The Who, What and How of Collaborative Documentation

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Workshop Goals

- Identify what is collaborative documentation

- Describe who is using it currently

- Identify the potential benefits and drawbacks

- Describe how to implement in private practice

Before we begin…

Take a moment to consider any biases.

Let go of any desperation or fear!

What is Collaborative Documentation?

Facts and changing ideas

What is collaborative documentation?

- Encouraging clients to be aware of the content of their records

- Writing notes with the client present

- Using client feedback directly in notes, assessments and treatment plans

- Allowing clients full access to online records for their own review

Who is Using Collaborative Documentation?

Surprising data

Who is using CD?

- Hospitals

- Mental health centers

- Non profit agencies

- Private practitioners

- Psychiatrists and therapists

Common Concerns About Collaborative Documentation?

Valid worries

"My client will resent that we're doing paperwork."

"It will take away time from clinical treatment"

Benefits of Collaborative Documentation?

Real life stories and legitimate data

Benefits

- Connects the clinical work and the paperwork (no longer "divorced" from one another)

- Supports a person-centered and client-driven approach

- Provides a clear and natural way to end the session

Benefits

- Addresses the changing culture in business

  - Encouraging more transparency

  - Aligns with the *meaning* of HIPAA

Benefits

- Improves time management

  - Take a moment to do the math on how much time you spend on paperwork

  - 20 clients x 10 minutes per note = 3 hours & 20 minutes weekly

  - Many clinicians report documentation takes up 30-50% of their work time

  - Leads to job dissatisfaction and burnout

Could your clinical time be spent elsewhere (without sacrificing quality and ethics?)

Food for Thought

How Do Clients Respond?

It's not what you'd think

How Clients Respond

- One national study found:

  - 82% of clients found it either Very Helpful or Helpful

  - 79% reported feeling more involved compared with previous experience (either with same or different provider)

  - 77% reported they would prefer to continue the collaborative documentation process

How Clients Respond

- No show rates decreased

- Opened up dialogue with child clients who were previously resistant

- Allowed misunderstandings with clients to be more easily resolved

How Clients Respond

- Another study found that 4 out of 5 patients who had access to notes *read them regularly*

- Data showed that more open and honest communication may lead to decreased lawsuits

Collaborative documentation tends to *increase trust* because some clients feel that you secretly view them as "crazy."

How Clients Respond

- Especially helpful for those with substance abuse issues since allows them to review on their own time

- Significant client improvement when discussing sensitive issues

- Clients reported being more motivated to change and felt *more respected*

How Do Clinicians Respond?

Can they learn to love it…

How Clinicians Respond

- Felt like working *less*

- Actually *decreased volume* of documentation

- Quality of notes felt improved

- Felt more *connected* to documentation, saw increased value

Considerations Before You Begin

Start smarter, not harder

Considerations

- Office set up and type of documentation (paper, EHR, etc.)

- Which clients will fit best with this approach

    - Use clinical judgment for type of client

- May require a change of writing style

Considerations

- Are you prepared to dedicate 6-8 weeks to give it a fair shot?

- Work through your own attitude

  - How you view it is how your clients will view it

  - What are your own barriers or preconceived notions?

My challenge to you: What do you fear would happen if your client saw you write notes?

Considerations

Consider coaching and accountability during your initial implementation.

>> You are not alone!

How to Implement Collaborative Documentation

Let's talk practicality

How To Implement

- Incorporate in *all* aspects of documentation

  - Treatment planning

  - Assessment

  - Notes

How To Implement

- Actual phrases to use:

  - *"You know that I write notes about our sessions and today I'd like to have you help with that"*

  - *"I'd like to get your feedback on our session today"*

  - *"Okay, let's sum up what we've discussed today"*

  - *"Let's stop here and review what we've talked about"*

How To Implement

- With children

  - *"When you see your mom, what will you tell her we did today?"*

  - *"Why don't you tell your mom what we did today?"*

  - Give younger children tasks during the writing (stress ball, coloring, etc.)

How To Implement

- Use descriptive language of what was discussed

  - Focus on behaviors rather than clinical labels or judgments

  - Highlight client strengths

  - Use note writing prompts for easy discussion

How To Implement

- Write a partial note

  - Finish later for some clients

  - Increase the amount done over time

How To Implement

- Give yourself a **goal**

  - *How many of your clients will use this and by what timeframe?*

  - *What percentage of your note will be collaborative?*

- Takes about 6 weeks to get used to it

Further Research/My Sources

- Bill Schmelter, PhD: Implementing Collaborative Documentation, Making it Happen!

  - http://www.integration.samhsa.gov/pbhci-learning-community/jun_2012_-_collaborative_documentation.pdf

- Open Notes

  - http://www.myopennotes.org/wp-content/uploads/2014/02/opennotes_toolkit_clinician_faq1.pdf

  - http://www.myopennotes.org/toolkit/writing-fully-transparent-notes/

- Katherine Hirsch, LCSW from MTM Services

  - https://ncc.expoplanner.com/files/7/SessionFilesHandouts/B5_Hirsch_1.pdf

- Scott Miller, PhD

  - http://www.scottdmiller.com/feedback-informed-treatment-fit/is-documentation-helping-or-hindering-mental-health-care-please-let-me-know/

- http://ps.psychiatryonline.org/doi/abs/10.1176/appi.ps.201100489

- http://ireta.org/2014/06/13/could-collaborative-documentation-be-the-next-big-and-effective-thing-in-behavioral-healthcare/