

Computerization of Scheduling and Client Data Management at Two College Counseling Centers

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The Project

- The need for a computerized appointment scheduling system was identified in the fall of 1999.
- Planning meetings began in the summer 2000 semester
- The new software was installed in August 2000
- An evaluation is taking place this summer

The Schools

Buffalo State College and the University at Buffalo

- SUNY schools
- The counseling centers provide individual and group psychotherapy, workshops and other services to the campus community
- Have a commitment to training

UB Mission

“UB serves the people of New York as State University’s sole comprehensive research-intensive university and primary center for professional education and training. UB has as its defining characteristic and distinguishing mission research, scholarship, artistic creation, postbaccalaureate training in the arts and sciences, and in the professions.”

(<http://wings.buffalo.edu/faculty/handbook/ID.html>)

BSC Mission

“Buffalo State College is committed to the intellectual, personal, and professional growth of its students, faculty, and staff. The goal of the college is to inspire a lifelong passion for learning, and to empower a diverse population of students to succeed as citizens of a challenging world. Toward this goal, and in order to enhance the quality of life in Buffalo and the larger community, the college is dedicated to excellence in teaching and scholarship, cultural enrichment and service.”

(<http://www.buffalostate.edu/about/mission.html>)

Comparative Statistics

	BSC	UB
# Students	10,549	25,830
# Staff	6 full-time 7 part-time	12 full-time 11 part-time
# Clients	575	722

The Planning

- Likes & Dislikes of the Existing System
- Goals – Process & Product
- Flow Chart
- Reporting Needs
- Ethics & Confidentiality
- Scheduling Needs
- Client Information Needs

Why the Change was Wanted

- 5 yrs ago: QI Committee, Rethinking Paperwork:
 - increase service / decrease wait list
- Efficiency
 - Searchable
 - Schedules *in* your office - control
 - Notes written *in* your office
 - Legibility
 - Congestion in front office
 - Confidentiality – front book can be viewed
 - Filing space – running out of room
 - Access from multiple sites (CC and SHS) – increased security
 - Reports: usage, staff activity, quarterly reports...
 - Data accuracy
 - Standardization

Software Options

Therapist Helper (and other commercial practice management software)

Expensive

Managed Care / Billing focus

Colorado State scheduling software (still available?)

Simple, easy to use. Scheduling ONLY
Not Y2K compliant! - Lesson learned.

UM Chart Maker – University of Michigan
Counseling & Psychological Services

Filemaker Pro

Nominal fee

No scheduling component

All the rest integrate scheduling and data management and are used in College/Univ Counseling Centers.

Rutgers Universal Counseling Center Database (UCCD)

Access 97 & 2000

James Mandala

Price: over \$1300

(DSM optional for extra money)

Demo available

Counseling Services Information System (CSIS)

Robert Meixner

Access 97

DSM

Allows for remote net access, with security (??)

Appropriate for community services and private practice.

Large and complex.

Protégé

Victor Ranft

Relatively new product

The price was right

A lot of good press.

Good tech support – fast turn around. Young, long term commitment

Onsite training.

Security – nothing on desktop, passwords

Software Options

Each has pros and cons. **No single right choice.** Depends on needs.

All have **a learning curve.** What matters is the sense of ownership, the “selling” of the product to the staff. The sale has to be based on real info (efficiency, improvement, life is better with this than without). If people believe that, then they will be willing to learn.

Staff Reactions

It helped to have regular meetings to discuss reactions & questions.

Pros

- Centralized data
- Searchable
- Control over schedule
- Ease of use (no front office congestion)
- Confidentiality
- Simplifies paperwork

Cons

- Complicates paperwork
- Speed
- Network crashes
- Limited search only

Websites

Counseling Center Software

- UM Chart Maker (University of Michigan)
http://www.tarleton.edu/~counseling/ccv/policy/michigan/CM_press_release1.pdf
- CSIS: Counseling Services Information System
<http://members.bellatlantic.net/~meix/>
- Protégé
<http://www.uncg.edu/~varanft/>
- Universal Counseling Center Database (Rutgers)
<http://www.rci.rutgers.edu/~mandala/>

Websites

Software information and reviews

- The Development And Implementation Of A Computerized Scheduling And Record Keeping System For A College Counseling Center, W. Ed Smith, Ph.D. & Tom Bissonette, M.S.W.
<http://www.tarleton.edu/~counseling/ccv/scheduling/scheduling.htm>
(A shorter version of this document can be found at
<http://www.ex.ac.uk/cimh/arts/comsched.htm>)
- Computers in Mental Health (CIMH): <http://www.ex.ac.uk/cimh/>
- Practice Management Software (American Psychiatric Association):
http://www.psych.org/pract_of_psych/software.cfm
- Software for Professionals: http://www.psychwatch.com/software_page.htm