



IT at Salisbury Management

IT Journey and Challenges Ahead

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About Me...

- Started my career in early 90's as an early era “webmaster” and building data-driven websites
- Spent time at Legg Mason and built their first website, Intranet and online account access systems before starting my own small software consulting company and creating Info.Net product
- Continued web-based software development and business process consulting for about 15 years and worked with many local and national companies including Black and Decker, WR Grace, AmerisourceBergen, Merck, World Wildlife Fund, International Game Technologies, National Aquarium and many others
- In 2010 became CTO and then COO of Regent Education, a cloud-based enterprise platform for financial aid management in higher education
- In 2017 joined Salisbury Management as their first CIO
- Married with 3 kids ages 18, 16 and 12 and I coach youth football and enjoy playing golf whenever possible



About Salisbury House and Salisbury Management

Salisbury's Mission and Core Values Drive Quality of Services



MISSION

Salisbury House helps people with serious and complex behavioral challenges live a high-quality life by working collaboratively with the individual, their family, community and state



CORE VALUES

EMPLOYEE EXCELLENCE

As a service provider, Salisbury hires the best people that always put the needs of the client first

QUALITY SERVICE

By utilizing the best practices in the industry, Salisbury provides affordable, high quality care

FISCAL RESPONSIBILITY

Every employee is responsible for maintaining efficient, streamlined and cost-effective operations



Salisbury's core values lead to a higher quality of life for people with serious and complex needs

History and Key Milestones



For over 35 years, Salisbury has demonstrated an inherent ability to continuously reinvent and expand its behavioral health service offerings

1979 - 1997

- 1979** Entrepreneur Paul Volosov identified an unmet need for community-based services for the I/DD and mental health ("MH") populations in Pennsylvania and incorporated **Growth Horizons** as a nonprofit
- 1986** Became the first CLA provider for individuals with co-occurring MH and I/DD in Pennsylvania
- 1989** Discontinued consulting operations to CLA providers in the state as they gained more expertise in ABA, a seminal event in the organization's development, cultivating a culture of continuous improvement and reinvention
- 1993** Transferred MH contracts held by Growth Horizons to a for-profit entity, now rebranded **Salisbury Behavioral Health**

1998 - 2011

- 1998** **Salisbury Management** was incorporated to provide centralized management and administrative services to support future growth and drive profitability
- 1999** Began operating the first integrated models of care for MH in Pennsylvania, solely providing and arranging residential, partial hospital, outpatient therapy, case management and community treatment
- 2001** Founded **PAHrtners**, a behavioral health services provider for children and adults who are deaf or hard of hearing with co-occurring MH and/or I/DD in the greater Philadelphia area
- 2003** Acquired 60% of the assets of New Hope of Pennsylvania, a predominately children's clinical program with a single special education school, the seed that would later evolve into **New Story Schools and Services**

2012 - PRESENT

- 2012** Acquired **New Story of Ohio**, the first expansion out of Pennsylvania
- 2013** Expanded **PAHrtners** into Western Pennsylvania and opened a CLA for adults who are deaf or hard of hearing with co-occurring I/DD
- 2015** Acquired **Green Tree School**, an urban non-profit special education school based in Philadelphia, PA
- 2016** Promoted multiple seasoned operators to solidify the Company's future: David Volosov (CEO of Salisbury House and its subsidiaries, former EVP of Salisbury House), Beth Davidson (CEO of Growth Horizons, former COO), Dana Monroe (CEO of New Story, former COO of Western Region)
- 2017** Hired CIO to continue to strengthen leadership team in preparation for growth

Market Leading Behavioral Health Brands

CLINICAL EXCELLENCE

EFFECTIVE & PROFITABLE CARE

LASTING RELATIONSHIPS WITH
FUNDING SOURCES

Salisbury provides a broad range of high-quality therapeutic services to must-serve populations through a family of leading behavioral health brands, which are supported by a common infrastructure

MANAGEMENT COMPANY



Centralized shared services enable supervisors and staff to focus on providing quality care

OPERATING COMPANIES



Provider of **residential and community-based therapeutic services** to adults and children with **mental health** illnesses who may also be experiencing co-occurring I/DD and/or medical complications



Provider of **residential and vocational services** to adults with **I/DD** who may also be experiencing co-occurring medical complications



Provider of **residential and community-based therapeutic services** to *deaf or hard of hearing* adults and children facing co-occurring I/DD and/or mental health illnesses



Provider of **community-based special education and residential services** to *children* up to age 21 with severe autism, emotional and/or behavioral challenges



The IT Journey...

History of IT at Salisbury

- IT Director level leadership, no CIO
- Historically an operational support function- Help Desk, PCs, networks, scanners, printers, etc...
- IT very limited involvement in line of business systems
- Minimal business analysis or business process reviews occurred with technology and systems within business units
- Misuse of systems and fallback to manual processes
 - Payroll
 - Time tracking
 - Billing
 - EHR
- Manual reporting, spreadsheets and paper processes
- Internally hosted systems, very limited remote access, aging equipment
- No governance processes or IT plan
- Significant lack of trust with IT department in some areas

Initial Actions as CIO

- Completed current state IT and business assessment
- Assessed current systems, contracts and service levels
 - Compliance risks
 - Security gaps, needs and risks
- IT Roadshows across business units
 - Issues, needs
 - Positives, negatives
 - Share a vision of what IT could provide
 - Educate users and leadership
- Create IT Roadmap
 - Low hanging fruit (multiple phone systems, expensive licensing, limited remote work, etc)
 - Document major gaps and needs
 - Meet with business units and key stakeholders about issues, pains, needs
 - Cost/Benefit analysis
- Establish IT Steering Committees for each business unit with regularly occurring status meetings

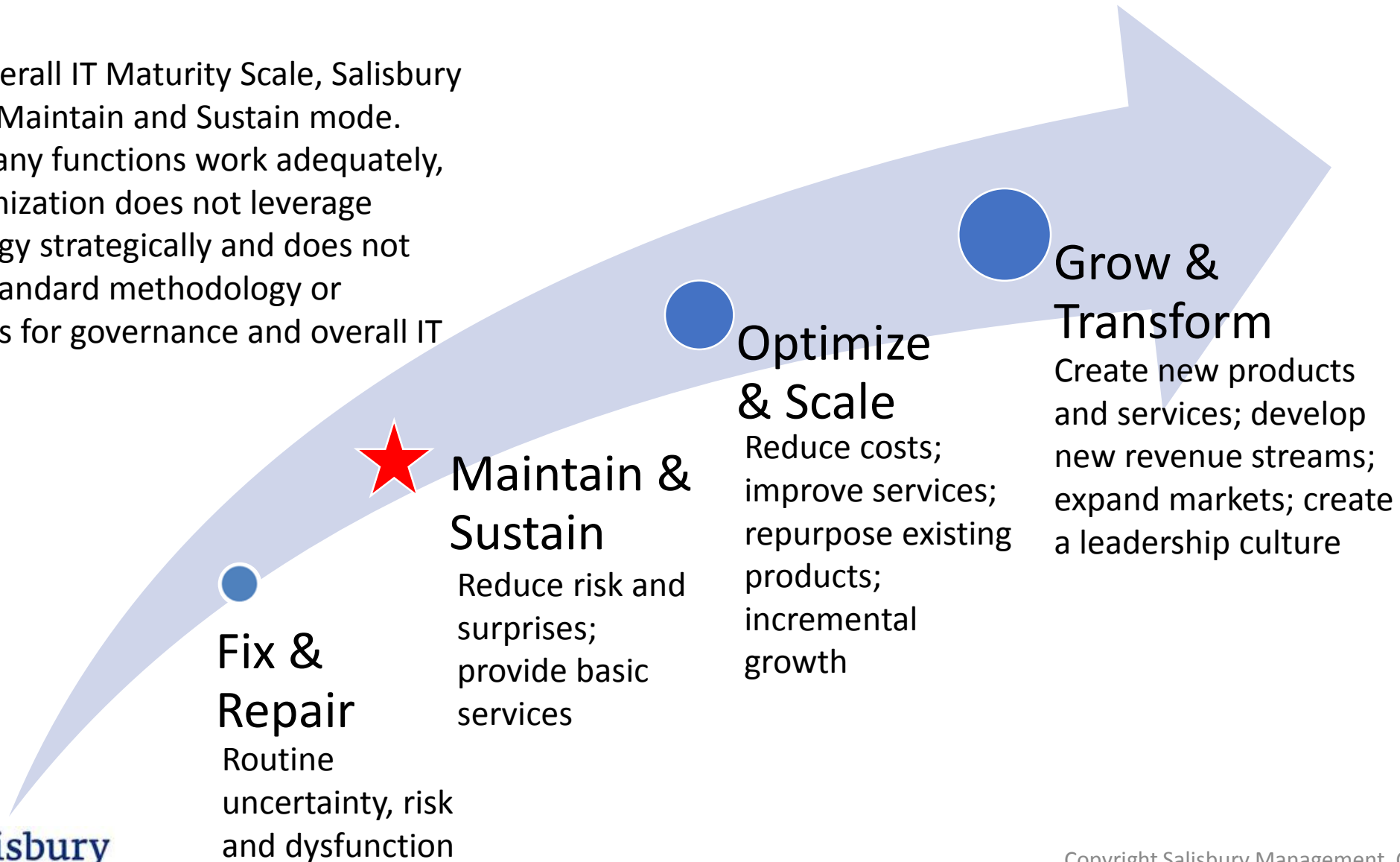
IT Assessment March 2017- Strategic Value Pyramid



<i>Status</i>	<i>Explanation</i>
1	Indicates area of most concern. Most significant impact from changes will be realized in these areas.
2	Indicates area that will result in modest operational improvements.
3	Indicates strong performance in this area. Likely not an area of immediate focus for improvement.









IT Assessment- Strategic IT Maturity Framework

On an overall IT Maturity Scale, Salisbury was in a Maintain and Sustain mode. While many functions work adequately, the organization does not leverage technology strategically and does not have a standard methodology or processes for governance and overall IT service.



IT Systems Overview- March 2017

Mix of cloud systems and internally hosted solutions

Business Process	System / Platform	Highlights
Patient Data	 CREDIBLE	<ul style="list-style-type: none"> Cloud-based EHR for behavioral health. Limited system functions Significant support issues
Student Data	 QuickSchools.com <i>Powerfully simple school management</i>	<ul style="list-style-type: none"> Cloud based tool- marginal integration with EHR platform. Limited capabilities for complex needs
Billing / Accounting / Payroll / Admin	 Centricity	<ul style="list-style-type: none"> Legacy billing system for healthcare providers. Manual processes with minimal automation available for residential and school billing
	 CREDIBLE	<ul style="list-style-type: none"> Clinical billing part of EHR platform Payroll being done through EHR platform for some staff Very manual and not able to do school or residential billing.
	 Microsoft Dynamics™ GP	<ul style="list-style-type: none"> GL is run with Dynamics GP Invoicing and expense processes are manual and paper based Significant scanning and Excel tracking
	 ADP	<ul style="list-style-type: none"> Payroll, HR and benefits but misuse and many manual processes in place Custom payroll processes for Credible EHR staff Poor vendor relationship
Reporting and Analytics	 X	<ul style="list-style-type: none"> Excel reporting, some limited SQL reporting, limited system reporting tools with Credible, ADP and GE
Collaboration Messaging	 Exchange	<ul style="list-style-type: none"> Internal Exchange servers, no messaging platform or Intranet Local file servers across offices

Aligned Strategy- IT and Business

Salisbury Management Mission:

Our mission is to provide a complete array of professional administrative services to minimize the complexity of day to day administrative operations for the service provider in order to allow their primary focus and attention to be on providing quality care to their patients, consumers and students.



Improve employee mobility and system access

Reduce risk, improve security and enhance system availability

Improve employee efficiency and quality of care

IT Mission and Principles:

Operational Efficiencies and Process Improvement,
Exceed Customer Expectations, Business Focused,
Agile, Buy not Build, Service Oriented

Informed Solutions

Our Mission:

Our mission is to provide a complete array of professional administrative services to minimize the complexity of day to day administrative operations for the service provider in order to allow their primary focus and attention to be on providing quality care to their patients, consumers and students.



Improve employee mobility and system access

- Single Phone System
- Consolidated AD
- Hardware refresh
- Cloud Services
- Office 365

Reduce risk, improve security and enhance system availability

- Mobile Security
- Encryption
- Network Architecture
- Compliance and Governance

Improve employee efficiency and quality of care

- Business Systems Leadership
- Improved EHR
- Reduction of Manual Processes
- Training

IT Mission and Principles:

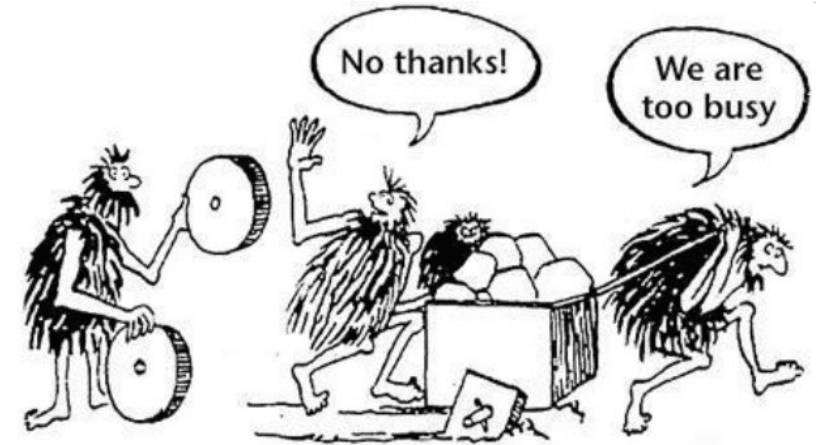
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Challenges...And Solutions

Challenges and “Mom and Pop” Culture

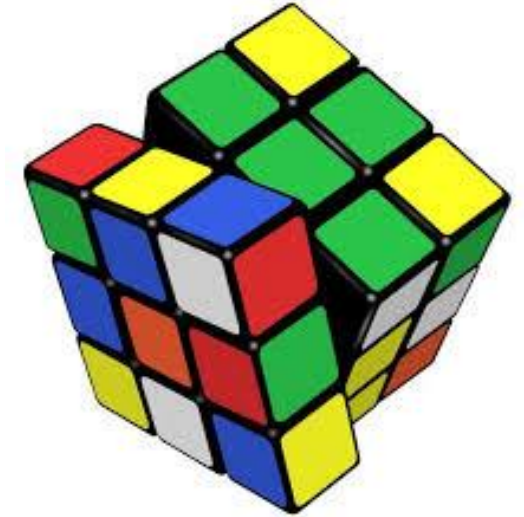
- Education
 - How to partner with an IT organization effectively
 - What do the various IT roles even mean and what do they do...
 - Business analysis and how to engage with vendors
- Resistance to Change
 - Very long tenure with leadership only working at Salisbury
 - We’ve always done it our own way- 30+ years with success...
 - Not comfortable with technology
 - We don’t trust the system until we manually verify it
 - Everything is an exception...
- Highly distributed structure
 - Multiple business CEOs and COOs
 - Wide variety of business needs
 - Location of businesses throughout PA while HQ is in Baltimore



"This really is an innovative approach, but I'm afraid we can't consider it. It's never been done before."

Problem Solving...Changing the Culture

- Consultative Approach
 - Service oriented approach to engaging with business
 - Staff changes to support growth and needs
 - Interpreters vs translators
- Education and Communication
 - Regular IT led onsite group IT training sessions and assessments
 - Formalized processes and increased communication
 - Status reports and visibility of what IT is working on
 - Business analysis and project management
 - IT Roadmap
- Break Down Barriers for Change
 - Ongoing challenge...change is difficult
 - Building trust through providing tools that fit for the needs and save them time
 - Education of how to use tools properly
 - Don't do too much at once...



Goals and Objectives of IT in 2018 and 2019

Theme: Work Smarter, Not Harder

- Deliver a foundation for standardization that supports growth and scalability
- Process improvement and efficiencies- reduce manual and time consuming processes
- Provide tools that support excellent clinical care
- Provide secure and resilient IT platforms
- Establish enterprise IT processes for change management and IT governance
- Provide outstanding support to our business community and users
- Secure information assets and mitigate vulnerabilities
- Ensure compliance with HIPAA, CARF and FERPA
- *Strengthen partnership between business units and IT for joint accountability of outcomes*

Solution Initiatives- 2018 and 2019

IT Infrastructure

- Standardized phone system (\$200K/year savings)
- Office 365 (Mail, OneDrive, Security)
- Upgraded networks, wireless and equipment so that staff can work effectively
- Windows 10 upgrade

Business Systems

- Eliminate HR, payroll and accounting manual processes
- Concur for Expense and Invoice tools to replace manual processes

Governance

- Established Governance Board
- Established Monthly Business/IT Meetings
- Formal IT project management processes

Reporting and Analytics

- Proof of Concept in PowerBI, plus additional projects
- Reduction of manual reporting processes

Clinical Systems








- Attempted to reimplement Credible to improve processes (Failed)
- Selected Welligent for future EHR system
- Selected Skyward for future Student Information System

Others

- Office 365 Tools- Skype, SharePoint, Teams
- Phishing campaigns, mobile device management
- HIPAA policies and procedures

IT Systems- Fall 2019

Cloud hosted solutions- limited internal systems

Business Process	System / Platform	Highlights
<p>Patient Data Medication Patient Billing</p>		<ul style="list-style-type: none"> Welligent – Cloud-based comprehensive, electronic medical records system for behavioral health Medication management Includes automated billing for all lines of business including schools Integrations with billing clearinghouses
<p>Student Information System</p>		<ul style="list-style-type: none"> Cloud-based enterprise student information system with special education capabilities
<p>Accounting Finance Payroll/HR</p>	  	<ul style="list-style-type: none"> Financial accounting system Invoice and Expense management Payroll, HR and benefits provided through one integrated delivery system
<p>Reporting and Analytics</p>		<ul style="list-style-type: none"> Transactional reporting from source systems Business Intelligence via PowerBI
<p>Collaboration Messaging</p>		<ul style="list-style-type: none"> Office 365 Platform SharePoint

Some Lessons Learned at Salisbury

- Old habits die hard...but taking a consultative approach with our business units has helped us drive success in IT
- It's still all about people and building relationship and trust and we can't lose sight of our mission- therefore we are frequently onsite and experience the challenges our teams face on a daily basis
- There is a limit to how much technology and change our organizations can absorb
- Education is a critical building block for change management and it has reduced the fear of technology change with many of our business units
- Getting a set of systems and data that give us a “single version of the truth” is going to be critical to our business growth and management

Questions/Comments?

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Thank You!!!