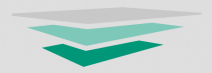


# Switching from Paper to an EHR

CASE STUDY

FOOTHOLD  
TECHNOLOGY



## ABOUT THE AGENCY

### SERVICES

Substance Use Disorder,  
Mental Health



Founded in 1976  
Staten Island, NYC

### SUCCESS

1,200 clients  
served annually

### AWARDS MEMBER

Since 2011

### OP. BUDGET

Over \$7M

## SITUATION

### The Limitations of Paper Records

Since 1971, Camelot Counseling, in Staten Island in New York City, has been working with individuals and families to address the adverse effects of alcoholism and substance use. Over the years, **Camelot has expanded its programs, streamlined operations and found more effective ways to support staff and the community it serves.** One transformative change was the decision by leadership to move from a paper-based documentation process to an electronic one.



## SOLUTION

### A Person-Centered EHR

Switching to an electronic record isn't just a change, it's an organizational transformation. "Adapting to the ever-changing environment has been a priority for us as an agency, which was why we came to the decision to go paperless," explains Logan Lewis, Director of Compliance and Quality Assurance.

As part of the process at Camelot, Mr. Lewis spent time meeting with all levels of staff within the agency to assess workflows and address concerns. "Our counselors expressed some concern that clients might feel that they weren't the primary focus during client meetings if a computer was involved, so we came up with a change in our workflow where clients summarize their session takeaways and the client and counselor type up the next steps together."

**This new approach has led to more holistic service delivery while maintaining a person-centered approach.** The hours previously spent on updating paper charts within multiple binders is now time spent working directly with individuals to address recovery goals and provide support.

**"We realized that going paperless would save us time, keep us organized, and in turn allow us to help more people."**

## RESULT

### A Perfect Audit

All told, it took about one year to standardize all forms, develop and launch new workflows, and train staff before the agency completely phased out paper charts. "The upfront work takes commitment and top level support, but it was well worth the effort," says Mr. Lewis. "Shortly after implementing AWARDS across all our programs, we received a perfect score on an audit!"

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