



Why Collaborative Documentation: *Implementing a New Intervention*

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MTMSERVICES.ORG
The Original Data Driven Change Leaders



What is our mission ...

To help people recover and thrive!

*If our documentation **processes** don't help us accomplish our mission, we are missing an important opportunity and wasting time!*

The Role of Documentation



Documentation is not “Just Paperwork”!

- It is a critical part of service delivery
 - Help Clients understand the work they are engaged in doing
 - Supports Team Based Care
- It must demonstrate
 - Medical Necessity
 - Alignment with Client Centered Treatment Plan
 - Use of Evidence Based Models of Care
 - Compliance with VBC Using Objective Measurements showing
 - **Positive Outcomes OR**
 - **Treatment Plan Changes**
 - Progress Towards Goals and Objectives

With CD....

- ✓ The Client Centered Treatment Plan drives care.
- ✓ Documentation is completed **with** the client.
- ✓ **Client engagement and activation increases.**
- ✓ Writing notes together, turns a “chore” into an intervention that enhances the therapeutic alliance.

A New Way to Enhance Care



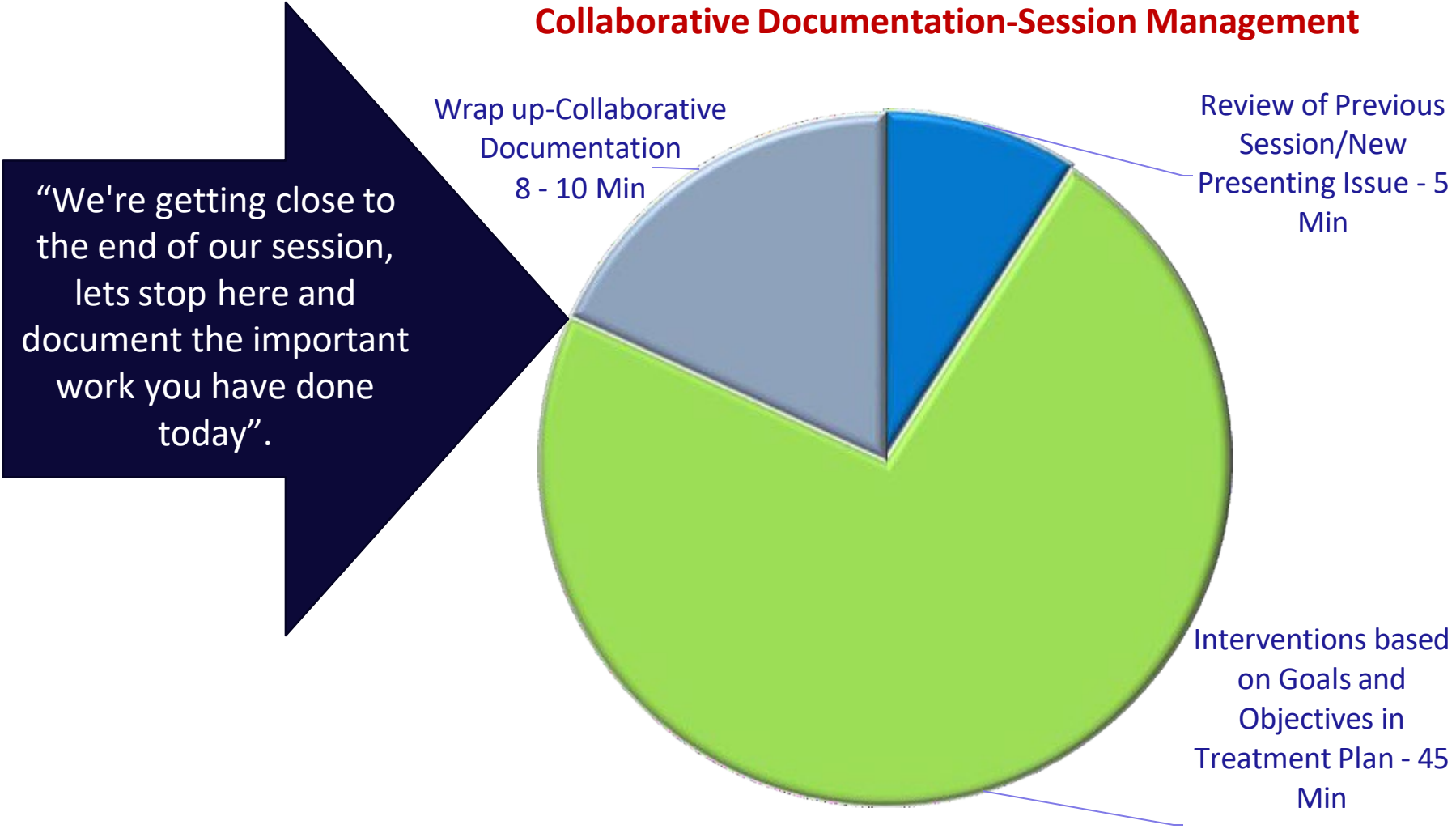
- **CD is a Change in Behavior and Workflow ...**
- Incorporates Clinician **and Client Perspectives = Client Centered**
 - Clarifies Understanding of Important Issues and Objectives
 - Keeps Focus on Outcomes and the Impact of Therapeutic Actions and interventions
 - Shared Monitoring of Progress towards Goals
 - **Gives Clients Voice and Choice**
 - **Establishes Personal Accountability for treatment outcomes**
 - **Improves understanding of the impact of inaction**
- Clients must be present and engaged in their treatment for it to be effective
 - **Shared Responsibility**
 - **Increasing Self Reliance and Resilience**

Documentation is a Shared Responsibility



Encounter Workflow

Collaborative Documentation-Session Management



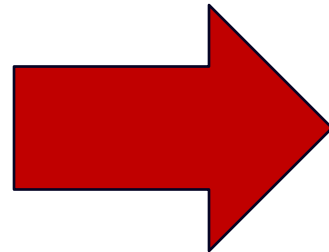
Collaborative Documentation Is Not ...

CD is about Engagement and Documenting Succinctly and Accurately

Simply jotting down notes during the session to prompt your memory for later ... It is completing the note together

Pulling the client in every time we document (collateral calls, care coordination, etc.) ... It is a tool not a rule ...
We use it when it makes sense

Documenting everything the client says ... It is collaborating to create a note that supports Medical Necessity and Focuses on Outcomes



It absolutely does not mean we type throughout the session.

Collaborative Documentation Is a Tool You Can Be Excited to Use!

- **A Trauma Informed Therapeutic Intervention that:**
 - **Aids in Diagnostic Precision**
 - **Helps clients develop new skills**
 - **Leads to rapid progress towards goals**
- **A Tool that Supports Professional Growth:**
 - **Improve quality and value of clinical documentation**
 - **Enhance Team Based Care**
 - **Increase Therapeutic Alliance**
- **Supporting Organizational Sustainability**
 - **Decreases Staff Burnout**
 - **Increases Access to Care**



Collaborative Documentation is Trauma Informed

Enhancing the Therapeutic Alliance

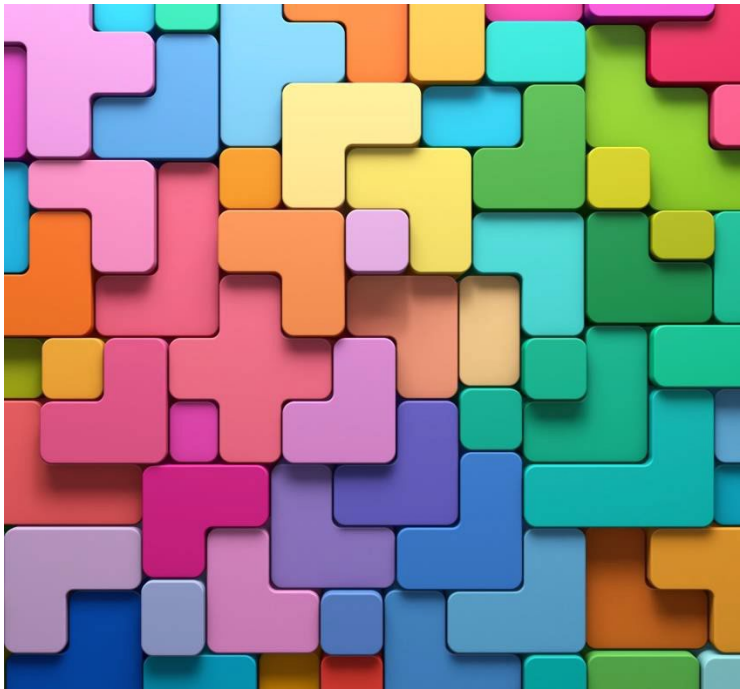


CD Improves Transparency and Trust

CD Promotes Collaboration

CD Ensures the Client's Voice is Included – Empowering Client Decision-Making - Helping to Develop and Increase Resilience

Collaborative Documentation – A Clinical Tool



- Diagnostic
 - Is the client able to collaborate?
 - Are they able to develop perspective?
 - How does this behavior affect their relationships with others
 - Should the Interventions or Treatment Plan be adjusted?
- Engagement and Relationship Building
 - What you have to say matters!
 - “I want to make sure we understand each other’s point of view”
 - **Transparency and true informed consent ... Knowing what is in the chart supports HIPAA compliance**
- Skill Building – helping clients to become better communicators and consumers of healthcare

Consistent with Evidence Based Service Delivery

Cognitive Behavioral Therapy

- Obtain brief update and mood check. • Fashion bridge from previous session. • Collaboratively set agenda.
- Review homework.
- Discuss agenda items and provide periodic summaries.
- Review methods of changing automatic thoughts, behavioral techniques and methods of changing schemas.
- Develop methods for managing triggers for relapse (use cognitive behavioral rehearsal if indicated).
- Set goals for future/provide between session work.
- Provide final summary and get feedback.

Collaborative Documentation

- Start with a check in and goal review
- Review Interventions and Response = Data
 - Last Session
 - Between Sessions
- Set agenda for session based on progress towards goals and objectives
- Identify interventions, expected impact and barriers to use
- Practice interventions in session
- Develop plan to use interventions between sessions
- Summarize session together including progress towards goals

Collaborative Documentation Supports the Use of Evidence Based Practices

*“Like standard cognitive-behavioral therapy (CBT) programs, DBT emphasizes **ongoing assessment and data collection on current behaviors; clear and precise definition of treatment targets; and active collaboration between the therapist and the client, including attention to orienting the client to the intervention and obtaining mutual commitment to treatment goals.**”*

Marsha Linehan, DBT Skills Training Manual, p.15

CD Provides Documentation that Demonstrates Value

- Establishing Medical Necessity
- Focusing on Progress towards Goals and Objectives using Measurement Based Care
- Demonstrating service integration
- Supporting True Shared Decision Making
- Promoting Diagnostic Precision
- Documents are completed on Time



Collaborative Documentation = Real Staff Self-Care



- **Implementing an Evidence Based Process that help staff to...**
 - Improve Therapeutic Relationships - Clarifying clinical impressions and engaging clients more effectively
 - Improve Outcomes – activated clients keep their appointments and do better!
 - Improve Access to Care
 - See clients more frequently when needed or when in crisis;
 - Able to see more clients,
 - Develop Professionally – especially Early Career Staff
 - Structuring Sessions to align with evidence-based service delivery
 - Engagement Strategies
 - Expanding Strategic Repertoire
 - Client Skill Building
 - Using Therapeutic Models with Fidelity
 - Participate in Organizational Change Management Projects
- **Eliminating the documentation “treadmill”**
- **Conversion to CD results in a 25% drop in usage of staff sick time**
- **Less anxiety and stress ... Improved client outcomes... greater job satisfaction ... improved quality of life and well-being ... Improved staff retention**

Benefits of CD for the Organization

- **Standardizes documentation practices**
 - Quality of Records – Demonstrating Medical Necessity ... Adhering to Treatment Plan ... Better Outcomes happening more quickly
 - **Completed accurately and on time**
 - Compliant with all applicable state, federal and accreditation standards, and funder requirements
 - Supports Internal Care Coordination and Collaboration ... **Decreasing Siloed Care**
- Lowers the risk of **post audit paybacks**
- Increased Staff availability improving access to care
 - Expand services to other populations
 - Increase Revenue and Decrease cost of Turnover
- **Increased staff morale and work-life balance**
 - Reduce Staff Burn-Out
 - Reduce Turnover rates.
- **TIA for Staff and Clients**



What Is the Bottom Line?



➤ What will be the same?

- Intervention Selection based on potential effectiveness
- Use of EBP with fidelity

➤ What will be Different?

- Session Workflow
- Treatment plan will be reviewed every encounter by all Disciplines
- Consistent use of Measurement Based Care Strategies
- Intentional engagement in Team Based Care
- Transparent record keeping

➤ What will be eliminated

- Documenting without Active Client Involvement
- Missing documentation timelines

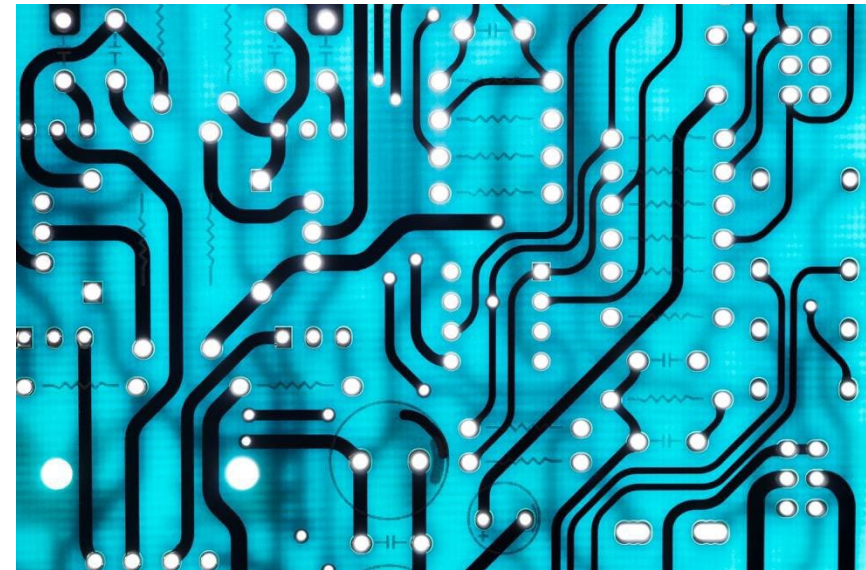
➤ Artificial Intelligence is a tool that can:

- Help Capture Content
- Help identify Use of Interventions
- Provide Recommended Language
- Highlight Diagnostic Elements
- Save Time
- **Uncover lack of competency in use of models and meeting documentation requirements**
- Mute the client's voice

➤ Staff are accountable for:

- Brevity, Clarity and Specificity ...
 - Overuse of AI content diminishes this
 - Clearly outlining how EBP interventions were used and their impact on client outcomes which means **Discussing data so AI can be used appropriately**
- Clinical and Medical Decision Making
- Diagnostic Precision

What about AI?!



The Value Proposition of Collaborative Documentation

- **Be Accessible** – Less time documenting increases your capacity to see clients
- **Be Efficient** – Less time documenting and decreasing staff burn out lowers the cost of providing care
- **Be Connected** – Better notes support better communication with clients and within the treatment team
- **Be Accountable (Effective)** – Increased engagement and focus on outcomes achieving better results
- **Be Resilient** – **Implementing an Evidence Based Process that helps us work smarter not harder**

Questions

Feedback and Brainstorming

QUESTIONS



Thank You!

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