

**A COYOTE SUCCESS STORY****CUSTOMER PROFILE**

Community Mental Health Clinic Guelph-Wellington-Dufferin

INDUSTRY

Health and Social Services

LOCATION

Ontario, Canada

COYOTE SOFTWARE SOLUTION

CASEWORKS

RESULTS

Streamlined Workflow

Ease of Use

Immediate Access to Case Records

Responsive & Thorough Implementation

Better Funder Reporting Capabilities

Easier Program Enrollment & Tracking

Improved Security & Privacy Compliance

New Support for Client-Centred Care

Community Mental Health Clinic staff streamline their workflow with CASEWORKS

In 2006, the Community Mental Health Clinic Guelph-Wellington-Dufferin adopted CASEWORKS as their information system. To Anna Tersigni-Phelan, it's "a front-line point of care solution that simplifies and streamlines our scheduling and case recording." What's the best thing it brought to her clinic? "The right information to the right people at the right time."

THE CHALLENGE

Imagine that you're the Manager of Health Information Services at a busy clinic in southern Ontario. Your job is to ensure that health records on all clients – past, present, and future – are recorded, used and stored in ways that are (a) accurate, (b) accessible to your caregivers and (c) hidden from prying eyes.

No problem? Well, just to make it a little more interesting, imagine also that:

- Your centre has to share data across nine different locations
- You have to manage health records on over 92,000 thousand patients
- You have accumulated health record data for the last 38 years
- Your legacy information system is bursting at the seams
- You've lost data entry support staff
- Your clinic is chronically under-funded for I.T.
- Your caseloads are increasingly severe and complex
- Your staff of over 150 is only about 30% computerized, and
- You're under pressure to comply with funders' reporting requirements and privacy legislation.

Still interested in the job?

Amazingly, Anna Tersigni-Phelan, who faces exactly these challenges at the Community Mental Health Clinic Guelph-Wellington-Dufferin, is not only still interested in her job, she sounds positively energized when she describes the Information and Technology headaches that until recently characterized her job description.

Partly, it's her nature. After 27 years at the Clinic, Ms. Phelan still communicates the energy and optimism of a health records professional who believes in the work that she and her team are doing to support the front-line staff, supervisors, and managers of the agency.

THE SOLUTION

And partly, her enthusiasm stems from the fact that on May 1, 2006, her Clinic began to implement a new health care information system, CASEWORKS, that was tailored to meet their client and case record, program enrollment, scheduling, and document management needs.

"All of our I.T. needs for the last 15 years are now being met," said Ms. Phelan about the rollout of CASEWORKS at the Community Mental Health Clinic. "Our agency provides a range of community-based (LHIN 3) services, including preschool support, developmental services for children and adults, and mental health services for infants, children, severely mentally ill adults, and seniors. It is imperative for us to be able to link our information from the family physician's office to the rest of the acute care and after-care community. We believe that with CASEWORKS, we are well on the way to link continuum of care information.

"As fond as we were of it," continued Ms. Phelan, "our old system was just breaking down. We needed one that keeps complete paperless records, one that is both reliable and accessible. CASEWORKS streamlines our workflow and, as a result, minimizes errors."

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Reliability and accessibility were just two of the factors that contributed to their decision to switch to CASEWORKS. “We spent three months looking, and narrowed our search down to three potential systems. In the end we chose CASEWORKS.” Their reasons? “Partly, it was because Coyote nailed the big issues that we require to meet Ministry standards – things like MIS/CDS compliance, HL7, and privacy through secure records, digital signatures, and audit reporting. But mostly, it was because the team at Coyote Software was so quick and able to customize their caseload management system to meet our needs.”

In fact, Ms. Phelan described the customization process as a partnership. “The software was good for caseworkers, but we also needed it to understand the specific workflows of mental health caseworkers. George Evink, CASEWORKS’ product manager, and the business analysts at Coyote investigated the requirements of the various programs at our agency. They looked at the unique program, job functions and scenarios at our agency, and determined how best to capture the information that we require in a streamlined manner. George and the rest of the Coyote team were incredibly responsive. We’re really pleased with the results.”

THE RESULTS

Beyond the modifications to the system’s main Dashboards and Scheduler, tailoring the system also involved programming CASEWORKS to automate – and simplify – many of the forms that the mental health clinic staff use daily. “Our number one priority is streamlining information management and workflow,” said Ms. Phelan. “Before CASEWORKS, we had 250 standardized forms. We’re now in the process of reducing it to less than 50.”

This reduction in paperwork and bureaucracy comes thanks to a key CASEWORKS module called eForms, which streamlines and digitizes the collection of data into electronic, ‘data-aware’ forms. Implementation of the Clinic’s customized eForms is slated for ‘Phase 2’ of the rollout, once everyone is up to speed on the core modules.

Another big advantage of CASEWORKS is its ease of use, important to Ms. Phelan because “we’re rolling it out to all of our staff.” The team of 150 includes social workers, mental health workers, psychologists, psychiatrists, nurses, early interventionists, behaviour therapists, family support workers – everyone from supervisors to support staff, all with their own CASEWORKS dashboard and access. Ease of use is crucial when introducing a clinic-wide system to such a large team, especially when only 30% of them are used to using computers in their daily work. As Ms. Phelan explained, “As a web-based system, the new software is very easy to learn. It has a visual calendar, an Outlook look and feel – it’s very conducive to being adopted by everyone in our environment.” The Clinic has invested in extensive computer and Outlook training, to prepare for the rollout of CASEWORKS.

According to Ms. Phelan, early reports from front-line workers are that it is “very, very useful. We provide ‘cradle-to-grave’ service for the severely mentally ill in our community, and we really need to have case record information at our fingertips. This web-based software allows us immediate access to electronic case records across all of our sites, and to the

appointment schedules of all our staff – both day time and after hours. When an after-hours crisis worker receives a call, for example, he or she can look up the information required to manage the client’s health care journey. And a social worker can look up anything related to his or her own caseload.”

As the Health Records Manager and “software point person” for the entire Clinic, Ms. Phelan has been involved with every phase of the transition to CASEWORKS, and speaks highly of her dealings with Coyote Software. “We held project implementation meetings with Coyote every week. We sent them charts, issues, reports, scenarios, and questions. They listen, and they remember – they’re very methodical. Everyone at Coyote has been very responsive throughout the process.”

Her overall assessment? “It’s very nice software. It brings us closer to being real-time and accountable. Information plays a very important role in our work, and CASEWORKS has been a huge help.”

UPDATE 2007

As of September 2007, staff at the Community Mental Health Clinic Guelph-Wellington-Dufferin have been using CASEWORKS as their daily information system for over a year. Ms. Phelan reports that “The implementation went well. We are now largely past the growing pains with those staff who previously had little or no experience with computers. We’ve realized huge benefits in our ability to share information immediately from all of our 9 offices and satellite locations.”

Executive Director Fred Wagner agrees, adding that their new software system “is an enabler in our mandate to deliver person-centred care. We’re experiencing increasing demands from our multiple funders, and we’re moving towards increased integration via Ontario’s Local Health Integration Networks (LHIN). CASEWORKS is a powerful and incredibly flexible tool that has brought a client-centred approach to our case records, increased our capacity to track outcomes, and facilitated improved organizational decision making.”

Ms. Phelan states, “We are very fortunate to have Caseworks to carry us into the next phase of Ontario’s eHealth vision, bringing the right information to the right people at the right time. The Coyote staff are working with us to further enable our clinic to provide population health data and quality outcome information and to meet all of our funder requirements.”

Kirk Were, Managing Partner at Coyote, says that demand for CASEWORKS is growing around the province. “CASEWORKS has now been implemented at many Mental Health and Family Services agencies – it’s a proven and increasingly popular caseload management system. We’ve just recently completed the first phase of a roll-out of our eForms module for Child Protection Recording to 28 Children’s Aid Societies across Ontario. Each new implementation aligns Coyote’s software and services more closely with the evolving requirements of Canadian health and social service agencies. CASEWORKS is exactly the robust, enterprise class solution that many organizations have been waiting for.”

For more information:

About Community Mental Health Clinic Guelph-Wellington-Dufferin: www.freespace.net/~cmhc
About CASEWORKS: www.coyotecorp.com