CANS AND COLLABORATIVE DOCUMENTATION

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WHAT IS COLLABORATIVE DOCUMENTATION?

- Completing the CANS, Progress Notes/Session Notes, Safety Plan, Assessments, Treatment Plans and other documentation in collaboration with the child and/family.

- CD is a clinical tool that provides kids and families with the opportunity to provide their input and perspective of services and progress, and allows kids/families and providers the opportunity to clarify their understanding of important issues and focus on outcomes.
Collaborative Documentation- Why Now?

- Employee Engagement Survey- Work Life Balance
- Times are changing- more kiddos, higher case loads with the same revenue....
- Increased scrutiny on documentation timeliness
- Increased scrutiny on targeted interventions and outcomes
**Benefits of Collaborative Documentation**

- **Work/Life balance**: Direct service staff completes documentation in the visit or meeting in real time.
  - No documentation once the visit/meeting is complete.
  - Documentation is completed by the end of the workday - direct service staff do not have to worry about completing documentation after hours or on the weekend - "No homework".
  - Documentation is always caught up.
  - Positive outcomes - employee and kiddo/family sense of accomplishment.

- Increases the ability for the direct service staff to spend 2-7 hours per week delivering services.
BENEFITS OF COLLABORATIVE DOCUMENTATION

- Provides Person Centered Care
  - The family is further integrated into treatment
  - The child/family is on the same page about what occurred during the visit
  - The plan for after the visit is clarified and both parties are on the same page
  - Ensures voice and choice in all documentation. Both the family and clinician have a shared understanding of what is going to occur in treatment
Creating the Space for Change - Change Management

- Huge culture shift
- Requires behavior change
- Begin from day 1
- Director/Manage buy-in is key
- Identifying from the beginning potential early adopters, etc.
IMPLEMENTATION OF CD

Change Management

From the beginning

The agency model-

Beginning

Targets experience
Ambivalence (want vs. fear)

Targets Need
- Reorientation
- Short-term goals
- Risk-taking (Support to move beyond comfort zone)

Neutral Zone

Targets experience
Anxiety, low motivation, overwhelmed, confused

Targets need
- 2-way communication
- Involvement
- Nurturing of creativity
- Refined systems/roles

Ending

Targets experience
Sense of loss & grieving

Targets need:
- Detailed description of the change
- Identification of who is losing what
- Open discussions regarding the change
- Empathy

Increase Readiness
IMPLEMENTATION OF CD

Testing and Planning

- Work with IT to enhance technology to meet the needs of a successful Collaborative Documentation implementation

- Meet with Director/Managers to discuss and plan the implementation- start the change management process

- Choose individuals to test technology

- Train the testers, AD and CPM on CD.
IMPLEMENTATION OF CD

- Find the bugs and fix them

- Gather the needed IT information in order to distribute
  - Need list of employees to be included in the initial implementation
  - Identify if any of them don’t have equipment
  - Identify those who use their technology in the field, which do not. For those that do not, why?
  - What support is needed – training versus troubleshooting and technical solutions
IMPLEMENTATION OF CD

Training and Sustaining
- Outfit the team with the needed technology enhancements
- Train staff
- Monitor the implementation on-going- using reports and metrics to supervise
- Structured Supervision
QUESTIONS?

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