Fast and Compliant Documentation for Mental Health

by Reuven Lirov, M.A.

A Case of Writer's Cramp

Alex sat at his desk shaking out his hand, which had cramped up after 10 minutes of concentrated writing. He knew how important it was to provide accurate documentation of patient visits but capturing every detail in writing, then making Luisa type it into the computer, was eating up valuable time for both of them. Plus, Luisa was forever complaining about his handwriting, which he admitted was difficult to read.

There was a knock on his office door. "Come in!" he called.

Luisa entered with a smile. "Hello, Dr. Friedman, I was wondering if you had a moment," she asked.

"Of course, Luisa, what's on your mind?" Alex asked.

"I've been working on entering your patient notes from last week and it's taking me a long time," she explained. "I know you try to be thorough but there are times when I need to extrapolate certain tidbits of information based on what I know about the patients."

"Well, we're all taught when we go into medicine that if we don't write it down, it didn't happen," said Alex. "I do try to capture every detail I can."

"And I do appreciate your efforts," said Luisa. "But I'm not just dealing with the SOAP notes—I need to include images, forms—such as Medicare, intake and verification of benefits—lengthy tests and more."

"How much time would you say this is taking you in any given week?" asked Alex.

"I haven't tracked my time but it takes hours," said Luisa. "Not just

in typing and attaching related documents, but also in touching base with you when I have questions that I can't figure out from your notes or past patient records. That takes time away from your day—and your patients—as well."

"It used to be so much simpler," mused Alex. "When I opened this practice, I could scribble myself some notes, stuff them in the patients' paper files and forget about them until the next patient visit. I was able to spend so much more time with my patients!"

"It's not just about spending time with the patients," said Luisa. "Our goal is to help patients get better, and to feel so much better that they feel compelled to bring family and friends who may be suffering to see you as well."

"That's true—we need happy, referring patients to make the practice grow," agreed Alex. "I wish there was a way to keep accurate, compliant notes in less time."

"You mean besides taking that handwriting course I'm always nagging you about?" teased Luisa.

Is there a way to reduce the investment of time in documentation so that Dr. Friedman can focus on his practice and his patients?

Cooking Up a New Plan

Alex arrived home after a busy day to find Laura in the backyard, throwing a stick to Golda. He bent down and gave the happy Golden Retriever an enthusiastic hug, finishing with a gentle pat on the head.

"How was your day, Alex?" asked Laura.

"It was so busy," Alex said. "I'm tired but happy to be home!"

"I think it's time to go in—Golda is very hungry," said Laura. This wasn't a surprise, because Golda was always hungry.

"Well, I'm hungry too," agreed Alex. "Let's go inside and fix all of us something to eat!"

Laura squeezed Alex's hand as they walked toward the kitchen.

"So tell me about your busy day," Laura said.

"Well, Luisa and I had a really good conversation this morning and I've been thinking about it all day," Alex said. "We're both getting pretty frustrated with patient notes. I have to write everything down—every single detail of each patient visit—and then Luisa has to take my notes and enter them into our system, along with images, forms, test results and more."

"That sounds like you're doubling the work for yourselves," mused Laura. "Plus, you know, I've heard Luisa give you a hard time for your handwriting."

"Yes, that's certainly a continuing topic of discussion in the office," admitted Alex. "But it's so important to capture every detail. Medical professionals have it

drilled into their heads that if we don't write it down, it didn't happen."

"Sounds just a bit like our student financials and progress reports at the preschool," said Laura. "Children attend for two, three or five days a week, and their families have differing levels of financial need. Plus, we need to track the children intellectually every step of the way. When a child enters the program, we assess where each child stands in terms of language, early math skills, social skills, all sorts of measurements. We continue those assessments throughout their time with us. If we can't give caretakers detailed feedback on their children at any given time, they may leave our program – and they certainly won't refer us to their friends and family."

"Luisa and I were talking about that today," said Alex. "The less time we spend on patient notes, the more time we can spend on patient interactions and care. Happy and healthy patients are going to be much more likely to refer us to others."

Laura nodded. "Plus, my accountant needs to have extensive financial details for each family, or else we might be in trouble if there's ever an audit," she continued. "So even though I grumble about what a pain it is to manage our student files, I make sure to dedicate enough time to the process to do it right."

"You know, our ClinicMind coach, Michelle, has warned us that every practice that has been in business for more than five years will likely be audited by a state board or insurance regulatory agency," said Alex. "It's been a while since our last audit—we really need to do better with our documentation. We need to be able to have notes that are both fast and compliant with state, federal and insurance rules."

"You know what we really need to do better with?" asked Laura. "Putting some dog food into a bowl, or else Golda might grow weak with hunger!"

Alex laughed and grabbed Golda's bowl from the corner of the kitchen. But he knew he'd be thinking more about this issue in the coming days.

What are Dr. Friedman's options to simplify the patient notes process while enabling him to remain in

100% compliance with state, federal and insurance rules?

The Java Blues

Dr. Alex Friedman parked in the only available space in the bustling parking lot, grabbed his keys, got out of the car and practically ran to the front door of the coffee shop. With things so busy in his practice and at home, he felt like he was perpetually running behind. He hoped his friend Steven hadn't been waiting long.

"Hey Alex!" he heard from across the room. Alex smiled and walked toward Steven's table. The two had so much in common—Steven operated a mental health clinic across town that specialized in youth services. He was looking forward to catching up with his friend.

"How have you been, Steven?" Alex asked. "I know it's been a few months but things have been so busy. Sorry for losing touch!"

"No worries, Alex," Steven said, giving his friend a firm handshake. "I've been busy too but things have never been better!"

"Tell me all about it," Alex encouraged. "I could use some happy news."

"We made some big changes in the office—we had been going around and around about whether or not to invest in that software that helps us to manage the practice but we finally dove in," Steven said. "It was intimidating at first but it has made a huge difference in our operations."

Alex sat back and stared at Steven with renewed respect. He and his friend had talked many times about ClinicMind, but he never thought Steven would be the first to go all in. "Tell me all about it," Alex said.

"You and I have always complained about how documentation is so tedious and takes away time from patient interactions," said Steven. "Plus data entry mistakes can be so costly—whether they hold up insurance reimbursements or take away from patient care because we don't follow up on missed appointments. What put us over the edge was our poor performance on our recent audit."

Alex nodded, knowing what was coming, since he and Luisa had been talking about this just last week.

"We made it through our audit relatively unscathed but one area the auditors pointed out needed drastic improvement was our patient notes," Alex admitted. "We'd all rather just scribble notes and stuff them into files so that we can maximize our time with our patients, but that never works out well. I'm pretty good at documenting patient visits and conversations but I haven't always documented in ways that are compliant with state, federal and insurance rules. We got ticked pretty good on that. I made a vow that we'd change things for the better and gave our ClinicMind coach a call the next day, after the audit was over."

"So how are things working out with your new system?" asked Alex.

"I couldn't be happier—in fact, everyone seems to be enjoying things more," Steven said. "We have become more efficient and accurate in documenting patient notes. Not just the SOAP notes but also getting in the related images, forms, test results and verification of benefits that are required to give the proper overview of care. All of us—from reception to treatment room—are now able to spend more time with our patients and ensure a great experience."

"Best of all," Steven continued, "I know our patients are happier too. This month we saw a 10 percent increase in referrals. Our investment in the ClinicMind software is going to pay off in no time."

"That does it, you've talked me into it," said Alex. "Tomorrow I will call Michelle, our ClinicMind coach. Today, the coffees are on me!"

Dr. Friedman is finally ready to take the plunge and start using ClinicMind to help with documentation. So what is the next step?

Right at Your Fingertips

"So did you finally get to see your friend, Steven?" asked Luisa on Thursday morning.

"Yes, I did—we've both been so busy for the last few months and it was great to have a chance to catch up," said Alex. "In fact, he told me about the new software they're using at his practice. It's helping them with their patient notes in particular—the entry is fast and accurate, and the system lets them know if there are any problems or areas of concern with the patient's record."

Luisa regarded Alex hopefully. "So I expect you'll be making a phone call to our good friend Michelle today?" she asked. Michelle was their ClinicMind coach.

"You bet I will be," said Alex. "Right after I get my coffee!"

A few minutes later, Alex called Michelle and, after some small talk, they settled down to business. Michelle directed Alex to the test system, and after giving his screen a quick glance, Alex was ready to learn more.

"So my friend Steven was raving about how his office has managed to cut down on their time entering patient notes all while increasing their accuracy," Alex said. "I'd like to see how this might work for us."

"Of course, Alex, I'll be happy to take you through it," Michelle said. "To begin, I'd like to emphasize that our system takes all the facets of patient care and enables you to see it just as you would look at your patients. Just as you wouldn't just only one symptom of a complex medical condition, we wouldn't want your practice to see just one part of your patient's record at a time. You can treat a patient most successfully if you can see his or her care plan, visit notes, appointments made and/or missed, where in the insurance cycle the patient is… with ClinicMind, you can really have every detail at your fingertips."

"That certainly sounds good—can you show me around a bit?"

"Of course – let's have a look around the Travel Card!" Michelle said. "First, you can see a column of patient visits down the left side. You know what's really cool? Missed appointments are marked in red and that's extremely valuable information to have at a glance."

"Have you ever had a patient who completely flummoxed you? Perhaps they're not getting better, or maybe they're getting worse – and you're starting to think that maybe it's your fault?" continued Michelle. "Well, if you were using ClinicMind, you'd see easily that, perhaps, this patient was missing one or two appointments each week, or month. Maybe you don't realize it because you've got a lot of patients and because memory management doesn't always kick in until there's an issue."

"Sure, with our patient load I don't always know how often a patient is supposed to be coming to see me," admitted Alex. "If I don't have an easy way to see if they're showing up or not, I won't know if they're getting the care I think they need."

"Right! Now look at the bottom left-hand side of the screen. There's a button you click when you need to add a picture or file," Michelle said. "Now look at the top for the billable codes: ICDs on the left—we recommend that method if you use XMR notes to enter a diagnosis using the assessment tab—and CPTs on the right."

"Well that seems pretty straightforward," said Alex.

"It sure is! If you're not going to use XMR notes, you just have to go to the diagnosis tab, select the area on the left and then choose the diagnosis code you need. Same for procedures—select the area or type on the left, and the procedure code from the right."

"Mmm hmm," Alex said. He was surprised how easy this was to follow. He had expected to be more intimidated.

"Now when you bill, if there are any issues, you'll get a message in red and a pop-up alerting you to possible problem, maybe with validation, or perhaps the service date is out of the care plan date range," Michelle said. "We even color code the billing section so that you'll know if you're in the insurance phase, cash phase or if the visit is free."

"But is there a place where I can enter notes that are for my own purposes?" asked Alex. "What if I have a conversation with my patient that I don't need to document for insurance purposes—I just want to make sure I have important information readily available?"

"If you look to the right of the screen, you'll see rectangular boxes—we call them 'sticky notes,'" said Michelle. "They're like Post-It Notes where
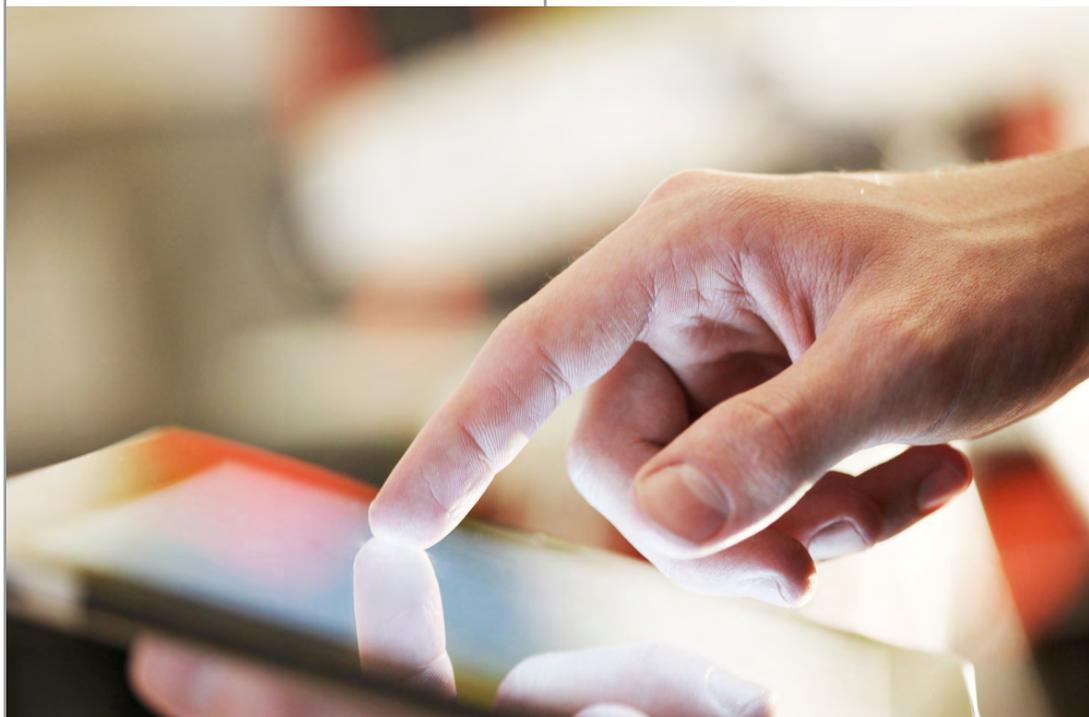
you can document reminders for yourself, personal information the patient shared with you or perhaps even some thoughts for the next phase of the patient's care."

"This is incredible," said Alex. "By having all of this information right at my fingertips I feel like I could really maximize my time with my patients and much less time in the system."

"That's the whole point," said Michelle. "By connecting all facets of a patient's care, scheduling, billing, personal notations, history... all of that is critical to ensuring that patient gets the best care possible."

"Well let's not waste any more time," said Alex. "We're ready to put your system to work for us!"

Dr. Friedman is ready to launch his next ClinicMind adventure!

What Would You Do?
Some advice from the ClinicMind community

Doing the work twice is not efficient and it allows room for more errors. The best option would be for Dr. Friedman to do his documentation during the visit. With Genesis that is exactly how the system is setup. That way no one is wasting time transcribing or documenting at a later date were details aren't as fresh.
—Heather Miller

ClinicMind could do so much for Dr. Friedman & his practice! Dr. Friedman could simplify the patient notes process if he only listened & signed up with ClinicMind already!
—Christine

Dr. Friedman could be entering his notes himself with a few typed words and a few clicks on buttons rather than having Luisa do it for him. ClinicMind documentation would free up time for both of them and they could concentrate on keeping their patients happy.
—George Konold

Dr. Friedman and Luisa have not tracked their documentation time, so they do not realize how much time they are losing. If D.Friedman spends 5 minutes writing and Luisa spends

5 minutes typing it, they are losing 10 minutes a patient. If they see 200 patients a week, they are losing a combined total of over 33 hours a week. With their current process, how can Dr. Friedman be sure each visit is documented? Implementing a full practice management solution that includes an electronic medical record would not only reduce the documentation time, but include automation/accountability to ensure each visit is documented.
—Michelle Corrigan

Dr. Friedman can spend more time treating patients and providing higher quality care by investing in a software that is easy to use, intuitive, saves time and is more compliant. I work with many providers who have invested this time and are reaping the rewards of being able to have more face time with the patients.
—Charles Pritchard

Documentation is a big challenge to mental health professionals. It takes time away from helping patients, but it has to be done well to remain compliant. Like other aspects of running a practice, it's a juggling act of balancing time. But before you can manage resources, you have to measure them.
—Andrew Kropff

Attend the webinar

Clinic Mind offers a complete solution for fast, compliant notes.

Visit http://www.clinicmind.com/fast-compliant-documentation-for-mental-health/ to view the recorded presentation or visit www.clinicmind.com to check out our other webinars.