

Midwestern Colorado Center for Mental Health

CONCURRENT DOCUMENTATION CLIENT SATISFACTION SURVEY

In early September 2007, the Midwestern Colorado Center for Mental Health began the practice of concurrent documentation for all clinicians and case managers. This model was implemented simultaneously in all of the 4 branch offices and their respective service areas. From July 14-25, 2008, the Mental Health Center conducted an agency-wide consumer follow-up survey for concurrent documentation to ascertain its efficacy in the agency.

Follow-up Survey Process

All branch office Program Supervisors were used as the point of initiation for conducting the Follow-up Survey. Supervisors were asked to

- Explain this survey and its importance to their staff in their next staff meeting. Participating staff would include out-patient mental health therapists, case managers and substance abuse therapists who conduct individual sessions.
- Have each service provider get a rough estimate of how many consumers he or she might see over that designated 2 week period.
- Each service provider then receives sufficient copies of the survey to be kept in a convenient place in his or her office.
- At the end of each session, the provider will give a survey to the consumer to complete **BEFORE THE CLIENT LEAVES THE SESSION**. However, the consumer does not show the questionnaire results to the provider.
- The consumer is then instructed to drop the completed survey off in a box or basket at the front desk when making the next appointment. The front desk staff can store completed surveys together in a file folder or drawer. Staff providing services out of a non-main office site (like Telluride, Lake City, etc.) would be responsible to return completed surveys to the respective main office. This would insure that the agency could get as many completed surveys as possible. In this manner, the consumers do not have the chance to throw the survey away, forget to complete it, fail to return it, etc.
- Remind staff at each subsequent staff meeting about the survey and survey period.
- Survey Coordinator is available for contact if the Program Supervisor and/or staff have any questions or problems.
- After the survey period ends, please forward all completed survey to the Survey Coordinator.

Follow-up Survey Tool

Consumers were asked to answer **8** questions. The first three were simply a “Yes” or “No” answer. The remaining 5 were a rating system from 1-5 from “Not at all important” to “Extremely important” (See attached survey).

Follow-up Survey Results

The results of the survey yielded a sample of **60** consumers from 4 different branch offices. This sample included **13** males, **39** females and **8** consumers who did not answer the gender question. The results of the survey are listed below

YES/NO Questions

	<u>Yes</u>	<u>No</u>
My therapist has explained to me that, at the end of each session, we will be writing the note for our session together.	60	0
I understand why we are doing this.	56	4
My therapist answered all my questions about this.	59	1

These statistics indicate that the process of concurrent documentation has been successfully introduced and clearly explained to consumers at the Midwestern Colorado Center for Mental Health. **100%** of respondents indicated that the service provider had adequately explained the process, and **59** felt they had their questions answered satisfactorily. This remaining one reported that she simply had “no questions.” **56** respondents or **93%** reported that they understood the significance of this practice.

RATING Questions

“Taking notes about the session while I am present is important to me.”

1. Not at all important	3
2. Not very important	5
3. No opinion on importance	11
4. Somewhat important	18
5. Extremely important	23

Of the **49** consumers who expressed an opinion (Answers 1, 2, 4 and 5), **41** or **84%** reported that taking notes in the session is of some importance.

“Taking notes about the session while I am present is helpful to me in my therapy.”

- | | |
|-----------------------------|----|
| 1. Not at all important | 5 |
| 2. Not very important | 4 |
| 3. No opinion on importance | 10 |
| 4. Somewhat important | 19 |
| 5. Extremely important | 22 |

Of the **50** consumers who expressed an opinion (Answers 1, 2, 4 and 5), **41** consumers or **82%** reported that taking notes in the session is helpful in therapy.

“Going over the session with the therapist is a good use of our time.”

- | | |
|-----------------------------|----|
| 1. Not at all important | 5 |
| 2. Not very important | 3 |
| 3. No opinion on importance | 9 |
| 4. Somewhat important | 12 |
| 5. Extremely important | 31 |

Of the **51** consumers who expressed an opinion (Answers 1, 2, 4 and 5), **43** consumers or **84%** reported that reviewing the session with the therapist or other service provider is good use of session time.

“I like being able to read the notes and to comment about what is in them.”

- | | |
|-----------------------------|----|
| 1. Not at all important | 3 |
| 2. Not very important | 0 |
| 3. No opinion on importance | 8 |
| 4. Somewhat important | 16 |
| 5. Extremely important | 33 |

Of the **52** consumers who expressed an opinion (Answers 1, 2, 4 and 5), **49** consumers or **95%** reported that having the opportunity to read the session notes and be able to comment on them is important.

“I like that I know what is being recorded in my medical record.”

- | | |
|-----------------------------|----|
| 1. Not at all important | 2 |
| 2. Not very important | 1 |
| 3. No opinion on importance | 2 |
| 4. Somewhat important | 15 |
| 5. Extremely important | 40 |

Of the **58** consumers who expressed an opinion (Answers 1, 2, 4 and 5), **55** consumers or **95%** reported that knowing what is being recorded in their medical record is important.

Follow-up Survey Comments

“This was great. I feel good about this session with _____(*name of therapist*).”

“This method of doing the notes together at the end of the session is a nice summary and reinforcement of the session. It helps to insure the patient and therapist are in tune with each other.”

“It helps to have notes to see how I have progressed. It also helps the therapist with where we ended our last visit and where to go from there. I did not have someone talking about the same thing in 2 or 3 sessions.”

“Good work!”

“I would prefer to use the time in discussion.”

“If it was up to me, I really don’t think we need to write the note together.”

“The employees here are very understanding and professional. Thank you.”

“I get more help during the sessions than notes afterwards.”

“Doing really good. I am happy with _____(*name of therapist*).”

“I feel I am important with the classes.”

“_____(*name of therapist*) is a good therapist .”

“Very good treatments.”

Follow-up Survey Outcomes

Overall, these numbers point to a favorable outcome over the last 10 months of using the practice of Concurrent Documentation at the Midwestern Colorado Center for Mental Health. It appears that the agency’s service providers have taken the process of concurrent documentation seriously and have done an effective job introducing and explaining the process to consumers. A majority of consumers felt that taking notes during the session, reviewing the session and writing the session note with the service provider was of some importance, if not very important. Of more significance, consumers reported that it is very important to them to know what is being put in their medical record and more so that the consumer has some input in that recording process.

Regarding the survey comments, the quotes above are all of the comments from the survey process. While there are several remarks that are not favorable to concurrent documentation, the great majority of the comments are positive (which is also reflected in the statistics cited earlier.

One of the elements contributing to this success is that all therapists and case managers were monitored by Program Supervisors or other Management staff for a period of 3-4 months to ascertain if concurrent documentation was indeed occurring. This was achieved by monitoring the electronic case records which has a date and time stamp for service providers signing off on notes. Service Providers who initially struggled with the process were given additional support and encouragement in supervision sessions.

Another outcome is the perceived need for a concurrent documentation “Refresher Training” session. This session is targeted to be a brief (one and one-half hours) and would include service providers who began employment with the agency after last year’s CD training, and for those therapists that have not met the concurrent documentation standards and need an action plan. This training would actually be a part of the clinician’s action plan. Perhaps this refresher course could be repeated annually.

The Midwestern Colorado Center for Mental Health extends it appreciation and congratulations to the service providers and consumers for their assistance and cooperation with this follow-up survey effort!

CONCURRENT DOCUMENTATION CLIENT SATISFACTION SURVEY

Name (optional):	
Age:	Gender:
Office where you are receiving services:	

The Center recently began a new way to write the notes staff are required to write after each individual session with a therapist. We changed from writing the note after the session to writing the note at the end of the session with, you, the client present and involved. We are very interested to hear what you think of this change and ask that you complete the following survey so we may improve our services to you.

For each question below, please circle either yes or no.

Question	Yes	No
My therapist has explained to me that, at the end of each session, we will be writing the note for our session together.	Yes	No
I understand why we are doing this.	Yes	No
My therapist answered all my questions about this.	Yes	No

For each question below, circle the number that best fits your opinion on how you feel about the issue.

Question	<i>Scale of Importance</i>				
	Not at all	Not very	No Opinion	Some-what	Extremely
Taking notes about the session while I am present is important to me.	1	2	3	4	5
Taking notes about the session while I am present is helpful to me in my therapy.	1	2	3	4	5
Going over the session with the therapist is a good use of our time.	1	2	3	4	5
I like being able to read the notes and to comment about what is in them.	1	2	3	4	5
I like that I know what is being recorded in my medical record.	1	2	3	4	5

Comments:

