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**Strategic Technology Plan**

1. **Introduction**
   1. **Mission**

*Our mission is to honor God by providing an atmosphere of teamwork, optimism and honesty to help anyone with a disability achieve a greater quality of life.*

* 1. **Organizational Overview**

*Location: 594 Halls Creek Rd New Bern NC 28560*

*Scope of services: At the office location, no services are provided. This location is used for administrative purposes. The technology plan serves for the office location as well as business needs for the company as a whole.*

* 1. **Organization’s Key Goals**

*Our key goals have to do with business function and service delivery*

* Pathways will provide model supports for persons served with disabilities and their families, either directly or through partnerships with or referrals to other service providers
* Pathways will develop a stable, highly qualified and motivated workforce that actively delivers the organization’s mission.
* Program improves which will result in more quality supports and services delivered to persons served.
* Ensure that Pathways strategic plan represents input for all agency stakeholders and is made available to all stakeholders.
* Ensure that Pathways is financially solvent and remains profitable.
* Pathways will ensure that all performances measures adhere to the CARF standards.
* Pathways will ensure that all performances Improvements adhere to the CARF standards.
* Ensure that Pathways meets all requirements recommended during its 2021 CARF survey.
* Ensure the rights of persons served are protected at all times.
* Receive a 3 year re-accreditation with CARF
* Update electronic health record for clients in the Pathways programs and client record areas.
* Ensure that Pathways meets all health & safety requirements

1. **The Planning Process**
   1. **Involved Parties**

* *Charlene Davis, Director*
* *Crystal Hughes, Office Manager*
* *Jackie Seamon, Book keeper*
* *Jimmie Hill, CEO*

**3. Review of Technology Areas**

**3.1 Infrastructure**

Current Status: Infrastructure of networks, internet access, operating system firewalls and security software are all in working order. We also use Therap system as our EHR and that is maintained by Therap.

Proposed Resolution: None

Implementation Plan: Ensure that security is maintained for firewall and networks.

What will success look like? No security breaches

**3.2 Data Management**

Current Status: Data management is currently being done with Therap. We are slowly adding more information on there to ensure that all data is saved and that documents have a place as well. We also want to back up newer policy and procedures to a safe place incase the book gets lost/or ruined.

Proposed Resolution: Back up new policy and procedure plans

Implementation Plan: Buy a thumb drive or hard drive to save all the new policy and procedure files to and organize them with the old files so that they are in order.

What will success look like? Completion of implementation plan

**3.3 Digital Communications**

Current Status:

Email: Currently using Gmail mail box for emails unless secure files need to be sent to Trillium, then you use zixmail.

Social Media: We have a Facebook, TikTok, and Instagram account

Website: [www.pbhsinc.com](http://www.pbhsinc.com), currently under WIX

Text messaging/phone calls: Staff use their personal cell phone to communicate with each other.

Proposed Resolution: None

Implementation Plan: None

What will success look like? None

**3.4 Training**

Current Status: Most have been trained on how to use Therap but some older employees do not want to make the switch, which we understand due to elderly people having issues with using technology. There are no technology skills gaps other than that.

Proposed Resolution: Offer online training to help more people get use to Therap for all documentation.

Implementation Plan: Make YouTube videos of using Therap for different things. If Therap already has a video, then we can just share that video with staff.

What will success look like? Staff learning more about Therap and implementing what they have learned.

**3.5 Technical Support**

*Therap: Julie Bowden: Business questions: Julie.bowden@therapservices.net*

*Chelsea: Evv/Scheduling questions: chealsea.lloyd@therapservices.net*

*Nalina: Therap Billing questions:* [*nalina.brenzel@therapservices.net*](mailto:nalina.brenzel@therapservices.net)

*HHA support:* [*support@hhaexchange.com*](mailto:support@hhaexchange.com)

*Trillium Health Resources: networkservicessupport@trilliumnc.org*

**4. Technology Projects**

**4.1 List of Technology Projects Being Addressed**

|  |  |  |  |
| --- | --- | --- | --- |
| Priority (A, B, C) | Project (1-line summary) | Justification (1-2-line summary of why it’s important for mission-impact and/or to achieve agency goals) | Tech Area addressed (from section 3) |
| A | Therap | Using all modules of therap will help achieve agency goals, data driven outcomes, etc | 3.1 |

**5. High-Level Implementation Plan**

* 1. **Responsibilities of staff, consultants, and vendors**

1. Responsibilities of Staff

*Director and office manager are responsible for uploading files to Therap and entering all the data needs to have a well rounded profile of each client*

1. Responsibilities of Consultants and Vendors

*It is Theraps responsibility to stay up and running, as well as HIPPA compliant*

**5.2 Timeline**

* Pull each client record individually and upload annual data into Therap into specific areas that it relates to
* Ensure that ISP is detailed in the Individual support plan area
* Ensure that behavioral plan (if applicable) is uploaded as well.
* Ensure that MAR information is uploaded (if applicable)
* Add more demographic information
* Update authorizations

**6. Budget**

**6.1 Detailed Budget**

*It costs Pathways $699 a month to use Therap as an EHR system.*

*Additional budget needs will be addressed annually as needed.*

**7. Technology goals and objectives**

Pathways will use technology to help meet the company’s standards and organizational goals. This section of the Technology Plan sets forth specific action steps which are defined and measurable, to ensure successful implementation.

**Goal A. Provide resources to support the improved delivery of services.**

*Objective A1*

* Research a backup system for data such as a server (possibly cloud) (4th Quarter 2022
* Replace computers as they being to have slow performance (as needed)
* Continue to update payroll system with current year updates (Annually, when updates are available, check for updates in 2nd Quarter of each year)

*Objective A2*

* Replace printers to provider more services from them/more efficient functionality(as needed)
* Purchase tablet for mobile training(1st Quarter 2022)

**Goal B: Promote Digital Literacy through educational programs and/or assistance to the community and staff on the use of information technology**

*Objective B1*

Provide staff development opportunities to ensure all staff meet expected technology competency levels

* Ensure staff is trained on cyber security and how that relates to their job (Annually)
* Develop plans for ongoing staff training and development (4th Quarter 2021)

**Goal C: Use technology to communicate more effectively with the public**

*Objective C1*:

Ensure the company website is current and convenient to the public

* Use google tools to ensure efficiency of the website and to evaluate website analytics (4th Quarter 2021)
* Design improved website for enhanced user experience and improved communications (4th Quarter 2021)

*Objective C2:*

Ensure the company’s social media presence is timely and effectively engaging to the community

* Re-evaluate all social media platforms to assess community reach and develop a plan of engagement (4th Quarter 2021)
* Update and implement social media guidelines and processes (4th Quarter 2021)

**Previous years accomplishments**

* Implemented Right Networks to have QuickBooks on the cloud for data back up and ease of access by administrative staff
* Started Using Therap for documentation collection and EVV
* Started using Adobe Sign to collect applications that have been filled out and signed for easier orientation process

**Appendix A**

*Technology Assessment*

**Inventory**

*1. Staff Desktop computers 2*

*2. Snow ball microphone 1*

*3. Neat File scanner 1*

*4. HP LaserJet printer 1*

*5. HP Envy printer 1*

*6. Security Cameras 10*

**Computer software**

* Microsoft windows 10 on the work stations
* Microsoft office 2020
* QuickBooks 2021

**Network and Infrastructure**

Internet connectivity is provided by CenturyLink Services and is the only internet provider that will service our area.

We have two business lines

* 1 telephone line for voice
* 1 telephone line for fax

Right Networks provides cloud service to us for QuickBooks to ensure data is not lost.

Approved by CEO January 4th 2021