

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

Michelle Bloodworth and Carlos Romero

- (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 SBHC 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

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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

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SBHCs in New Mexico



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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

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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

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Apex Education

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

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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

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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

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The Two Systems

welligent
Smart Software Solutions

patient and encounter data


Horizon

project management support

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Welligent

- Scheduler
- Patient information
- Encounter data
- Billing
- Reports



Scheduler

Apex Clinical Management System

FRONT DESK | WELLPROVIDER | User: User Test | View

Central Schedule | 1 - Student Search | 2 - Student Search | 3 - Student Search | 4 - Student Search | 5 - Student Search

Central Schedule - Roles & Providers

Show Dates: 26-Jun-2009 | View: 1 | 7 | 31

Show Increments of: 15 Minutes | 30 Minutes | 60 Minutes

Assigned Location: Smalltown test location

Show Cancelled Appointments:

Student:

--Select a Role--

--Select a Provider--

Location	Day	Time	Provider
Smalltown Test Location	Friday, June 26, 2009	10AM-11AM	Evans, Jennifer (15-Feb-1983) Primary Care Office Visit
Smalltown Test Location	Friday, June 26, 2009	10AM-11AM	Fake, Bob (12-Jan-1993) Primary Care Office Visit

Test, User

Create a New Appointment

Student Information: List of Students

Apex Clinical Management System

FRONT DESK | WELLPROVIDER | User: User Test | View

Central Schedule | 1 - Student Search | 2 - Student Search | 3 - Student Search | 4 - Student Search | 5 - Student Search

Student Search - Record Viewer 1

Search | New Student

Last Name: First Name:

Student ID: Location: Test Location

DOB: Status: Active Student

Location Grouping: Global Search:

Type of Record: Student

Teacher:

dit	Info	New	Alert	Student	DOB	ID	Phone	Location	Status
+					Brown, George	01-Jun-1982	0009874299	Test Location	Active
+					Fictitious, Jack	01-Dec-1991	F1JA709	Test Location	Active
+					Fictitious, John	22-Jan-1989	JOF11989	Test Location	Active
+					Gibson, Mike	01-Feb-1986	MLG6673	Test Location	Active
+					Mouse, Mikey	01-May-1996	56987	Test Location	Active
+					Test, Sally	01-Jun-1995	321	Test Location	Active

Student Information: Student Record

Apex Clinical Management System

FRONT DESK | WELLPROVIDER | User: User Test | Version Info | View

Central Schedule | 1 - Fictitious, Jack | 2 - Student Search | 3 - Student Search | 4 - Student Search | 5 - Student Search | 13 - Test

Student: Jack Fictitious | School/Student ID: Test Location/F1JA709

Date of Birth: 01-Dec-1991 (17 yrs & mths) | Home Phone:

Grade: 11th

Record Navigator

- Demographics
- Alerts(0)
- Case Notes(0)
- Health Events(2)
- Lab Tests(0)
- Medications(0)
- Office Visits(2)
- Scanned Documents(0)
- Screenings(0)
- Treatment Plan(0)
- Visits Monitoring(0)

Search Criteria

Type of Office Visit:

Primary Health Problem:

Complaint:

Text:

Visit Location: All Assigned Locations

Visit Between: and

Search | New

Edit	Type Of Visit	Prim Health Problem	Date Completed	Status	Provider
+	Primary Care Office Visit	Not Specified	01-Jun-2009	Completed	Mike Gibson
+	Family Planning	Not Specified	05-Feb-2009	Completed	Ginger Edwards

Encounter Data: Visit Details

Apex Health Management System

WELLPROVIDER | BILLING | BILLING SERVICE | ADMIN | User: Singer Edward | View

Encounter: Jack Fake | School/Student ID: Smalltown Test Location/00014

Date of Birth: 12-Jan-1992 (16 yrs & mths) | Home Phone:

Record Navigator

- Demographics
- Alerts(0)
- Appointments(0)
- Assessments(0)
- Billing Information
- Case Notes(0)
- Claims Referrals
- Health Events(0)
- Lab Tests(0)
- Medications(0)
- Office Visits(2)
- Scanned Documents(0)
- Screenings(0)
- Treatment Plan(0)

Office Visit Details

Encounter Administration

Date Event Scheduled: 04-Apr-2009 | Time Scheduled: 04:00PM | Time In: 04:00PM | Time Out: 04:30PM

Event Status: Completed | Transferor Admin: | Transferor Needed:

Staff Person: | Confidentiality Status: Confidential

Reason: Family Planning | Symptom Duration:

History of Present Illness:

Primary Health Problem: | Pain Location:

Assessment:

Note: This record was last modified by Welligent Admin on Wednesday May 06, 2009 at 03:10 pm.

Student Information: Visit Details

Management System

FRONT DESK | WELLPROVIDER | User: User Test | View

Central Schedule | 1 - Fictitious, Jack | 2 - Student Search | 3 - Student Search | 4 - Student Search | 5 - Student Search | 13 - Test

17 yrs & mths | School/Student ID: Test Location/F1JA709 | Home Phone:

Office Visit Details

Office Visits

Set - Problem focused(99211)	Yes - Problem focused(99211)
Set - Problem focused(99212)	Yes - Problem focused(99212)
Set - Expanded problem focused(99213)	Yes - Expanded problem focused(99213)
Set - Detailed(99214)	Yes - Detailed(99214)
Set - Comprehensive, high complexity(99215)	Yes - Comprehensive, high complexity(99215)
Set - Comprehensive, med. complexity(45 min)(99216)	Yes - Comprehensive, med. complexity(45 min)(99216)
Set - Add on Code to 99215 or 99216 Prolonged Service, with patient contact beyond 20 - 74 min.(99254)	Yes - Add on Code to 99215 or 99216 Prolonged Service, with patient contact beyond 20 - 74 min.(99254)

EPSON Well Child Exam/ Preventative Medicine

Set - Infant(99391)	Yes - Infant(99391)
Set - 1-4 years(99392)	Yes - 1-4 years(99392)
Set - 5-11 years(99393)	Yes - 5-11 years(99393)
Set - 12-17 years(99394)	Yes - 12-17 years(99394)
Set - 18+ years(99395)	Yes - 18+ years(99395)

Paper Encounter Form

NEW MEXICO HEALTH

ENCOUNTER FORM SBHC NAME

ESTAB	NEW	OFFICE VISITS	X	CPT	DESCR
99211		Minimal eval.			No lab
99212	99201	Problem focused		80081	Lipid B
99213	99202	Expanded problem focused		81000	Urinal
99214	99203	Detailed		81001	Urinal
99215	99204	Comprehensive, mod complexity; 45 min.		81002	Urinal
99215	99205	Comprehensive, high complexity		81003	Urinal
99384	99381	Adm on Case to 99245 or 99205. Previsit focus, with patient contact beyond 30 - 74 min.		81015	Urinal
ESTAB	NEW	EP-SPOT WELL CHILD EXAM - PREVENTATIVE MEDICINE	X	CPT	DESCR
99391	99381	Infant		82270	Screen
99392	99382	1-4 years		82455	Cholest
99393	99383	5-11 years		82948	Glucose
99394	99384	12-17 years		82962	Glucose
99395	99385	18+ years		84733	HCG B
PSYCHIATRIC THERAPEUTIC PROCEDURES					
		All Bk Services billed to Varies. Options should be submitted with TR Modifier		85013	Hypnot
90801-TR		Psychiatric diagnostic interview examination		85018	Hypnot
90804-TR		Individual psychotherapy, 20-30 min.		85877	W. psyc
90805-TR		Individual psychotherapy, 20-30 min. with medical eval & mgt		87210	W/med
90806-TR		Individual psychotherapy, 45-50 min.		87430	Stratfy
90807-TR		Individual psychotherapy, 45-50 min. with medical eval & mgt		87481	Urinal

Billing

Apex Health Management System

WILLPOWHER | BILLING | BILLING SETUP | ADMIN

11 Billing Cycle | 1211 Year 08 | 1311 Current Billing | 1411 Current Billing | 1511 Current Billing | 1611 Current Billing | 1711 Current Billing

11 Billing Cycle Details

Billing Cycle Information

Fee Source: Medical
Billing Cycle Status: Defined
Cycle Start: 01-Mar-2009
Report Format: ANSI ASC X12 837 Professional W
Retractive Billing: No Retractive Billing

Procedure Type: Medical
Batch ID: 49404
Cycle End: 01-Apr-2009
Date Posted:

Claims Information (Messagepress)

Total Claims: 1
Total Service Lines: 1
Total Billed: \$61.00
Total Paid: \$61.00
Balance: \$61.00

Functions and Reports

Gather Claims
Delete Entire Cycle
Post Claims
Export Claims
Cycle Summary
Detail Report
Exception Report
Interactive Report

Horizon

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

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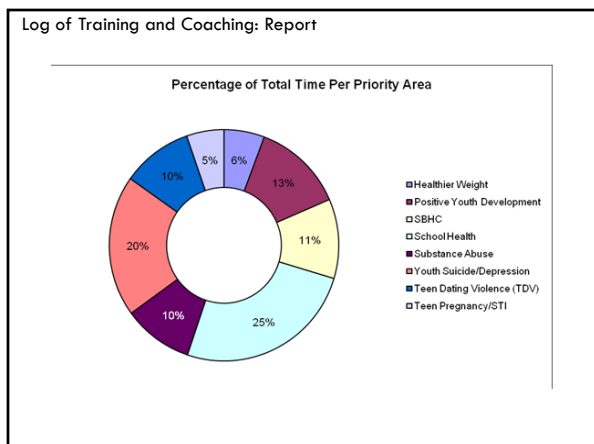
Log of Training and Coaching: Data Entry

Office of School and Adolescent Health
Data Collection and Evaluation

NEW MEXICO HEALTH

Submit s(x) OSAH Training/Coaching Log

Labels: (N)SBHC Presentation
Public:
Start Date: 06/24/2009
Stop Date: 06/27/2009
Hours: 1
Minutes: 30
Expires: Statewide
Target Audience (by Age): Adults (over 14 years old)
Priority Populations:
Size of Group:
Priority Areas:
Topic Areas:
Did this include Youth Partnership?
Method(s):
What did you do?:
Healthier Weight
Positive Youth Development
SBHC
School Health
Substance Abuse
Youth Suicide/Depression
Teen Dating Violence (TDV)
Teen Pregnancy/STI
What worked?:



Log of Training and Coaching: Calendar View

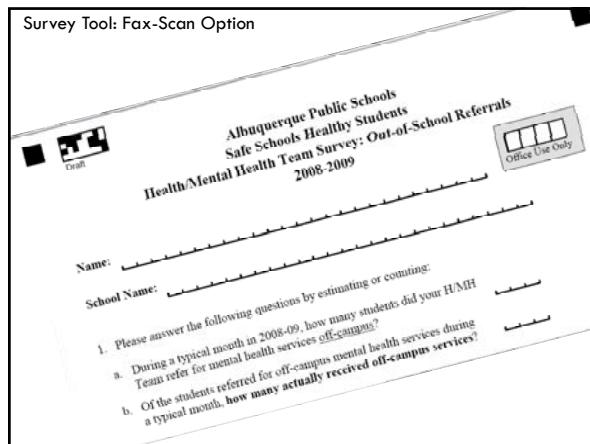
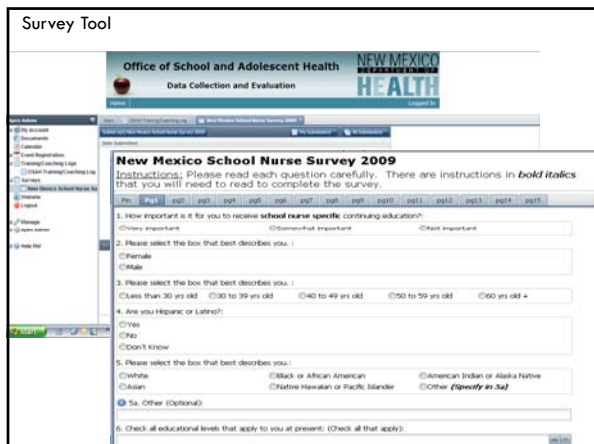
Office of School and Adolescent Health
Data Collection and Evaluation

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Calendar

Monday, Tuesday, Wednesday, Thursday, Friday, Saturday

13
Crisis Response Training



Reports

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

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Reports: Menu

WellReports Manager

Function Navigator

- Report Dashboard
 - Dashboard
- Report Groups
 - Aggregate Reports (11)
 - Apex Reports (20)
- Report Tools
 - Ad Hoc Report Generator
 - Administration Reports
 - Behavioral Health Reports
 - Billing Reports
 - Clinic Reports
 - General Reports
 - Program Report Builder
 - Program Reports
 - Registration Reports
 - Screening Report Card
 - Service Report Builder
 - Therapy/Service Reports
- Report Hot List
 - ICD-9 Diagnosis Frequency
 - Office Visits: New & Returning
 - Office Visits: Treatment Active

Reports: Menu

Apex Clinical Management System

WellReports Manager

Function Navigator

- Report Dashboard
 - Dashboard
 - Apex Reports (20)
- Report Tools
 - ICD-9 Diagnosis Frequency
 - Immunizations Administered By Location

WellReport Reports

Report Name: ICD-9 Diagnosis Frequency
 Report ID: 363
 Report Engine: Univariate
 Start Date: 01-Jan-2009
 Ending Date: 26-Jun-2009
 Location: All Assigned Locations

ICD-9 Code: [Dropdown menu]

Daily Log Report: Please enter the date range for the daily log
 Gender Distribution: This report provides a breakdown of student gender.
 ICD-9 Codes by Gender: Dimensional Cross-Tab
 ICD-9 Diagnosis Frequency: Univariate
 Immunizations Administered By Location: Dimensional Cross-Tab

Reports: ICD-Frequency

NEW MEXICO DEPARTMENT OF HEALTH solutions for improvement

ICD-9 Diagnosis Frequency

Report Criteria

Starting Date: 01-JUN-2008
 Ending Date: 26-JUN-2009
 Location: All Assigned Locations
 Diagnosis Code:

Value	Total	Percent
V70 General Medical Exam*	1	5.9
V202 Routine Child Health Exam	1	5.9
78650 Unspec Chest Pain	1	5.9
311 Depressive Disorder Nos	2	11.8
2558 Adrenal Disorder Other	1	5.9
3007 Body Dysmorphic Disorder	1	5.9
3007 Hypochondriasis	1	5.9
07988 Chlamydia Infect Other	1	5.9
30021 Agoraphobia W/Panic Attack	3	17.6
3099 Adjustment Disorder Unspecified	1	5.9
300 Anxiety Disorder NOS*	3	17.6
7867 Abnorm Chest Sounds	1	5.9
Total	17	100%

Reports: Office Visits by Student and Type

NEW MEXICO **apexeducation** 6739 Academy Rd. NE #330
evaluation | research | technical assistance Albuquerque NM 87109
Office Visits: Location, Student Type, Visit Type

Report Criteria
 Location: Escalante High School
 Starting Date: 01-Jun-2008
 Ending Date: 26-Jun-2009

	Primary Care Office Visit	Behavioral Health Office Visit	EPSCoT Well Child Exam/ Immunizations/ Medication	Family Planning	Communications	Other Screening	Sports Physical	Total
Escalante High School:								
Staff	1 100%							1 100%
Student	47 25.5%	2 1.1%	40 21.7%	11 6%	5 2.7%	2 1.1%	104 100%	188 100%
Total	48 100%	2 100%	40 100%	11 100%	5 100%	2 100%	188 100%	

*Key: Cell Value, Row Percent, Column Percent

Date Created: 26-Jun-2009
 Time Created: 11:18 AM
 Created By: User: Test

Print Report Close Report

Reports: Summary of All Sites

Data	Q1	Q2	Q3	Cumulative
Sites Reporting	43	61	61	
Unduplicated students with at least one visit	3,761	6,312	4,527	8,623
SBHC visits	6,156	13,645	9,816	29,617
Average visit per student	1.6	2.16	2.16	
Behavioral health visits	1,764	4,935	3,580	10,279
% of behavioral health visits	28%	36%	36%	35%
Unduplicated students with behavioral health visit	1,086	1,606	1,282	2,360
Percent of students with behavioral health visit	28.00%	25%	28%	

Sustainability

- Integrated billing
- Immediate access to data for advocacy efforts

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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

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