

**Clinical Management for Behavioral Health Services (CMBHS)
Beta Release Rollout Plan (BRRP)**

This is an outline of the CMBHS beta release rollout to seven (7) pilot sites. The plan addresses rollout team activities, pre-rollout user readiness, training design, training materials development, end user training, user support and pilot close-out.

Rollout Plan Outline

1. CMBHS BRRP Team

a. Team Members

i. Project Manager

1. David Speegle
2. Role and responsibilities (for the BRRP)
 - a. Approve CMBHS BRRP
 - b. Direct BRRP
 - c. Coordinate resources
 - d. Liaison with DSHS MHSA Senior leadership regarding resource issues

ii. Rollout Plan Coordinator

1. Doug Hancock
2. Role and responsibilities
 - a. Design rollout plan
 - b. Monitor plan progress
 - c. Advise Project Manager of resource issues
 - d. Arrange weekly pilot-users teleconferences
 - e. Report progress to CMBHS Project Manager
 - f. Liaison with DSHS MHSA Senior leadership

iii. Chief Training and Support

1. Glenn Richardson
2. Role and responsibilities
 - a. Lead and coordinate 4 member training team
 - i. Delegate and distribute tasks
 - b. Lead training design development
 - c. Approve training design
 - d. Lead curriculum development
 - e. Train trainers
 - f. Arrange for training location and materials
 - g. Liaison with Focus Group
 - h. Participate in pilot-users teleconferences
 - i. Report progress and problems to Rollout Plan Coordinator and Project Manager

iv. Online Help Developer

1. ~~Sue Michalski~~
 - a. Replaced by James Goolsby, then Terri Washington ~2/1/08
2. Role and responsibilities
 - a. Develop online help screens

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- b. Solicit input and feedback from BRRP team
 - c. Participate in pilot-users teleconferences for online help feedback
- v. Chief Technical Architect
 - 1. Debabrata Mitra
 - 2. Role and Responsibilities
 - a. Provide BRRP team with CMBHS technical requirements that may affect training or support activities.
 - b. Identify CMBHS “single points of failure” so trainers/support staff can communicate same to pilot users
 - i. Coordinate with server operation and support team (Team Texas) to ensure user support staff are notified of outages affecting pilot users
 - c. Ensure training staff have access to the CMBHS beta release no later than 10/10/07
 - i. Trainers need software to become familiar with content and function and develop training screen shots, etc.
 - d. Receive and respond feedback from BRRP team regarding technical concerns
 - e. Participate in pilot-users weekly teleconferences
- vi. Stakeholder Liaison
 - 1. Kevin Davis
 - 2. Role and Responsibilities
 - a. Represent stakeholder users needs and desires in training plan
 - b. Act as a resource for training staff for curriculum development and content
 - c. Review training plan with Focus Group
 - d. Liaison with Senior MSHA Leadership regarding stakeholders’ issues.

2. Define BRRP Mission

- a. BRRP Problem Statement
 - i. The CMBHS software has not been tested in the user environment for an evaluation of technical, administrative and clinical content functionality prior to a full deployment in ~~2008~~ **2009** (*changed to January 2009 when pilot start date was delayed by 6 weeks.*)
- b. Define BRRP Mission and Scope
 - i. The mission BRRP is to rollout the CMBHS Beta software to 7 pilot sites, then design, deploy and evaluate user access and training processes and providing a teleconference process for stakeholder feedback in preparation for CMBHS full deployment in ~~2008~~ **2009** (*see 2.a above*).

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- c. Goals
 - i. Define Objectives
 - 1. Arrange access for 1-3 users at 7 external pilot sites.
 - 2. Arrange access for various users within MHPA central office.
 - 3. Train pilot users.
 - 4. Support pilot users
 - 5. Evaluate training.
 - 6. Test effectiveness of CMBHS help screens
 - 7. Test technical functionality
 - 8. Test administrative functionality
 - a. Set-up provider
 - b. Set-up location
 - c. Set-up staff security
 - 9. Test clinical functions on 30 cases per pilot site (*Note: Changed to 20 cases documented thru discharge when pilot extended 8 weeks thru 6/15/08. -DBH*)
 - a. Create client record
 - b. Search client record
 - c. Conduct screening
 - d. Conduct assessment
 - e. Development treatment plan
 - f. Admission
 - g. Create and end service
 - h. Enter progress notes
 - i. Administrative notes
 - ii. Group notes
 - iii. TIMA notes
 - i. Discharge documentation
 - j. Clinician workspace
 - k. Client workspace
 - 10. Collect pilot user feedback via Focus Group sponsored teleconference
 - 11. Prepare post-pilot report
 - a. User satisfaction
 - b. Commendations
 - c. Recommendations
3. **Key Assumptions** (critical factors appear in *italics*)
 - a. *A pre-pilot version of CMBHS Beta is available to training staff no later than 10/10/07 (Failed: Beta version release delayed until January 14, 2008 to complete online help and fix several functional problems including “debugging.”)*
 - b. *CMBHS Beta is complete and operational before 11/1/07 (Failed: Beta version release delayed until January 14, 2008 to complete online help and fix several functional problems including “debugging.”)*
 - c. *Rollout budget is adequate*

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- d. *There are sufficient personnel available for rollout activities*
 - e. CMBHS product supports existing policy, regulations and clinical practice
 - f. *CMBHS training plan is completed before 11/1/07* (**Failed: Beta version release delayed until January 14, 2008 to complete online help and fix several functional problems including “debugging.”**)
 - g. *CMBHS online help will be complete and operational before 11/1/07.* (**Failed: Beta version release delayed until January 14, 2008 to complete online help and fix several functional problems including “debugging.”**)
 - h. *DSHS IT and Team Texas will provide adequate server environment and support*
 - i. Server capacity will be adequate for user volume (estimated at >13,000 users)
 - ii. Server availability will be maintained at 99.9%
 - iii. Network security will meet HIPAA requirements
 - i. *DSHS and MHSA Senior Leadership project support*
 - i. MHSA senior leadership will ensure budget approval and expenditure processing do not become barriers to BRRP schedule and timeframes.
 - j. *Pilot sites are willing participants*
 - i. Community Mental Health Centers (CMHC)
 - 1. Lubbock Regional MHMR Center, Lubbock
 - 2. Tarrant County MHMR, Fort Worth
 - 3. Helen Farabee regional MHMR Centers
 - ii. Substance Abuse Providers (SAP)
 - 1. Amarillo Council on Alcoholism and Drug Abuse, Amarillo
 - 2. Managed Care Center for Addictive/Other Disorders, Inc., Lubbock
 - 3. Recovery Resource Council, Fort Worth
 - iii. Behavioral Health Organization Providers (BHOP)
 - 1. Lakes Regional MHMR, Terrell for Value Options/NorthSTAR
 - k. *Pilot sites understand and are willing to do “dual entry” during pilot by entering data both into their local system(s) and CMBHS-Beta.*
 - l. *“Data exchange” feature will not be included in the CMBHS-Beta pilot*
 - m. *Pilot site technology will support application*
 - i. Workstation
 - 1. There will be sufficient number of workstations at pilot sites for CMBHS beta release users
 - 2. Local workstations meet minimum specifications for CMBHS
 - ii. Local Network
 - 1. There will be sufficient drops for CMBHS users
 - 2. Bandwidth at pilot sites will be adequate to support multiple simultaneous users
4. **Risks and Constraints** (Critical factors appear in *italics*)

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- a. *Resources acquisition is contingent on prompt budget and purchase approval*
 - b. *Limited involvement of end-users during product development*
 - c. Local technology environment inadequate to support CMBHS
 - i. Inadequate number of workstations for target users
 - ii. workstation may not meet minimum specs to run CMBHS
 - iii. Local network bandwidth insufficient
 - iv. Local network availability below 99.9%
 - d. *DSHS IT server capacity and availability*
5. **Alignment with Communication Plan** (CP)
- a. The BRRP will employ existing communication systems and processes established in the CP.
 - i. The BRRP will depend on the CP as a mechanism to provide pre-rollout announcement to ensure local user and site readiness.
6. **Identify Milestones**
- a. BRRP team selected
 - b. BRRP outline developed
 - c. Project Manager approves BRRP outline
 - d. Pilot sites selected
 - i. Pilot sites notified
 - ii. Pilot sites agree to participate
 - e. Online Help completed and available in CMBHS Beta
 - f. Pre-pilot version of CMBHS Beta provided to BRRP Team
 - g. CMBHS Beta completed and approved for release 10/27/07
 - h. Trainers trained
 - i. Training curriculum developed specific to 3 user types
 - i. MH
 - ii. SA
 - iii. BHO - NorthSTAR
 - j. Training equipment acquired
 - k. Training site secured
 - i. Austin State Hospital Computer Lab
 - l. Training Dates scheduled
 - m. Training completed
 - n. Local sites register users
 - o. CMBHS pilot-user support established
 - p. In-pilot user teleconferences conducted
 - q. Post rollout evaluation
 - r. Close out report to project manager
7. **Status Reports**
- a. Routine status reports will be provided weekly to the project manager on Friday afternoons.
 - b. Additional status reports will be provided on request
 - c. Closeout report completed in March 2008.
8. **Pilot sites Technology Environment Requirements**

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- a. Communicate minimum workstation technical requirements
 - i. User workstation
 - 1. 400 MHz Pentium processor
 - 2. 512 MB RAM
 - 3. Windows 2000 or XP
 - 4. 15" Super VGA (800 x 600) or higher resolution monitor
 - 5. Internet Explorer 6.0 or higher
 - ii. High-speed Internet connection
- 9. User Training**
- a. Obtain pre-pilot version of CMBHS Beta for training staff
 - i. Training staff review software functionality
 - 1. Administrative functions
 - 2. Clinical functions
 - 3. Screen navigation
 - 4. Online help
 - b. Develop Beta Release Training Plan
 - i. Develop classroom curriculum outline per user type
 - 1. MH
 - 2. SA
 - 3. BHO
 - a. Discuss specific training needs with NorthSTAR trainer Holly Brock
 - ~~4. MHSA C.O. Users~~ *Removed as a pilot activity on 11/9/08 –DBH*
It was later decided to offer this training to the MHSA C.O. Staff as classroom overview, but not "hands-on" training like users received. - DBH
 - ii. Online user help screens
 - 1. Write user help for individual CMBHS screens and functions
 - 2. Review online help screens and text
 - a. Focus group
 - b. Training team
 - 3. Revise help screens as needed
 - 4. Install in CMBHS Beta
- c. Obtain Focus Group feedback on curriculum
 - i. Modify curriculum as needed
- d. Train the trainers
- e. Develop classroom training materials
 - i. Develop training agenda
 - ii. Develop PowerPoint Trainer Slides
 - iii. Develop PowerPoint User Slides specific to user group
 - 1. MH
 - 2. SA
 - 3. BHO
 - a. BHO training will be a "train the trainer" approach

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- b. NorthSTAR trainer will receive training in both MH and SA classes
- 4. ~~MHSA C.O. Users~~ *Removed as a pilot activity on 11/9/08 –DBH*
It was later decided to offer this training to the MHSA C.O. Staff as classroom overview, but not “hands-on” training like users received. -DBH
- f. Develop training evaluation form
 - i. Model after BHIPS training evaluation
- g. Arrange for printing of classroom hardcopy materials
 - i. Determine quantities needed
 - 1. See #9.I.i.3.b below for external users class size
 - 2. See #9.I.ii.3 below for external users class size
 - ii. Documents needed
 - 1. Agenda
 - 2. Screen print handouts
 - 3. Evaluation form
- h. Determine equipment needed for training
 - i. 30 Laptop computers
 - ii. Wireless router
 - iii. Internet access for 30+
 - iv. 2 In-Focus projector
 - v. 2 screens
 - vi. 2 laser pointer
 - vii. audio equipment
- i. Acquire equipment
- j. Test equipment
- k. Acquire and reserve training room
 - i. Austin State Hospital Building 636 Training Room
- l. Schedule Training
 - i. Pilot sites
 - 1. ~~Week of November 26-30~~ *(Pilot start date delayed. Training conducted on January 8 & 9.)*
 - 2. Notify pilot sites
 - a. provide specific dates
 - b. Suggest travel and accommodations
 - 3. Request names and number of trainees per pilot site
 - a. Request to be notified of any cancellations one week prior to training date.
 - b. Determine total number of persons to be trained
 - ii. ~~MHSA C.O. Users~~ *Removed as a pilot activity on 11/9/08 –DBH*
It was later decided to offer this training to the MHSA C.O. Staff as classroom overview, but not “hands-on” training like users received. -DBH
 - 1. ~~Early January 2008~~
 - 2. ~~Names and numbers per MHSA unit~~
 - 3. ~~Determine class size and number of classes needed~~
- m. Set-up classroom

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- i. Configure classroom router and Internet access for class size of 30
- n. Conduct Training

10. Develop Pilot User Phone Support Team

- a. Identify phone support staff
 - i. User support Coordinator
 - 1. Glenn Richardson
 - ii. Support staff
 - 1. Same as training staff
- b. Design support system after BHIPS support plan
 - i. Determine “helpdesk” software system to be used to track support calls during pilot
 - ii. Log all support calls and responses
 - 1. Ensure log design allows for calculation of the number of calls and responses in the following categories
 - a. User type
 - i. SA
 - ii. MH
 - iii. Local CMBHS administrator
 - b. Each of the 7 pilot sites
 - c. Type of support
 - i. access and logon
 - 1. administrator
 - 2. role issues
 - ii. clinical functionality
 - 1. Create client record
 - 2. Conduct screening
 - 3. Conduct assessment
 - 4. Development treatment plan
 - 5. Enter progress notes
 - 6. Discharge documentation
- c. Identify support equipment needs
 - i. 4-5 pagers
 - ii. Computer access
 - iii. Phone access
 - iv. “helpdesk” software access
- d. Acquire needed support equipment
- e. Train support staff
- f. Notify pilot sites how to contact user support staff

11. Pilot Support Teleconferences

- a. Sponsored jointly by the Training and Support Team and Focus Group
 - i. Teleconference structure
 - 1. One-hour ComNet meetings in 3-130
 - 2. Meeting announcement with dates and format will be sent to pilot participants

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3. Meetings will be managed, structured and carefully moderated to avoid open-forum and off-topic discussions
 - a. Rollout Plan Coordinator will moderate meetings
 - b. Project Manager will serve as back-up
 4. Standing agenda will be developed
 - a. New agenda items submitted prior to meeting
 - b. Develop agenda item form to include specifics of issue (suggested):
 - i. Pilot Site
 - ii. User name
 - iii. User role
 - iv. Workstation specs
 - v. Problem Type
 1. Technical functionality
 2. Administrator functions
 3. Clinical functionality
 - vi. Specific function causing problem
 - vii. Date problem started
 - viii. Description of problem
- b. 60 minute meetings held Friday mornings starting on 12/7/07. *(Actual start date was 1/18/08 due to delayed pilot start date. Additional meetings were scheduled as a result of the 8 week pilot extension. -DBH)*
- i. ~~December~~ *(January)* meetings will be weekly except Christmas week.
 1. ~~12/7, 14 & 21~~
 2. 1/18 & 25
 - ii. ~~January & February~~ *(February, March, April, May & June)* meetings will be held ~~very other week~~ *on:*
 1. ~~1/11 & 25~~
 2. ~~2/8 & 22~~
 3. 2/1 & 8
 4. 3/7 & 20
 5. 4/4 & 18
 6. 5/2, 16 & 30
 7. 6/6 & 13
- c. Participants
- i. Focus Group Members
 - ii. Project Manager
 - iii. Chief Technical Architect
 - iv. Chief Trainer and training/support staff
 - v. Online Help Developer
 - vi. Pilot site users and technical staff

12. Post Rollout Evaluation

- a. Develop Evaluation Survey to get feedback on CMBHS user experience and rollout process:

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- i. Paper or online? **Online.**
- ii. Distribute Evaluation to pilot users
- iii. Collect and Compile Results
- iv. Evaluate Overall Survey Results
 - 1. Overall Customer Satisfaction
 - 2. Overall Commendations
 - 3. Overall Recommendations
- v. Evaluate Survey Results by Customer Group
 - 1. MH Providers
 - a. Satisfaction
 - b. Commendations
 - c. Recommendations
 - 2. SA providers
 - a. Satisfaction
 - b. Commendations
 - c. Recommendations
 - ~~3. BHOP~~ *The STRS Evaluation data will only be divided into two groups: MH and SA. -DBH, 6/26/08*
 - ~~a. Satisfaction~~
 - ~~b. Commendations~~
 - ~~c. Recommendations~~
 - ~~4. MHSA A&S~~ *Removed as a pilot activity on 11/9/08 -DBH*
 - ~~a. Satisfaction~~
 - ~~b. Commendations~~
 - ~~c. Recommendations~~

13. Closeout

- a. Prepare Closeout Report for Project Manager
 - i. Use responses from #12.a.iv-v above
 - ii. Include "Lessons Learned"
- b. Close out celebration

Submitted on October 11, 2007 by:

Doug Hancock
CMBHS Clinical Consultant



X Reviewed and Approved ___ Reviewed and NOT Approved

Comments:

None

Appendix A

**Clinical Management for Behavioral Health Services (CMBHS)
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(Copy with original signature on file)
David Speegle, CMBHS Project Manager

10/18/07
Date