

# Behavioral Health Provider Centralizes Patient Records to Improve Service and Security

*Preferred Family Healthcare (PFH) integrated its in-house electronic medical record software with FileBound's secure document repository to provide continuity of care for the more than 10,000 patients treated annually at 33 locations.*

## Business Needs

To meet the unique needs of its fast-growing behavioral health practice, Preferred Family Healthcare built a specialized electronic medical record (EMR) application, but it still needed a secure document repository to store the associated patient care documents. The project required a product that could support seamless API integration to centralize documents at care centers across three states.

## The Solution



PFH integrated Upland's FileBound enterprise content management software with its EMR software with support from solution provider IMS (Mexico, MO) to allow clinicians to immediately access documents related to the patient record to provide the highest levels of care.

## Benefits

- Easy-to-use FileBound application programming interfaces (APIs) connect patient records directly to the EMR to create a seamless experience for users.
- Centralized storage of patient records enables clinicians to access documents from any authorized PFH location, improving their ability to provide a continuity of patient care.
- Improves security of patient records and convenience for patients by eliminating the need to move charts between locations that may be hours apart.



Preferred Family Healthcare is the largest provider of publicly funded substance abuse treatment services, as well as the largest provider of adult and adolescent substance abuse treatment services, in Missouri. In recent years, the agency also began to expand its comprehensive approach to behavioral health by integrating services that focus on whole-person care. For example, Preferred Family Healthcare has been intimately involved in the development of the Healthcare Home Initiative in Missouri since October 2010 and was designated as a Community Mental Health Center (CMHC) affiliate Healthcare Home in January 2012 for Community Psychiatric Rehabilitation Center (CPRC) consumers.

---

<b>INDUSTRY:</b>	Healthcare
<b>ADMINISTRATIVE</b>	Kirkville, MO
<b>OFFICES:</b>	& St. Louis, MO
<b>EMPLOYEES:</b>	850
<b>WEBSITE:</b>	<a href="http://pfh.org">pfh.org</a>

---

*"Having everything centralized has been a new experience, and our users really like it. The speed is fast and they don't even realize they are accessing a different system."*

— **Terry Kennard, vice president of information technology, Preferred Family Healthcare**

## Easing the transition to electronic records

Behavioral health providers have different requirements than other providers. After investigating several options, PFH, a non-profit provider operating in three states, determined that creating an in-house solution would be the best fit for its substance abuse treatment and prevention and mental health services.

Building any software solution can be challenging, but EMRs require additional time spent gathering the documentation to attest to Meaningful Use and comply with the Health Insurance Portability and Accountability Act (HIPAA). So when it came time to look at how to incorporate physical documents into the electronic record, Terry Kennard, PFH's vice president of IT, looked for an option to integrate a secure repository, rather than starting from scratch.

"The highest priority is the safety and security of our patients' information and protecting their rights," states Kennard, who evaluated a number of solutions before choosing FileBound. "We weren't looking for a front-end imaging solution. We wanted something that could be integrated to look like an integral part of the EMR." After a trial period, Kennard was convinced that the FileBound API would provide tight integration to the data repository and a file structure that supported his goals.

As a nonprofit, PFH always has to be conscientious about expenses, but potential changes to funding sources make it even more important to find software that is affordable and has reasonable administration costs. Combined with the expertise of Kennard's team, the FileBound APIs deliver the ease-of-use needed to keep the project moving smoothly.

### About FileBound

Upland's FileBound delivers document and workflow automation applications that improve the operation of any organization by connecting users with the information they need to work more efficiently and effectively. With FileBound, customers can build automated workflow processes and centrally manage documents to improve compliance, collaboration and access to information.

## Improved patient care and satisfaction

Prior to the implementation of the EMR, PFH staff would create physical charts that had to be updated and distributed manually. Now, caregivers collect documents at intake and add them to the virtual patient chart. Patients can also sign documents within the system, reducing the amount of paper.

*"When we had paper charts, they had to move with the client. Now if a client transfers to a site two hours away, the chart is there when he or she gets there."*

— **Terry Kennard, vice president of information technology, Preferred Family Healthcare**

With 33 locations, having a centralized document repository allows PFH to provide better service. "When we had paper charts, they had to move with the client. Now if a client transfers to a site two hours away, the chart is there when he or she gets there," says Kennard. Smooth transition between locations improves patient satisfaction and ensures that clinicians have the information needed to provide exemplary care. It also eliminates the potential security risks of moving sensitive patient information.

PFH's service region covers a wide geographic area, and some patients find it difficult to get to a clinical site. "We really want to get the clinical documents to where the patients are," says Kennard. "We are looking at ways we can offer disconnected access through secure laptops in a way that fits our security protocols." Though the EMR solution is PFH's top priority, Kennard sees the potential to integrate FileBound into other PFH systems such as human resources and finance.

### The Upland Product Family



Upland's family of cloud-based enterprise work management software helps every team in your organization do their best work. See what you can do with Upland. Contact us at 855-944-7526 or [info@uplandsoftware.com](mailto:info@uplandsoftware.com).