

## **vaEonline Requirements Workgroup**

Tuesday 9/12 at 10AM

**Present:** David Mills, Richard Corbett, Catherine Hancock, Telisha Woodfin, Barbara Fields, Jennifer Stokes, Mary Lou Hutton, Sarah Moore, Anne Brager, Vaishali Shah, Emily Sales, Kyla Patterson, Allison Standing, Sameena Nolan, Mirlena Sanchez, Tracey Edman, Emily Chebtar, Dee Holland, Terri Strange-Boston, Helyett Alvarez, Muff Perry, Adele Rohner, Angelina Banaag, Lynne Wolf, Kelly Matthews,

### **Introductions of participants:**

During intros, please think of two things you would like the new data system to do.

- Participants introduced including national experts, information technology partners, Central Office Staff, Subject Matter experts

### **Overview of purpose/objectives of our work:**

Our plan for EI Online is to make an Electronic Health Record / Case Management tool.

- Depending on your role or roles, you interact with different parts of the early intervention process.
  - collecting the referral information
  - scheduling the Assessment for Service planning
  - billing for services
  - scheduling the transition meeting
  - making sure you have enough service coordinators and providers to provide the services on the IFSP
- We have questions for you about how the data system can support the steps in the process, thereby making your job easier.

### **Overview of system plan and targeted capabilities:**

- As we build the new system, we are very mindful of its impact on the user especially in regards to double data entry.
  - Secure: HIPAA & FERPA
  - Available Online & Offline
  - Electronic Signatures
  - Scheduling appointments
  - Email Connectivity
  - Dashboard specific to function(s) and role(s)

### **Demo of work-to-date:**

- Guardian misspelled on one screen
- Transition also misspelled
- Transitional Plan- change to Transition Plan
- Check spelling of Administrator

## Questions:

- How will this work with electronic medical databases that are already in place such as credible  
Answer: currently working on a trial linkage for data exchange with Fairfax
- Can we edit information after it is added?  
Answer: database is intended to be editable prior to being finalized
- If referral source is pediatrician will multiple sources be able to be added?  
Answer: yes, the referral source will be customizable for your system
- Will there be a way to correct errors, typos after the IFSP form is signed?  
Answer: that will be something we need to figure out
- Can SC see all children or only those on caseload?  
Answer: That will be a local decision
- Will enhanced service providers link to the system to upload notes for billing?  
Answer: yes
- Is it intended to be a comprehensive system with the hope that it will be the only data system?  
Answer: yes
- Will the new system do all the billing?  
Answer: Billing will be done at the local level but the system will have the capability.
- Can you enter the IFSP and then print?  
Answer: Yes the intent is to not have to complete paper version of IGFSP.
- In terms of billing - currently the system only gives an option of "Family Fees" but does not allow you to enter the exact amount of the family fees. Will this be revamped to allow for entry of the exact amount (this aids in billing). If so, how will full charge be notated?
  - Answer: We want it to do these things.
- It sounds like we will be able to send the PCL and the IFSP to the doctors and providers electronically, instead of printing and faxing. Is that correct?
  - Answer: Yes, there will eventually be ways to do this electronically.
- Will the new system have compliance monitoring on multiple levels, providers, supervisors and local system administrators
  - Answer: Yes, we'll need your assistance in getting the overlapping, data rules and compliance to consider.
- So local systems will use this to generate billing to Medicaid and Providers to Local Systems?
  - Answer: yes
- Will this allow for simultaneous data entry for ASP/IFSP teams to complete in the field?
  - Answer: Makes sense but we'll need our IT folks to help us
- Any IFSP reviews and changes in goals will continually be updated in EI online correct?
  - Answer: Yes
- Sometimes I will go on a visit with the intent to just visit, so I don't bring my computer. While in the home I find that I need to do a review and will just use a paper copy,

- which I can currently just scan into Credible. Will there be an option to attach things like this, since the signature will not be collected electronically at the time the review is done.
- Answer: We are going to by trying to move the process to have the review completed electronically but we have not gotten to how to upload items yet.
  - Will there be an option to document a note from your calendar, or will you need to record the activity outside of the appointment calendar function?
    - Answer: Sure
  - Our program does not have a way to do an electronic signature for the parent so scanning would be the only way to get it into a record.
    - Answer: yes
  - Will there be an "auto-save" option or a "go back to XYZ version" in case you lose power or your computer dies?! That happened a few times that I know of.
    - Answer: We plan to have the function that when you enter data it will be automatically saved
  - What happens in areas where there is no internet service? In some areas of our catchment, we have no internet services or the internet is done. That's why we have paper copies as a back-up.
    - Answer: There will be an offline access eventually.
  - Would it also be possible for each LS to determine which widgets they make visible? Some systems have a staff member other than the SC monitoring HSI, Physician cert, etc.
  - Priority for many to communicate with EHR and retrieve data that is already entered
  - Will the system be able to communicate with the DOE?
  - Who will have access to unassigned referrals? Will 45 day timeline be included with unassigned referrals?

**FOCUS: Dashboard(s) and widgets**

- Dashboard gives you quick access to tasks and information that is relevant to your work.
- Widget is an application or component that allows the user to do a simple function

Ideas from chat for Dashboard

- Kelly Matthews: 30 day timeline
- Kelly Matthews: dashboards for roles
- Alison Standring: Transition timelines
- Jennifer Stokes: List of staff if you are monitoring
- Emily Chebetar: For management, would love to see a widget for caseload size per practitioner
- Kelly Matthews: transition timelines
- Muff: authorizations expiring; lost medicaid; no EI benefits
- Barbara Fields: list of providers
- Tracey Edman: Automated reminder e-mails for appointments or deadlines?
- Lynn Wolfe: physician certification
- Sameena Nolan: Child aging out

- Emily Chebetar: For SC screen- transition timeline reminder
- Kelly Matthews: contract managers
- Mary Lou: Under reminders can a reminder be added for the Health Status Indicators if that will remain a service coordinator function?
- Angelina - LSM: HSI reminder
- Kelly Matthews: System Compliance indicators
- Mary Lou: I like the automated reminders if that is a possible function.
- Alison Standing: caseload by practitioner as well, how many hours of service are they assigned
- Angelina - LSM: PPN/Schedules to family and providers before reviews/annuals/transition meetings etc.
- Lynn Wolfe: I think it would be important to tease out which things would be on a SC's page vs a managers page
- Alison Standing: financial widgets to track billing and reimbursement
- Lynn Wolfe: and would the local system be able to decide which widgets go on which view...
- Angelina - LSM: IFSP sign date/projected start date
- Kelly Matthews: The assigned provider to see the names and dates that the service must be provided by
- What kind of widgets would you like to see on the thirty day timeline?
  - Emily Chebetar: For 30 day timeline: date service added, type of service, provider assigned, 30th day
  - Sameena Nolan: Reason why the 30 day timeline was not met

#### **Homework:**

- We are asking each person to think about what they'd like to see (what interface) on their dashboard based on your user role in EI and be prepared to share at next week's meeting. Reminder: The dashboard is the main menu you will see when you log in and is specific to your role.

#### **Overview of upcoming meetings and topics**

- We have a proposed schedule to review each screen.
- Next meeting: Tuesday, September 19<sup>th</sup> at 10:00am
  - Review Homework
  - Topic: In-depth look at CLIENT INFORMATION SCREEN and connection to ASP