



## health & social services

"All of our wish lists for the last 15 years are now coming true."

**Anna Tersigni Phelan,**  
Health Records Manager  
Community Mental Health Clinic

Coyote Software Corporation provides IT consultation and software development services to workplaces that require tailor-made technology solutions.

By providing high-quality, enterprise-class, affordable software solutions we transform industries, one business at a time.

### ANOTHER COYOTE SUCCESS STORY

#### COMPANY

Community Mental Health Clinic

#### TYPE OF BUSINESS

Health & Social Services

#### NUMBER OF LOCATIONS

Nine

#### WEBSITE

[www.freespace.net/~cmhc](http://www.freespace.net/~cmhc)

#### RESULTS

- **Streamlined Workflow**  
Reduced Standardized Forms by 75%
- **Ease of Use**  
150 workers learnt the software in 2 weeks while catching up on 2 months of data retrieval
- **Rapid Data Retrieval**  
Brings real-time info instantly, quickly and efficiently. All at your fingertips
- **Responsive Developers**  
Coyote Staff listen and methodically respond

#### THE CHALLENGE

Imagine that you're the Manager of Health Information Services at a busy clinic in southern Ontario. Your job is to ensure that all health records on all clients – past, present, and future – are recorded, used and stored in ways that are (a) accurate, (b) accessible to your caregivers and (c) hidden from prying eyes.

No problem? Well, just to make it a little more interesting, imagine also that:

- Your centre has to share data among clinics in seven different cities
- You have to manage health records on thousands patients
- You have accumulated health record data for the last 38 years
- You're still running an old DOS-based health records system
- That system is inaccurate and increasingly unreliable
- You've lost data entry support staff
- Your clinic is chronically under-funded
- Your staff of over 150 is only about 30% computerized, and
- You're under pressure to comply with the Ministry's requirements for data reporting and confidentiality

Still interested in the job? Amazingly, Anna Tersigni Phelan, who faces exactly these challenges at the Community Mental Health Clinic Guelph-Wellington-Dufferin, is not only still interested in her job, she sounds positively energized when she describes the IT headaches that until recently characterized her job description.

#### THE SOLUTION

And partly, her enthusiasm stems from the fact that on May 1, 2006, her Clinic began to implement a new health care information system, Coyote CaseWorks, that was custom-tailored to solve their IT woes.

"All of our wish lists for the last 15 years are now coming true," said Ms. Phelan about the rollout of CaseWorks at the Community Mental Health Clinic. "As fond as we were of it, our old DOS-based system was just breaking down. We needed one that keeps reliable records. CaseWorks doesn't allow errors."

Reliability was just one of the factors that contributed to their decision to switch to CaseWorks. "We spent three months looking, and narrowed our search down to three potential systems, but in the end we chose CaseWorks, even though it was the most expensive of the three." Their reasons? "Partly, it was the only one that offered HL7 compliance, which we need to meet Ministry of Health standards. But mostly, it was because the Coyote Software company was so quick and

## ANOTHER COYOTE SUCCESS STORY

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### THE SOLUTION con't

willing to customize their system to meet our needs."

In fact, Ms. Phelan described that customization process as a partnership. "The software was good for caseworkers, but we needed it to understand the specific workflows of mental health caseworkers. We sent George (Evink, CaseWork's chief software engineer) every new scenario, and both he and the rest of the Coyote team were incredibly responsive. We're really pleased with the results."

### THE RESULTS

#### Streamlined workflow

Beyond the modifications to the system's main dashboards and Scheduler, tailoring the system also involved programming CaseWorks to automate – and simplify – all of the forms that the mental health clinic staff use daily. "Our number one priority is streamlining information management," said Ms. Phelan. "Before CaseWorks, we had 250 standardized forms. We're now reducing it to less than 50."

This reduction in paperwork and bureaucracy comes thanks to a key CaseWorks feature called E-Forms, which are custom entry screens that essentially streamline and digitize the collection of data into 'data-aware' forms. Implementation of the Clinic's customized E-Forms is slated for "Phase 2" of the rollout, once everyone is up to speed on the basics.

#### Ease of use

According to Ms. Phelan, another big advantage of CaseWorks is its ease of use, which she hopes will help them to catch up with their data entry. "Right now, we're two weeks to a month behind in our data flow, and we're going to real-time data entry and retrieval. CaseWorks is a front-end system that we're rolling out to all of our staff." This team of 150 includes social workers, mental health workers, psychologists, psychiatrists, nurses, early interventionists, behaviour therapists, family support workers – everyone from supervisors to support staff, all with their own CaseWorks dashboard and access.

Ease of use is important when introducing a clinic-wide system to such a large team, especially when only 30% of them were used to using computers in their daily work. As Ms. Phelan explained, "As a web-based system, the new software is very easy to learn. It has a visual calendar, an Outlook look and feel – it's very conducive to being adopted by everyone in our environment." The Clinic has invested in extensive computer and Outlook training, to prepare for the rollout of CaseWorks.

#### Rapid data retrieval

Early reports from front-line workers are that it is "very, very useful. We provide 'cradle-to-grave' service for the severely mentally ill in our community, and we really need to have casework information at our fingertips. If someone comes in and says, 'I have an appointment but I don't know with whom or when', we need a way to look it up quickly. With the new system, anyone can find the answers to questions like that immediately. And a social worker can look up anything related to his or her own caseload. That's beautiful."

#### Responsive Developers

As the Health Records Manager and "software point person" for the entire Clinic, Ms. Phelan has been involved with every phase of their transition to CaseWorks, and speaks highly of her dealings with Coyote Software Corp. "We met with George every week. We sent him charts, issues, reports, scenarios, and questions. He listens, and he remembers – he's very methodical. Everyone at Coyote has been very responsive throughout the process."

Her overall assessment? "It's very nice software. It brings us closer to being real-time and accountable. A huge help."