



CPA Online

Content Finder, Scan Manager and Metadata Manager from Folding Space are providing a vital search and retrieval tool for mental health service professionals across Worcestershire NHS.

There are some situations where record keeping and access to critical information takes on a level of importance many people never have to consider in their daily working lives.

One such area is that of healthcare, and in the particular instance of mental health records, it is vital that health professionals can work with a uniform approach which is comprehensive and readily accessible.

In many organisations, difficulties with gaining access to key information can be inconvenient – in healthcare, any problems can be much more far reaching.

This is why health authorities have traditionally relied heavily on paper-based systems that meet their requirements for accuracy and reliability.

The downside always lies in the issues of access and retrieval, which is why one NHS Trust in Worcestershire began to look for a way to provide a rapid and reliable digital search and retrieval solution to support its existing processes.

Care Programmes across Worcestershire

The Care Programme Approach (CPA) department within Worcestershire Mental Health Trust is responsible for what has been a central pillar of national mental health policy since it was originally introduced in 1991, as a 'best practice' way to care for people with mental health needs outside hospital.

CPA applies to all people who have been involved with mental health services and who require ongoing care and review.

Importantly, the Care Plan Approach links local authority social services departments with the NHS, where social services are assessing needs and operating under the Community Care Act.

The approach is to place the patient (or 'client' as they are referred to) at the centre of the service in order to effectively provide an accurate assessment of needs & risks, and then put in place a plan which guides ongoing care and treatment.

The Forms Challenge

Across Worcestershire, CPA record keeping was historically a forms-based, paper system. Key workers and mental health staff needed to maintain CPA records in a uniform manner, and in the Worcestershire NHS health economy, mail them to a central records management location where they could be retrieved in the future by authorised staff for review.

This was an important process as mental health services would work closely with local authority services which meant that social workers, clinicians and management all needed access to the same set of CPA records for each individual.

Although this system proved reliable, one of the problems was that the forms were inaccessible in certain situations.

If a mental health client came onto a ward in the middle of the night, for instance, staff wouldn't have immediate access to the CPA information because it was out of office hours. This could mean that hospital staff may have to carry out a new risk assessment without access to a care plan already in place, and couldn't refer to existing notes until the records department re-opened and a copy could be requested.

Creating a digital future

In looking for a remedy to this issue the Worcestershire NHS CPA manager, Ben Visser, wanted to create electronic access for staff, but to do so without asking for any fundamental changes in the process of compiling or submitting CPA records to their centrally held location.





"I was conscious that staff were already working with some IT systems that were not fully compatible, as previously the mental health trust had its own information database, as did the local authority so it was important that we didn't duplicate effort by asking them to enter information twice. Budget was also a factor, and while CPA document management is important, we didn't have the resources to bring the disparate systems together or create an integrated solution from scratch. We needed something more imaginative that could work with the processes we had in place."

Ben Visser took this question to his colleague John Thornbury, Director of ICT for Worcestershire NHS.

They were looking for a solution that could capture information as it arrived on paper, but then provide an electronic search and retrieval capability that could be accessed by all authorised staff wherever they were based, and at whatever time of day or night they needed it.

John Thornbury had worked with Birmingham-based Folding Space on previous projects, and as specialists in software development for content and document management and retrieval, asked them to take a look at the particular challenge faced in Worcestershire.

Combining Folding Space Technologies

Folding Space looked to apply the technology behind their **Content Finder** product to help provide an accurate search capability, without the need to build any kind of new database within the Worcester NHS IT infrastructure.

Also, to take advantage of the Folding Space scanning software (**Scan Manager**) and metadata management (**Metadata Manager**) technologies.

Content Finder works by applying what is known as 'symbiotic indexing' to deliver full text search & retrieval across networked computers based on distributed computing and local indexing.

This enables very rapid and accurate retrieval of documents based upon any choice of words or phrases.

Content Finder operates without the use of a central server, repository or database, or any file re-formatting or document conversion. Instead it works with the original folders, files, documents, programs, database records and emails.

Importantly, the technology can carry out search and retrieval simultaneously - across a network, irrespective of its size or multi-location - within every data processing device connected to that network - and to/from any such device connected to that network.

Users search by typing in any words, phrases, figures, and dates or similar as a search query into the Content Finder interface.

Then all the relevant folders, files, documents, programs, database records, pages, images and scans with or containing those words and/or phrases are immediately there to access & view from the desktop.

Individual 'finds' typically take milliseconds and rarely take more than one second irrespective of how many servers, PCs and software assets are searched.

CPA Online

The application that Folding Space developed is called 'CPA Online' and is accessible across all of Worcestershire NHS Mental Health Trust.

This includes around a dozen community mental health teams, all specialist teams in the community, as well as in-patient wards across four hospital sites.

All of which amounts to a potential user base of hundreds of people across wide-ranging locations, not to mention mobile users.

The solution works within the existing CPA administrative structure.

Two administrators receive care plans in the post from colleagues across the county, as they did before CPA Online was created.

These plans are now scanned and metadata added (i.e. categorization & descriptive labelling) and then automatically routed into Content Finder.

The plans were also back scanned over the previous 12 months when the CPA system was first developed. This gives CPA staff a comprehensive and constantly updated range of plans to refer to as required.

Secure access via the intranet

On the Trust intranet page there is a section for CPA, which provides a secure link to CPA Online search and retrieve functions.

These facilities can be used by all registered and authorised staff within the CPA structure.

To assist the launch and deployment of the new service, an online application for registration and authorization program was also developed.

Instant search & retrieval

CPA Online provides a simple to use instant search facility where users can look at both current and discharged care plans.

Care coordinators can look for all their care plans for which they have responsibility and find all kinds of useful information, such as all their points of review.

This helps with workload management as searches can be directed towards these specific fields.

They can search on the basis of a wide variety of criteria from standard document tags, such as client name, to specific items within the content of an individual plan.

"The system we have delivered to our CPA team fits our needs very precisely" explained Ben Visser.



“We have been able to retain the process already in place and so minimise any disruption to staff, and also eliminate much of the need for training we would have created had we implemented a new solution which relied on building another database.

It is powerful, accurate and very rapid, and we know that it will scale upwards very effectively as we continue to build our electronic store of CPA records” said Ben Visser.

“We have also experienced a very positive effect on patient care, particularly in the case of out-of-hours access to patient CPA records – there is none of the potential for delayed access we were faced with before.

Staff have taken to the system very easily and the general familiarity we all have with search technology has helped us all to make proper use of CPA Online from the very beginning.”

Folding Space

Folding Space software technology enables users to find, identify, discover, retrieve and manage all the folders, files, programs, documents, emails, images, scans and records across their network. Also, to create, collaborate and route files, documents, records, forms and dynamic data across the network via automated workflows and business processes.

This technology is manifested in a number of complementary software products and applications which can also be treated as software ‘modules’ or ‘aspects’ that can be assembled and customized into new products, applications and niche solutions upon demand.

Folding Space has developed an ‘intelligent software’ technology IPR that is truly unique – **symbiotic indexing** via **distributed computing** allied to a breakthrough in the concept of **intelligent, self aware documents** and **business process automation** (‘**symbiotic intelligence**’).

This world class technology and the resulting products and applications are demonstrably superior to anything comparable providing significant and sustainable competitive edge, both in terms of cost of purchase and cost of ownership.

Folding Space products and applications address various parallel and complementary IT areas:

- o Business process management
- o Document/Records management
- o Document & Email search & retrieval
- o Document & Email Archiving
- o Document de-duplication
- o Document scanning
- o Document workflow management
- o Enterprise-wide intra-mail
- o Forensic document & data discovery
- o Image editing & redaction
- o Intelligent Electronic Forms
- o Metadata management
- o Program asset management
- o Website construction & content management

Products:

- Search & Retrieval
 - **Content Finder**
 - **Desktop Finder**
- Email management
 - **Exchange Finder**
 - **Exchange Archive**
 - **Message & Search Manager**
- Records management
 - **Image Viewer**
 - **Scan Manager**
- Metadata management
 - **Image Tagger**
 - **Document Tagger**
 - **Metadata Manager**
 - **Taxonomy Manager**
 - **Process Manager**
- Document management
 - **Document Workflow Manager**
- Content management
 - **Site Manager**