

Welcome to the HIT Toolkit Self-assessment and Checklists

1. In this document, you will find the self-assessment and other focus area checklists that can help you optimize your organization from a technology perspective. By following the self-assessment and checklists, your organization is aligning with CCBHC requirements.
2. The goal for each checklist is to understand your organization's current state, opportunities, and what changes can be done to achieve the future state.
3. Checklists are on the subsequent tabs. Each tab has a specific focus that can help you identify if your organization is operating effectively or if there are areas for improvement.
4. To complete a checklist, you will be responsible for answering a number of questions. Each question has three options, each with a defined value. Upon completing the checklist, your score will be calculated, which will define the range of where your organization stands compared to others.
5. Each checklist can be taken independently and should be scored individually. An organization may score higher on some checklists than others. That is OK. This helps identify gaps in the organization and opportunities for improvement.
6. Each organization is at a different place in its technology journey so not all checklists may be applicable.
7. While some organizations may have more technology experience/expertise than others, this self-assessment can still 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.

Self Competency Checklist: This checklist focuses on how your organization's staff and skill sets benchmark against peers.

Governance Structure Checklist: This checklist focuses on how your governance structure benchmarks against peers.

Care Coordination Checklist: This checklist focuses on how your care coordination capabilities benchmark against peers.

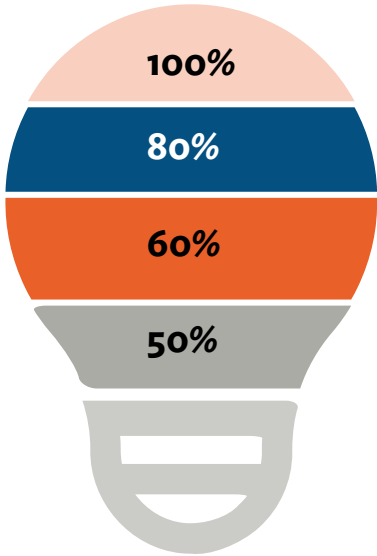
Designated Collaborating Organizations Checklist: This checklist focuses on how your organization and DCOs technology capabilities.

Electronic Health Record Checklist: This checklist focuses on how your electronic health record setup and features benchmark against peers.

Billing Capabilities Checklist: This checklist focuses on how your billing capabilities benchmark against peers.

Reporting Capabilities Checklist: This checklist focuses on how your reporting capabilities benchmark 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

Self-assessment

	1	2	3	Score	Checklist Notes
Does your organization currently use any technology solutions for charting, billing or any related CCBHC services?	We do not use any technology solutions. Everything currently is done with spreadsheets and paper.	The organization does have basic solutions to start charting information and a general ledger to track billing. Both systems are capable of or are currently talking to each other.	The organization has implemented solutions (or some combination of solutions) for charting and billing to deliver and support CCBHC-related services.		
Does your organization currently have an electronic medical record (EHR) system?	We do not have an EHR system at our organization.	We have a homegrown solution.	We have implemented a vendor solution as our EHR.		
Does your organization currently utilize multiple EHR systems?	We have multiple systems performing separate functions and staff manually work with the data.	We have multiple systems working together but we have to manage more than one system.	Our organization did have multiple solutions performing different tasks, but the organization made a decision to consolidate into one solution.		
Does your organization have an action plan in case of a cybersecurity incident?	We currently do not have an action plan.	We are establishing an action plan and committee to prepare in the event of a cyberattack.	We have a fully dedicated team developing policies and procedures and leading trainings to prepare for a cyberattack.		
Does your organization have a disaster action plan if solutions are not available?	We do not have an action plan if our organization's technology solutions are unavailable.	We have a manual process to meet our organization's needs in the event of a technological issue.	We have an integrated network of solutions along with an action plan (and/or secondary systems) that can be relied upon in the event of a technological issue.		

<p>Are your organization's technology solutions on premise or cloud-based? <i>(Do you have a system administrator who has the ability to make updates and maintain the system on-site (on premise), or is your solution cloud-based where you work with the vendor to get updates/corrections made in your system by submitting support tickets or phone calls?)</i></p>	<p>We do not know our current technology setup.</p>	<p>We have solutions on premise and/or in the cloud but they could be improved.</p>	<p>We have an integrated network of solutions operating effectively and efficiently (on premise and/or cloud-based) to meet the needs of the community.</p>		
<p>Does your organization have the ability to offer telemedicine?</p>	<p>We do not have the capabilities to offer telemedicine services.</p>	<p>We have a solution that is functional but has inefficiencies.</p>	<p>We have implemented a vendor solution that is working efficiently and our staff knows how to use it.</p>		
<p>Do your organization's current technology solutions have capacity for organizational expansion? <i>(Technology solutions are defined as computer or automated systems that support the organization's operations. For example, charting, billing, care coordination.)</i></p>	<p>The current solutions are outdated and cannot support organizational expansion.</p>	<p>We have multiple solutions operating independently and have a large manual process to reconcile. Expansion would add more work.</p>	<p>We have an integrated network of solutions operating effectively and efficiently to allow organizational expansion.</p>		
<p>Has your organization established a governance team to oversee all compliance measures?</p>	<p>We do not have a governance committee or program.</p>	<p>We are establishing a governance committee and program to oversee compliance measures.</p>	<p>We have an established governance committee and program overseeing compliance measures.</p>		
<p>How is your organization currently tracking the care delivered to people receiving services?</p>	<p>We currently do not have any tracking methods.</p>	<p>We currently have a manual process to track services delivered to patients.</p>	<p>We have an integrated network of solutions operating effectively and efficiently to track the services delivered to patients.</p>		
<p>Does your organization currently capture all needed CCBHC reporting metrics?</p>	<p>We do not currently have a process to capture CCBHC reporting metrics.</p>	<p>We have a process to capture CCBHC metrics but the process is very manual.</p>	<p>Our organization has an electronic system to efficiently and effectively capture and report CCBHC metrics.</p>		

<p>If your organization is only capturing some metrics, is there a plan in place to capture the remaining required reporting elements?</p>	<p>Our organization has not discussed a plan to capture the remaining metrics.</p>	<p>Our organization has established a plan to capture these missing metrics but we do not have the technology or staff to do this currently.</p>	<p>Our organization has implemented a plan to capture the remaining metrics and has established benchmarks to meet our goal.</p>		
<p>Does your organization have the adequate IT expertise and staff to support the operations and services needed for the community?</p>	<p>Our organization is currently understaffed and cannot meet the requirements of the community.</p>	<p>Our organization has staff operating in multiple roles to meet the requirements of the community.</p>	<p>Our organization has adequate staff and has connections with DCOs to provide appropriate care to the community.</p>		
<p>Does your staff utilize a telemedicine tool to communicate with those receiving services or does your organization outsource this service?</p>	<p>Our organization currently outsources this service as we do not have enough staff to meet service demands.</p>	<p>Our organization is looking to bring services in house and train our staff. We are not at this point yet.</p>	<p>Our organization has trained staff to provide telemedicine services and does not outsource this service.</p>		

Implementing a Technological Solution

<p>Does your organization have a budget for a technology solution implementation?</p>	<p>Our organization is unaware of the costs, time and resources needed to complete a technology solution implementation.</p>	<p>Our organization has the available funds for a technology solution but we do not know what to purchase.</p>	<p>Our organization has adequate funds to purchase and has selected the best solution for us.</p>		
<p>How is your organization preparing for a technology implementation and assessing readiness?</p>	<p>Our organization has started the project and will figure things out through the process. We may consider external support (consultants) if needed.</p>	<p>Our organization has dedicated resources and staff to accomplish the project tasks but the resources and staff do not have the adequate capabilities and skill sets. We are considering outside assistance (consultants) for support.</p>	<p>Our organization has the appropriate resources and staff to take on and implement a technology solution.</p>		

<p>If an area for improvement is identified, how is your organization prepared to correct the issue?</p>	<p>Our organization does not have an action plan to address any identified issues.</p>	<p>Our organization has put together multiple plans to address different issues. This includes involving specific resources depending on the issue.</p>	<p>Our organizations has an action plan, resources and a timeline identified to resolve issues when they come up.</p>		
<p>How has your organization prioritized the action plan items?</p>	<p>We do not have an action plan to prioritize the issues identified.</p>	<p>We have prioritized the items we want to address but do not know how to start.</p>	<p>We have an action plan with prioritized items and a timeline to resolve the issues identified.</p>		
<p>How are stakeholders involved in the process at your organization? <i>(Stakeholders are defined as direct and indirect decision-makers for the organization, including staff and people receiving services. Depending on the topic, different stakeholders may be involved.)</i></p>	<p>The project team and stakeholders do not speak.</p>	<p>The project team and stakeholders are the same people but there is a disconnect on the project.</p>	<p>The project team and stakeholders have strong communication, an action plan and benchmarks to keep the project on track for completion.</p>		
<p>How will your organization determine if the technology implementation was a success? <i>(Select the option that best represents your organization's goal when implementing a technology solution and the expected outcomes.)</i></p>	<p>Success will be measured by completing the project and a functional tool.</p>	<p>Success will be measured by more available resources and improved patient care delivery.</p>	<p>Success will be measured by additional service offerings and expansion opportunities that will benefit the community.</p>		
<p>TOTAL</p>					

Self Competency

	1	2	3	Score	Checklist Notes
Current State					
Are all your staff knowledgeable on health information technology (HIT)?	Our staff has no knowledge or experience with HIT.	Our staff who utilize HIT regularly have limited knowledge on how to use the solution(s).	Our staff has extensive knowledge and/or experience with HIT. The organization offers routine trainings to keep the staff using these solutions up to date with current knowledge refreshers.		
Does your staff know how to use a telemedicine tool to communicate with patients?	Our staff has never used a telemedicine tool.	Some of our staff has experience using a telemedicine tool.	Our staff is proficient with a telemedicine platform.		
Does your organization provide any HIT education trainings?	Our organization never offers any HIT trainings to staff.	Our organization offers staff two trainings a year.	Our organization has quarterly trainings.		
Does your organization provide specific HIT role trainings?	Our organization only offers general HIT trainings to staff.	Our organization does not have all the HIT expertise, so we do not offer specific HIT training for each role.	Our organization has a specific HIT training for each role and the curriculum is targeted for that role.		
Does your organization have a repository of all the staff's HIT skill sets to meet CCBHC requirements and serve the community?	Our organization does not have a repository of all the staff's HIT skill sets to serve the community.	Our organization has a repository of the staff's HIT skill sets, but we do not have all the skill sets to meet the technical needs for a CCBHC.	Our organization has all the necessary HIT skill sets to meet the requirements and needs of the community.		

Technology Skill Sets

<p>Does your staff utilize a telemedicine tool to communicate with those receiving services or does your organization outsource this service?</p>	<p>Our organization currently outsources this service as we do not have enough staff to meet service demands.</p>	<p>Our organization is looking to bring services in house and train our staff. We are not at this point yet.</p>	<p>Our organization has trained staff to provide telemedicine services and does not outsource this service.</p>		
<p>How is your organization preparing for a technology implementation and assessing readiness?</p>	<p>Our organization has started the project and will figure things out through the process. We may consider external support (consultants) if needed.</p>	<p>Our organization has dedicated resources to accomplish the project tasks, but the resources do not have the adequate skill sets. We are considering outside assistance (consultants) for support.</p>	<p>Our organization has the appropriate resources and skill sets to take on and implement a technology solution.</p>		
<p>Does your organization have an IT specialist to oversee a technology implementation?</p>	<p>Our organization does not have an IT specialist to oversee the implementation. Our organization will seek outside consulting support.</p>	<p>Our organization has staff with some experience but we plan to seek outside support as no one is officially credentialed or has held an IT leadership position before.</p>	<p>Our organization has a designated IT specialist to oversee and coordinate resources internally. We do not need outside support to complete implementation.</p>		
<p>TOTAL</p>					

Governance Structure

	1	2	3	Score	Checklist Notes
Current State					
Does your organization have privacy and HIPAA-compliant policies and protocols in place?	Our organization does not have any policies and protocols in place for privacy and HIPAA compliance.	Our organization has some policies and protocols in place, but we are not sure how up to date they are.	Our organization has a privacy and HIPAA compliance committee that regularly meets and updates these policies and protocols.		
Does your organization have a security and compliance committee? <i>(A security and compliance committee is a group of leaders and staff that oversee, discuss and develop policies for the organization.)</i>	Our organization does not have this committee.	Our organization is defining this committee now but we lack expertise.	Our organization has established an effective and efficient security and compliance committee that has knowledge and expertise in this field.		
Does your organization have a reporting structure for HIT system access and decision-making?	Our organization has a limited number of staff that do multiple roles and they all have access to every system capability.	Our organization is currently defining this HIT structure and who should have access to which features in their role.	Our organization has established an effective and efficient HIT role structure and users can only access information/ functionality relevant to their role.		
Does your organization have employees who have experience securing and maintaining HIT systems? <i>(Systems include charting, billing, reporting.)</i>	Our organization does not have these skill sets.	Our organization has these skill sets and is currently defining roles.	Our organization has established an effective and efficient role structure to monitor and secure systems. We do have the appropriate knowledge and expertise.		
Do all of your staff have access to electronic medical record data for people receiving care?	Our organization has a limited number of staff that do multiple roles and have access to all system capabilities.	Yes, but we are working on defining roles and the information access relevant to each role.	We have established an effective and efficient role structure and users can only access information/ functionality relevant to their role.		

<p>Does your organization utilize security practices (e.g., multifactor authentication, passwords, security levels to access certain information)?</p>	<p>Our organization does not have these security measures in place.</p>	<p>Our organization is implementing security measures so staff only see information applicable to their role. We could benefit from additional external support.</p>	<p>Our organization has implemented new measures for users to have secure passwords and multifactor authentication requirements to access information for people receiving services.</p>		
<p>Does your organization have policies/procedures for regularly obtaining input from people with lived experience and family members (e.g., through serving on the board of directors or advisory board, and/or via community needs assessment) to inform development and use of HIT and EHRs to support engagement in treatment, person-centered, recovery-oriented, trauma-informed, developmentally appropriate and culturally responsive care?</p>	<p>Our organization does not have any policies or protocols for obtaining information from people with lived experience or family members.</p>	<p>Our organization currently tracks this information in the patient chart but we do not have any standard/official policies that everyone follows.</p>	<p>Our organization has established policies and procedures for effectively capturing input from people with lived experience and family members.</p>		

Technology Implementation

<p>Does your organization have expertise in a governance structure and practices?</p>	<p>Our organization does not have that expertise on staff.</p>	<p>We have staff with some experience but very limited.</p>	<p>We have seasoned professionals that have skill sets to monitor and secure organizational systems.</p>		
<p>Does the technology used at your organization offer abilities to govern services internally and externally?</p>	<p>The technology offered at my organization does not have these features.</p>	<p>We selected a solution that has these capabilities but there will be a learning curve at the organization to use this function effectively.</p>	<p>We have proficient solutions to govern services internally and externally.</p>		
<p>How does the technology used offer an electronic interface to report care services to governing entities?</p>	<p>This process is manual at our organization.</p>	<p>The solution offers this capability but we do not have it turned on.</p>	<p>Our solution is functional and is automatically sending information to the appropriate governing/reporting bodies.</p>		
<p>TOTAL</p>					

Care Coordination Checklist

	1	2	3	Score	Checklist Notes
Care Coordination Capabilities — Current State					
How does your organization use health information technology (HIT) for care coordination?	We do not use HIT for care coordination.	We use some HIT for care coordination — currently more reporting and documentation.	We have sufficient and integrated HIT solutions that help drive care coordination.		
How does your organization use HIT for quality improvement?	We do not use HIT for quality improvement.	We use some HIT for quality improvement — currently more reporting and documentation.	We have sufficient and integrated HIT solutions that help drive quality improvement.		
How does your organization use HIT for research and outreach?	We do not use HIT for research and/or outreach.	We use some HIT for research and outreach at minimum to meet compliance.	We have sufficient and integrated HIT solutions that help drive research and outreach.		
How does your organization currently work with designated collaborating organizations (DCOs)?	We do not collaborate with any DCOs at this time.	We are in starting discussions to coordinate more with DCOs.	We have existing relationships with DCOs and coordinate patient care.		
Does your organization have a plan to improve care coordination using HIT?	We currently do not have a plan in place.	We are in discussions and putting together a formal plan.	We have a plan in place and benchmarks set up to confirm we are meeting our goals in the expected timeline.		
Does your organization currently have enough staff to meet the service demands?	We currently are operating with limited staff and not able to effectively serve all patients.	We have plenty of staff to care for patients, but there is no communication/ collaboration between services.	Our organization is sufficiently staffed to meet CCBHC compliance requirements and provide adequate services to our patients.		

Technology Implementation

<p>Does your organization need a technology system to coordinate/oversee all the services?</p>	<p>We currently do not have a solution — all practices are manual.</p>	<p>We currently have multiple solutions tracking the services but need something more efficient and integrated.</p>	<p>We have an integrated network of solutions operating effectively and efficiently to coordinate all the services needed for each patient.</p>		
<p>Does the solution offer abilities to coordinate services internally and externally?</p>	<p>The solution selected does not have this feature.</p>	<p>We selected a solution that has these capabilities but there will be a learning curve at the organization to use this function effectively.</p>	<p>We have proficient knowledge of care coordination practices and use this functionality to provide services internally and externally to our patient.</p>		
<p>Does the solution offer an electronic interface to report care services to governing entities?</p>	<p>This process is manual at our organization.</p>	<p>The solution offers this capability but we do not have it turned on.</p>	<p>Our solution is functional and is automatically sending information to the appropriate governing/ reporting bodies.</p>		
<p>TOTAL</p>					

Designated Collaborating Organizations (DCOs)

	1	2	3	Score	Checklist Notes
Current State					
When working with a designated collaborating organization (DCO), does the organization have a certified electronic health record technology (CEHRT) solution?	The DCO does not use any technology solutions at our organization. Everything currently is done with spreadsheets and paper.	The DCO does have basic solutions to start charting information and a general ledger to track billing. Both systems are capable or currently talking to each other but they are not certified.	The DCO is utilizing a CEHRT solution for charting, billing (or some combination of solutions) to deliver and support CCBHC-related services.		
Does the DCO have systems in place for data management? The purpose of data management is to improve quality of care and reduce redundancies in cost and efforts. Tracking efficient data also ensures care compliance standards and tracking outcomes.	Currently, the DCO does not have the ability for data tracking.	The DCO uses paper to track patient data metrics and scans them into a central repository system.	The DCO uses an electronic health record to manage all patient data, outcomes and quality scores to maintain compliance and track effective care efforts.		
Does the DCO offer telehealth services?	The DCO does not have the technology or the capabilities to provide telehealth services.	The DCO uses a telehealth platform that is not fully secure and no longer compliant with regulations.	The DCO has a compliant and efficient solution to provide telehealth services to patients within the community.		
Does the DCO have the ability to share and communicate data with the CCBHC? Interoperability standards for communicating data will improve patient care and help staff provide targeted services to those in need.	The DCO does not currently use technology to share and communicate patient data effectively and compliantly.	The DCO uses paper to track patient data metrics and scans them into a central repository system.	The DCO uses an electronic health record to manage all patient data, outcomes and quality scores to maintain compliance and track effective care efforts. Both the CCBHC and DCO have the ability to view and exchange data within the system to provide continued care to the patients.		

<p>Has the DCO established cybersecurity and employee access policies and procedures?</p>	<p>The DCO does not currently have any policies or procedures to validate cybersecurity measures and gaps because they do not use any technology for patient care or charting.</p>	<p>The DCO uses paper to track patient data metrics and scans them into a central repository system. All staff have access to this system and can view all the information. There are no roles currently set up for specific access.</p>	<p>The DCO uses an electronic health record to manage all patient data, outcomes and quality scores to maintain compliance and track effective care efforts. Each employee is assigned a specific role (appropriate for this job) and has access to what they need in the system to complete their job tasks. The DCO has set up policies and procedures to make sure the system and data are kept secure and compliant.</p>		
<p>TOTAL</p>					

Electronic Health Record System

	1	2	3	Score	Checklist Notes
Current State					
How does your organization currently use an electronic health 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? <i>(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.)</i>	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.		
How does your EHR support person-centered planning and shared decision-making?	Our organization currently does not have an EHR to capture this data.	Our organization currently captures all of this data/information on paper and scans it into our EHR.	Our organization uses an EHR to manage all patient data, outcomes, and quality scores to maintain compliance and track effective care efforts. Both the CCBHC and designated collaborating organization have the ability to view and exchange data within the system to provide continued care to patients.		
Does your EHR electronically submit prescriptions to the pharmacy?	We do 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 have used this feature of the EHR and are able to streamline some processes for our patients.		
How does your CCBHC's current EHR system capture health information, including demographic information (as feasible)?	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 current EHR system, at a minimum, support care coordination by sending and receiving summary of care records?	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 current EHR system provide people receiving services with timely electronic access to view, download or transmit their health information or to access their health information via an application programming interface using a personal health app of their choice?	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 current EHR system provide evidence-based clinical decision support?	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 current EHR system conduct electronic prescribing?	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.		
Is your staff knowledgeable on health information technology (HIT)? <i>(HIT supports health information management across computerized systems and the secure exchange of health information between consumers, providers, payers and quality monitors.)</i>	Staff has no knowledge or experience with HIT.	Staff has some knowledge or experience with HIT.	Staff has extensive knowledge or experience with HIT.		
Does your EHR solution currently offer billing capabilities?	We do not have a billing feature in our EHR solution. We need guidance from an expert.	Our billing solution is separate from our EHR solution and they are not integrated. We would like to connect with an expert.	We have a sufficient and integrated billing function within our EHR.		
Does your EHR solution currently offer reporting capabilities?	We do not have a reporting feature in our EHR solution. We need guidance from an expert.	Our reporting solution is separate from our EHR solution and they are not integrated. We would like to connect with an expert.	We have a sufficient and integrated reporting function within our EHR.		

Technology Implementation

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 EHR solution and are not in the market for a new one.		
Does your organization have expertise in 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 the solution allow for customizing EHR capabilities?	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 our EHR solution and understand all of the features to utilize their functionality effectively.		
Does the solution offer an electronic interface to automate EHR practices for governing entities?	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.		
TOTAL					

Billing Checklist

	1	2	3	Score	Checklist Notes
Billing Capabilities — Current State					
What is your current billing process?	It is a manual process with paper and spreadsheets.	We have multiple solutions that capture different billing data and have to be migrated manually.	We have a sufficient and integrated billing structure that is automated.		
How does your organization currently use a technology billing solution? <i>(Note: many electronic medical record systems have the ability to bill for services.)</i>	We do not have a billing solution.	We use multiple solutions that collect billing-related data but they are not connected.	We have a sufficient and integrated billing structure.		
Does your organization currently use multiple solutions for billing practices?	We currently do all billing processes manually.	We use multiple solutions for billing practices and they currently operate independently.	We have a fully integrated solution that captures and bills all appropriate services.		
Technology Implementation					
Does your organization need a new billing solution?	We currently do not have a billing solution — all practices are manual.	We currently have a billing 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 in billing 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 billing practices.		
Does the solution offer the ability to customize billing capabilities?	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 billing practices and utilize the functionality.		
Does the solution offer an electronic interface to automate billing practices for governing entities?	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.		
TOTAL					

Reporting Checklist

	1	2	3	Score	Checklist Notes
Reporting Capabilities — Current State					
How does your organization capture reporting metrics?	It is a manual process with paper and spreadsheets.	We have multiple solutions that capture different data sets and have to be migrated manually.	We have a sufficient and integrated reporting structure that is automated.		
How does your organization utilize technology for reporting?	We do not have a reporting solution.	We have multiple solutions that capture data but they are not connected.	We have a sufficient and integrated reporting structure.		
Does your organization currently report National Outcome Measures (NOMs)?	We are not aware of all the reporting metrics.	We can capture some of the CCBHC-required metrics.	We are currently reporting all required metrics.		
Does your organization currently report Prevention and Mental Health Promotion (IPP) activities?	We are not aware of all the reporting metrics.	We can capture some of the CCBHC-required metrics.	We are currently reporting all required metrics.		
Does your organization currently report clinic-collected quality measures? <i>(This is required for all individuals receiving services.)</i>	We are not aware of all the reporting metrics.	We can capture some of the CCBHC-required metrics.	We are currently reporting all required metrics.		
How is your organization gathering encounter data? <i>(Encounter data is interactions between providers and people receiving services, medical appointments, etc.)</i>	We are not currently gathering encounter data.	We have multiple solutions that capture different data sets and have to be migrated manually.	We have a sufficient and integrated reporting structure that is automated and captures encounter data.		

Technology Implementation

<p>Has your organization identified all of the report needs to select a technology system?</p>	<p>We have selected a solution that focuses on other priorities.</p>	<p>We have selected a solution but do not know how to set up the reporting capabilities.</p>	<p>We have selected a fully integrated solution that has functional reports and capabilities to build additional reports (if applicable) to capture CCBHC metrics.</p>		
<p>How is your organization currently building reports to capture the required data elements?</p>	<p>We do not have that expertise on staff.</p>	<p>We have staff with some experience but very limited.</p>	<p>We have seasoned professionals that have skill sets in reporting and data model building.</p>		
<p>Does the solution offer the ability to customize reporting capabilities?</p>	<p>The solution selected does not have this feature.</p>	<p>We selected a solution that has these capabilities but there will be a learning curve at the organization to use this function effectively.</p>	<p>We have proficient knowledge of report building and utilize the functionality.</p>		
<p>Does the solution offer an electronic interface to automate reporting to governing entities?</p>	<p>This process is manual at our organization.</p>	<p>The solution offers this capability but we do not have it turned on.</p>	<p>Our solution is functional and is automatically sending information to the appropriate governing/reporting bodies.</p>		
<p>TOTAL</p>					