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PRC Providers' Resource Center
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*Providers Growingly Concerned About EHR Functionalities & The Technologies Needs For Future Service Delivery & Reimbursement:*
**Top EHR Trends From The 2021 *OPEN MINDS* National Behavioral Health EHR Survey**

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# Agenda

I. Introductions

II. Key Findings Of The 2021 *OPEN MINDS* National Behavioral Health Survey

III. Trends In EHR Functionality

IV. Future Planning

V. Questions & Discussion

# II. Key Findings From The 2021 *OPEN MINDS* National Behavioral Health EHR Survey

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# Survey Objectives & Overview

The 2021 *OPEN MINDS* National Behavioral Health EHR Survey was conducted to understand the current behavioral health EHR market and gain insight on the current and future technology needs of behavioral health and human services provider organizations.

The survey was distributed via e-mail to 8,000+ behavioral health provider organizations over the course of two months. Follow-up calls were conducted for each unique contact.

Response collection ended on September 24, 2021.

# Definitions

**Large Provider Organizations** – Those provider organizations making $5M+ in revenue with 75+ employees

**Small Provider Organizations** – Those provider organizations making less than $5M (ideally $1-5M) with less than 10 employees

**The Core 4 Functionalities** – the four core functionalities of an EHR system defined as clinical, scheduling, billing, and reporting and analytics — all of which are necessary to remain competitive in the health and human services industry

# Key Findings From Behavioral Health Provider Organizations
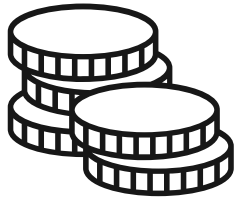
## 1
- A quarter of provider organizations plan to purchase an EHR soon
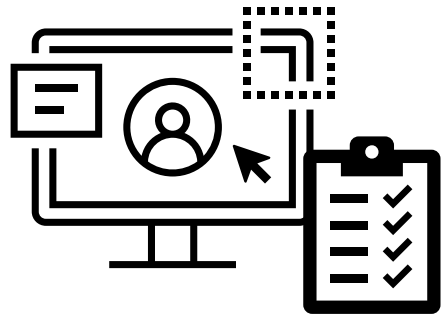
## 2
- The majority of provider organizations report their EHR is fully implemented

## 3
- Concerns around implementation challenges are growing among provider organizations
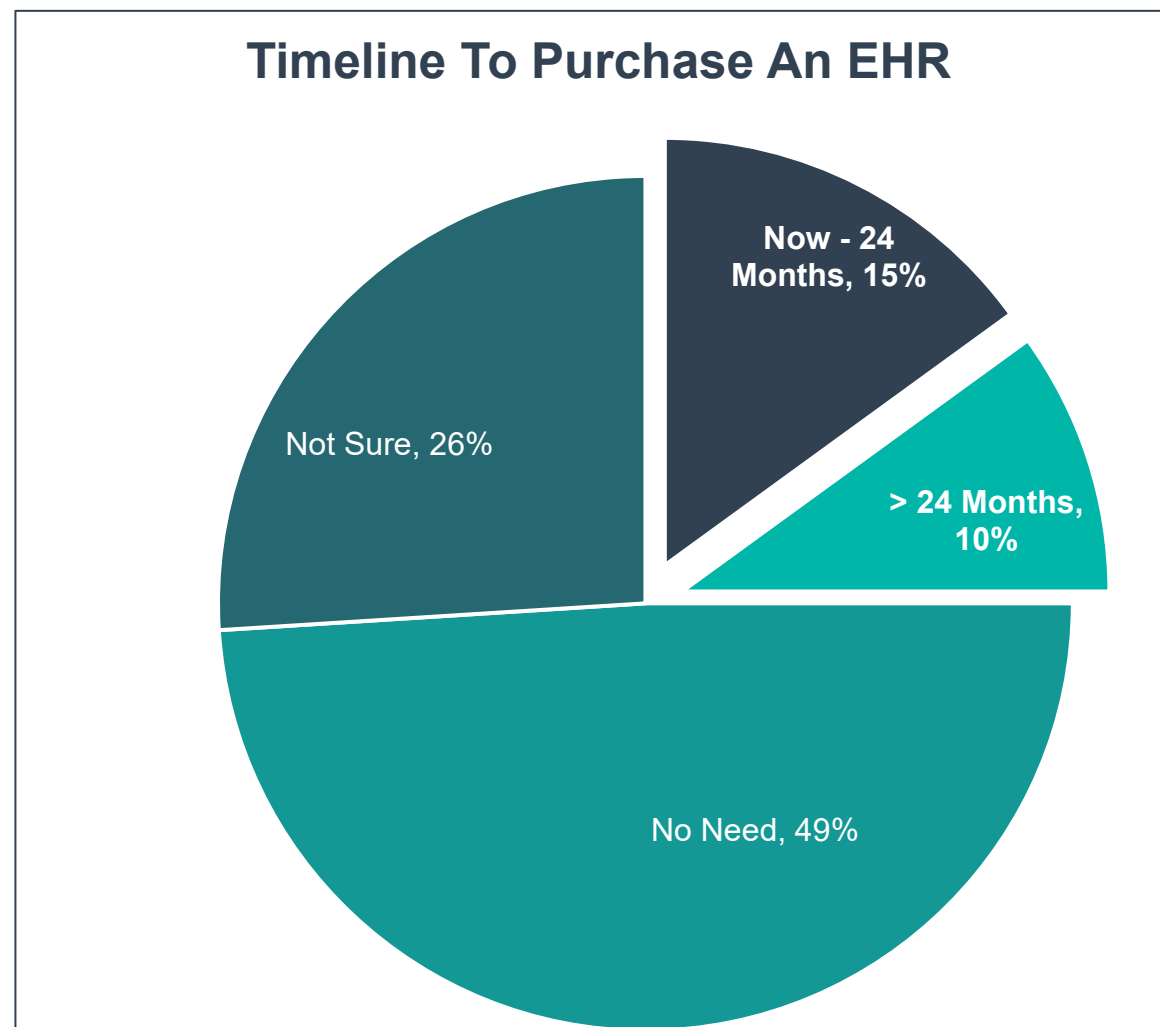
## 4
- Provider organizations report EHR functionalities are not meeting their needs

# 1. A Quarter Of Provider Organizations Plan To Purchase An EHR Soon

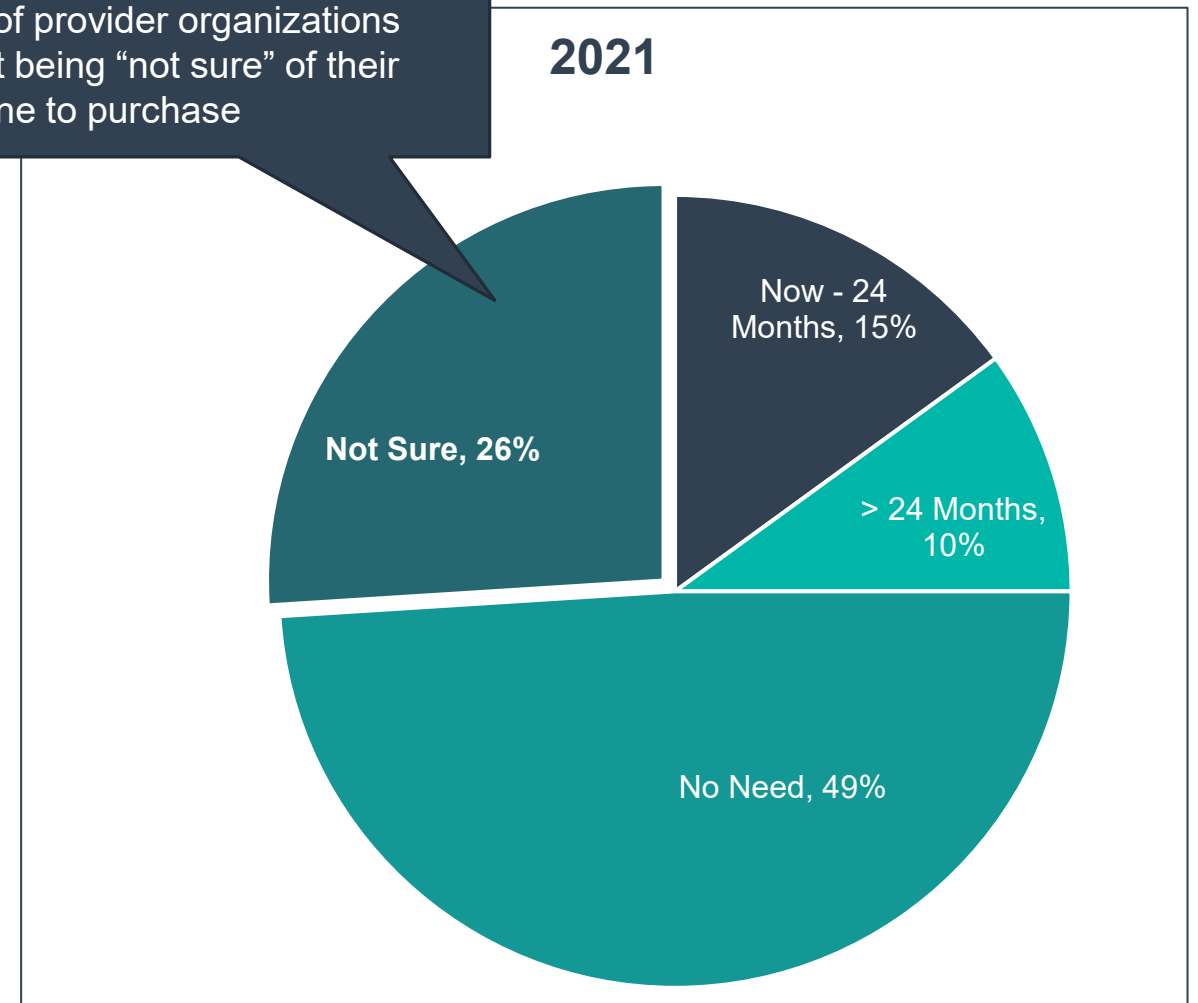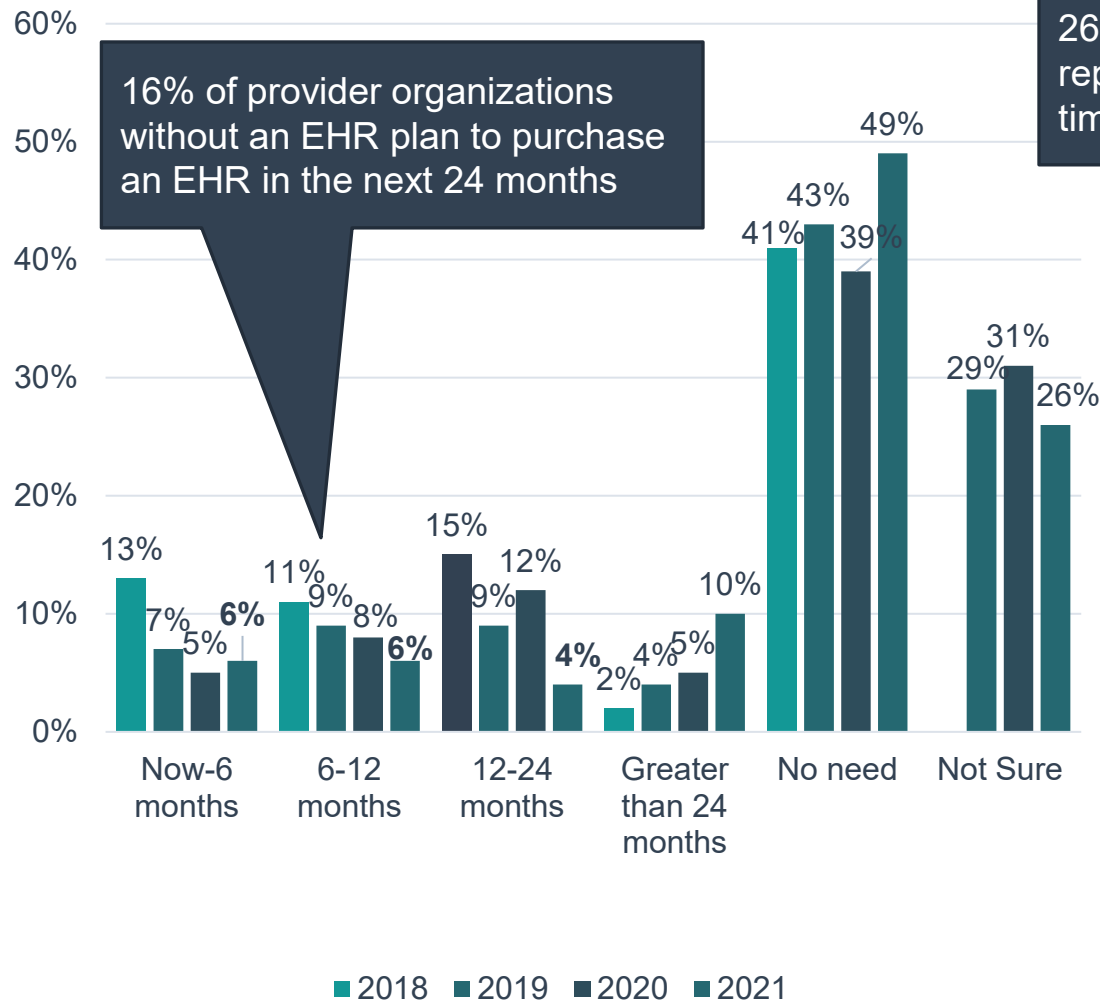# 1. A Quarter Of Provider Organizations Plan To Purchase An EHR Soon

- **16%** of provider organizations without an EHR plan to purchase an EHR in the next 24 months

- **21%** of those who've had their EHR for 6+ years are looking for or currently switching EHRs

**Timeline To Purchase An EHR**

Now - 24 Months, 15%

> 24 Months, 10%

No Need, 49%

Not Sure, 26%

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**Reasons Organizations Have Not Purchased An EHR, 2016-2021**

Consistent with previous years, most organizations have not purchased an EHR due to perceived expense, followed closely by no need

| | Limited time | Too expensive | No need | Implementation challenges and concerns | Purchasing new EHR | EHR provided by state | In-house system | Other |
|---|---|---|---|---|---|---|---|---|
| 2016 | 8% | 29% | 24% | 0% | | | | 39% |
| 2017 | 7% | 20% | 35% | 8% | | | | 29% |
| 2018 | 5% | 44% | 22% | 18% | 18% | 16% | 20% | 36% |
| 2019 | 0% | 27% | 23% | 20% | 20% | 16% | 21% | 13% |
| 2020 | 2% | 27% | 21% | 4% | | | 21% | 11% |
| 2021 | 4% | 26% | 25% | 25% | 8% | 8% | 21% | 21% |

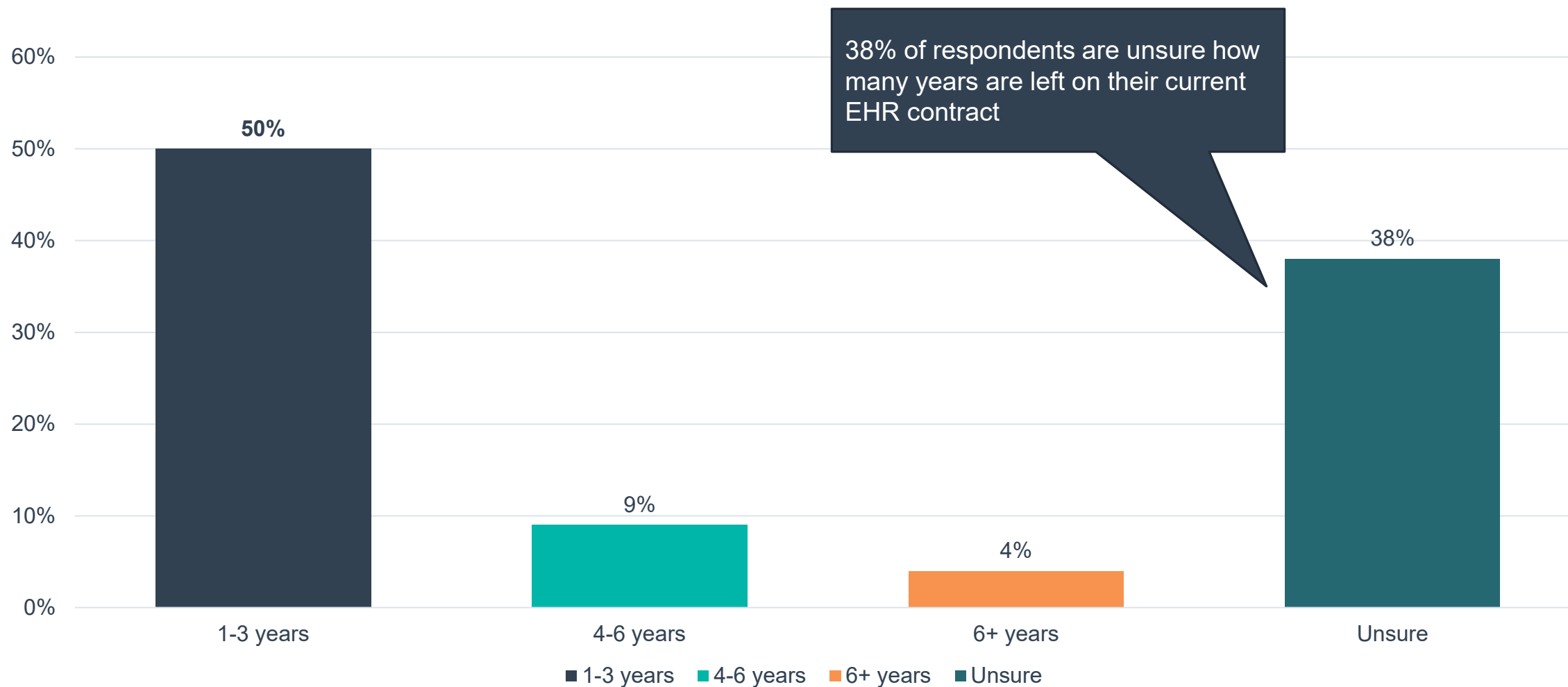# Timeline To Purchase An EHR For Those Organizations Without An EHR Or Those Who Say They Are Planning To Purchase, 2018-2021



16% of provider organizations without an EHR plan to purchase an EHR in the next 24 months

26% of provider organizations report being "not sure" of their timeline to purchase

2021

Not Sure, 26%

Now - 24 Months, 15%

> 24 Months, 10%

No Need, 49%

2018  2019  2020  2021

# 21% Of Provider Organizations That Have Had Their EHR For 6+ Years Are Currently Looking Or Switching EHRs
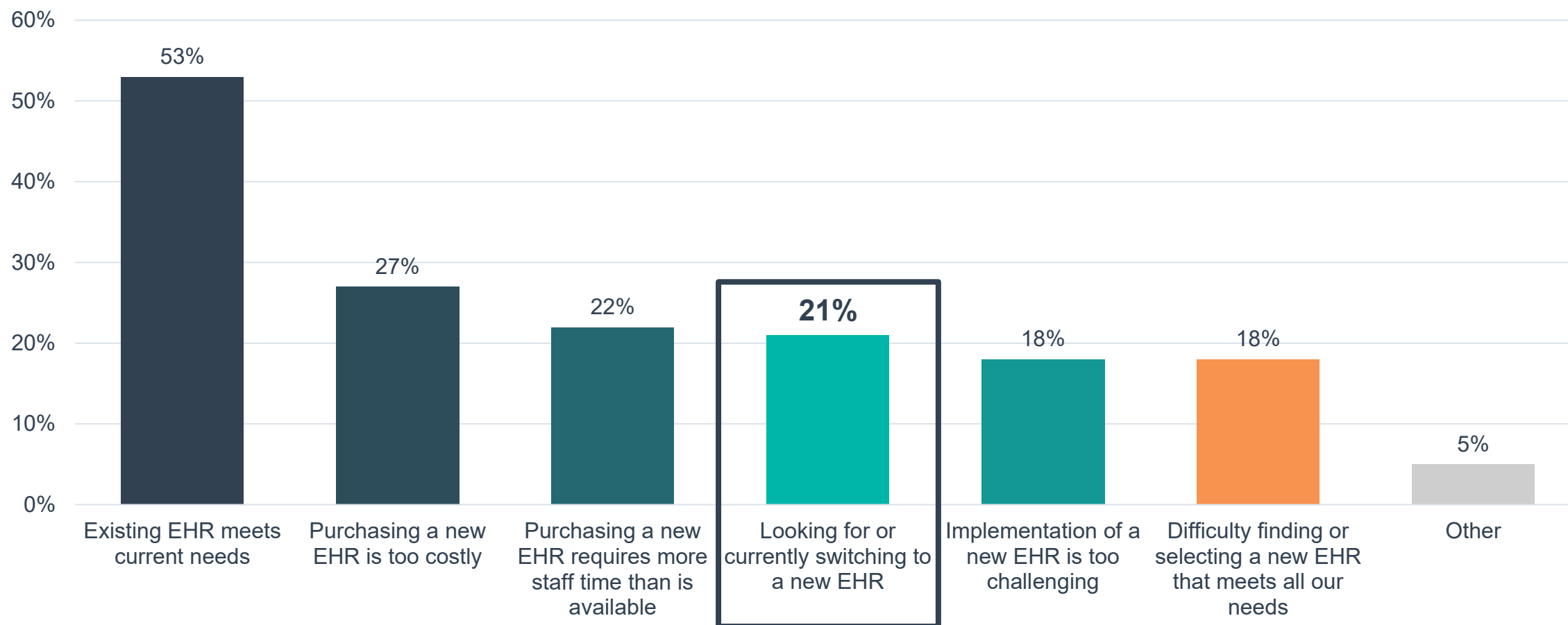


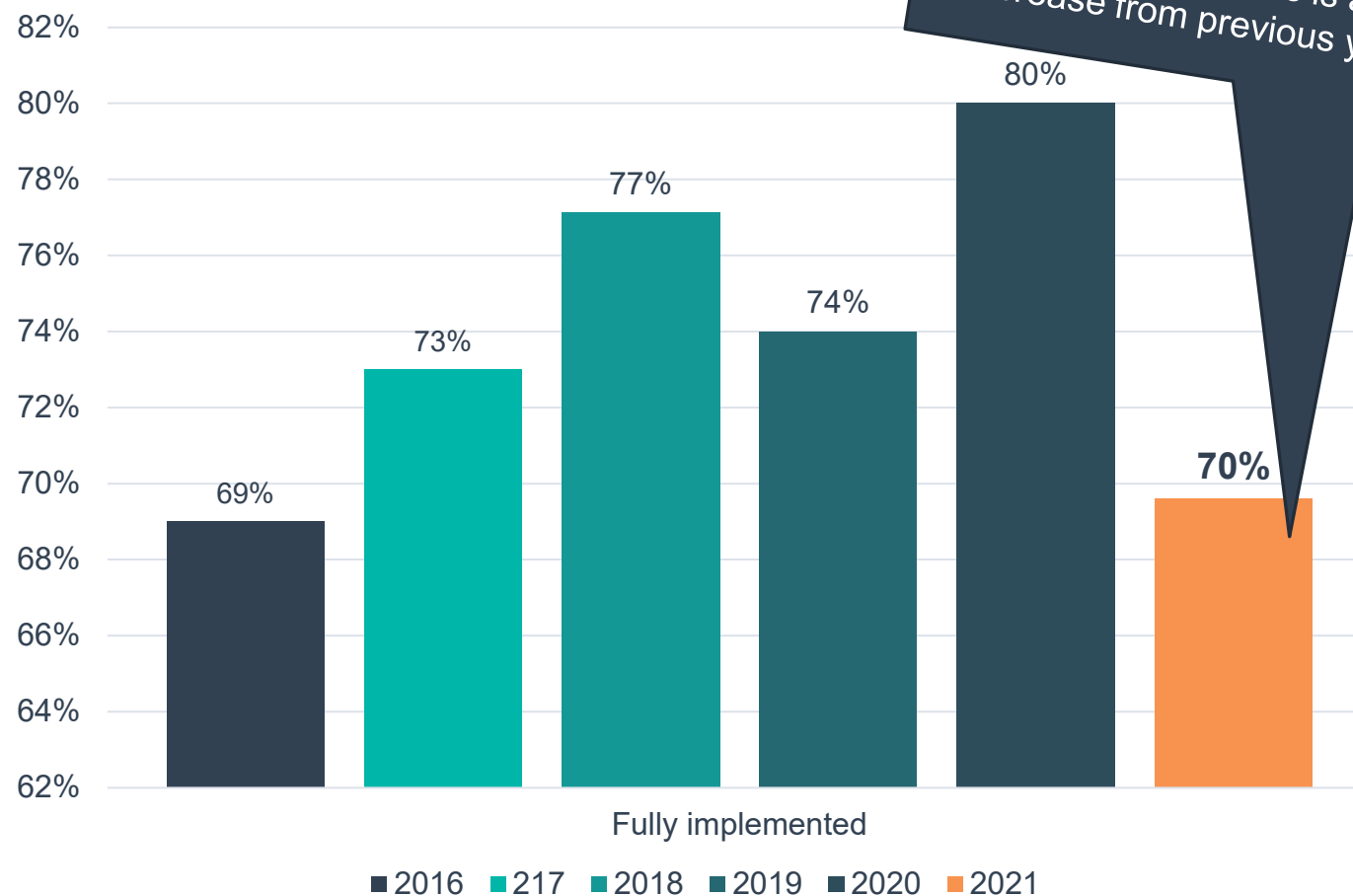| Category | Value |
|---|---|
| Existing EHR meets current needs | 53% |
| Purchasing a new EHR is too costly | 27% |
| Purchasing a new EHR requires more staff time than is available | 22% |
| Looking for or currently switching to a new EHR | 21% |
| Implementation of a new EHR is too challenging | 18% |
| Difficulty finding or selecting a new EHR that meets all our needs | 18% |
| Other | 5% |

# 2. The Majority Of Provider Organizations Report Their EHR Is Fully Implemented
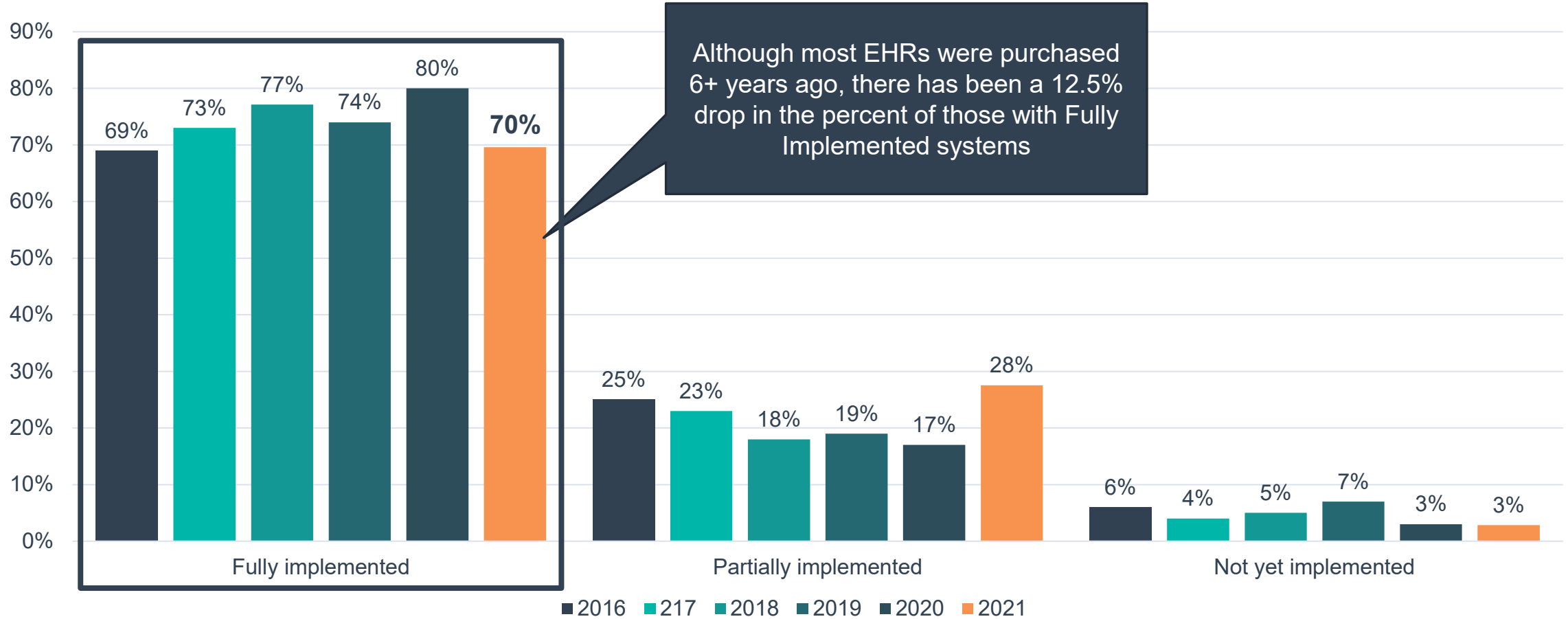
# 2. The Majority Of Provider Organizations Report Their EHR Is Fully Implemented
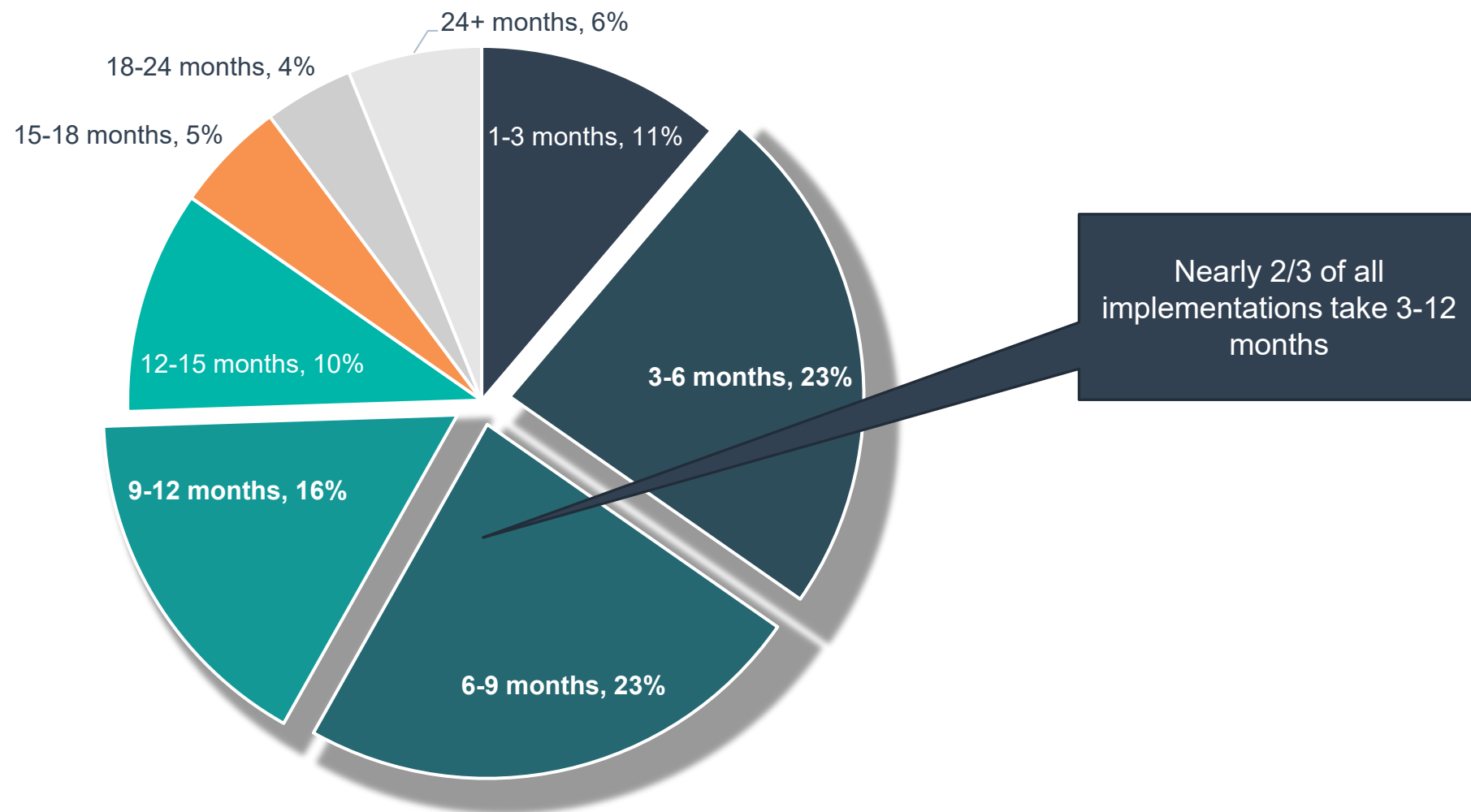
Although most EHRs were purchased 6+ years ago:

- 30% are still reporting their EHR isn't fully implemented

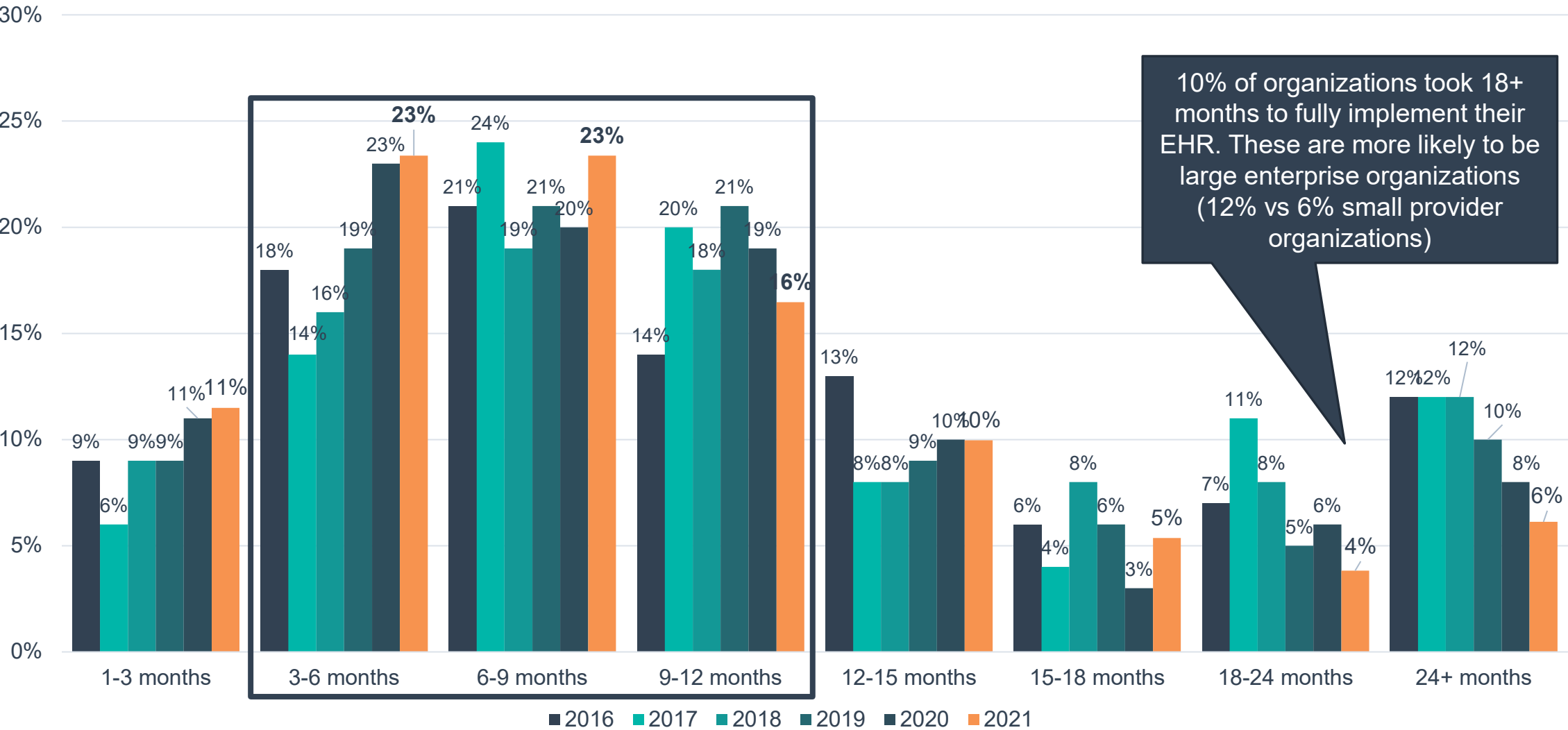- Only 70% report their EHR IS fully implemented, a full 12.5% less than the previous year

While most report their EHR is fully implemented, this is a large decrease from previous years



Fully implemented

- 2016 ■ 217 ■ 2018 ■ 2019 ■ 2020 ■ 2021

# Provider Organization's Report Their EHR Is... 2016-2021



Although most EHRs were purchased 6+ years ago, there has been a 12.5% drop in the percent of those with Fully Implemented systems

**Fully implemented**
- 2016: 69%
- 217: 73%
- 2018: 77%
- 2019: 74%
- 2020: 80%
- 2021: **70%**

**Partially implemented**
- 2016: 25%
- 217: 23%
- 2018: 18%
- 2019: 19%
- 2020: 17%
- 2021: 28%

**Not yet implemented**
- 2016: 6%
- 217: 4%
- 2018: 5%
- 2019: 7%
- 2020: 3%
- 2021: 3%

Legend: ■ 2016 ■ 217 ■ 2018 ■ 2019 ■ 2020 ■ 2021

# Length Of Time To Fully Implement The EHR (From Contract Execution To Go Live), 2021



24+ months, 6%

18-24 months, 4%

15-18 months, 5%

12-15 months, 10%

9-12 months, 16%

6-9 months, 23%

1-3 months, 11%

3-6 months, 23%

Nearly 2/3 of all implementations take 3-12 months

# Length Of Time To Fully Implement The EHR (From Contract Execution To Go Live), 2016-2021



10% of organizations took 18+ months to fully implement their EHR. These are more likely to be large enterprise organizations (12% vs 6% small provider organizations)

Legend: 2016 2017 2018 2019 2020 2021

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# Top Reasons EHRs Are Not Fully Implemented, 2016-2021



Sharp increase in functionality not equal to what is needed

**Both delays from our internal organization and from our EHR vendor**
- 23%
- 24%
- 22%
- 24%
- 24%
- 19%

**Delay from our EHR vendor**
- 19%
- 5%
- 12%
- 10%
- 9%
- 18%

**Delays from our internal organization**
- 22%
- 24%
- 24%
- 21%
- 16%
- 11%

**Functionality not equal to what is needed**
- 0%
- 21%
- 18%
- 19%
- 21%
- **34%**

**Other agency initiatives have taken priority**
- 27%
- 26%
- 25%
- 27%
- 32%
- 19%

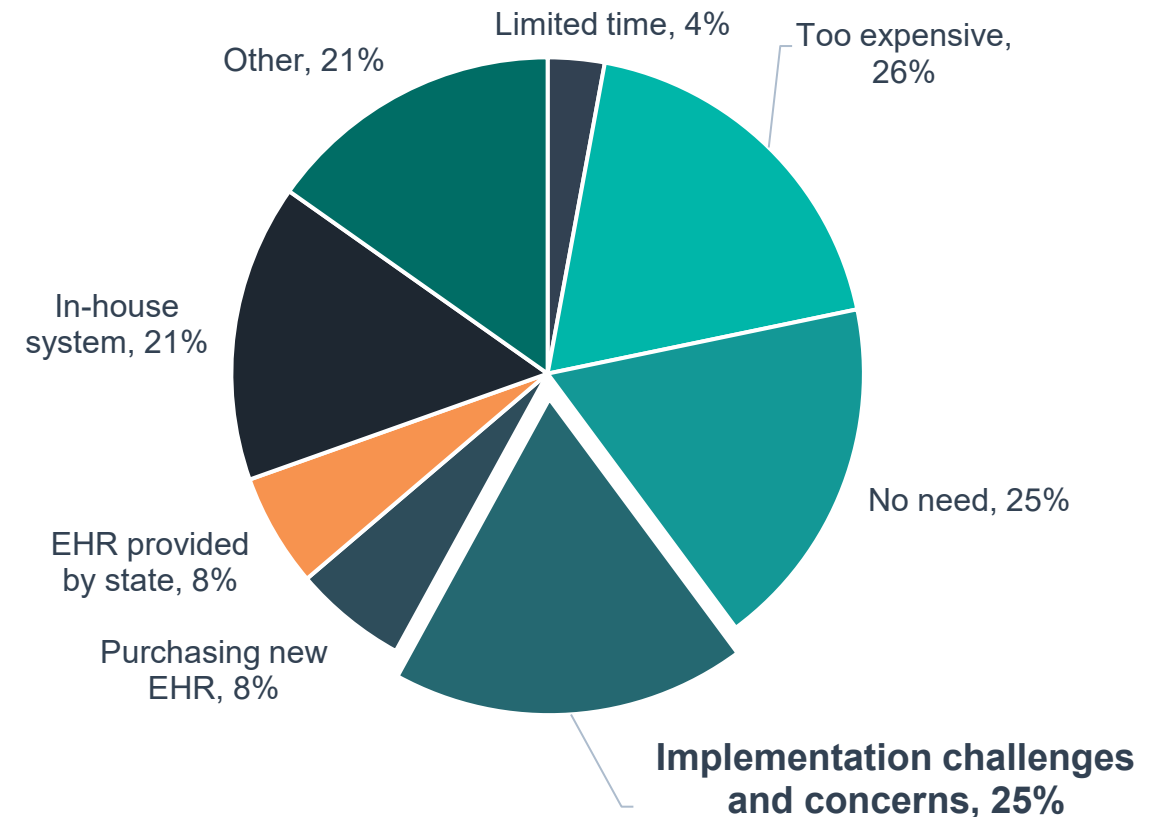Legend: ■ 2016 ■ 2017 ■ 2018 ■ 2019 ■ 2020 ■ 2021

# 3. Concerns Around Implementation Challenges Are Growing Among Provider Organizations

# 3. Concerns Around Implementation Challenges Are Growing Among Provider Organizations

## Reasons Provider Organizations Have Stayed With Their Current EHR

Existing EHR meets current needs — 53%

Purchasing a new EHR is too costly — 27%

Purchasing a new EHR requires more staff time than is available — 22%

Looking for or currently switching to a new EHR — 21%

Implementation of a new EHR is too challenging — **18%**

Difficulty finding or selecting a new EHR that meets all our needs — 18%

Other — 5%

## Reasons Provider Organizations Have Not Purchased An EHR

- Limited time, 4%
- Too expensive, 26%
- No need, 25%
- Implementation challenges and concerns, 25%
- Purchasing new EHR, 8%
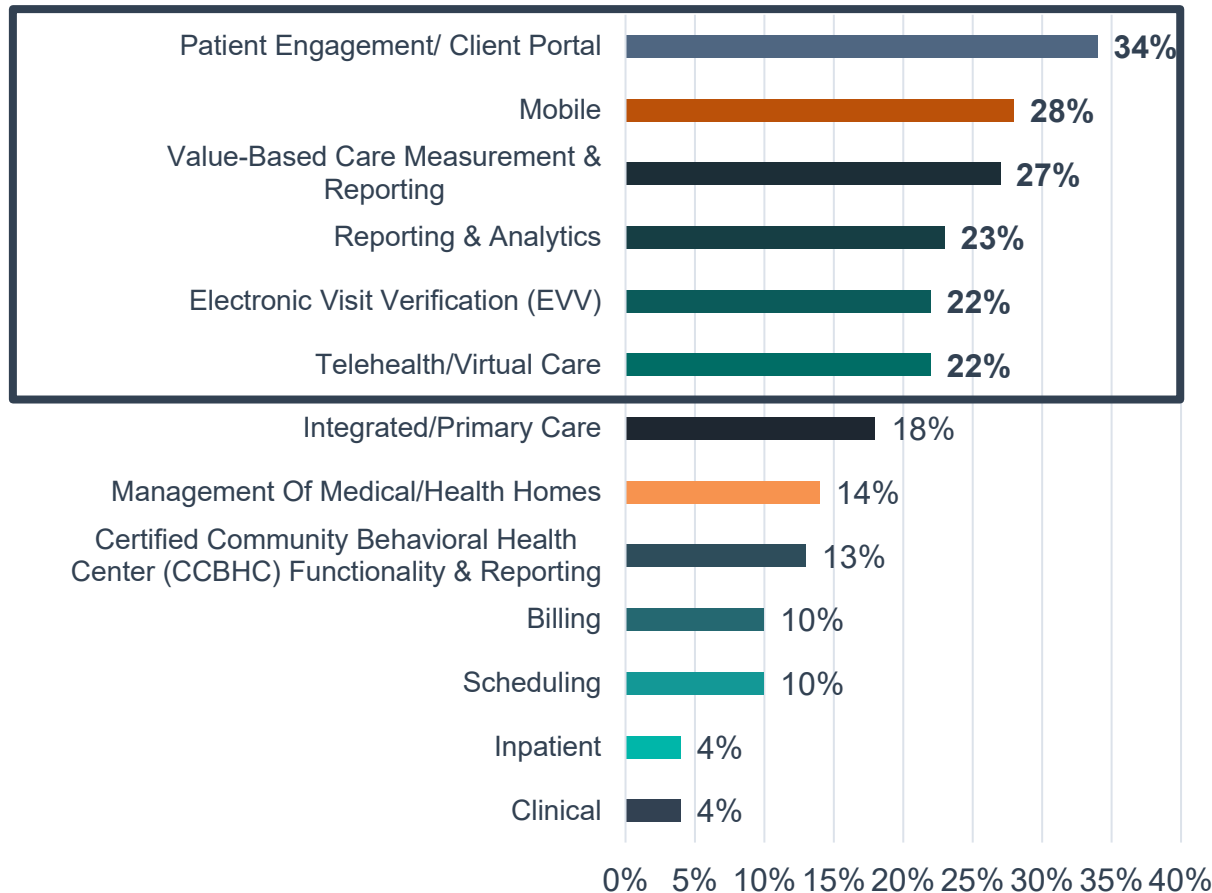- EHR provided by state, 8%
- In-house system, 21%
- Other, 21%

# 18% Of Provider Organizations That Have Had Their EHR For 6+ Years Reporting Staying Due To Implementations Being Too Challenging
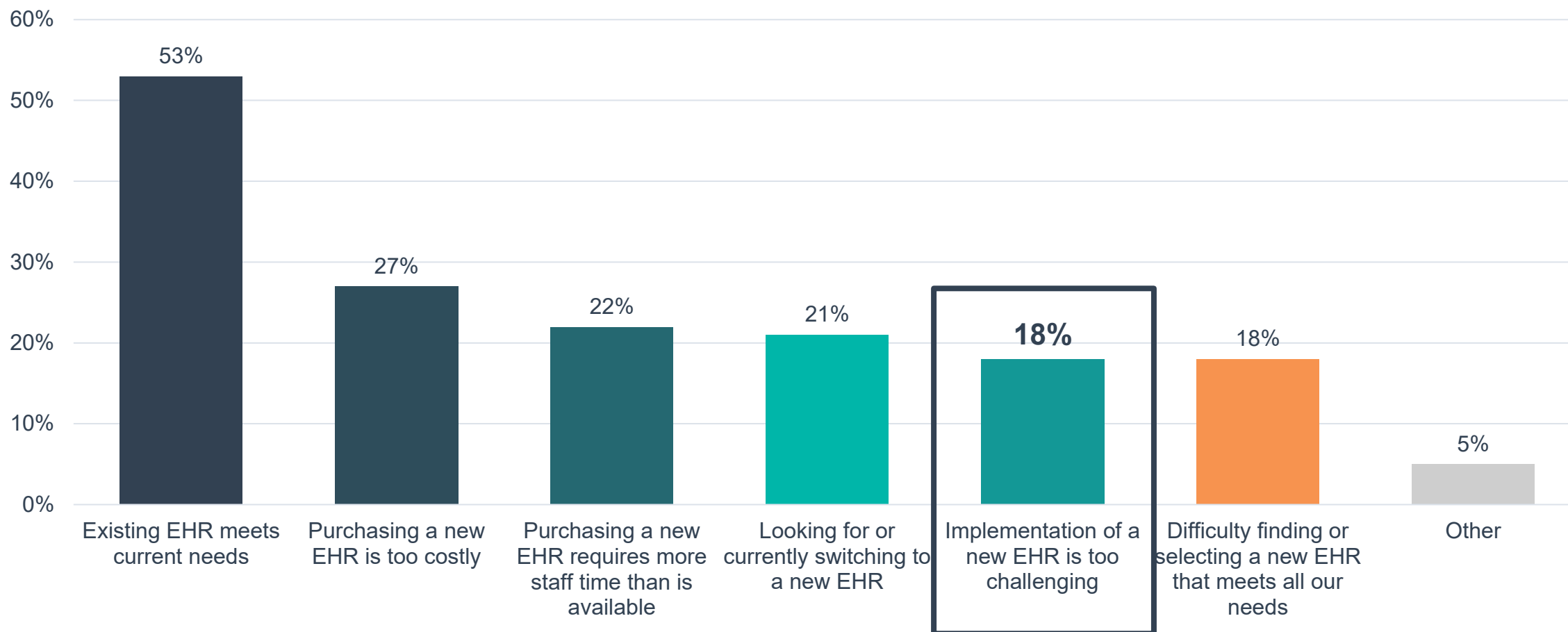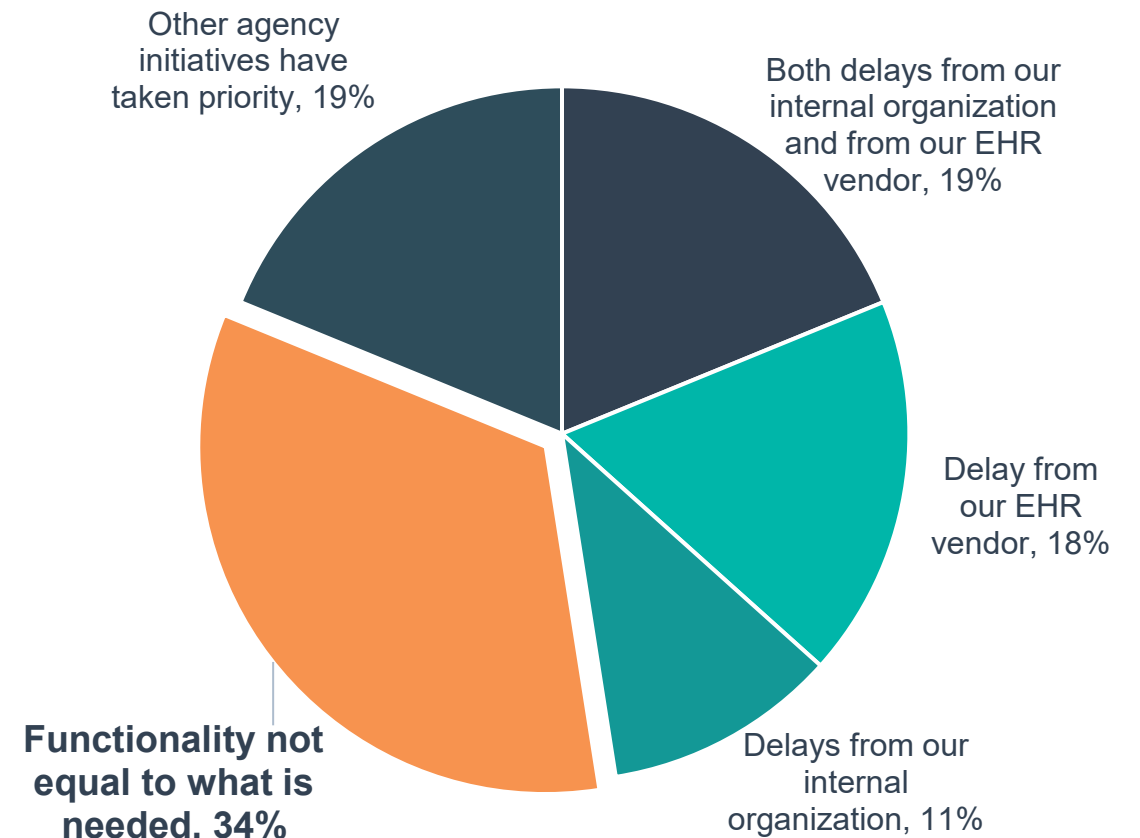
# 4. Provider Organizations Report EHR Functionalities Are Not Meeting Their Needs

# 4. Provider Organizations Report EHR Functionalities Are Not Meeting Their Needs

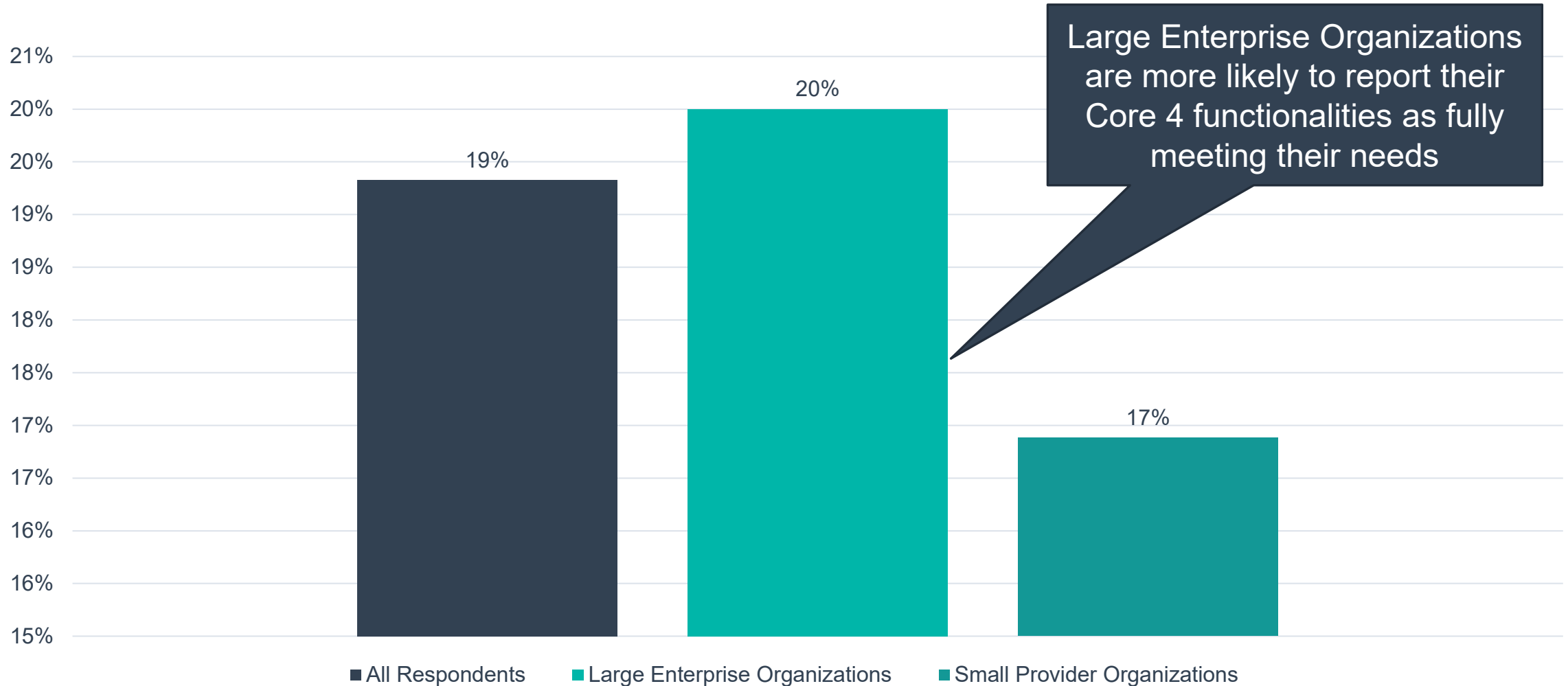## Provider Organizations Reporting Functionality Not Meeting Needs

| Category | Percentage |
|----------|-----------|
| Patient Engagement/ Client Portal | 34% |
| Mobile | 28% |
| Value-Based Care Measurement & Reporting | 27% |
| Reporting & Analytics | 23% |
| Electronic Visit Verification (EVV) | 22% |
| Telehealth/Virtual Care | 22% |
| Integrated/Primary Care | 18% |
| Management Of Medical/Health Homes | 14% |
| Certified Community Behavioral Health Center (CCBHC) Functionality & Reporting | 13% |
| Billing | 10% |
| Scheduling | 10% |
| Inpatient | 4% |
| Clinical | 4% |

0%  5%  10%  15%  20%  25%  30%  35%  40%

## Top Reasons EHRS Are Not Fully Implemented

Other agency initiatives have taken priority, 19%

Both delays from our internal organization and from our EHR vendor, 19%

Delay from our EHR vendor, 18%

Delays from our internal organization, 11%

**Functionality not equal to what is needed, 34%**

# Are The Core 4 EHR Functionalities Meeting Provider Organization Needs?

| | Meets Needs | Somewhat Meets Needs | Doesn't Meet Needs | Not Needed |
|---|---|---|---|---|
| **Clinical** | **61%** | 33% | 4% | 1% |
| **Scheduling** | **55%** | 29% | 10% | 6% |
| **Billing** | **61%** | 27% | 10% | 2% |
| **Reporting & Analytics** | 32% | **44%** | 23% | 0% |

# Organizations Whose Core 4 Functionalities Fully Meet Their Needs, 2021

Large Enterprise Organizations are more likely to report their Core 4 functionalities as fully meeting their needs

19%
20%
17%

■ All Respondents   ■ Large Enterprise Organizations   ■ Small Provider Organizations

# How Well Are Additional EHR Functionalities Meeting Provider Organization's Needs?

| | Meets Needs | Somewhat Meets Needs | Doesn't Meet Needs | Not Needed |
|---|---|---|---|---|
| Patient Engagement/ Client Portal | 22% | 32% | **34%** | 11% |
| Mobile | 29% | **31%** | 28% | 12% |
| Management Of Medical/Health Homes | 17% | 20% | 14% | **48%** |
| Inpatient | 22% | 11% | 4% | **63%** |
| Integrated/Primary Care | 17% | 18% | 18% | **46%** |
| Value-Based Care Measurement & Reporting | 17% | **35%** | 27% | 20% |
| Telehealth/Virtual Care | 33% | **34%** | 22% | 11% |
| Electronic Visit Verification (EVV) | 20% | 20% | 22% | **38%** |
| Certified Community Behavioral Health Center (CCBHC) Functionality & Reporting | 15% | 21% | 13% | **50%** |

# What We've Learned So Far From Provider Organizations…

#1 reason reported (34%) for EHRs not being fully implemented is functionality not being equal to what is needed

Only 32% say their EHR reporting & analytics meet their needs

24% report patient engagement/ client portal functionality not meeting their needs

28% report mobile functionality as not meeting needs

Only 33% report telehealth/virtual care as meeting their needs

20% report not needing value-based care measurement and reporting functionality as not needed

38% report not needing EVV

50% report not needing CCBHC management and reporting functionality

21% of those who've had their EHR for 6+ years are looking for or currently switching EHRs

Although most EHRs were purchased 6+ years ago, 30% are still reporting their EHR isn't fully implemented

53% Of Provider Organizations Report Their EHR Does Not Have All The Functionality Needed, 2021
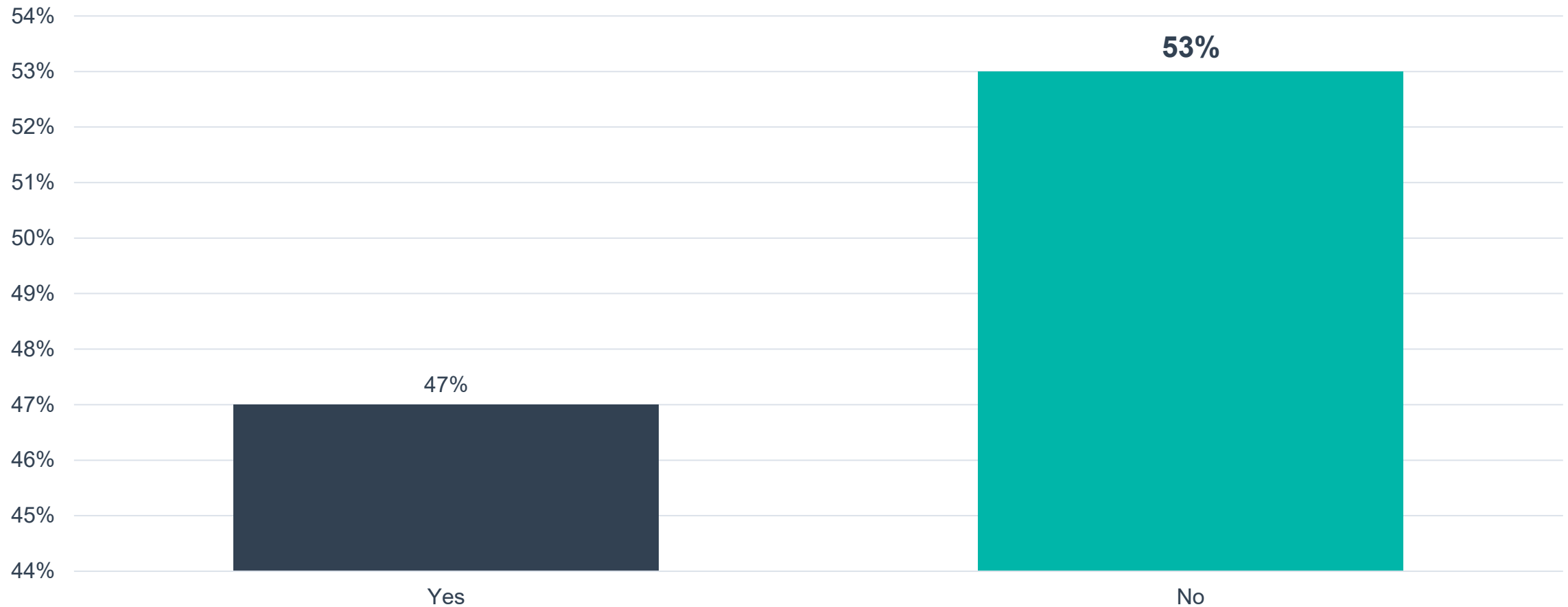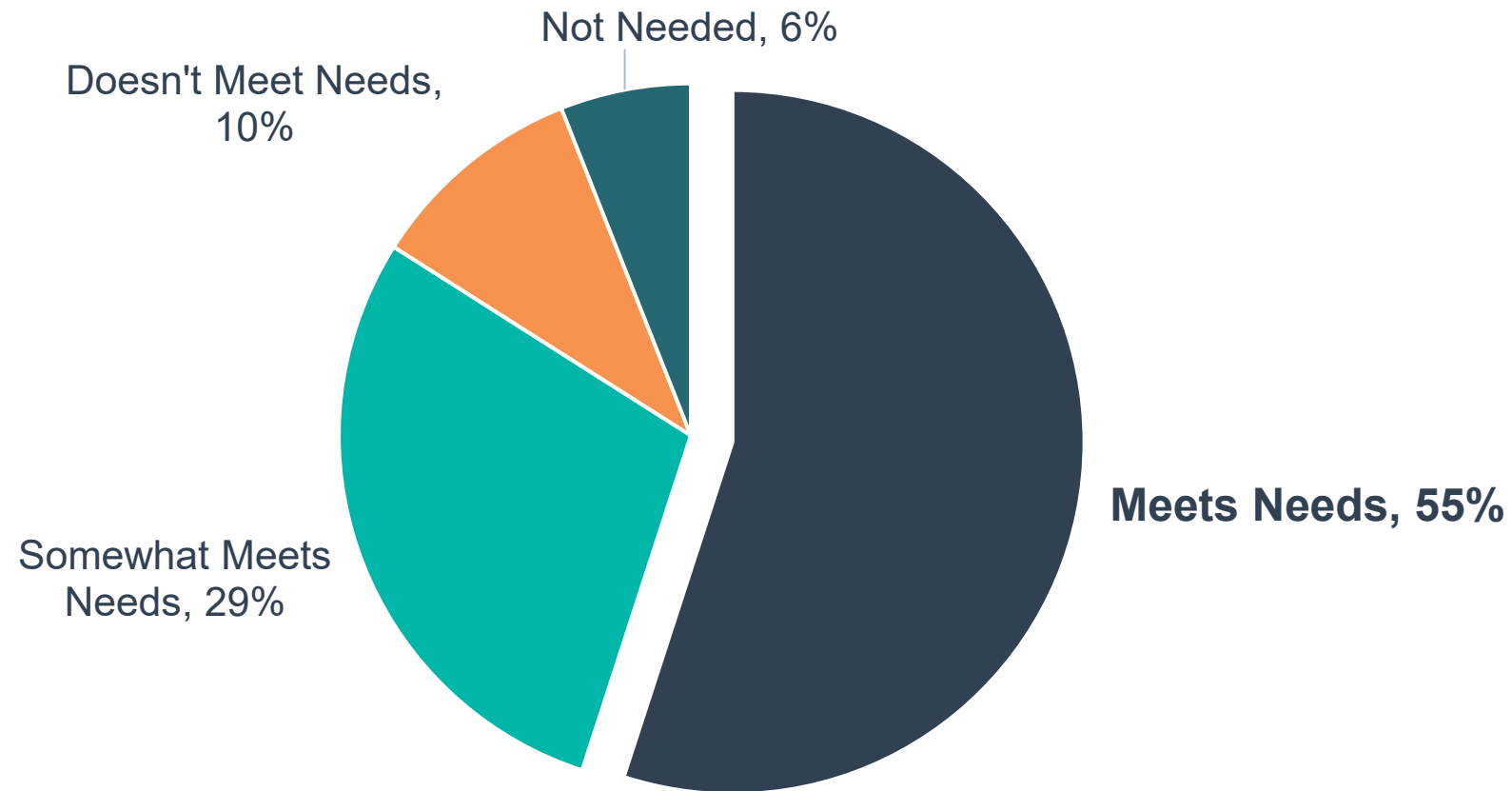
# III. Trends In EHR Functionality
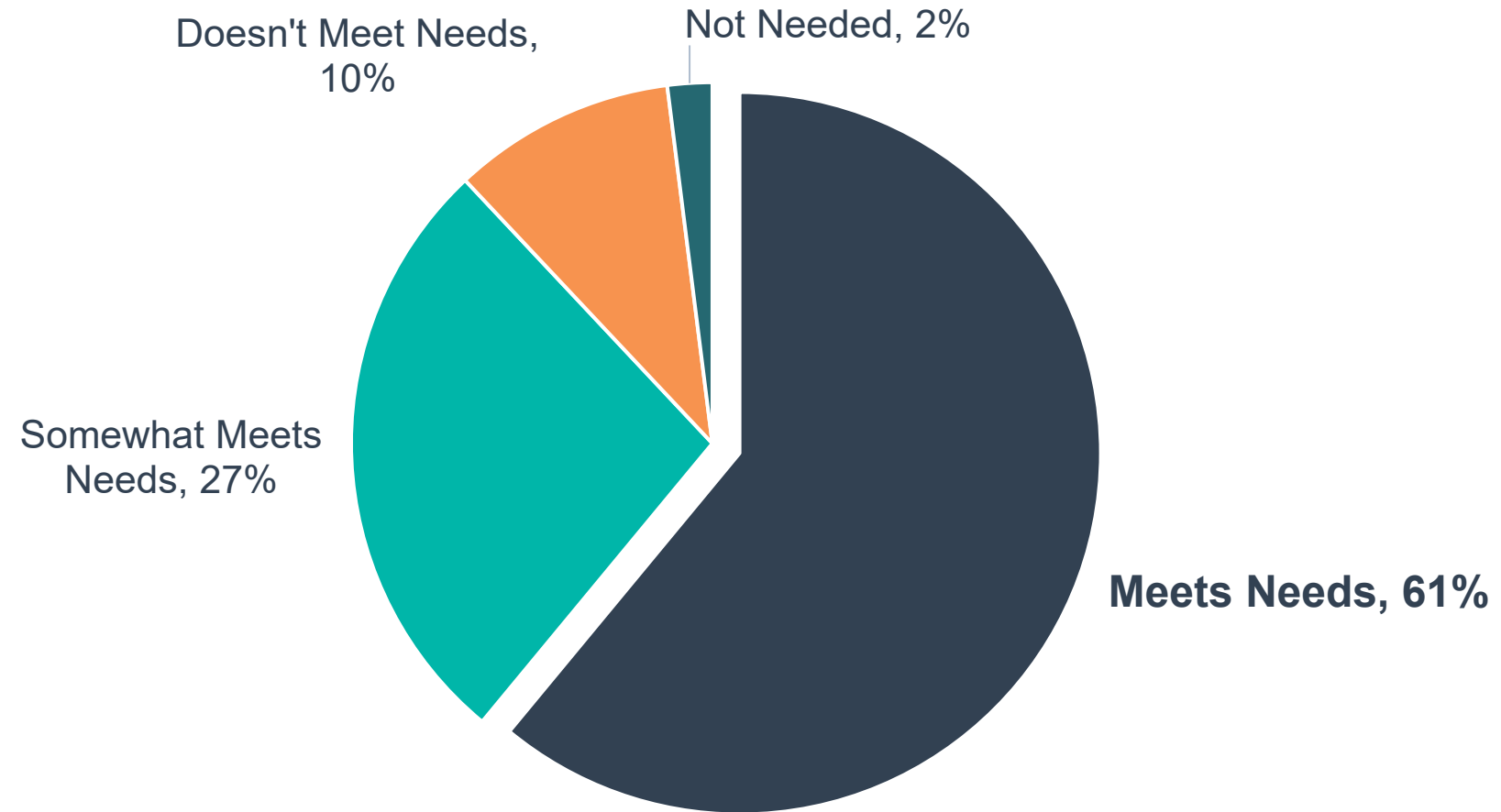
# The Core 4 Functionalities

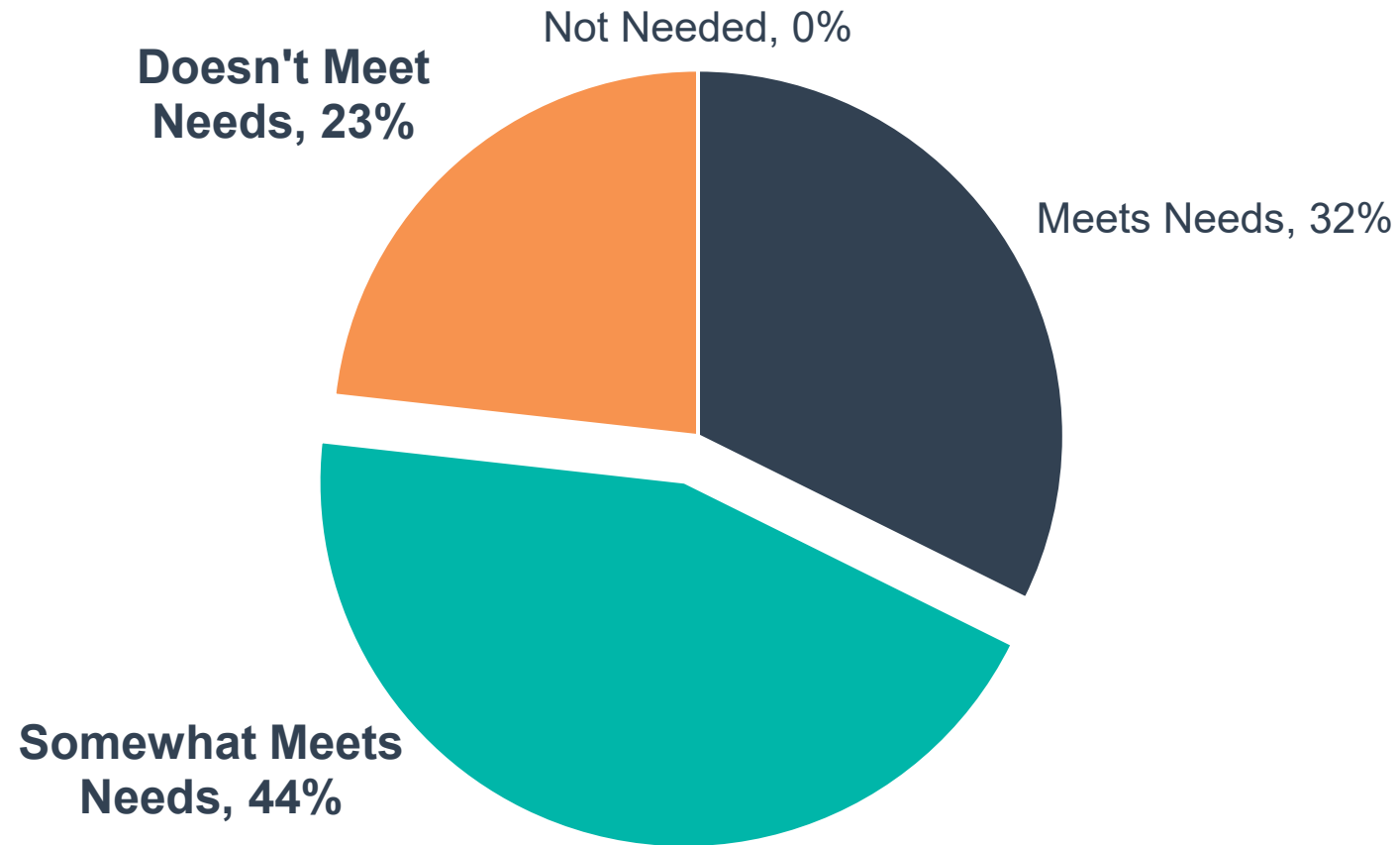# How Well Are EHR's Clinical Functionality Meeting Provider Organization's Needs



Doesn't Meet Needs, 4%

Not Needed, 1%

Somewhat Meets Needs, 33%

Meets Needs, 61%
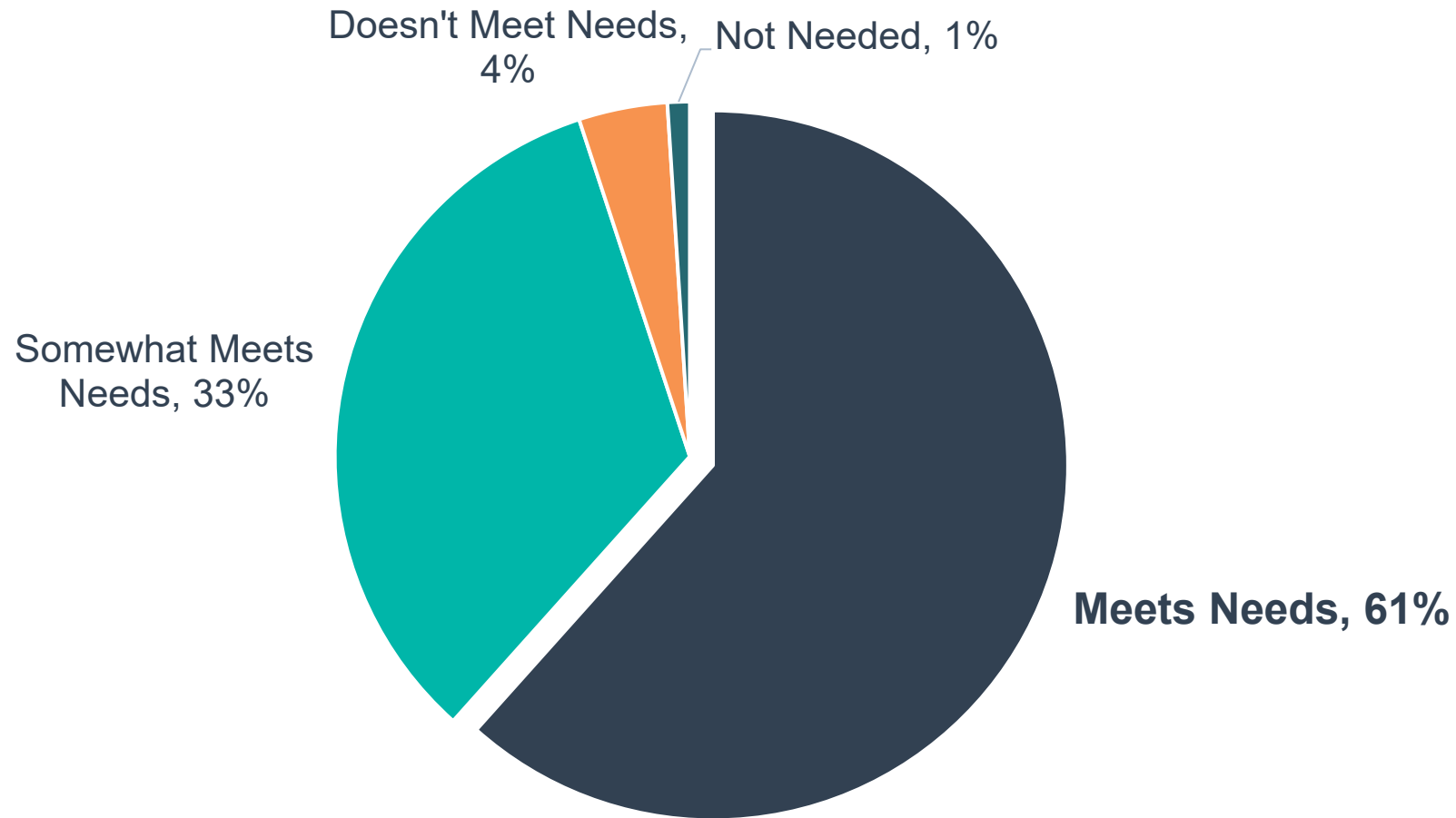
# How Well Are EHR's Scheduling Functionality Meeting Provider Organization's Needs



Not Needed, 6%

Doesn't Meet Needs, 10%

Somewhat Meets Needs, 29%

**Meets Needs, 55%**

# How Well Are EHR's Billing Functionality Meeting Provider Organization's Needs



Doesn't Meet Needs, 10%

Not Needed, 2%

Somewhat Meets Needs, 27%

**Meets Needs, 61%**

# How Well Are EHR's Reporting & Analytics Functionality Meeting Provider Organization's Needs



Not Needed, 0%

Doesn't Meet Needs, 23%

Meets Needs, 32%

Somewhat Meets Needs, 44%
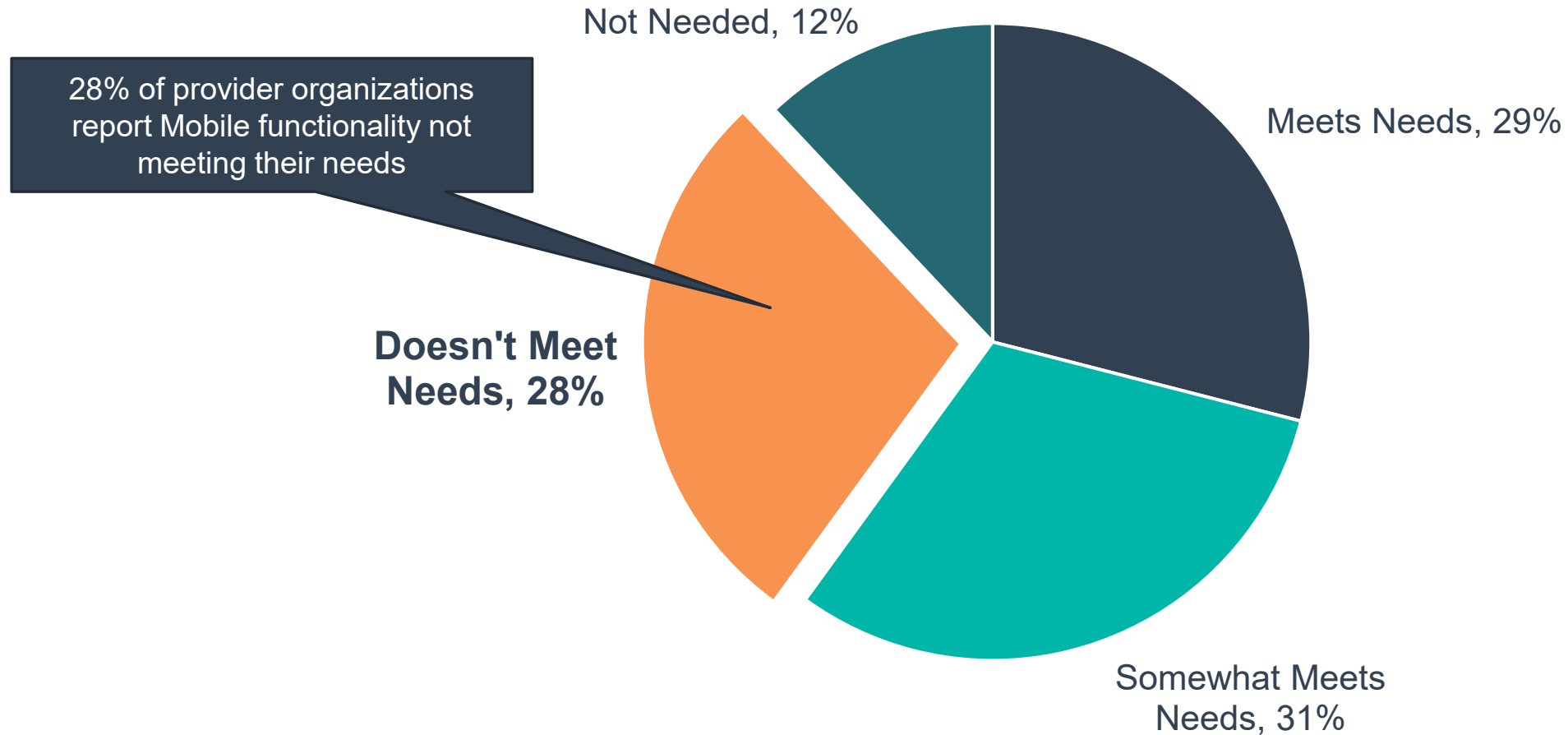
# Additional Functionality Trends

# Organizations Whose Core 4 Functionalities Fully Meet Their Needs Report On Additional Functionality Not Meeting Needs
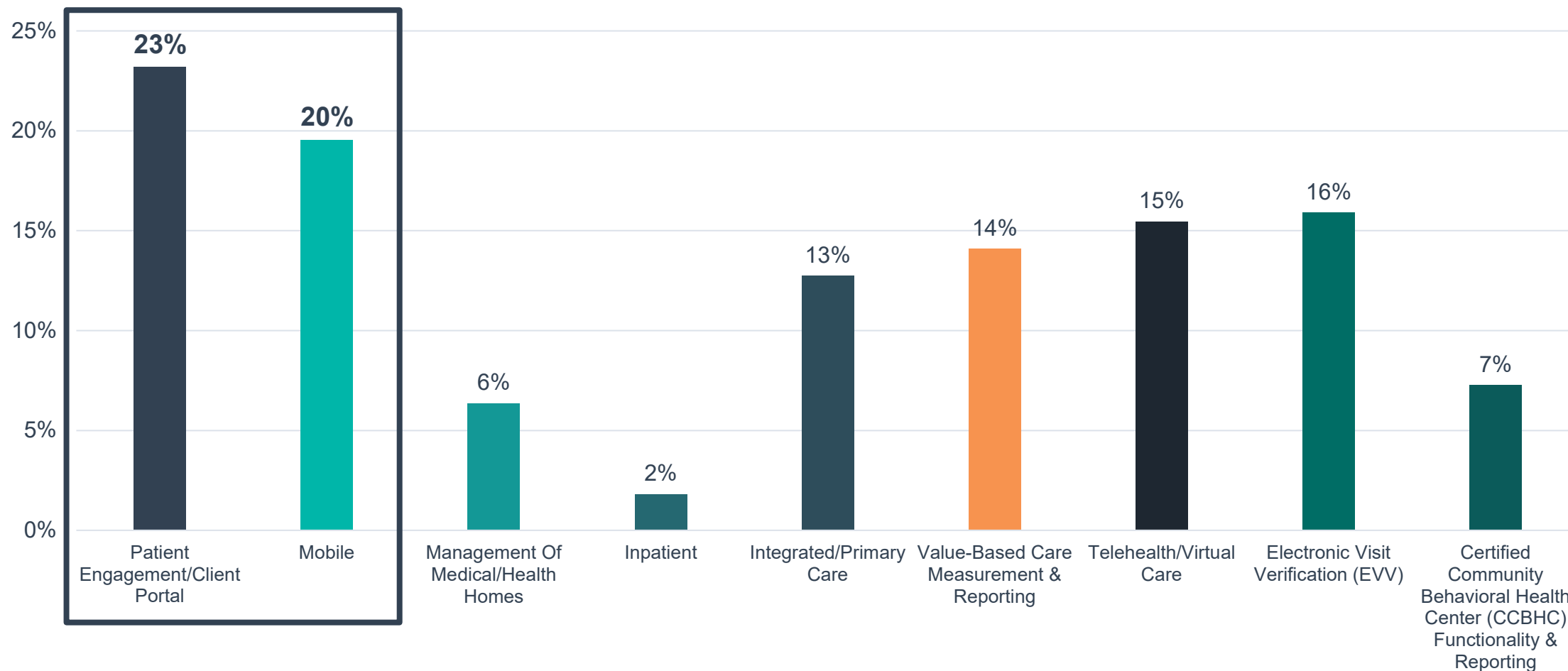
# How Well Are EHR's Patient Engagement/Client Portal Functionality Meeting Provider Organization's Needs



Not Needed, 11%

Meets Needs, 22%

A third of provider organizations report Patient Engagement/Client Portal Functionality not meeting their needs

**Doesn't Meet Needs, 34%**

Somewhat Meets Needs, 32%
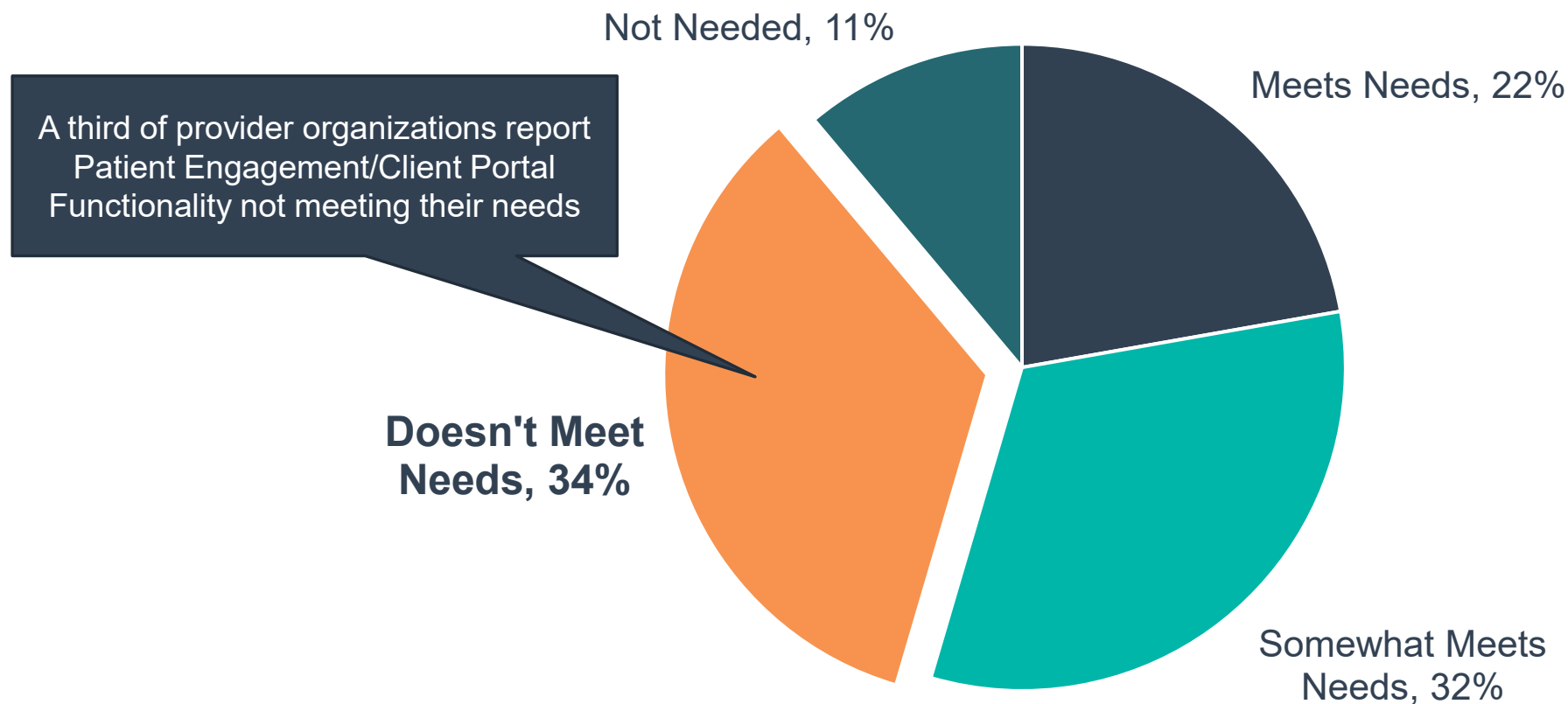
# How Well Are EHR's Mobile Functionality Meeting Provider Organization's Needs



28% of provider organizations report Mobile functionality not meeting their needs

Not Needed, 12%

Meets Needs, 29%

**Doesn't Meet Needs, 28%**

Somewhat Meets Needs, 31%

# How Well Are EHR's Telehealth/Virtual Care Functionality Meeting Provider Organization's Needs
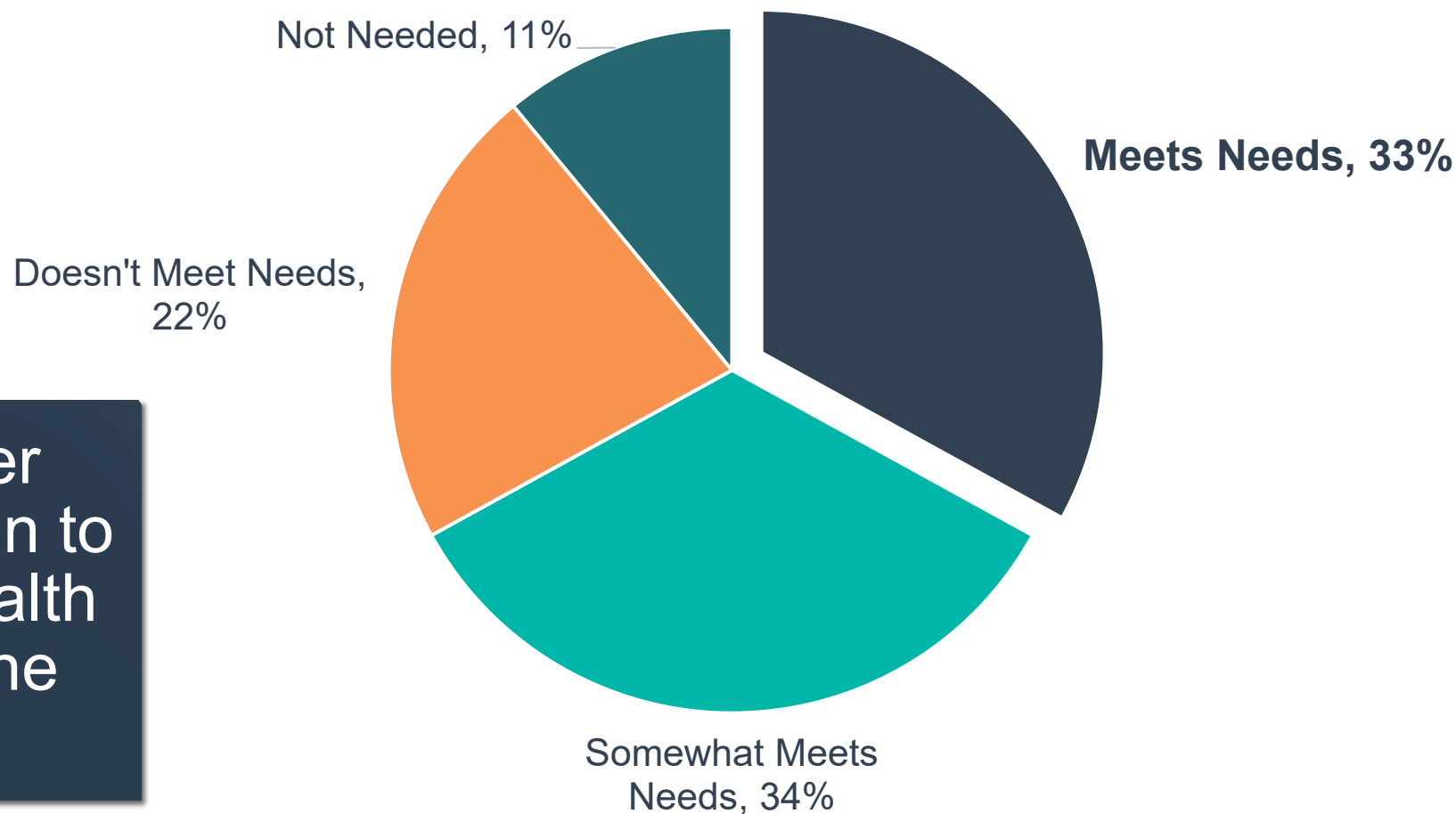
**19%** of provider organizations plan to purchase telehealth technology in the next year

Not Needed, 11%

**Meets Needs, 33%**

Doesn't Meet Needs, 22%

Somewhat Meets Needs, 34%

# IV. Future Planning

# How Well Are EHR's Value-Based Care Measurement & Reporting Functionality Meeting Provider Organization's Needs
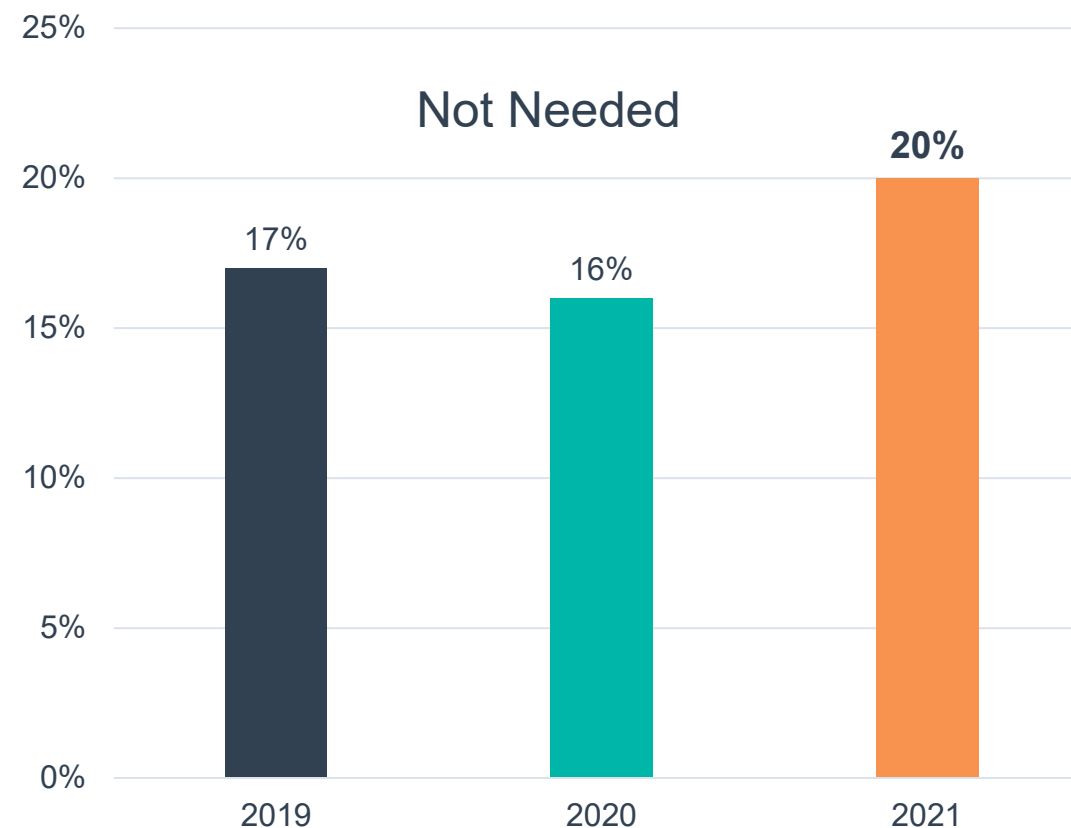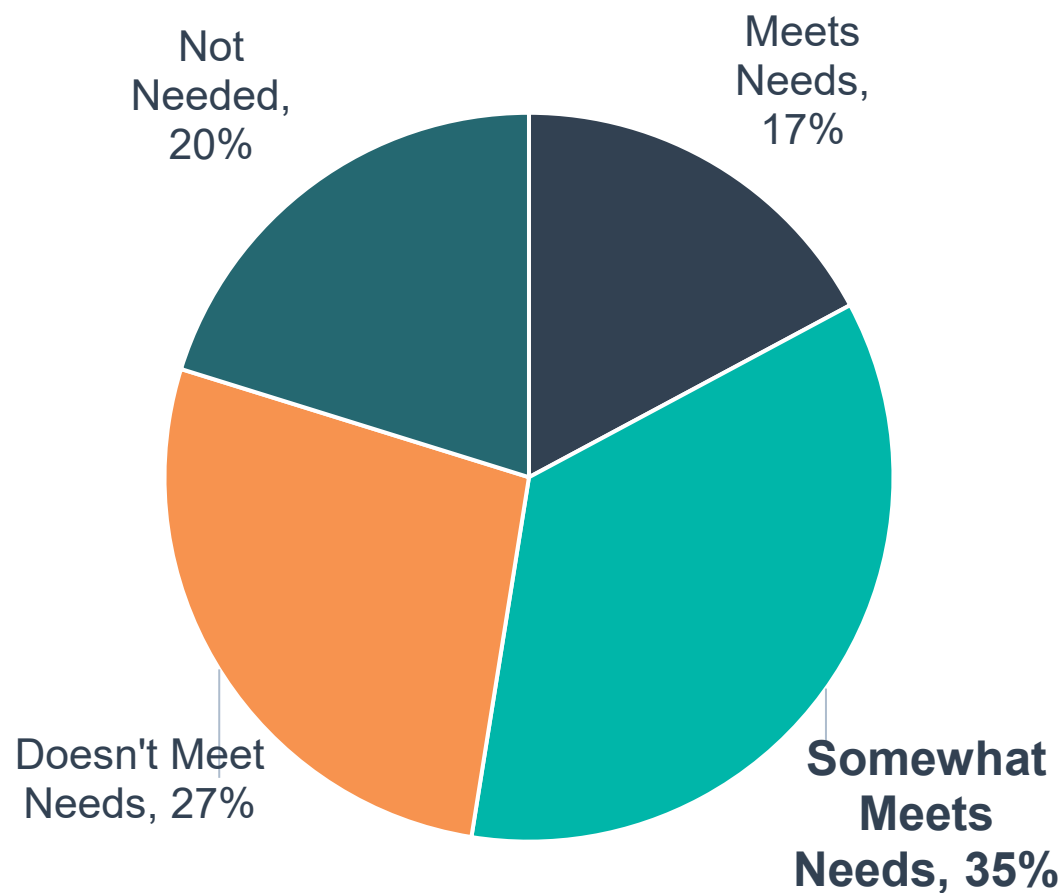
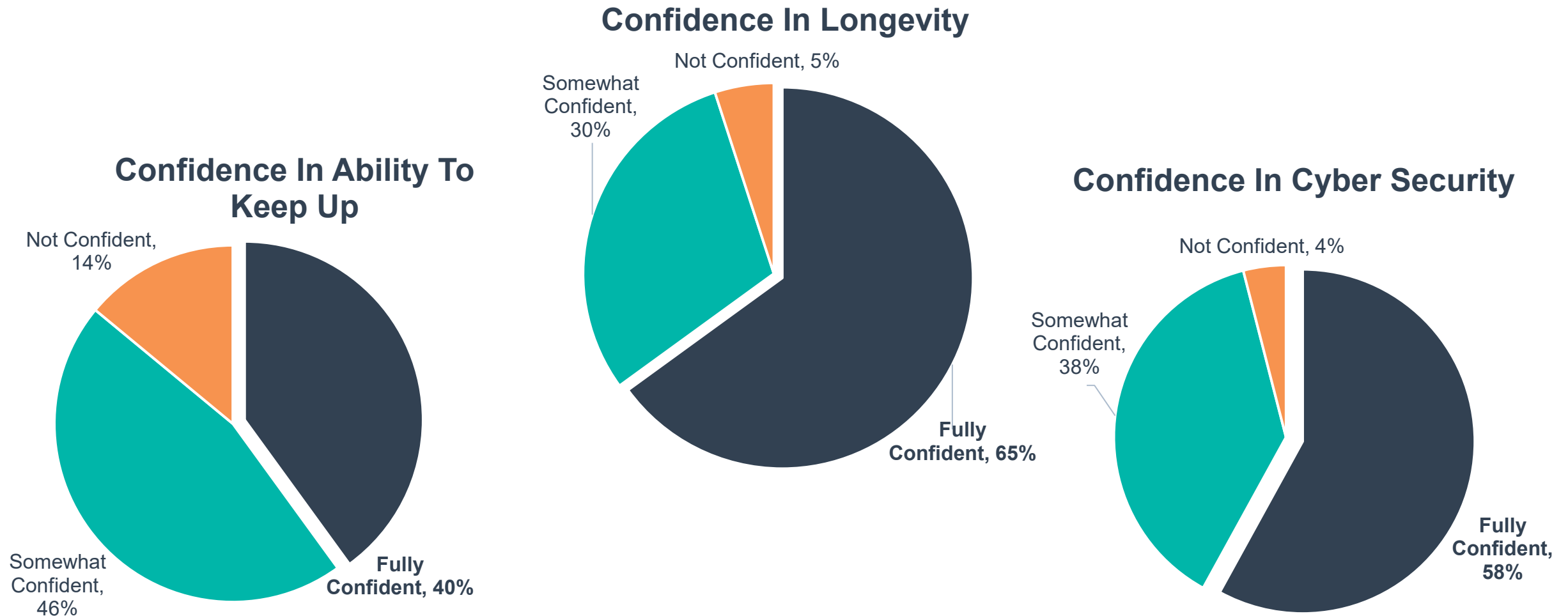# How Well Are EHR's Electronic Visit Verification (EVV) Functionality Meeting Provider Organization's Needs



Meets Needs, 20%

Somewhat Meets Needs, 20%

Doesn't Meet Needs, 22%

Not Needed, 38%
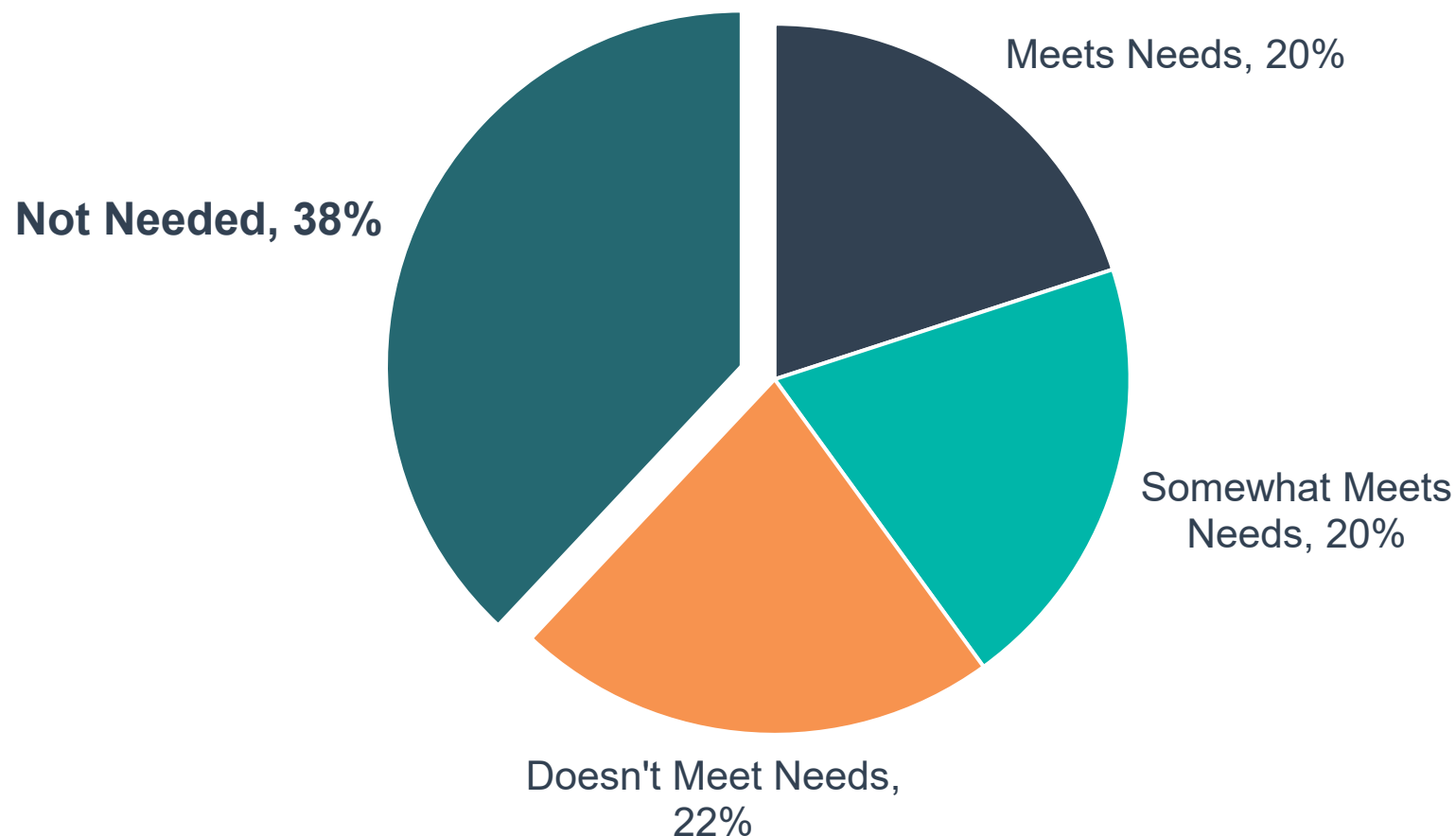
# How Well Are EHR's Certified Community Behavioral Health Center (CCBHC) Functionality Meeting Provider Organization's Needs



Meets Needs, 15%

Somewhat Meets Needs, 21%

Not Needed, 50%

Doesn't Meet Needs, 13%
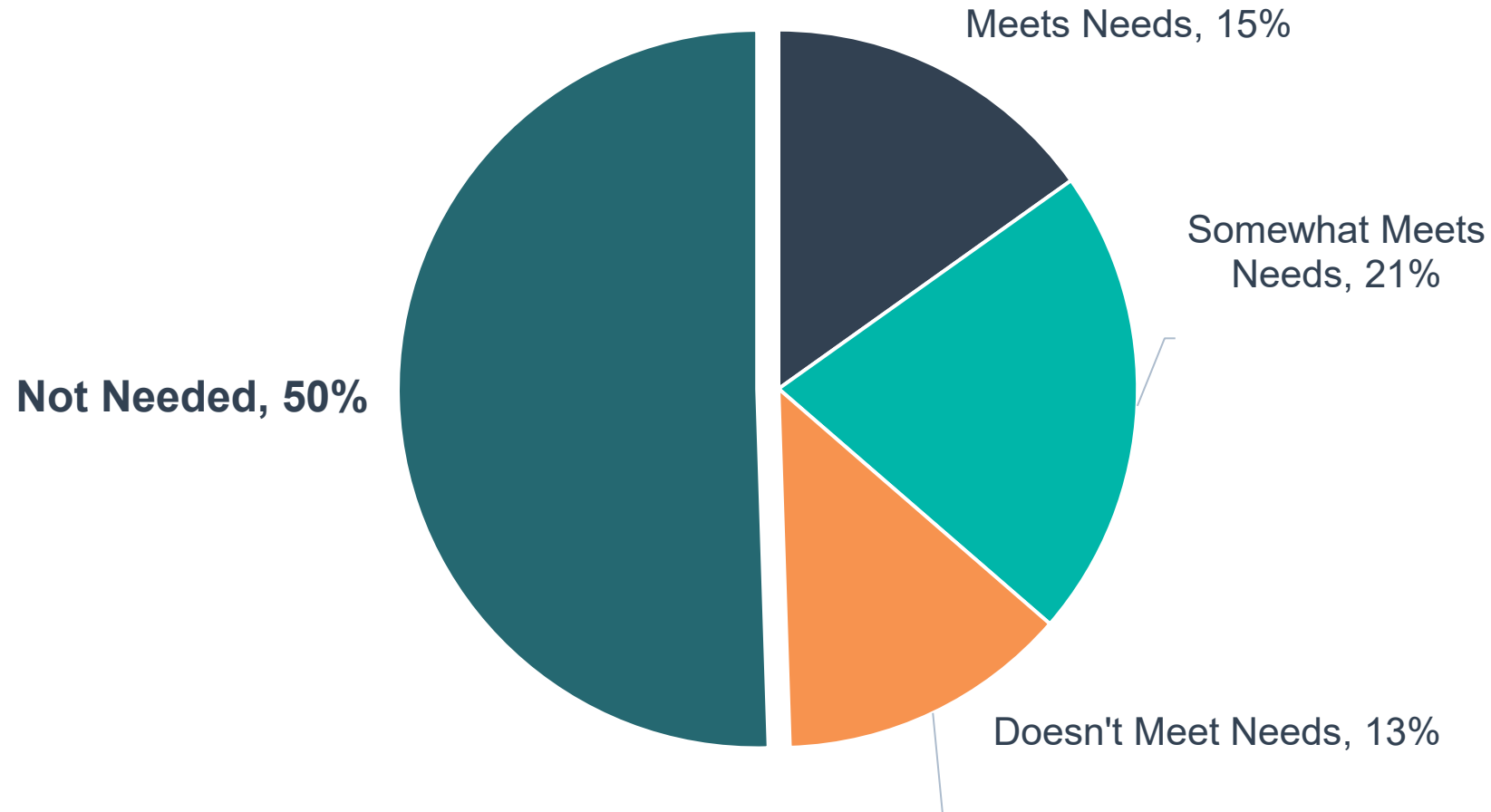
# 34% Of Provider Organizations Are Fully Confident In Their EHR & Vendor's Longevity, Ability To Keep Up With Market Changes & Cyber Security, 2021



## Confidence In Ability To Keep Up
- Not Confident, 14%
- Somewhat Confident, 46%
- Fully Confident, 40%

## Confidence In Longevity
- Not Confident, 5%
- Somewhat Confident, 30%
- Fully Confident, 65%

## Confidence In Cyber Security
- Not Confident, 4%
- Somewhat Confident, 38%
- Fully Confident, 58%

# V. Questions & Discussion

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