DATA MANAGEMENT AND UTILIZATION: DEVELOPING A STATEWIDE SBHC DATA SYSTEM FOR PROJECT MANAGEMENT AND EVALUATION

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NASBHC 2009 Convention, Hollywood, FL

Presenter Disclosures

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(1) The following personal financial relationships with commercial interests relevant to this presentation existed during the past 12 months:

Horizon is one of the products to be demonstrated during the presentation and is Apex Education’s proprietary tool that is licensed to clients.

Welligent will also be demonstrated in the presentation but the presenters do not have any personal financial relationship with this product.

Session Objectives

- Recognize challenges for data collection, management, and reporting of a large-scale statewide SBCH system
- Describe benefits of an integrated and multifunctional data system
- Identify benefits to increased communication and data sharing between SBHC and school administration

Data Needs of Statewide SBHC Systems

- Sites need access to up-to-date information for operations and planning
- Support and funding agencies need data on a regular basis for planning, monitoring, advocacy, and accountability
- Schools need access to aggregate data to coordinate services and effectively partner with SBHCs
- Evaluators need data in the same format from all sites

SBHCs in New Mexico

- Prior to 2004, NM had approximately 20 SBHCs
- 2004 Governor Bill Richardson moved to expand SBHCs
- At present, NM Department of Health’s Office of School and Adolescent Health (OSAH) supports 65 SBHCs
Prior to 2004
- Sites used a very basic data management system
- Mailed floppy disks with data into OSAH semi-annually
- Needs of sponsored (FQHC) SBHCs were met by existing data systems, but other SBHCs needs were not met

Data Management in Era of Expansion
- OSAH realized need for better data system
- Both sites and funding agencies have needs for current useful data
- Desired:
  - Web-based system
  - Centralized management of system and data
  - De-centralized access and entry
- Value-Added Features:
  - Integrated billing
  - Scheduler
  - Local Reports

Apex Education
- Coordinates and supports data system
- Conducts evaluation of SBHC and OSAH

The path thus far...
- Apex contracted as data management coordinators and evaluators
- Decided to seek existing system rather than create
- System selected and purchased
- Began inputting previous data into new system
- Train staff at SBHCs to use system
- Some sites utilize a different data system through their FQHC and must export data

A bump in the road...
- After several months, realized 1st purchased system could not meet project needs
- Second system purchased and data transfer process begun
- Training of staff and input of previous data almost complete

The Two Systems
- Welligent
  - Patient and encounter data
  - Project management support
- Horizon
Horizon

- Project management
- Training and coaching log
  - Data Entry
  - Report
  - Calendar
- Surveys
- Events

Log of Training and Coaching: Data Entry

Log of Training and Coaching: Report

Log of Training and Coaching: Calendar View
Reports

- Reports support formative assessment with continuous feedback
- Monitor productivity
- Needs assessment
- Track implementation of training and coaching
- Customized reports for different stakeholders
Sustainability

- Integrated billing
- Immediate access to data for advocacy efforts

Lessons learned thus far...

- Must think through and articulate every need when exploring a product
- Organization change in the form of adopting new data system, harder than anticipated
- Staff turnover inhibits institutionalization
- To facilitate adoption, system should support project management as well as accountability