



Sept. 18th  
**SUNDAY**

**1:35 pm**

Red sox vs Kansas City Royals  
Baseball game at Fenway Park

**4:00pm – 6:00pm**

Event registration is open

Sept. 19th  
**MONDAY**

Sept. 20th  
**TUESDAY**

Sept. 21st  
**WEDNESDAY**

8 - 9am

**Buffet Breakfast**

**Early Morning**  
9 - 10am

**Welcoming Remarks**

George Epstein, Chairman, The Echo Group

**Keynote**

Tara Larson

10 - 10:15am

**Break**

**Morning**  
10:15 - 11:15am

**M1A**

How Augmented Intelligence Can Reduce Burnout a...

**M1B**

Roadmap to Recovery- Explore Our Person Centered...

**M1C**

Form designer training 101

**T1A**

What do You Want to Get Out of Your EHR: Creating a 5-year...

**T1B**

Your Data Visually - A Look at Echo's Dashboards

**T1C**

GRAND Access Network on Demand. The GRAND Model in...

**W1ABC**

Workshop: Design - A Participatory Event

**Mid-Day**  
11:15 - 12:15pm

**M2A**

Leveraging Tele-therapy Technology to Improve Access and Outcomes

**M2B**

Anxiety and SUD - What is the Connection

**M2C**

Form designer training 201

**T2A**

The Final Frontier - Preparing Your Neurodiverse Students...

**T2B**

Advanced Graylog Searching

**T2C**

So, You Think You Want to Become a CCBHC

**W2A**

Treatment has Changed - So Has Treatment Planning. Echo's...

**W2B**

Billing with EchoVantage - Do You Know All the Features

**W2C**

See What Your Client's Can See. Echo Client Portal and

12:15 - 1:30pm

**Lunch**

**Early Afternoon**  
1:30 - 2:30pm

**M3A**

Shalom House Art Program

**M3B**

Technology Change Management - You are not alone!

**M3C**

Form designer training 301

**T3A**

A New Path - Fresh Applications of Virtual Reality in Special...

**T3B**

CIO/CEO Round Table

**T3C**

Nifty Forms to Streamline Staff Workflows

**Late Afternoon**  
3 - 4pm

**M4A**

Building a Behavioral Health Centric Clinically...

**M4B**

Building a Feedback Informed Electronic Health Record

**M4C**

Taking Form DesignEHR out in the Real World

**T4A**

Alerting You to Alerts!

**T4B**

Increase Community Awareness of Your Agency - For Free

**T4C**

The County Government Provider - Unique and Challenging

**Evening:**

**5pm:**  
Duck Tours & Dinner

**6pm:**  
Bowling & Dinner

# Session Details



## Monday, Sept. 19th

9:00am

### Welcoming Remarks

Etiam porttitor ut nisl at pharetra. Maecenas pretium libero aliquam massa venenatis condimentum.

10:15am

### M1A: P

#### How Augmented Intelligence Can Reduce Burnout and Improve Care

**Presenter:** Jennifer Gridley, Josh Cantwell  
**Employer:** Elios, Grand Lake

When we digitize behavioral health conversations, we unlock possibility. During this session you will learn about how leading behavioral health organizations are reducing administrative workloads, scaling supervision and unlocking visibility into care quality with Eleos Health, an Echo Group partner.

### M1B: C

#### Roadmap to Recovery—Explore Our Person Centered Recovery Plan

**Presenter:** Tyler Wilkenson  
**Employer:** Thrive

Recovery is the goal of treatment for your clients, but it is also the challenge. Learn about the Newport Recovery Plan that provides the goals and objectives needed to guide their clients on the road to recovery.

### M1C:

#### Form designer training 101

**Presenter:** Jason Pitzen  
**Employer:** Echo

You want to create your forms but are still a little shaky. This session will assist you in building that first form and your confidence.

11:15am

### M2A: P

#### Leveraging Tele-therapy Technology to Improve Access and Outcomes

**Presenter:** Jeff Hunter, Jeremy Hume  
**Employer:** Huner Care

Learn how integrated telemedicine solutions can be used to reduce inpatient hospitalization, improve outcomes, and enhance workflow. From screenings, to signature capture, to crisis services, to on-demand telemedicine, learn how to maximize telemedicine technology with integrated EchoVantage solutions.

### M2B:

#### Anxiety and SUD – What is The Connection

**Presenter:** Suki Norries  
**Employer:** Echo

Suki Norris will present her research on the relationship between anxiety and SUD. Is it a problem just for women, or is it dependent on SES? Come and learn what she found out and why she undertook such research.

### M2C:

#### Form designer training 201

**Presenter:** Jason Pitzen  
**Employer:** Echo

With a little bit of confidence and the first forms under your belt, what else can you do? You want to learn the next steps in creating interactive forms for your team

# Monday, Sept. 19th Continued

1:30pm

## M3A: C

### Shalom House Art Program

**Presenter:** Jill Silander, Tenney Swift  
**Employer:** Shalom House

The Shalom House Art Program encourages self-expression through the visual arts for people living with psychiatric disabilities. Our goal is to provide a safe, supportive environment where participants can freely explore and express ideas, learn new skills and discover their strengths and abilities.

## M3B: C

### Technology Change Management – You are Not Alone!

**Presenter:** Jonathan Myers  
**Employer:** Mecklenburg County

We can agree that technology changes rapidly and that everyone involved has different needs and perspectives. It is often challenging to know specific required changes, how to prioritize them, their status at any given time, and who is supposed to be working on what. This session provides insights into our successful Technology Change Management process, including examples from our experience utilizing Microsoft Teams to identify, track and oversee Technology Change Management.

## M3C:

### Form designer training 301

**Presenter:** Jason Pitzen  
**Employer:** Echo

You are now ready to fly. It is time to learn the power of FormDesignEHR and find out where your forms can go. This is also a chance to ask questions to help you solve your challenges with FormDesignEHR.

3:00pm

## M4A: P

### Building a Behavioral Health Centric Clinically Integrated Network

**Presenter:** Chris Thompson  
**Employer:** CCR

Learn the steps to build a Clinically Integrated Network. There are some dos and don'ts that you need to know. There are also data needs and data requirements you should not ignore.

## M4B: C

### Building a Feedback Informed Electronic Health Record

**Presenter:** Ashley and Chelsea  
**Employer:** Heritage Behavioral Health

Like many other behavioral healthcare providers in the country, Heritage faces the challenges of "doing more with less," while remaining committed to expanding its services in the community. Learn how clinical and administrative teams worked together to develop a thoughtful plan for transitioning to EV. It started with our shared motto of "the fewer clicks, the better" and developed into a series of workflow meetings that opened up the doors for meaningful discussions.

## M4C:

### Taking Form DesignEHR out in the Real World

**Presenter:** Jason Pitzen, Charley Suter  
**Employer:** CCR

You have learned FormDesignEHR, from the ground up. Now let's take it out for a drive, and see some creative tools that users have built.

# Tuesday, Sept. 20th

9:00am

## Keynote:

Tara Larson

10:15am

## T1A: **C**

### What do You Want to Get Out of Your EHR: Creating a 5-year Road Map

**Presenter:** Carolyn Spence

**Employer:** Alexander Youth

In this session, Alexander Youth Network will present their approach to developing an EHR roadmap. The information is presented to help organizations think about what they want out of their system, where they are going, the external influences that may impact the future, and how to cultivate an organization of experimentation and innovation.

11:15am

## T2A:

### The Final Frontier – Preparing Your Neurodiverse Students for Life After High School

**Presenter:** XXX

**Employer:** XXX

For many, the term college readiness means being “smart enough” to do college-level academic work. The reality is that college readiness is a multidimensional construct that includes academic and nonacademic factors. In this session we will discuss college readiness and what it looks like for neurotypical students and its place in the postsecondary transition planning for high school students.

## T1B:

### Your Data Visually – A Look at Echo’s Dashboards

**Presenter:** Kelly Stepura

**Employer:** Echo

Echo's dashboards have changed dramatically from dashboards driven by excel to a real-time look at data. Data can demonstrate and facilitate meaningful results and help you see the choices before making decisions. Join Kelly Stepura, and see what Echo is doing with dashboards.

## T2B:

### Advanced Greylog Searching

**Presenter:** Allan Normand

**Employer:** Echo

This session will review the audit searching capabilities in EchoVantage and the advanced searching capabilities available through the Graylog interface. We will look at filtering the data on your production or test environments, staff or client, or date.

## T1C: **C**

### GRAND Access Network on Demand: The GRAND Model in CCBHC Practice

**Presenter:** Josh Cantwell, Lary Smith

**Employer:** GRAND Mental Health

Come learn about the study's results, including how Grand reduced inpatient hospitalizations, increased outpatient service utilization, and produced cost savings for GRAND and law enforcement. While serving a predominantly rural community

## T2C: **C**

### The GRAND Model in CCBHC Practice

**Presenter:** Lissa James, et al

**Employer:** GRAND Mental Health

Join a discussion with GRAND Mental Health's management team as they discuss the CCBHC process. Each member of the management team will address the changes to the system required to be successful CCBHC.

# Tuesday, Sept. 20th Continued

1:30pm

**T3A:** **C**

## A New Path – Fresh Applications of Virtual Reality in Special Education

**Presenter:** Charley Suter  
**Employer:** Spaulding

Come discover how Charley Suter, Jen Benjamin, and Spaulding Academy & Family Services are creating custom-made Virtual Reality content to meet the individual needs of special education students! We'll explore the tools and workflow for creating your own custom VR content, and we'll discuss the many innovative and creative ways that this technology can be implemented. A demonstration will be included - there will be VR headsets to try, and if there's time, we might even make our own 360-degree video!

11:15am

**T4A:** **C**

## Alerting You to Alerts

**Presenter:** Shawn Cornell  
**Employer:** West Central Behavioral Health

Learn how to use alerts to track pending documentation, from treatment plans to required assessments. Learn how to make alerts program-specific. Alerts can even be foundations for reporting. Most importantly, learn how to get your clinical staff to use alerts.

**T3B:**

## CIO/CEO Round Table

**Presenter:** Allan Normandin  
**Employer:** Echo

Remember the good old days when we used to have CEO or CIO roundtables. Well, we are bringing the roundtable back. Come and sit down with your peers and discuss the challenges you face in 2022 and the solutions you have found. The only requirement is that you join and participate as you see fit.

**T4B:**

## Increase Community Awareness of Your Agency – For Free

**Presenter:** Matthew Guruge  
**Employer:** Echo-Consultant

In this session, Matthew Guruge, Echo's Sales and Marketing Consultant will go over how you can increase community awareness, create better partnerships and build marketing promotions inexpensively. You'll learn ways to showcase the great work you're doing, create better community relationships and build out your marketing infrastructure. You'll walk with a better understanding of marketing, ready-to-use email and social media templates, and a list of free-to-use marketing tools for your team.

**T3C:** **C**

## Nifty Forms to Streamline Staff Workflows

**Presenter:** Rachel Bowley, Lucy Putnam  
**Employer:** Community Partners

Community Partners has taken full advantage of the Forms menu in EchoVantage and has built some nifty forms to streamline staff workflows. Add in a touch of automating the creation of EV Messages and you have yourself a recipe for some pretty cool features their clinical staff have happily tossed away their spreadsheets for. Lucy and Rachel will show you some of what they have built and explain how they work.

**T4C:** **C**

## The County Government Provider – Unique and Challenging

**Presenter:** Hether Bitsky, Paula Swattek  
**Employer:** Adams County, Crawford County

While County Government may present unique challenges and opportunities to providers, we have a solution. We use Power BI for EV Dashboards so that data is available as we need it. We know the status of key data points, including outcomes, quality, and productivity.

# Wednesday, Sept. 21st

10:15am

## W1ABC:

### Workshop – Design – A Participatory Event

**Presenter:** Tristan Emerson, Chris McKnight, Travis Soule

**Employer:** Echo

During the week you will have an opportunity to vote on your three top new features. We will share the winners and begin the design process with Tristan, Chris, and Travis. Learn how we use your ideas in our design process, and then keep an eye out for the new functionality.

11:15am

## W2A:

### Treatment Has Changed – So Has Treatment Planning Echo's New Outcome-Based Treatment Planning System

**Presenter:** Kelly Stepura

**Employer:** Echo

Our new treatment planning system is a comprehensive map of care that seamlessly connects all aspects of a client's care journey. Visually, clinicians and clients can track progress and ensure that they address treatment issues. This innovative system represents a paradigm shift, allowing outcomes to drive treatment through pre-determined logic based on evidence-based practices. Interventions and objectives are suggested based on assessment results to help answer: Is treatment positively impacting outcomes for this client?

## W2B:

### Billing with EchoVantage, Do You Know All the New Features

**Presenter:** Kathy Bunker

**Employer:** Echo

Join Kathy Bunker as she shares the newest developments in EV Billing. From sending Void Requests on the 837P to pausing the waterfall. Kathy will discuss these and other enhancements, and there will be time for questions

## W2C:

### See What Your Clients Can See: Echo Client Portal and Echo InForms

**Presenter:** Scott Taylor, Kali Zumpfe

**Employer:** Echo

Client engagement is the phrase, and the solution is Echo InForms. Get the data you need before the client comes in for services. The information is immediately available to you, whether securely emailed or accessed through the portal. And for the clients who want immediate access to information, from changing appointments to completing forms, the client portal is the solution.