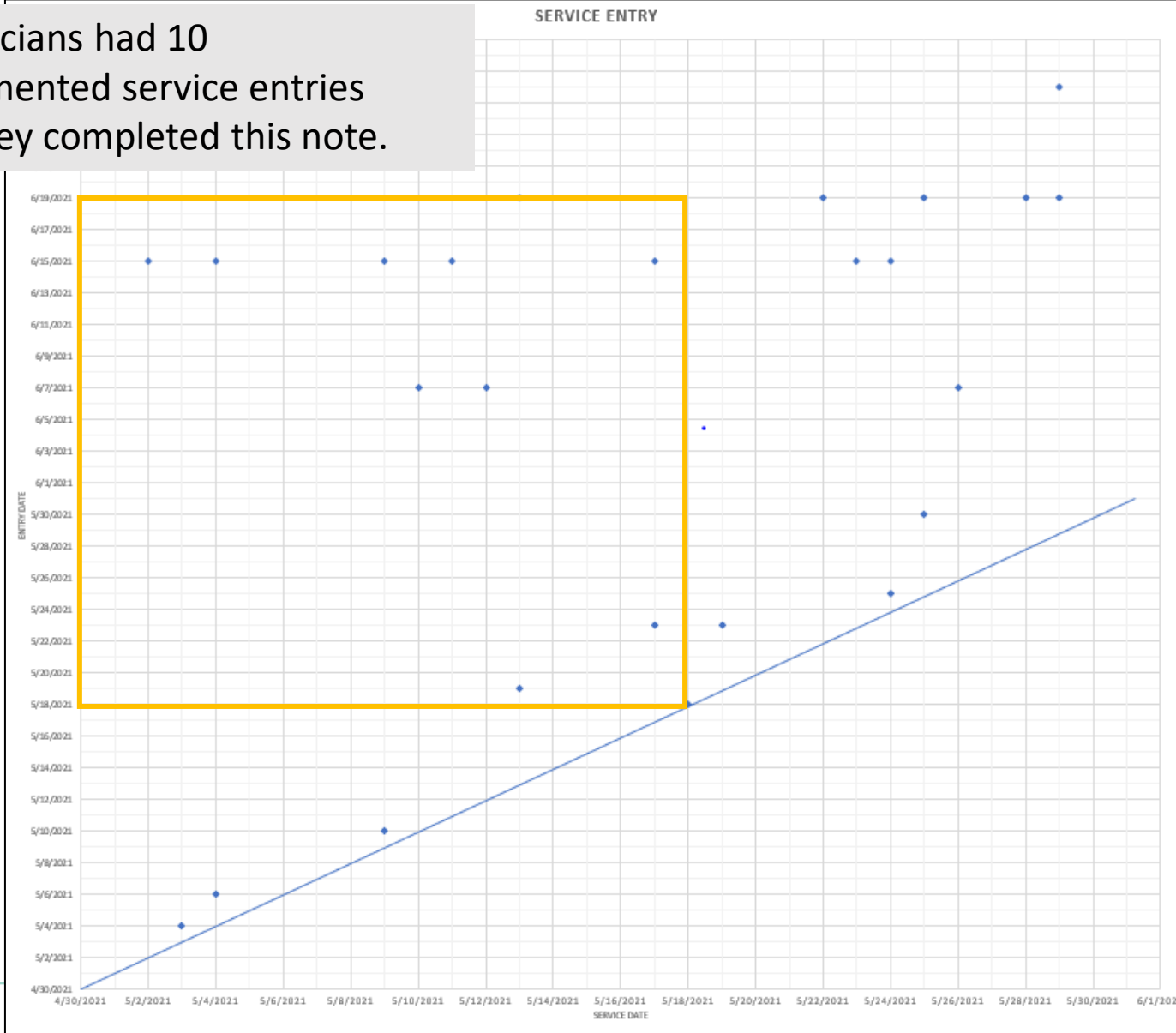
The closer a dot is to the line, the faster a clinician documented and submitted a therapy note.

While there are some outliers in this graph, this clinician typically completes their note within a few days of providing therapy.
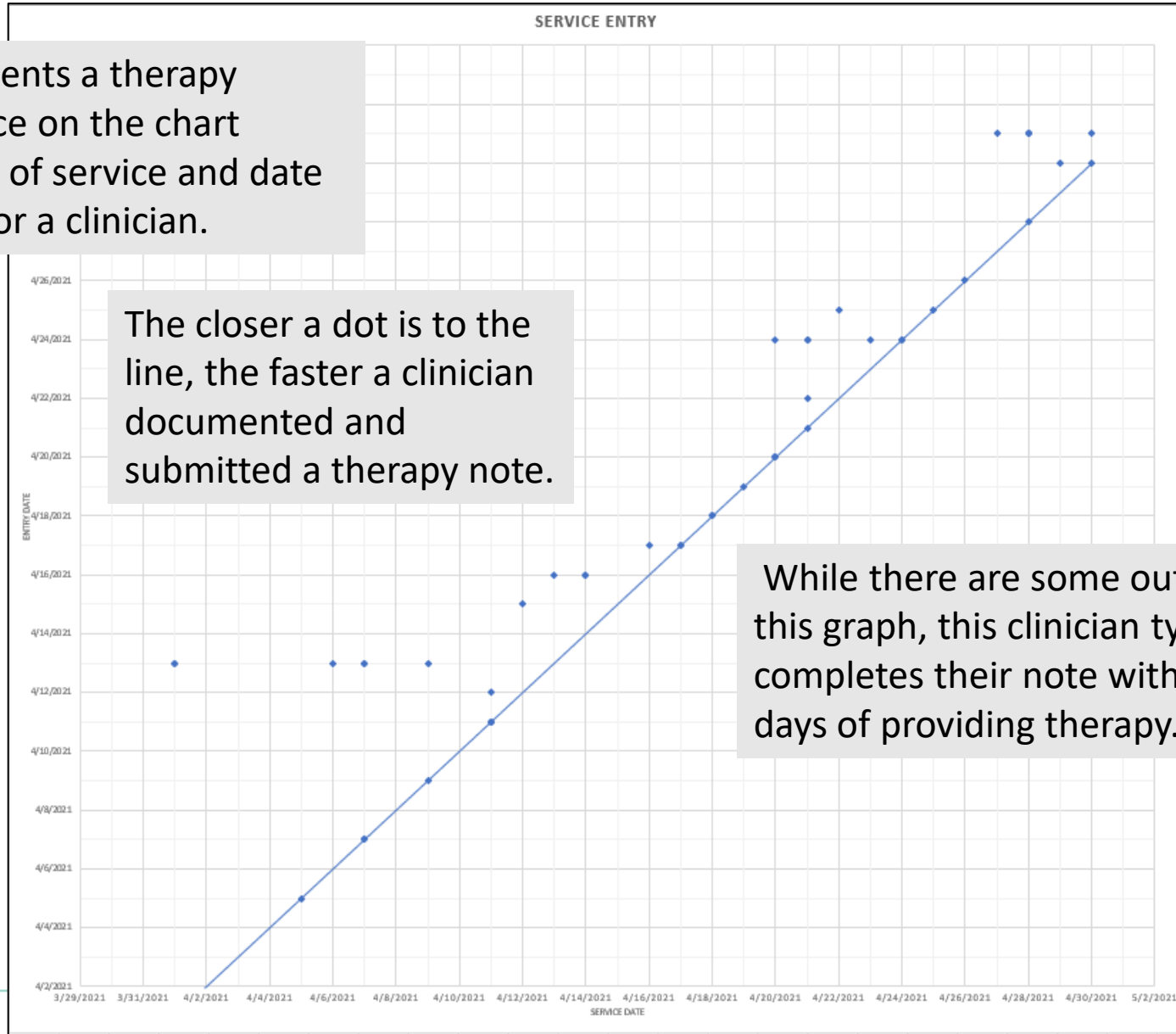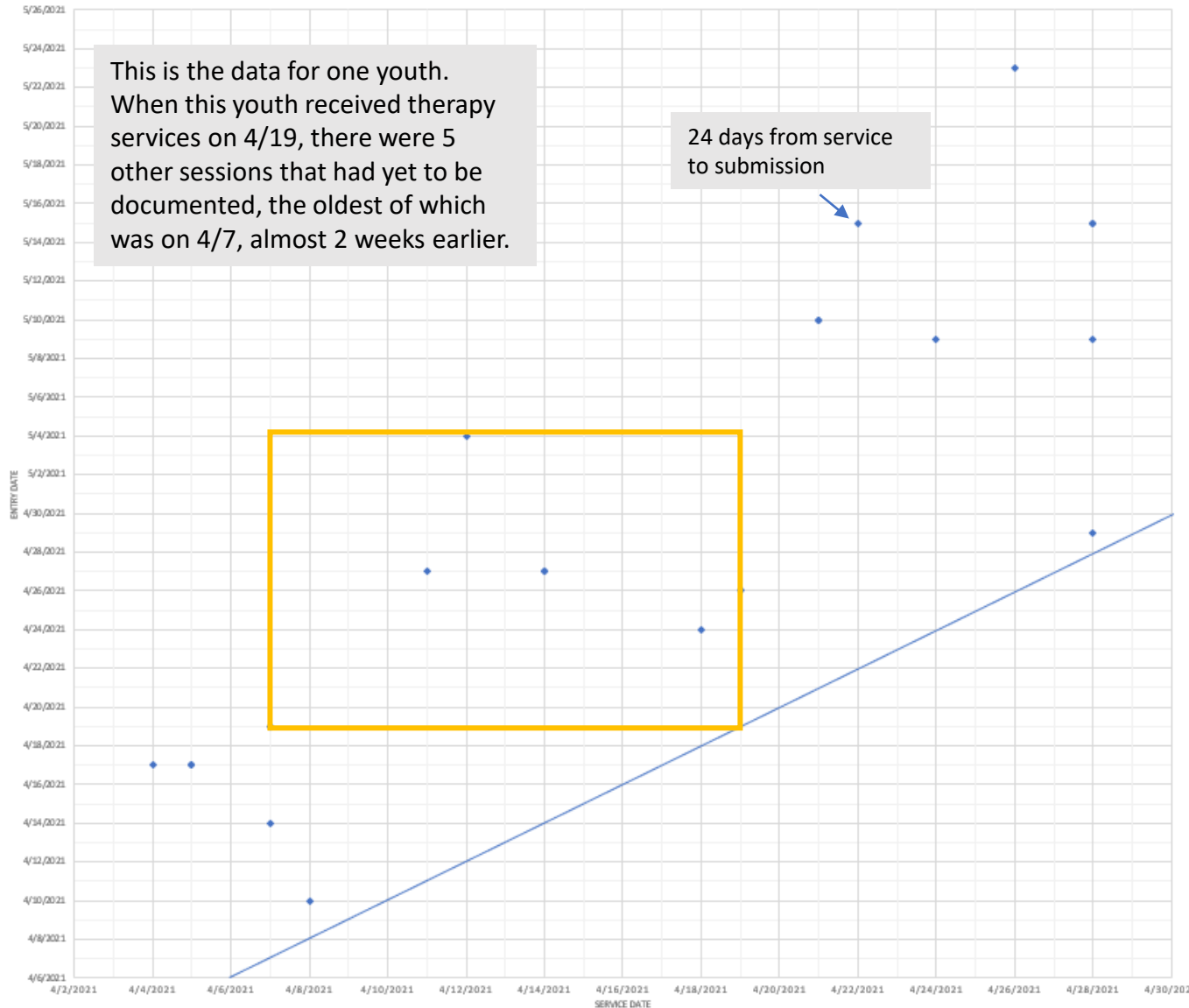
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SERVICE ENTRY

ENTRY DATE

SERVICE DATE

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This clinicians had 10 undocumented service entries when they completed this note.

- Review data
- Identify opportunities in the data
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Sharing Information & Creating Buy-in

- To create buy-in, you must make space for reflection
  - What surprised you?
  - Does this data align with what you're experiencing?
  - How did seeing this data make you feel?
  - What are the possible causes for the situation?
  - Is there anything you wish you had at your disposal to monitor this?

- Review data
- Identify opportunities in the data
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Sharing Information & Creating Buy-in

- To generate goals, we needed to provide a framework.
- We did this through using Project Management resources.

- Review data
- Identify opportunities in the data
- **Project Management Framework**
- Generate goals and set plans

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Sharing Information & Creating Buy-in

- *What is project management?*

  - **Project management** is the application of knowledge, skills, tools, and techniques to project activities to meet project requirements.

  - Basically, it's the organization and tracking of activities to accomplish specific goals!

- Review data
- Identify opportunities in the data
- Project Management Framework
- Generate goals and set plans

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Sharing Information & Creating Buy-in

- If you've ever planned a wedding, thrown a birthday party, renovated your home, made and followed through on a New Years resolution, etc., you have managed a project.

- *Why is project management helpful?*
  - Communicate with project team members more clearly and effectively
  - Organize your work
  - Deliver projects on time
  - Create durable systems

- Review data
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Sharing Information & Creating Buy-in

- Review data
- Identify opportunities in the data
- **Project Management Framework**
- Generate goals and set plans

- **Initiate**: Define the project scope, the objectives, and outcomes

- **Plan and Design**: Fill in the detail to meet objectives

- **Execute**: Do the work according to the plan

- **Monitor and Control**: Progress is tracked, deliverables are reviewed, performance is monitored

- **Closing**: Take time to learn from what happened

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Sharing Information & Creating Buy-in

- Together we went through the **initiate phase**

- During this stage, we determine why we are doing this work. We should be able to answer questions like…

  - What events led up to the current situation?

  - What is the need, opportunity, or problem as we currently understand it?

- Who answers these questions?

  - Those initiating the effort

  - Those affected by the situation

  - Those who will be involved in implementation

- Review data
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Sharing Information & Creating Buy-in

Scope Brainstorm

- Why: big picture
- Who: Who does this work and who is affected
- What: deliverables (scope), expenses (cost)
- How: how to get there (process and communication plan)
- When: start date/end date (timeline)

Scope Brainstorm	
Why	
Who	
What	
How	
When	

- Review data
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Sharing Information & Creating Buy-in

- Project Scope Document
  - Set the stage for our work
  - Help us determine what is in and out of scope
  - Allow us to be thoughtful about who our "customer" is
  - Help us develop outputs and outcomes

Project Scope Document   Project Name: _____

1. Who is the customer? (There can be multiple customers) _____
   _____

2. What does the customer need and want?

Customer(s)	Need(s)	Want(s)

3. Develop an outcome statement based on those requirements – includes what, where, when.
   _____
   _____

4. What are the key deliverables (outputs)? _____
   _____

5. What are the key business benefits (outcomes)? _____
   _____

6. What criteria will be used to measure customer satisfaction with this outcome? _____
   _____

7. What are the constraints that will impact how this project is carried out? _____
   _____

8. What critical assumptions have been made? _____
   _____

9. What are the top risks to consider? _____
   _____

10. What are the key resources required for this project? _____
    _____

11. What is out of scope? _____
    _____

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Executing the Plan

▶ Teams were set up to focus on setting different aspects of the project. These included a variety of areas, but we will focus primarily on:

▶ Expectations

▶ Report Generation

Executing the Plan

▶ Expectations

  ▶ WHO: A cross functional team (direct care, clinicians, and leadership) was brought together to set new agency-wide expectations for service delivery frequency and timeliness

  ▶ WHAT: Discuss current expectations, review specific productivity data, and engage in conversation about setting new, realistic expectations

Executing the Plan

▶ Report Generation

  ▶ WHO: Quality worked with leadership to understand what they would need to see, how frequently they would need access to the data, and how they could use it to hold staff accountable.

  ▶ WHAT: Resources were created to support leadership in managing their programs.

Deliverables and Results – Timeliness & Productivity

▶ Rigorous Expectations Set

   ▶ A set expectation of the number of service hours delivered by role

   ▶ Weekly and monthly expectations around service note submission

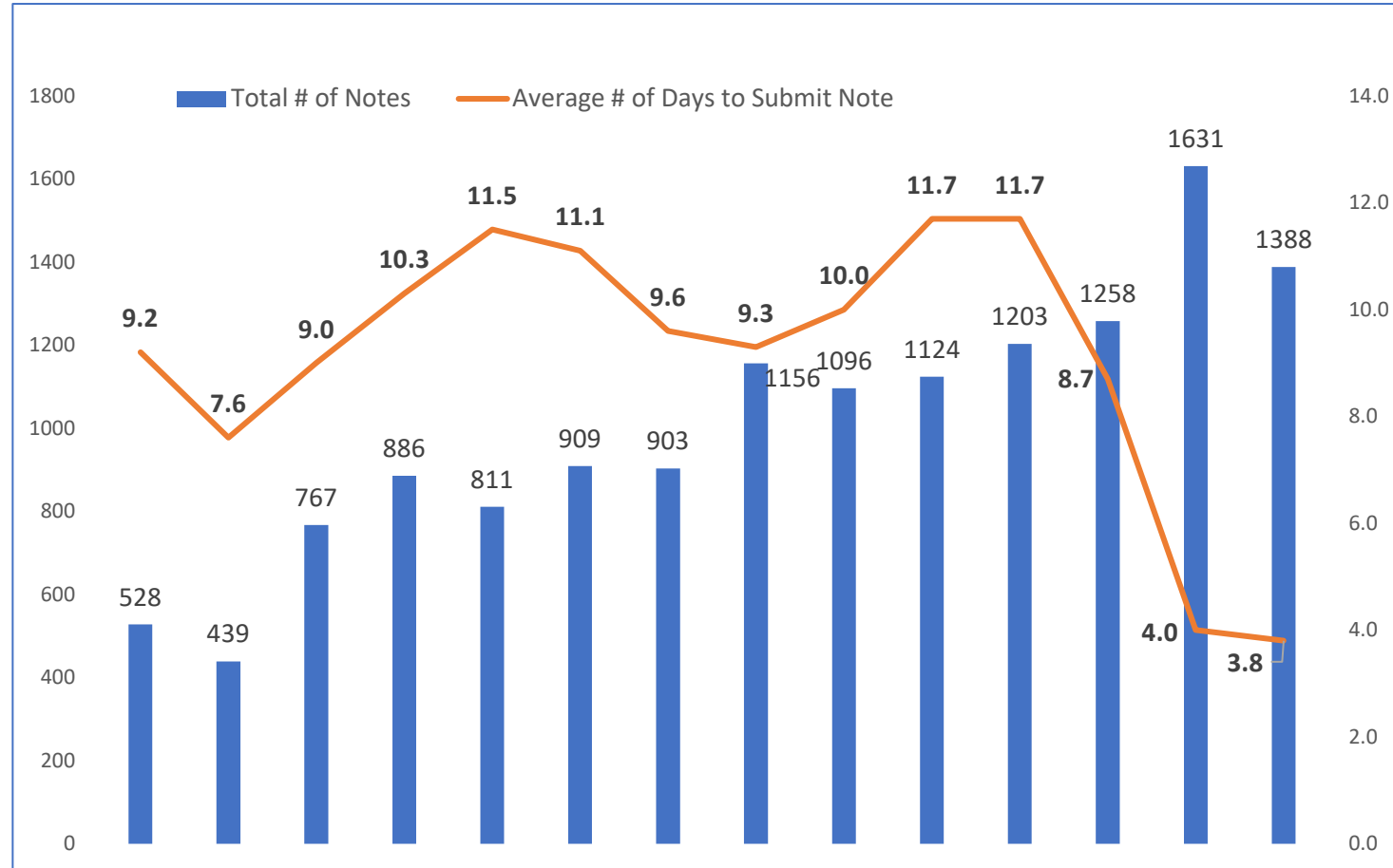▶ Process to review improvement once expectations are put in place

Deliverables and Results – Timeliness & Productivity

► Rigorous Expectations Set

    ► Service providers will document and submit in EHR all instances of treatment for the week by Saturday at midnight.

    ► All services provided during the last week of the month are due no later than midnight on the 1st of the following month.

	% of notes submitted within 7 days of service	% of notes submitted by the end of the month	Average # of days to submit notes
July, Aug, Sep	45%	60%	9.6 days
Oct, Nov, Dec	39%	56%	10.7 days
Jan	**50%**	**70%**	**9.5 days**
Feb	**55%**	**75%**	**8.5 days**

GOAL

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Deliverables and Results – Timeliness & Productivity

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July, Aug, Sep	45%	60%	9.6 days
Oct, Nov, Dec	39%	56%	10.7 days
Jan	~~50%~~ 82%	~~70%~~ 89%	~~9.5~~ 4.0 days
Feb	~~55%~~ 84%	~~75%~~ 91%	~~8.5~~ 3.8 days

GOAL

Deliverables and Results – Timeliness & Productivity

Legend: Total # of Notes | Average # of Days to Submit Note

Data labels (Total # of Notes): 528, 439, 767, 886, 811, 909, 903, 1156, 1096, 1124, 1203, 1258, 1631, 1388

Data labels (Average # of Days to Submit Note): 9.2, 7.6, 9.0, 10.3, 11.5, 11.1, 9.6, 9.3, 10.0, 11.7, 11.7, 8.7, 4.0, 3.8

Annotations: Discussions begin around the importance of documentation; Project teams formed and begin work; New documentation expectations put in place

26% increase in documented sessions

64% decrease in time to submit notes

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Deliverables and Results – Timeliness & Productivity

▶ Reports Developed

   ▶ Real-time reports that show performance against newly defined expectations.

      ▶ Staff Productivity: by staff person, role, and program overtime

      ▶ Medicaid Billing: real-time update on where agency is against monthly billing expectations

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Dates

| This ▾ | - | Month ▾ |

📅 10/1/2024 - 10/31/2024

Program
All ▾

Job Title
All ▾

Submission Status
All ▾

Remove Program from Graph

Service Hours by Program Modifier and Staff

If more than one month is selected, then the bar colors will be grey. Colors are calculated one month at a time.   ↑ ↓↓ ↓↑ ▽ ⧉ ⋯
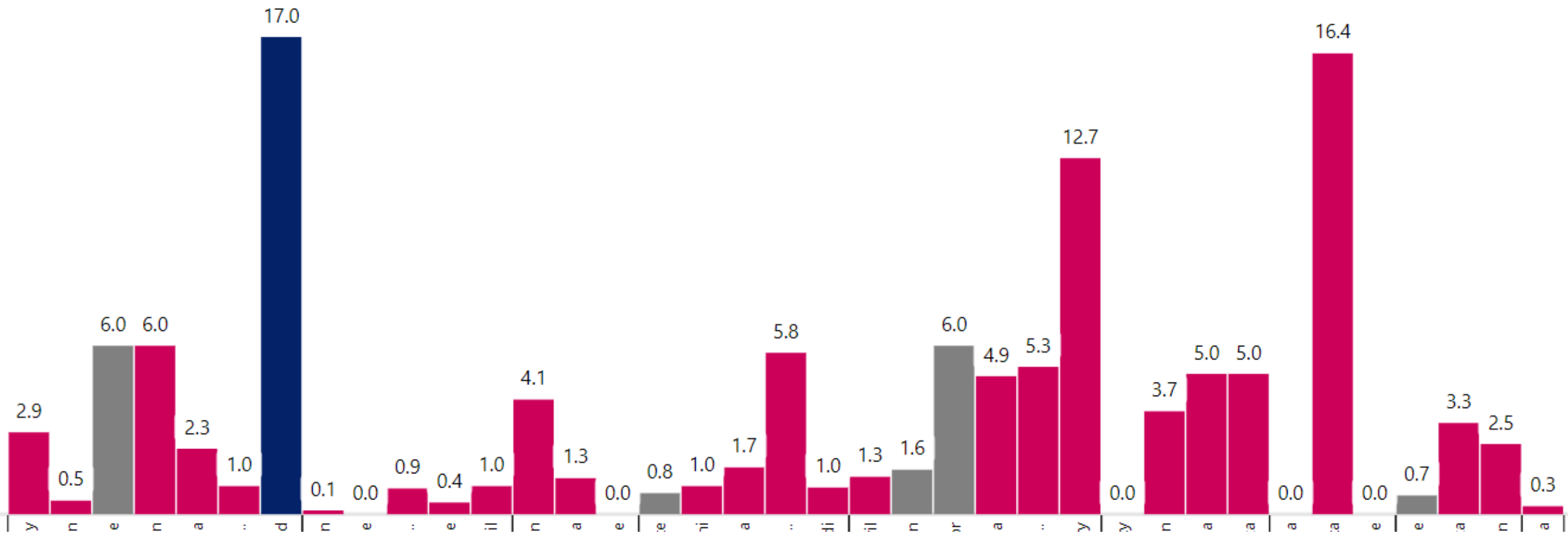
Service Expectations

Top section defaults to this month
<u>This tab will be lower than the other tabs</u>
because this only includes a subset of services.

Dates

This ∨	-	Month ∨

🗓 10/1/2024 - 10/31/2024

Program

All ∨

Staff

All ∨

Program	By End of Week	By 1st of Month	Average Days to Submit	# Services	Hours
⊞ 511	55.6%	88.9%	2.09	18	35
⊞ 512	100.0%	100.0%	1.00	2	1
⊞ 514	100.0%	100.0%	1.40	5	3
⊞ 520	80.0%	93.3%	1.00	15	8
⊞ 521	71.9%	87.5%	1.13	32	29
⊞ 540	28.6%	57.1%	3.43	14	14
⊞ 545	90.0%	90.0%	0.82	20	16
⊞ 570	85.7%	100.0%	1.00	7	6
Total	**70.8%**	**86.7%**	**1.47**	**113**	**114**
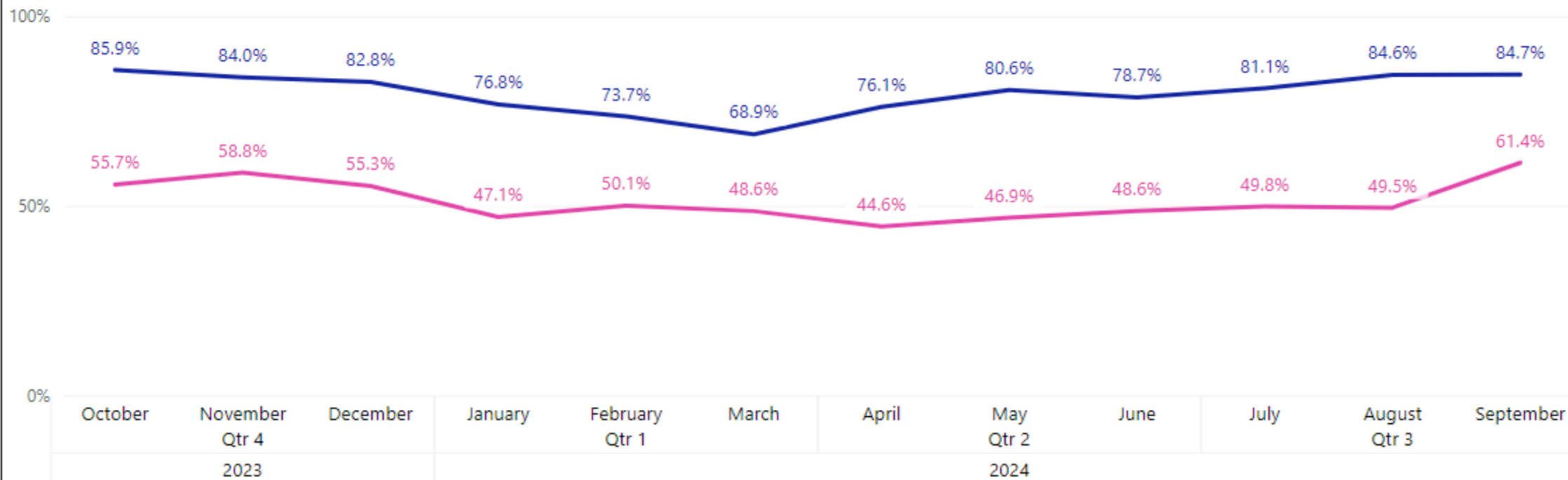
Included Services

Case Management – Mental Health (Illinois)

Case Mgmt. – Client Centered Consult. (Illinois)

Case Mgmt. - Trans, Linkage & Aftercare (Illinois)

Community Support - Individual (Illinois)

Community Support Group (Illinois)

IM+CANS (Illinois)

IM+CANS LPHA Review (Illinois)
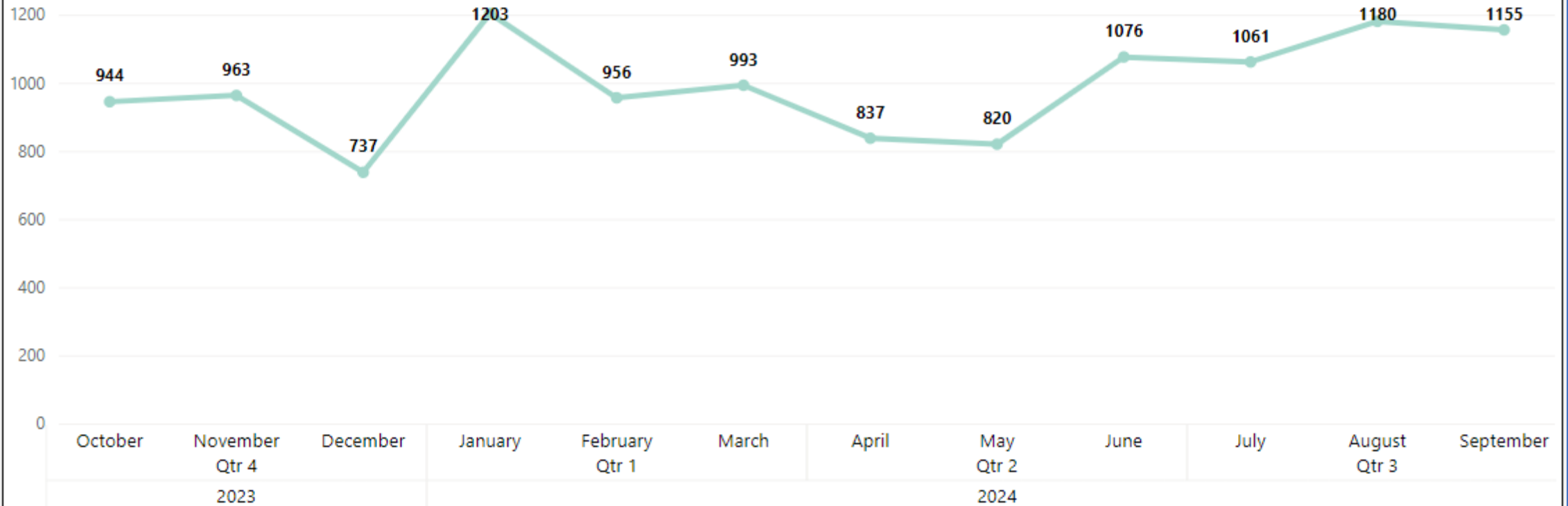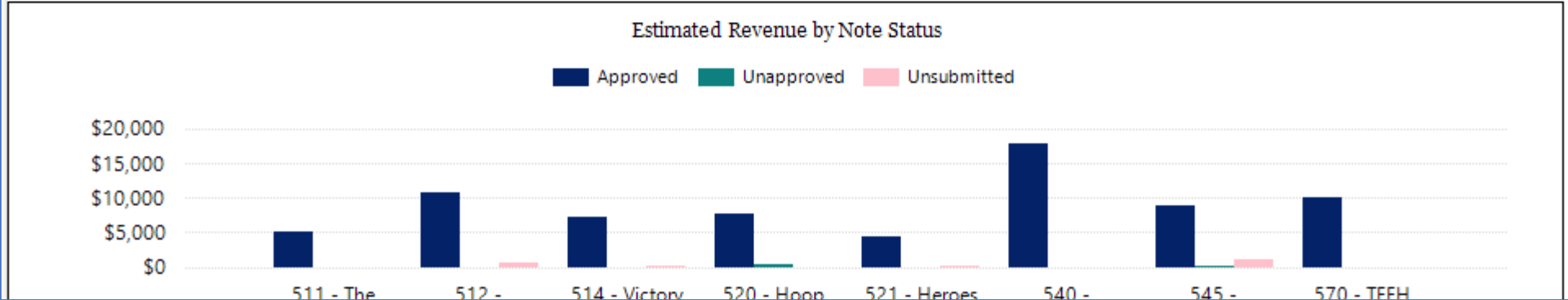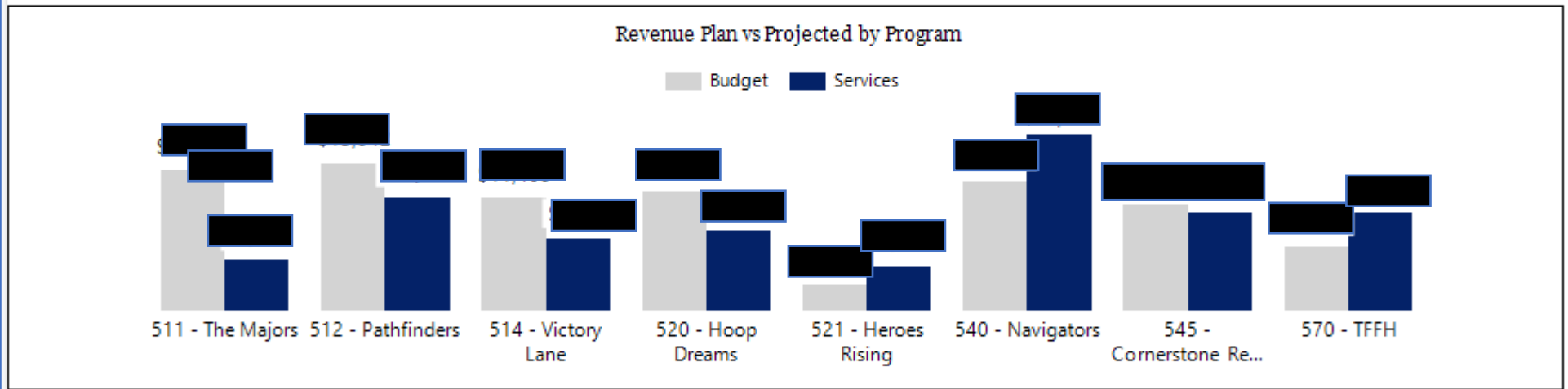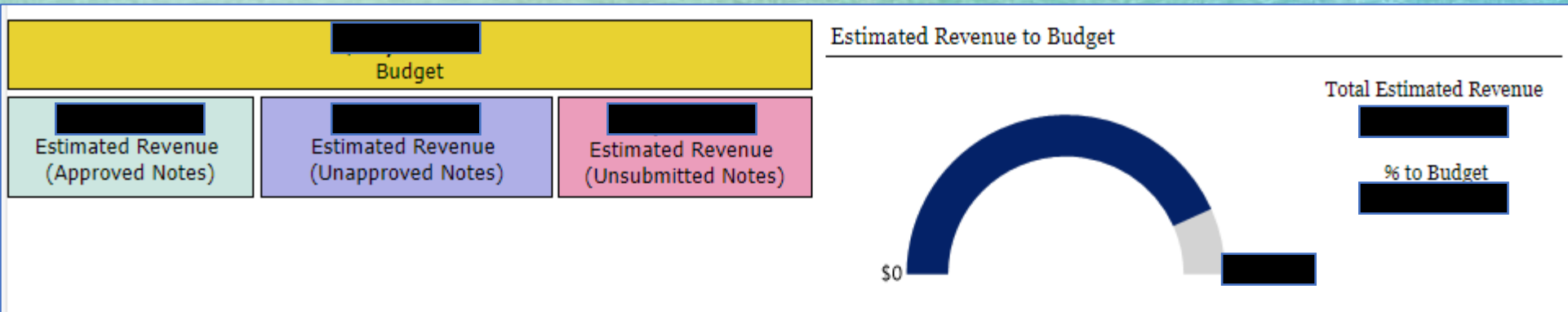
Deliverables and Results – Quality

► **Work-in-Process Reports**

   ► Integrate routing into EHR practice

     ► Quality team reviews all service notes and routes back notes that don't meet Medicaid Billing expectations.

     ► This provides timely feedback to staff to modify current note and adjust behavior going forward.

   ► Routing Workgroup Quality Check

     ► Reports developed to manage quality assurance.

     ► Reports developed to help supervisors identify trends with staff performance by providing a summary of note routed back for correction.

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Service Entry Workgroups: Items Routed Back
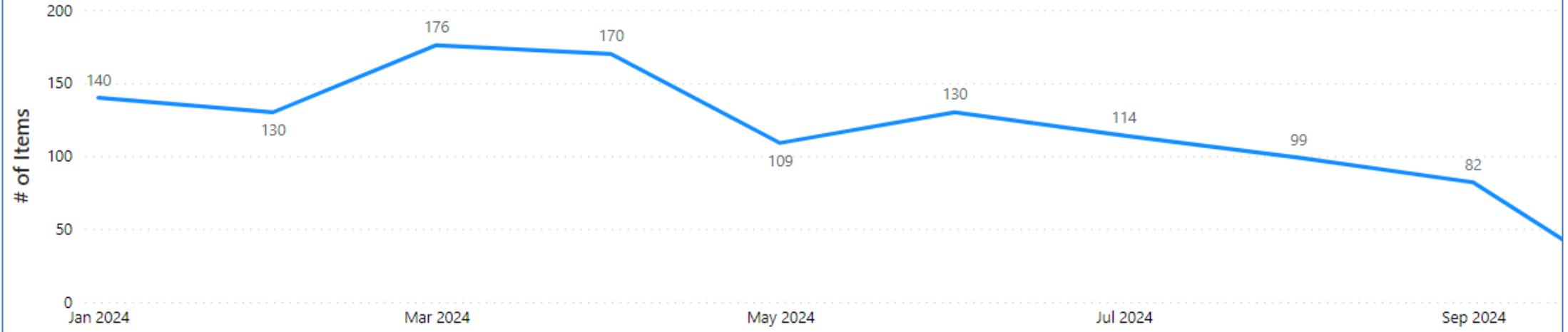
Items Routed Back Over Time

Items Routed Back by Program and Author

Program Modifier	# Items Routed Back	Total # Items	% Items Routed Back
⊞	17	177	9.6%
⊞ 511 - The Majors	149	797	18.7%
⊞ 512 - Pathfinders	267	1553	17.2%
⊞ 514 - Victory Lane	116	669	17.3%
⊞ 520 - Hoop Dreams	153	751	20.4%
⊞ 521 - Heroes Rising	79	1032	7.7%
⊞ 540 - Navigators	121	1125	10.8%
⊞ 545 - Cornerstone Records	189	1020	18.5%
⊞ 570 - TFFH	67	660	10.2%
Total	**1158**	**7784**	**14.9%**

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Service Entry Workgroups: Routed Back Details

Program Modifier

All ⌄

Year, Month

2024 ⌄

Original Author

All ⌄

Route Back Person

All ⌄

Item	Youth/Group Name	Actual Date	Approved Date	Program Modifier	Original Author	Route Back Date	Route Back Person	Route Back Note
Therapy/Counseling Individual (NOA)						3/21/2024		Hi Kristin, Please add more detail to this and his thoughts, feelings, situations. Plea intervention to justify billing this as thera
Community Support - Individual (Illinois)						4/16/2024		, Could you add a sentence s conducted this session in private, not in a overhearing you? (HIPPA) Also, please ad connecting what he is thinking, to his fee make a connection by exploring his depr health intervention) relating to his fear of helped ▇▇▇ make a connection betwe about what would happen to him becaus suggest he use any coping skills? That co
Case Mgmt. – Client Centered Consult. (Illinois)						8/19/2024		. For these notes, could you a implementation of the treatment plan. Th
Community Support - Individual (Illinois)						7/3/2024		I'm not seeing a mental health i behaviors. Ambivalence or the state of ha intervention.
Community Support - Individual (Illinois)						2/22/2024		We're getting away from the me his anxiety connected to his thinking, feel ▇▇▇ onnect his anxiety to attending s graduated, he would be able to step dow intervention.

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Deliverables and Results – Quality

► **Work-in-Process Reports**

   ► Accountability Resources

      ► Help Supervisors know what tools are available to them and how they can use each report.

      ► Staff aren't waiting for data to be given to them. They know where to look to review data and where to go should they need support on how to use them.

Power BI reports Toolkit

Report Name	Report Link/Breadcrumb	Purpose	What Questions Does it Answer?	Who is this for?	S
DCFS Medicaid - YTD	Home>NOA>Medicaid Billing>DCFS Medicaid -YTD	Provide a visual representation of historical Medicaid Billing data (expected, billed, paid) by program. Provides a breakdown of billed services by youth in terms of Medicaid carveout expectation.	How is the agency/my program trending overtime in terms of Medicaid Billing? Are youth receiving the appropriate amount of services each month?	Staff/Supervisors/Directors	O
Medicaid Billing Summary	Home>NOA>Medicaid Billing>Medicaid Billing-Monthly Billing	Provide real-time estimation of monthly Medicaid revenue and end of month review of outstanding items.	Is my program on-track to meet our monthly Medicaid carveout expectations? Has my program left any "money on the table"	Supervisors/Directors	O
Service Entry Delay	Home>NOA>Service Delivery - Staff Productivity> Service Entry Delay	Provide a summary of the number of approved notes per program/staff and the number of days on average to submit the note. Provides detail on each service entry, whether or not it was submitted, and how many days it took to do.	How long does it take a person to submit their service documentation?	Staff/Supervisors/Directors	O
Staff Productivity	Home>NOA>Service Delivery - Staff Productivity> Staff Productivity	This report provides a visualization of the staff productivity report in Evolv. Given a specific date range, provide a summary of the number of service hours a staff member has provided. Data can be narrowed by program, job title, and note submission status. Color coding indicates curent service hour delivery expectations.	How many hours of service have I provided in a given time frame? What types of services are being provided on my program? How many hours of services has a youth received? How many hours of service are unsubmitted?	Staff/Supervisors/Directors	O

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Sustainability

Clear ~~Unclear~~ Expectations

+

Consistent ~~Inconsistent~~ Tracking
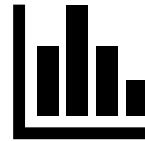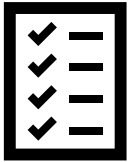
▶ To ensure these expectations are met and resources used we:

- ▶ Monitor reports to ensure compliance
- ▶ Continue to hold staff and leadership accountable
- ▶ Create space to discuss data
- ▶ Update reports to meet the needs of programs

Sustainability

Clear ~~Unclear~~ Expectations **+** **Consistent** ~~Inconsistent~~ Tracking **+** Competing Priorities

- ▶ Strategies to address the competing priorities
    - ▶ Recognize them!
    - ▶ Ask teams what keep them up at night or what takes up their time.
    - ▶ Continue to value and prioritize data – it's not just QI's!
    - ▶ Meet teams where they are at.
    - ▶ Create trainings for staff and leadership to improve data literacy skills.

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Thank you!