

# Management Information System Resource Tool for Behavioral Health Providers

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### ***About the Authors***

*BHCS* is a collaboration of four national behavioral healthcare consulting firms, offering the combined talents of clinical, operational, and financial professionals with over fifteen years experience. Nationally known and respected, *BHCS* member consultants have worked in all 50 states to assist providers, state/county/local authorities, and managed care entities with adapting to and managing in an ever-changing behavioral healthcare environment.

*BHCS* member consultants focus on operational practicalities and have an unflinching commitment to implementing solutions that work in the real world of day-to-day service delivery. With a complementary client portfolio of authorities and providers, *BHCS* member consultants appreciate the interests and challenges faced by the entire behavioral health funding, management, and delivery system.

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# **Management Information System Resource Tool**

*For Behavioral Health Providers*

The Management Information System Resource Tool is intended to be a starting point for organizations that are researching software applications with the intent of purchasing a new system or upgrading an existing system. It is designed to provide a list of software products used by behavioral health organizations that are known to the authors, a list of the functions that should be considered in purchasing a software product, and limited information about the functionality of each software product included in the list. The Tool is not intended to be a fully comprehensive listing of all software available to the behavioral healthcare industry and their functions, nor is it an endorsement (either positive or negative) of any of the products listed.

When embarking on the process of looking for a software “system/application”, it is important to understand and be able to define exactly what “system” requirements or functions are needed for your organization. Often behavioral health organizations have unique programs and services, and have funding/data requirements that may tax even the best software. Below are some basic guidelines to think about as your organization begins the process of looking for a software application.

## ***Size Matters:***

The size and complexity of your organization will have a direct impact, both on what you actually need and what you have to spend on a software application. Smaller organizations with only a few users (or programs) can limit implementation and infrastructure costs because they can operate with a few personal computers on a very small network. As an organization grows in size and complexity, more staff members need access to the software and also need software with greater functionality to perform their job duties. This requires much more information system infrastructure, more complex networking, communications between different sites, and processing power to allow multi-user scalability.

The budget ranges below are general guidelines for the types of software and their range of functionality that would be most appropriate for organizations of the stated budget size. In general, 1-4% of the organization's annual budget is a good guideline for the initial purchase price; therefore the range for a \$10 million organization to consider spending is \$100,000 to \$400,000, or \$10,000 to \$40,000 per million. Conversely, organizations should not buy software that is priced well below these general guidelines, or they risk purchasing an application that will not provide the functionality necessary to address the complexity of their organization. Organizations that are close to one end of the budget range may wish to move up or down in the recommended software, depending upon anticipated growth and other factors.

A note of caution: while it may sound optimal to move quickly to an integrated clinical record, most organization's first priority for software should be to manage billing, scheduling and staff productivity effectively. Organizations without much information system experience may be best served by implementing billing and scheduling first, with any clinical record modules implemented in a subsequent phase.

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1. **Budget Less than \$3 million.** If your organization operates on an annual budget of less than \$3 million, you most likely will be looking at a “canned” practice management software application that requires relatively lower cost and resources to implement basic billing with a few additional features. These applications give you basic functionality for very specific needs such as scheduling, basic client information (enough to bill), service recording and billing, consumer statements, and maybe some basic reports. These typically provide no business/financial functionality, (general ledger, payroll, etc.) These would need to be purchased separately.
2. **Budget of \$3 – 7 million.** An organization of this size may need additional functionality above what a practice management package can offer. These additional items could be more detailed enrollment or assessment information about the consumer, data required by state payers to earn grants or contracts, accounts receivable management, and electronic medical record/treatment planning capabilities. Again, business/finance software would most likely need to be purchased separately.
3. **Budget Over \$7 million.** Any organization operating in the behavioral healthcare field with an annual budget of \$7 million or more is large and must take a more holistic approach to their management information system needs. A large behavioral healthcare organization must have sound software applications implemented to deal with all the functions required for day-to-day operations. This would include the ability to respond to and deal with external data requirements and reporting, and the ability to produce internal management reporting to provide the necessary information for managing the organization. These system applications would not only provide the functions listed above, but also provide tools to allow an organization to obtain an electronic medical record, provide dynamic system warnings when problems occur, provide alerts indicating when action is required, etc. As a larger organization, having a fully functional and integrated management information system is the key to your success or failure in the future.

## ***Integration***

Some organizations consider buying “the best of breed” for each functional area, and then trying to link this data together in some fashion. This usually tends to be very expensive, and consumes more staff resources than might be necessary if a fully comprehensive software package was used. This approach does give the organization the best in each functional area, and with the right staffing resources, this can work well for the organization. Most behavioral healthcare organizations have limited resources, and often cannot afford the staffing to properly manage, maintain and provide training to staff for multiple software applications.

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When purchasing a fully comprehensive package, organizations need to consider what functionality they are or are not willing to give up in each area in order to achieve full integration of all their organizational processes.

## **Pricing**

Cost is always a major consideration. Once you have identified the scope of functionality your organization needs, you can begin to look at what different vendors have to offer. Many of the practice management software applications that offer a more narrow scope of functionality can be purchased “off the shelf” for a minimum investment. Obviously, the larger your organization, and the more functionality the organization desires, the larger the investment becomes. It is very important to understand how each vendor prices their product. Several vendors price their applications in pieces or “modules” such as: Clinical Module, Financial Module, Human Resource Module, etc. Other vendors may give you a “total price” for all the functions they offer, which may or may not be exactly comparable to another vendor. Other vendors will offer a price based on the number of users the organization is planning on using their system, and their “system” may or may not have all the features of another vendor’s product.

## **Implementation Resources.**

Organizations should also understand that reducing costs for appropriate implementation planning and staff training on the new system will limit the effectiveness of the system, create a poor return on the investment made in purchasing the system, and ultimately, may cause disaster. Horror stories about poorly functioning systems can often be traced to poorly planned and resourced implementations. Most reputable software vendors are very clear that part of the cost of the software includes training and assistance with implementation. It is very difficult for any organization, large or small, to use a product “out of the box” without training and thoughtful implementation. Budgeting for implementation assistance from a consultant with experience in behavioral healthcare and information technologies may be important for success for all sized organizations: from those larger organizations with high complexity to small organizations without internal information technology staff. Consultation should be used to assist with planning, training, process flow and implementation.

## **Information and Functions**

The list of functions below represents the type of information that can be captured and tracked in a system along with functionality of the software. This list is intended to provide the range of possible data and functions that may be available in software products to assist organizations with comparing products with their needs and resources. This list explains the categories included on the Product Grid.

- **Client data**
  - **Client billing data**—client information required to submit electronic or paper claims, such as name, address, identifying number, etc.

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- **Client clinical data**—includes information from an integrated clinical component of the product, such as assessment scores, treatment plan goals, or outcome data
- **Other client data**—includes fields for information that may be required or customized for submission to state payers for enrollment into publicly-funded services. Examples include Federal Block grant data, family size, and income level.
- **Scheduling**—includes ability to electronically schedule multiple clinicians
  - **Link schedule to billing**—includes an automated link between the schedule and billing once a service is confirmed.
- **Authorization tracking**—includes the ability to enter the number of units or services authorized and usage against those authorized units. Users should investigate the functionality within this area depending upon the needs of their environment. For example, if a payer authorizes 40 hours of therapy, the ability of the software to track and count down remaining service hours for purposes of monitoring usage of that authorization will vary between products.
- **Billing**—will generate a paper or HIPAA compliant electronic claim for professional services (837P). If an 837I is needed by the user for census-based services, that functionality is not included in the grid and should be researched by the user.
- **Accounts Receivable (A/R) Management**
  - Tracking Aging of Unpaid Services
  - Tracking Reasons for Denials
  - Aged Receivable Report by Payer Source
- **Reporting**
  - Basic—includes a “canned” set of reports
  - Report writer—includes a feature that allows users to design some customized reports
- **Medical record**—includes an integrated medical record component. If a product provides links to other software, such as Microsoft Word, for medical record activities, that functionality is not included in this grid.
  - **Assessment**—includes a clinical assessment with some tailoring to the agency's requirements

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- **Treatment plan**—includes a treatment plan with some tailoring to the individual agency's requirements
- **Progress/encounter notes**—includes the capacity for staff to enter progress or encounter notes after a service has been delivered
- **Compliance**—three of the most common basic compliance issues associated with billing are listed below along with potential system features that can help to address the compliance issues. These features require a product that integrates medical record and billing functions.
  - **Expired treatment plan**—produces a report and/or prevents billing when a treatment plan has expired
  - **Service on treatment plan**—prevents billing a service that is not included on a treatment plan
  - **Progress note present**—prevents billing for a service if the progress note has not been entered and “signed” by the clinician
- **Financial**
  - General ledger
  - Payroll
  - Accounts Payable
  - Financial Reporting
- **Estimated costs**—includes costs for initial purchase and annual licensing or maintenance costs. Does not include hardware or network costs.
- **Number of users**—indicates the maximum appropriate number of users. This information is not included in the grid, but should be researched by the user based on the nature of the product and operating environment. Vendors may be optimistic about the number of possible users along with the hardware needs and resulting speed of the system.

## **The Product Grid**

The grid on the following page lists what information and/or functions are available for each product based on the knowledge of the authors at the time of this publication and may include representations from vendors of these products. Each information/function area on the grid should be researched specifically by potential purchasers to ensure accuracy at the time of purchase.

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The grid is divided into two groups to indicate the nature of the software and its corresponding cost. Group A represents larger, enterprise-wide application solutions with primary markets of behavioral healthcare and human service organizations. The majority of these vendors have a long history in the field and offer full functionality across a broad spectrum of states, programs and services. Several include full integration with complete business functionality while others focus on clinical service delivery, requiring the additional purchase of business software. Generally, this group would be the target for medium to larger organizations because of the broader capabilities and higher cost. These systems require a large investment that generally starts at \$100,000 and can exceed \$150,000 to \$200,000. It is also important to remember that additional investments are required for hardware and communication equipment to implement these applications throughout the entire organization. Several offer “web-based” ASP (Application Service Provider) versions of their product. These can greatly reduce equipment and infrastructure costs for the organization. Many vendors offer financing and leasing options to reduce the “upfront” cash investment.

Vendors listed in Group B are a collection of offerings referred to as “Practice Management” products or software. These are developed with very specific functions and can be purchased off-the-shelf. Because these applications are intended to be “canned”, and are less expensive, they do not have flexibility for any customization for your organization’s specific needs. Many are based on a medical practice office-based environment adapted for behavioral healthcare. These products can range from an application designed to run on a single personal computer (single user mode) to a scalable application that can be networked and utilized by multiple users. For those that claim to be multi-user, the optimal number of users should be researched as a part of the purchase decision since many products may function poorly with a large number of users. Some of these products focus on a very specific function like billing and have no other capabilities. A number of these products are offered as a web-based ASP product that only requires a personal computer and a reliable high-speed Internet connection. Providers should be clear that the products in Group B are designed to meet specific needs, and not intended to address the multiple information system needs of an organization with a wide range of programs and services.

Information contained in the grid was obtained based on vendor-supplied information, and the authors do not warrant the accuracy of specific items on the grid. The grid is intended to offer general information about the systems, and functionality of each system should be researched and confirmed prior to purchase.

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Company	Web Address	Price Range	Client	Schedule	Auth.	Billing	A/R	Basic	State	TX	EMR	Fin.	Comments/Characteristics
			Data		Tracking		Mgmt.	Reports	Reports	Plans			

**Group A**

Anasazi Software, Inc.	<a href="http://anasazisoftware.com">anasazisoftware.com</a>	Individualized Pricing	X	X	X	X	X	X	X	X	X	X	Comprehensive Behavioral Health Application
Askesis Development Group (PsychConsult)	<a href="http://askesis.com">askesis.com</a>	Individualized Pricing	X	X	X	X	X	X	X	X	X	X	Comprehensive Clinical Operations
Defran Systems, Inc. (Evolv CS)	<a href="http://defran.com">defran.com</a>	Individualized Pricing	X	X		X	X	X					Web-Based, Human Service Application
Harmony Information Systems, Inc.	<a href="http://harmonysis.com">harmonysis.com</a>	Individualized Pricing	X	X	X	X	X	X	X	X	X	X	Web-Based, Comprehensive Behavioral Health Application
Health Care Software, Inc. (HCS)	<a href="http://hcsinteractant.com">hcsinteractant.com</a>	Individualized Pricing	X	X	X	X	X	X		X	X	X	Web-Based ASP, Client Server, Comprehensive BH App.
Lavender & Wyatt Systems, Inc. (Essentia)	<a href="http://lwsi.com">lwsi.com</a>	Individualized Pricing	X	X	X	X	X	X	X	X	X	X	Comprehensive/Fully Integrated Enterprise Application
Netsmart Technologies, Inc. (CSM- CMHC)	<a href="http://ntst.com">ntst.com</a>	Individualized Pricing	X	X	X	X	X	X	X	X	X	X	Comprehensive Behavioral Health Application
NextGen	<a href="http://nextgen.com">nextgen.com</a>	Individualized Pricing	X	X	X	X	X	X	X	X	X	X	Comprehensive Medical Service Application
Qualifacts Systems, Inc.	<a href="http://qualifacts.com">qualifacts.com</a>	Individualized Pricing	X	X	X	X	X	X	X	X	X	X	Web-Based, ASP Only
Sequest Technologies, Inc. (TIER)	<a href="http://sequest.net">sequest.net</a>	Individualized Pricing	X			X		X	X	X	X	X	"Clinical Records System"
The Echo Group	<a href="http://echoman.com">echoman.com</a>	Individualized Pricing	X	X	X	X	X	X	X	X	X	X	Comprehensive Enterprise Application
UNI/CARE Systems, Inc.	<a href="http://unicaresys.com">unicaresys.com</a>	Individualized Pricing	X	X	X	X	X	X	X	X	X	X	Comprehensive Behavioral Health Application

**Group B**

CIS (Kenneth Young/IL Only)		\$50,000 to \$60,000	X	X		X	X	X	X	X			Plus Monthly Fee \$1,000 - \$2,000
Civerex - Civer Psych	<a href="http://civerex.com">civerex.com</a>	\$1,700 per user		X	X	X		X			X		
ClaimTrak Systems, Inc.	<a href="http://claimtrak.com">claimtrak.com</a>	\$50,000	X	X	X	X	X	X		X	X		Client Server & ASP Options, Can Purchase Modules
Psych Advantage (Compulink)	<a href="http://advantagesoftware.com">advantagesoftware.com</a>	\$3,500 to \$6,500/5 user	X	X	X	X	X	X		X	X	X	Practice Management Package- Scalable
Core Solutions, Inc. (Web Care 3.0)	<a href="http://coresolutionsinc.com">coresolutionsinc.com</a>	\$36,000 for 20 users	X	X		X	X	X					Web Based Application & ASP, Focus on SA and MR
Easy Billing System	<a href="http://easybillingsoftware.com">easybillingsoftware.com</a>	\$2,148 to \$7,334	X	X		X	X	X					Billing Application Only
Esteam	<a href="http://esteam.net">esteam.net</a>	\$60,000+	X	X	X	X	X	X		X	X		Web-Based: Internally Hosted, Agencies > 8 Million Budget
EZ Claim	<a href="http://ezclaim.com">ezclaim.com</a>	<\$1,000				X	X	X					Billing Application Only
Foothold Technology, Inc. (AWARDS)	<a href="http://footholdtechnology.com">footholdtechnology.com</a>	\$1,100 to \$2,200/Mo	X	X		X	X	X		X	X	X	ASP Only, One Time Set-Up Fee \$7,500 Plus Monthly Fee
Handel Information Technologies (RiteTrack)	<a href="http://handelit.com">handelit.com</a>	\$52,500 to \$195,000	X	X	X	X		X	X	X	X		Comprehensive Human Services Product
Hill Associates Health Mngt. Systems	<a href="http://hill-associates.com">hill-associates.com</a>	\$30,000 for 3 Users	X	X	X	X	X	X		X	X		Additional Users: \$1,500 per Work Station
Intergy Practice	<a href="http://emdeonps.com">emdeonps.com</a>	Individualized Pricing	X	X	X	X	X	X		X	X		PM: Priced by Provider Drs. \$12,500, Others \$1,000 Each
Inventive Software Solutions	<a href="http://inventivesoftware.net">inventivesoftware.net</a>	Not available	X		X	X	X	X					Focus on Custom Design and Development
Kaleidacare	<a href="http://kaleidacare.com">kaleidacare.com</a>	\$400/mo for 50 users	X	X		X		X			X		ASP Only, Focus on Care Management, Set-up Fee \$3,500
LYTECS	<a href="http://completemedicalbilling.com">completemedicalbilling.com</a>	\$5,000 to \$20,000	X	X	X	X		X					Small Medical Practice Software
Med Ware	<a href="http://medware.com">medware.com</a>	\$2,500		X	X	X					X		Practice Management App./Small Practice, not Scalable
MedAssist	<a href="http://inservio.com">inservio.com</a>	\$4,800 single user	X	X		X	X	X		X			Practice Management Application: \$6,400 up to 99 users
Medez (Integrated Software Solutions)	<a href="http://emedez.com">emedez.com</a>	\$10,000 for 5 users	X	X		X	X	X					Have Behavioral Health Specific Product
NDC Medisoft	<a href="http://completemedicalbilling.com">completemedicalbilling.com</a>	\$1,074 to \$7,798	X	X		X		X					Medical Practice Management Application
Misys Healthcare Systems	<a href="http://misyshealthcaresystems.com">misyshealthcaresystems.com</a>	\$15,000/Initial Single Provider	X	X	X	X	X	X					Practice Mgmt. Application: Individual Pricing Single Provider

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			Data		Tracking	Mgmt.	Reports	Reports	Plans				
MS* Health Software	<a href="http://mshealth.com">mshealth.com</a>	\$11,495 to \$69,995	X	X	X	X	X	X		X	X		Client Server Based, Only Behavioral Health
Payerpath, Inc.	<a href="http://payerpath.com">payerpath.com</a>	\$49/per Mo/Per Provider				X	X	X					Web-Based ASP Clearinghouse with Billing & Claims Mgmt.
Practice Management Technologies	<a href="http://pmtechweb.com">pmtechweb.com</a>	\$12,000 to \$14,000 for 10 users	X	X	X	X	X	X		X	X		Michigan Only:Larger users (CMH: \$125,000)
PsyTech Solutions, Inc. (Epitomax)	<a href="http://psytechsolutions.net">psytechsolutions.net</a>	25-50 Users/\$2,000-\$3,000/Mo	X	X		X		X		X			Web-Based ASP or Installed on your Own Server
Raintree Systems, Inc.	<a href="http://raintreeinc.com">raintreeinc.com</a>	Not available	X	X		X	X	X		X	X		Web-Based, ASP or Installed on your Own Server
ScerIS, Inc.	<a href="http://sceris.com">sceris.com</a>	\$4,000 to 100,000	X					X		X	X		EMR: Document Management:Pricing on concurrent users
Shrink Rapt	<a href="http://shrinkrapt.com">shrinkrapt.com</a>	\$635 to \$1,035	X		X	X	X	X					Small Therapists Practice Application
SOS Software (Synergistic Office Solutions)	<a href="http://sosoft.com">sosoft.com</a>	\$2,963 to \$32,105	X		X	X	X	X		X	X		Medical Practice Management Application
SSIMED	<a href="http://ssimed.com">ssimed.com</a>	\$7,000 for single provider	X	X	X	X	X	X		X	X		Practice Management App.: \$3,000 per Service Provider FTE
The CIMS Group, Inc. (ChartEvolve)	<a href="http://theclimsgroup.com">theclimsgroup.com</a>	\$499 to \$1,200 per user per year	X	X	X	X	X	X	X	X	X		Comprehensive Behavioral Health Solution
Teresa Pickering (IL)		\$12,000 to \$21,000	X			X	X			X			Illinois Application

**Key:**

Auth. Tracking--Authorization tracking

A/R Mgmt--Accounts Receivable Management

TX Plans--Treatment Plans

EMR--Electronic Medical Record

Fin--Financial records, general ledger, etc.