CCBHC-E National Training & Technical Assistance Center

Funded by Substance Abuse and Mental Health Services Administration and operated by the National Council for Mental Wellbeing

RSM

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## Welcome to the HIT Toolkit Electronic Health Record (EHR) Self-assessment Checklist

1. In this document, you will find the self-assessment checklist that can help your organization determine whether you will optimize your current electronic medical record (EHR) system or select a new system.

2. The goal for this self-assessment is to understand your organization's current state, opportunities, and what changes can be done to achieve the future state.

3. To complete the self-assessment, you will be responsible for answering a number of questions. Each question has three options, each with a defined value. Upon completing the self-assessment, your score will be calculated, which will define the range of where your organization stands compared to others.

4. Many organizations use different EHRs and some may find it beneficial to optimize their current system while, for others, selecting a new system is the best option.

5. While some organizations may have more EHR experience than others, this self-assessment can be completed by a CCBHC's leadership, IT leadership or both working together.

Checklist Definitions and Purpose

A user completing these checklists should be knowledgeable of the CCBHC requirements and follow the best practices outlined in the toolkit.

> **Self-assessment Checklist:** This checklist gives a holistic view of how your organization is performing with technology and benchmarking against peers.

RSM and the National Council for Mental Wellbeing created this checklist to guide a CCBHC or organization to examine its current state of operations and determine where gaps exist. Each score has identified recommended next steps.
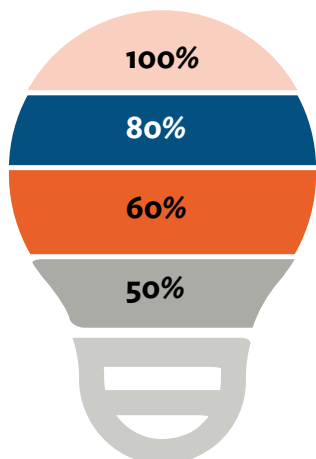
100%   **Operating Efficiently** - Organization is exceeding the standards required for CCBHCs

80%   **Operating to the Standard** - Opportunities for improvement but meets the CCBHC requirements

60%   **Operational Improvements Needed** - Operating at less than satisfactory and needs to address some gaps for CCBHC requirements

<50%   **In Need of Assistance** - Operating below the CCBHC requirements and need immediate attention

Electronic Health Record Checklist

	1	2	3	Score	Checklist Notes
Electronic Medical Record — Self-assessment (Optimize or Select a New System)					
Does your organization currently use an electronic medical record (EHR) system?	We do not have an EHR solution.	We use a homegrown EHR solution.	We have implemented a third-party solution as our EHR system.		
Is your organization's EHR system ONC-certified? *(ONC is the Office of the National Coordinator for Health Information Technology, which has a certification program. CCBHCs are required to have their EHR systems ONC-certified.)*	We are not familiar with ONC certification.	We have an EHR but it is outdated and does not meet ONC compliance.	We have an ONC-certified EHR that is meeting current standards.		
Does your EHR system electronically submit prescriptions to the pharmacy?	We do not have this feature in our EHR.	We have this feature in our EHR but we do not know how to use it or set it up.	We utilized this feature of the EHR and are able to streamline some processes for our patients.		
Are you currently able to capture all Certified Community Behavioral Health Clinic (CCBHC) EHR requirements?	We are not aware of all the EHR requirements.	We can capture some of the EHR requirements.	We are currently capturing all required EHR information.		
Does your EHR solution currently offer billing capabilities?	We do not have a billing feature in our EHR solution.	Our billing solution is separate from our EHR solution and they are not integrated.	We have a sufficient and integrated billing function within our EHR.		
Does your EHR have the ability to create documentation templates and customizations?	We cannot create our own documentation templates.	We can only use a certain library of documentation templates that have standard fields.	We have the ability to customize and create our own documentation templates in the EHR.		
Does your EHR offer communication capabilities between staff, providers, etc. (E.g., instant messaging, emailing)?	We cannot communicate or send messages within our EHR.	We only have the ability to leave notes and comments in patient charts that have to be manually accessed by another staff member.	We have the ability to send emails and instant messages within our EHR for real-time communication.		

Does your staff find the EHR navigation and platform user-friendly? This includes reading and interpreting the data, leveraging the system tools, and being able to complete job tasks efficiently.	Our staff has expressed concerns about our EHR. Staff currently has to navigate multiple pages to complete a task and the navigation is not user-friendly and requires a lot of clicks.	Our staff is comfortable with our EHR, but the navigation layout is not ideal to complete tasks timely. Our system tends to freeze and users often find themselves waiting for the system to catch up with the task at hand.	Our staff loves our EHR and finds the navigation and platform very user-friendly. The system meets all our current business requirements and mission goals.		
Is your EHR system interoperable with other systems?	Our EHR system cannot interface or connect with any other systems.	Our EHR can connect with other solutions but the maintenance of multiple systems is not ideal for our business needs and we do not have the expertise to complete this setup.	Our EHR provides all the functionality we need for data collection, billing and reporting. We do not have any secondary systems that we need to connect with.		
Does your organization share patient information with a health information exchange (HIE)?	Our organization currently does not share or receive data from an HIE.	Our organization currently sends and receives data from the HIE. We currently do not have dual data flow.	Our organization currently sends and receives data from the HIE. This data is very beneficial for providing updated and appropriate quality of care.		
Does your EHR have a mobile app feature for staff to access it on the go?	Our EHR does not offer an app feature. Our staff needs to access our EHR at the organization's location. It is an on-premise solution and cannot be accessed remotely.	Our EHR offers an app and users can also access the EHR through a web browser. We have found users have difficulty accessing remotely because of internet issues and internal EHR functionalities.	Our EHR is accessible at the organization's location and remotely. Users can access the system through a URL and app, and can access it on multiple devices using different browsers.		
Does your EHR solution currently offer reporting capabilities?	We do not have a reporting feature in our EHR solution.	Our reporting solution is separate from our EHR solution and they are not integrated.	We have a sufficient and integrated reporting function within our EHR.		
Does your organization need a new EHR solution?	We currently do not have an EHR solution — all practices are manual.	We currently have an EHR solution but need something more efficient.	We have an efficient and effective solution and are not in the market for a new one.		
Does your organization have expertise with EHR practices?	We do not have that expertise on staff.	We have staff with some experience but very limited.	We have seasoned professionals that have skill sets in EHR practices.		

Does your organization's EHR allow for customization?	The solution selected does not have this feature.	We selected a solution that has these capabilities but there will be a learning curve at the organization to use this function effectively.	We have proficient knowledge of EHR practices and utilize the functionality.		
Does your EHR provide an electronic interface to support automation?	This process is manual at our organization.	The solution offers this capability but we do not have it turned on.	Our solution is functional and is automatically sending information to the appropriate governing/reporting bodies.		
If you work with designated collaborating organizations (DCOs), have you assessed your EHR capabilities for supporting enhanced care coordination and data sharing?	Our organization does not have an EHR to share data with a DCO.	Our organization's EHR is an on-site solution and does not currently have information-sharing capabilities. Our organization would need to build interface links with the DCO's EHR to share data.	Our organization has an EHR solution that has the capabilities to share and receive data with the DCOs in the community.		
How does your EHR support person-centered planning and shared decision-making?	Our organization does not use the EHR for person-centered planning and shared decision-making.	Our organization uses the EHR for person-centered planning and decision-making, but our processes are not uniform.	Our organization's EHR supports uniform person-centered planning processes by documenting patient goals, decision support tools, communication with patients and much more.		
TOTAL					