ANNUAL REPORT | 2025

BEHAVIORAL HEALTH
CONNECT

IMPLEMENT · OPTIMIZE · IMPROVE

MetaStar

GUIDING CHANGE IN HEALTH CARE SINCE 1973

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Background and Introduction

Wisconsin (WI) Department of Health Services (DHS) External Quality Reivew (EQR) Focus Area 2 Activity 4 - EHR Adoption and Quality Improvement

Purpose

Behavioral Health (BH) Connect is a no-cost resource available to support Wisconsin Medicaid-enrolled behavioral health organizations and providers to:
- Implement health information technology (IT) and ensure security.
- Optimize electronic health information to increase efficiency.
- Improve quality using data and technology.

Organizations receive personalized support from a project specialist with:
- Electronic health record (EHR) selection, implementation, and optimization.
- The use of health IT to improve quality.
- Accessing the online platform for resources and peer-to-peer collaboration.
- SRA and related training, along with risk mitigation support.

WI counties are encouraged to join a county-focused behavioral health community on the online platform to connect, collaborate, and share ideas with peers across the state.

2025 Key Accomplishments

Increased Peer Collaboration
- Coordinated collaborative meetings to promote knowledge sharing between organizations.
- Hosted a dedicated event for tribal behavioral health providers to discuss challenges unique to tribal communities.

Expanded Program Awareness and Engagement
- Achieved 100% program awareness among all eligible county-based behavioral health organizations.
- Expanded outreach and engagement, prioritizing rural and urban underserved areas.

Security Risk Assessment (SRA) and Risk Mitigation
- Facilitated SRAs for 37 organizations, over 85% of which were not conducting SRAs regularly.
- Provided training to support risk mitigation and strengthen the protection of health information.
- Developed example and template documents to assist organizations in mitigating identified risks and complying with HIPAA requirements.
- Over 80% of organizations who prioritized conducting an SRA initiated one in 2025.

Education and Event Planning
- Used the BH Connect platform to share weekly health IT updates, host events, and provide on-demand resources.
- Published a monthly cybersecurity newsletter to provide organizations with periodic reminders to reinforce HIPAA Security Rule requirements.
- Hosted events on quality improvement and using health IT to support better outcomes.
- Selected topics based on Health IT Needs Assessment findings, technical assistance (TA), and participant feedback.
- Hosted 9 live educational events and uploaded 35 new resources, including 3 resources contributed by participants.

Reassessment and Progress Tracking
- Developed and implemented a work plan survey to monitor progress for organizations receiving one-on-one TA.

Improved Performance Metric Reporting
- Created an internal dashboard to support targeted outreach and TA.
- Updated year three metrics to better measure program progress and impact.

This annual report summarizes the accomplishments BH Connect achieved during the 2025 calendar year.

Performance Metrics

	Contract Year Three Target	Actual as of December 31, 2025

Provider Awareness Rural Urban Designation Area (RUDA) Classification
MetaStar will provide awareness to behavioral health organizations serving Wisconsin Medicaid Members based on RUDA classifications.

70% 244 organizations | **65%** 227 organizations

Organizations Completing an Initial Health Information Technology (IT) Needs Assessment
MetaStar will complete an initial health IT needs assessment with organizations who request an individualized TA meeting prioritizing behavioral health organizations in underserved areas. The Assessments results will be used to generate a work plan to prioritize gaps.

75% 72 organizations | **74%** 71 organizations

Organizations with a Workplan Identifying Self-Determined Goals
Goals will be documented in a work plan for organizations who identify goals within the scope of BH Connect.

90% 64 organizations | **90%** 64 organizations

Initiate a Security Risk Assessment (SRA)
MetaStar will initiate an SRA for all organizations who prioritize SRAs in their most recent work plan.

90% 39 organizations | **84%** 36 organizations

Organizations with Progress on Risk Mitigation
After completing an SRA, risk mitigation progress will be supported through BH Connect.

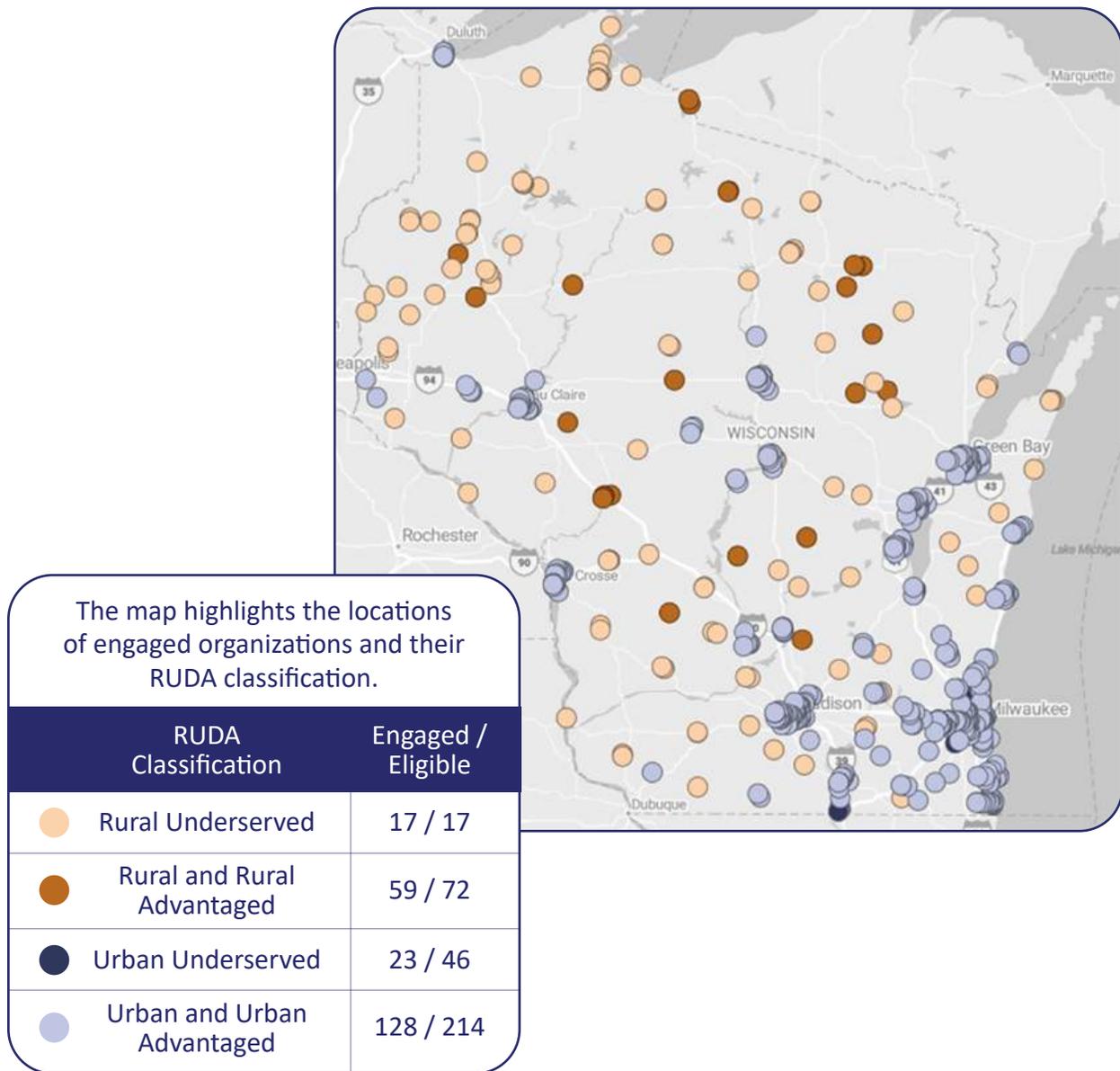**80%** 30 organizations | **82%** 31 organizations

Outreach and Engagement

Rural Urban Designation Area (RUDA)

Reducing health disparities remains a major priority in Wisconsin. Health disparities often appear as gaps in insurance coverage, access to care, and service quality—differences driven more by social, economic, and environmental conditions than by medical need. UW–Madison research shows that health challenges differ across the state, grouping Wisconsin ZIP codes into six categories: rural underserved, rural, rural advantaged, urban underserved, urban, and urban advantaged.[1]

To better align with DHS priorities, BH Connect shifted its focus on July 1, 2025, from Cohort groups by organization type to RUDA classification areas, which organize communities based on these rural-urban categories.

The map highlights the locations of engaged organizations and their RUDA classification.

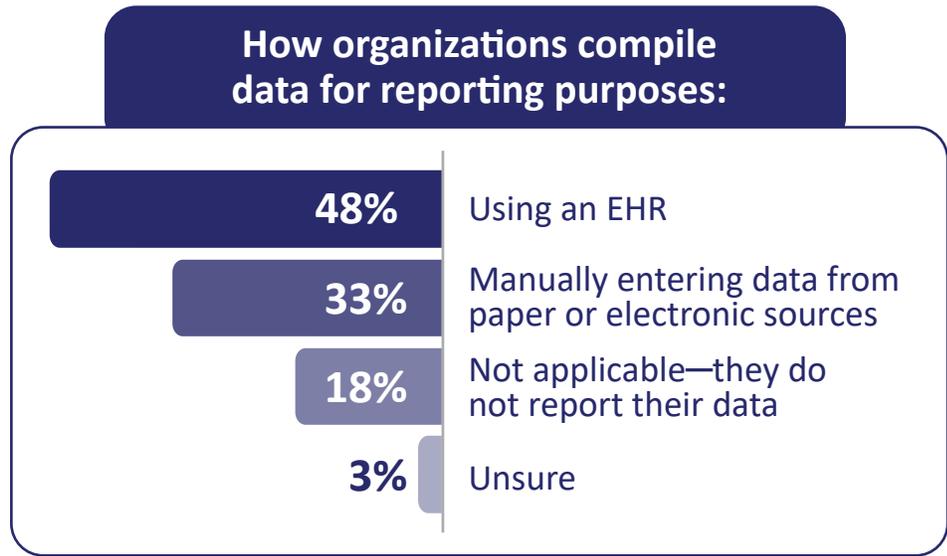| RUDA Classification	Engaged / Eligible
Rural Underserved	17 / 17
Rural and Rural Advantaged	59 / 72
Urban Underserved	23 / 46
Urban and Urban Advantaged	128 / 214

[1] 2020 Wisconsin Health Disparities Report: Rural and Urban Populations, Wisconsin Collaborative for Healthcare Quality.

Health IT Needs Assessment

The BH Connect Health IT Needs Assessment is often the first step organizations take when engaging with the project. It helps identify key trends and support needs. In 2025, the original assessment was reviewed and updated to incorporate emerging considerations related to artificial intelligence (AI), ensuring it captured an up-to-date snapshot of evolving electronic systems. The revisions also reduced the time required to complete the assessment, decreasing participant burden.

The examples below showcase select data points BH Connect collected from the 40 assessments completed in 2025.

How organizations compile data for reporting purposes:

48%	Using an EHR
33%	Manually entering data from paper or electronic sources
18%	Not applicable—they do not report their data
3%	Unsure

Over half of organizations do **NOT** have a dedicated department managing their health IT systems.

52%

Organizations report that SRAs are typically facilitated by:

1	External Organizations
2	Internal IT Departments
3	Supervisory Staff

Health IT Needs Assessment

Organizations identified cost and staffing as the top two barriers to EHR optimization. The graph below highlights all the reported challenges.

Challenge	Percentage
Cost	83%
Staffing	63%
Competing Priorities	60%
Patient Digital Literacy	53%
Lack of Health IT Knowledge	48%
Technology Capability Limitations	48%
Patient Socioeconomic Status	48%
Vendor	38%
Privacy, Confidentiality, and Security Concerns	30%
Internet Connectivity	30%
Lack of Infrastructure	28%
Other	15%

> In addition to TA, BH Connect acts as a trusted accountability partner, helping clinics continue progressing on EHR optimization, SRAs, and policy updates through structured timelines, regular check-ins, and tailored follow-up, despite the limited time and staffing capacity at many clinics.

EHR Success and Impact

Provided collaborative opportunities for organizations using the same EHRs.

- While working with an organization on their search for an EHR, a clinic requested collaboration with another participant in the project who is currently using the same system to gather up-to-date feedback on their usability in a clinic setting. BH Connect successfully connected the two clinics, supporting a meaningful discussion that informed decision-making about the system's suitability.

- One county organization is exploring updates to its record release process. BH Connect facilitated a meeting with another county organization using the same EHR system that has a well-established record release workflow. Both organizations expressed appreciation for the opportunity to connect and reported that the discussion was beneficial.

Using Health IT to Improve Quality

Quality-focused Education Events
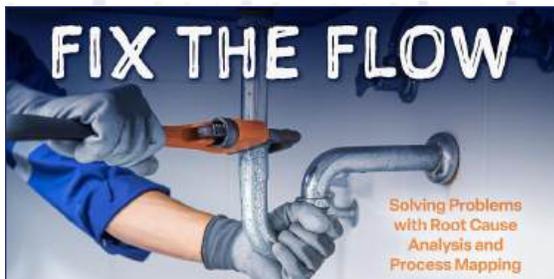
Fix the Flow: Solving Problems with Root Cause Analysis and Process Mapping

This lunch and learn session explored how root cause analysis (RCA) can uncover the underlying causes of clinical and operational challenges, helping teams address issues at their source. The session also demonstrated how process mapping provides a clear visual understanding of care delivery, supporting smarter workflow improvements. Participants learned practical ways to apply these tools to streamline processes and enhance outcomes for clients and patients.

Quality 101: Improving Patient Outcomes

This webinar explored practical ways to use quality improvement (QI) in behavioral health to enhance patient outcomes and streamline care. Viewers learned the core steps of a QI project, discovered commonly used QI tools, and saw how data—especially within an EHR—can guide and strengthen improvement efforts. Whether part of a small practice or a large organization, participants gained actionable insights to help integrate QI into everyday workflows.

QI Success and Impact

- Partnered with two health systems to develop technology-driven QI initiatives aimed at strengthening post-hospitalization behavioral health follow-up. One system focused on improving coordination and follow-up after discharges at external facilities using a shared health information platform, while the other concentrated on enhancing outpatient follow-up for patients discharged from its own inpatient unit.

- Facilitated a cross-partner discussion between a county organization and a contracted provider to address barriers in sharing referral information, as well as challenges with authorizations and payment delays. Following the conversation, both partners are implementing process improvements and will continue exploring additional opportunities, including strengthening overall communication.

Security Risk Assessment (SRA)

SRA Completion Findings

BH Connect completed **37 SRAs**, identifying a total of **2,294 potential risks** for organizations to review and address. Notably, **32 of the 37 organizations** had not been conducting SRAs regularly, with nearly half completing their first assessment. The data reveals a consistent pattern: organizations that complete SRAs routinely identify fewer risks, while organizations completing an SRA for the first time identify, on average, **40 more risks**, indicating a greater need for education and mitigation support. These findings reinforce the importance of ongoing assessments and underscore BH Connect's continued efforts to help organizations reduce vulnerabilities and strengthen their overall security posture.

2,294
potential risks identified

Business Continuity Planning (BCP)

BCP emerged as a significant need across participating organizations. Nearly **45% of organizations** responded "no" to the SRA question, *"Does your organization have a written contingency plan in the event of an emergency?"* Among those with existing plans, many lacked key elements identified within the SRA. In response, BH Connect hosted a Lunch and Learn session, **Business Continuity Planning: Protecting Tomorrow's Care by Planning Today**, to provide an overview of best practices and highlight available resources. To further support organizations in mitigating risk, a comprehensive **Business Continuity Plan Template** was developed to serve as a practical tool to guide organizations in creating or strengthening their own contingency plans.

Policies and Procedures

The SRA emphasizes the importance of written policies and procedures to document how organizations meet administrative, physical, and technical safeguard requirements. While many organizations report performing these practices, they often lack formal written documentation. Existing policy templates are available, but most are overly complex for smaller, simpler, cloud-based organizations. To address this gap, a **Policy and Procedure Sample Language** document was developed, designed to give organizations accessible starting language for drafting their own policies and procedures. The resource also demonstrates how to consolidate multiple SRA requirements within streamlined documents.

Resource Success and Impact

The **Policy and Procedure Sample Language** document has been widely praised, helping one organization save significant costs by eliminating the need for an external consultant.

Security Risk Assessment (SRA)

Security Walkthroughs

- **Train the Trainer**
One organization completed their first formal security walkthrough across all six of their locations. Using a train-the-trainer model, BH Connect conducted a walkthrough of the organization's main office while coaching a designated staff member through the process. With this training, the staff member then conducted walkthroughs at the remaining five clinic sites. This resulted in immediate improvements across all locations, including the relocation of protected health information (PHI) from individual clinician offices to a secured, centralized storage area.

- **Meaningful Improvements**
Security walkthroughs continued to yield significant results for partner clinics. Following a 2024 walkthrough conducted by BH Connect, one organization implemented several improvements to strengthen PHI protection. These updates included requiring office doors to remain closed to prevent visibility of computer screens and reduce the risk of overhearing sensitive information, as well as undertaking a major remodel of the nurses' station to enhance privacy for patient interactions. During its 2025 SRA, the organization highlighted the value of having a neutral third-party (BH Connect) perspective to reinforce HIPAA requirements and guide practical, actionable improvements.

- **Post Security Breach**
The value of a neutral third-party perspective became especially evident in 2025, when one clinic experienced a security breach that prompted changes in IT oversight and a renewed focus on strengthening overall security. BH Connect provided support by conducting an onsite SRA and physical walkthrough. During the assessment, numerous previously unidentified security risks—such as unattended computers logged into the EHR, exposed PHI, and saved passwords within systems—were identified. Clinic leadership expressed deep appreciation for BH Connect's objective evaluation and the guidance provided to help prioritize and address these critical security needs.

Value of Security Walkthroughs

On-site security walkthroughs give clinics a fresh set of eyes to help identify risks that may go unnoticed in daily routines. Project Specialists with the BH Connect project provide real-time feedback and a written report with recommendations and strengths, helping clinics reduce risks to patients, staff, systems, and data.

Common quick improvements that strengthen clinic security and better protect PHI include:
- Adjusting computer screens to prevent hallway visibility.
- Closing doors to reduce overheard or visible information.
- Locking unattended workstations.
- Turning over printed materials with visible PHI.
- Using sound machines to protect privacy.
- Removing written passwords near computers.

County Outreach and Engagement

In 2025, BH Connect increased program visibility through targeted outreach, including presentations at DHS regional director meetings. By year's end, all 69 eligible county behavioral health organizations had confirmed awareness of the program, supporting broader participation in SRAs and risk-mitigation activities, as well as increased opportunities for peer support and collaboration.

Many county organizations have appreciated basic SRA and risk-mitigation training, which has helped them recognize that the SRA is focused on electronic protected health information (ePHI) and required for compliance. County SRAs present unique challenges, requiring coordination across multiple systems and departments. Despite these complexities, counties consistently report positive experiences with BH Connect's SRA and risk-mitigation supports.

Counties have expressed that they value the neutral, third-party insights from walkthroughs where they have shared findings with staff, prompting immediate security improvements. Additionally, competing priorities are a frequent barrier to risk mitigation. Counties have expressed appreciation for BH Connect's consistent support, resources, and accountability, noting that regular check-ins help advance risk-mitigation efforts.

100%
awareness among 69 eligible county behavioral health organizations
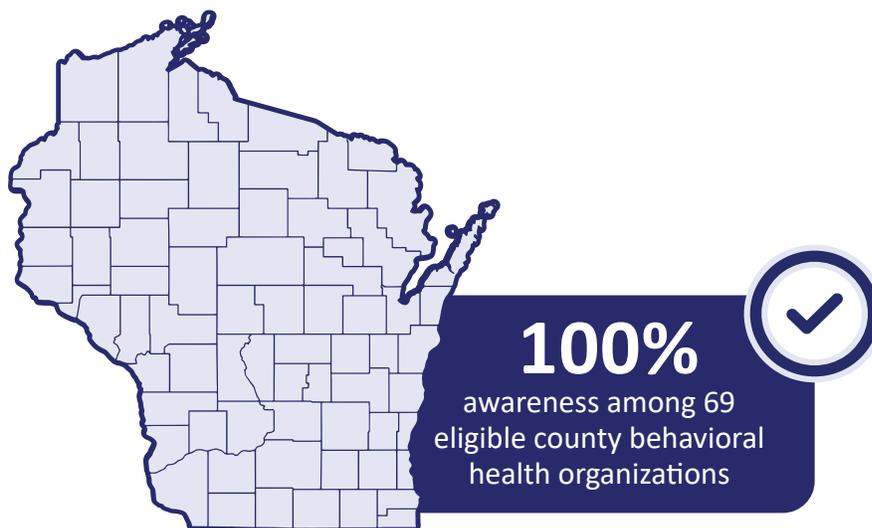
County Engagement Success and Impact

One county shared that although its IT department conducts several assessments, the team sought a department-specific SRA to better identify and mitigate risks to its ePHI. In addition to identifying risks and vulnerabilities, the onsite review uncovered process inconsistencies in how they provide and monitor system access in the county's newly merged department, highlighting opportunities to improve standardization. The assessment also clarified the department's responsibilities under its Business Associate Agreement (BAA).

BH Connect's relationships with county partners have enabled effective information sharing across counties. When one county organization identified potential risks in its processes with contracted providers during its SRA, they sought input from peers before making changes. BH Connect facilitated this by reaching out to multiple counties, all of which responded quickly with helpful guidance that supported the organization's process redesign.

County Outreach and Engagement

Behavioral Health County Community (BHCC)

BHCC, a dedicated platform managed by BH Connect to help counties network, collaborate, and share resources related to behavioral health IT, launched in February 2025. By year's end, the community included **132 county members representing 50 counties**, including security officers, IT staff, department directors, behavioral health managers, and providers.

Throughout 2025, BH Connect hosted five discussion events on topics including HIPAA, AI, SRAs, security culture, and a county-led conversation on the proposed reproductive rule. Given the busy fall conference season, BH Connect released a recorded cybersecurity interview with a county IT director, allowing counties to access expert guidance on their own schedule.

The community has grown into an active, open forum where counties regularly share practices, ask questions, and exchange resources. One county shared its security process documents, supporting peer learning and helping promote stronger ePHI/PHI protections statewide.

132 COUNTY MEMBERS REPRESENTING 50 COUNTIES
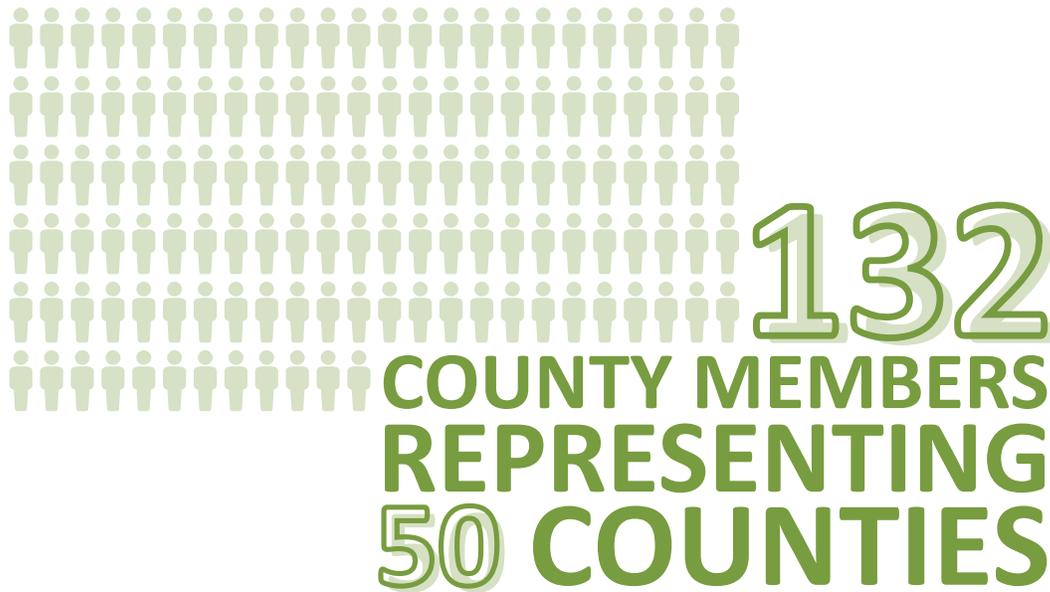
The Clinical Manager (TCM) Community

BH Connect partnered with counties using The Clinical Manager (TCM), an EHR and case management data system, to build a private sub-community within the BH Connect online platform, creating a secure space for shared documentation and collaboration. Eight county organizations participate in this sub-community. According to Susan Fernandez of Door County, the platform offers a secure, centralized resource that reduces administrative burden by eliminating the need for counties to independently manage user access. While competing priorities limited their use of the platform in 2025, participating counties expressed interest in using the sub-community more fully in 2026.

Education and Support

Online Community

Content Strategy:
BH Connect strengthened its digital presence in 2025 by implementing a structured content strategy built around monthly blogs and posts guided by a year-long editorial plan. This approach ensured consistent outreach and focused on the topics participants requested most—AI, cybersecurity, and quality, data, and process improvement.

Improve Usability:
To support efficient access to information, BH Connect implemented the AI Assistant Search feature, allowing members to efficiently locate key resources and platform content.

35 resources uploaded

12 blogs published

77 discussion posts

9 live education events

2025

Events and Resources

Events with the Highest Attendance:

- **Patient Privacy Matters: Navigating 42 CFR Part 2**
  This event focused on 42 CFR Part 2, exploring patient privacy from the patient's perspective. The session highlighted how these regulations affect patients' experiences, the role of confidentiality in building trust in healthcare, and practical strategies for supporting patients while maintaining compliance.

- **Securing ePHI: Understanding the HIPAA Security Rule**
  This presentation covered the HIPAA Security Rule and its role in protecting electronic health information. The session explained key requirements, the difference between required and addressable safeguards, and practical steps organizations can take to maintain compliance and improve data security.

Most Utilized Resources:

- **Policy and Procedure Sample Language**
  This document provides sample language to help organizations develop HIPAA Security Rule–compliant policies and procedures.

- **Business Continuity Plan (BCP) Template**
  This resource is a customizable template to help organizations plan for emergencies and maintain operations while continuing to protect ePHI.

- **Threat Source List**
  This document is used to identify, assess, and document potential physical, technical, environmental, and human-related risks as part of a security risk assessment.

- **Physical Walkthrough Worksheet**
  This worksheet is used to identify and document facility, workstation, and server-room security risks that could impact the protection of PHI and ePHI during on-site assessments.

Education and Support

Monthly Security Reminders

Early in 2025, BH Connect began offering Monthly Security Reminder emails to support ongoing HIPAA compliance. These reminders covered common topics such as password security, data backups, software updates, and phishing awareness, and were designed to be easily shared within organizations. Participation is open to all interested recipients, with platform membership encouraged to support collaboration and continued learning.

Approximately
75%
of organizations reported not sending periodic security reminders to staff

On-Demand Education

BH Connect expanded its flexible learning resources to ensure providers can access key information whenever they need it, like:

- Pre-recorded webinar series that offer short sessions on emerging topics, including the use of AI in behavioral health settings.
- A cybersecurity quiz that provides an interactive way to reinforce key security practices.
- Condensed lunch-and-learn sessions offering quick, practical lessons on essential health IT and compliance topics—including quality improvement, business continuity, and building a security-minded culture.

Peer Collaboration

Tribal Collaboration:

- **Policies and Procedures:** BH Connect facilitated a discussion between two tribal clinics to address policies and procedures, accreditation requirements, and how clinics use their EHR systems to protect data across services. As a result, participants recognized the need for a tribal-specific event to continue and deepen these discussions.

- **Hybrid Meeting:** Building on the success of BHCC and growing interest from tribal clinics, BH Connect facilitated a tribal-focused event at **Forest County Potawatomi**, focusing on HIPAA security, AI, and cybersecurity. The hybrid event brought together 20 participants, creating an inclusive forum for sharing perspectives, discussing common challenges, and learning about emerging technologies and security practices through both in-person and virtual participation. The success of this meeting prompted BH Connect to plan additional virtual discussions for 2026.

One-to-One Collaboration:

- **Reproductive Rule:** Before the rule was overturned, BH Connect facilitated a discussion between two county organizations seeking to understand the Reproductive Rule and plan for implementation. BH Connect shared resources and supported dialogue to help the counties consider operational impacts and next steps.

- **EHR Implementation:** BH Connect connected two county organizations when one began implementing a new EHR system. While the organizations used different EHR platforms, the experienced county shared practical insights, including vendor-provided resources and system-use tips. The organizations also exchanged role-based contacts to support ongoing collaboration as needed.

Insights and Future Opportunities

Key Findings and Current Gaps

- Inconsistent SRA completion.
  - Most providers assessed were not conducting SRAs regularly.
  - Nearly half completed their first SRA through this program.
  - Many organizations struggle to achieve full staff engagement in the SRA process.
- Persistent documentation and compliance gaps.
  - Many organizations lack the required written policies and procedures.
  - Available templates are often over-complex and not suited to smaller, cloud-based providers.
  - Some organizations still rely on a mix of paper-based processes and partial EHR use, leading to inconsistent data storage and workflows.
- Access control and system security weaknesses.
  - Common risks include inadequate physical and system access controls and SRAs that fail to assess ePHI within the EHR, an issue frequently seen in smaller rural counties.
- Business Continuity Planning remains a critical vulnerability.
  - A substantial portion of organizations reported no written BCP.
  - Existing plans are frequently misaligned with identified risks.

Looking Ahead

- The BH Connect project contract is scheduled to conclude on June 30, 2026. If granted additional contract years, BH Connect aims to continue expanding health IT support, deepening security readiness, and helping organizations use data to drive quality improvement statewide.
- Engagement was strongest among rural behavioral health organizations, highlighting the ongoing need for accessible, no-cost TA in communities with limited resources.
- Continued engagement through ongoing meetings that help organizations keep risk mitigation front-and-center amid competing priorities.

Contact Information

Take the next step toward improving health IT, closing compliance gaps, and enhancing security by partnering with MetaStar.

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Referenced Documents

Business Continuity Plan Template

Policy and Procedure Sample Language

Threat Source List

Physical Walkthrough Worksheet