

Next Chapter Behavioral Health

How a multi-location behavioral health provider improved documentation, billing, compliance, HR, training, and client engagement with Zoobook Systems.

Based on customer discovery notes from Kathleen Mores, Operations Manager.

2021 Zoobook start Long-term adoption	2 Locations Salisbury & Princess Anne	25 Employees today Started with 5	12+ Workflow areas improved Clinical + operational
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Executive Summary

Next Chapter Behavioral Health needed an EHR that could support the realities of behavioral health operations: custom documentation, multiple branches, changing levels of care, billing denials, HR/payroll workflows, CARF-related compliance, staff training, UDS results, policies, referrals, telehealth, and productivity tracking.

Zoobook Systems helped centralize those workflows into one flexible SaaS EHR platform. Since adopting Zoobook in 2021, Next Chapter reported faster task completion, fewer documentation errors, lower administrative workload, stronger reporting visibility, and a smoother experience for staff and clients.

Growth proof point

Next Chapter started with Zoobook as a 5-employee organization and has grown to 25 employees today. Kathleen Mores credited Zoobook's support, faster billing, and easier revenue collection as important enablers of that growth - a 5x workforce increase.

Reported Outcomes at a Glance

5x Workforce growth 5 to 25 employees	25 Employees today Started with 5	85% Billing efficiency Up to	Faster Revenue collection Customer-reported
80% Training efficiency Reported	60-75% HR workload reduction Reported range	40-50% Documentation error reduction AI summary impact	30-50% No-show reduction From 50% baseline
60% Faster UDS retrieval Reported	70% Referral tracking efficiency Up to	60-80% Faster task completion Across workflows	12+ Workflow areas improved Clinical + operational

Customer Profile

Organization	Next Chapter Behavioral Health
Interviewee	Kathleen Mores, Operations Manager
Industry	Behavioral Health, Mental Health, Substance Abuse, and Medication Management
Locations	Salisbury and Princess Anne
Zoobook Start Date	2021
Employee Growth	Started with 5 employees and grew to 25 employees after adopting Zoobook.

Key Needs	Custom forms, multi-location workflows, billing, HR/payroll, compliance, training, UDS results, prescriptions, policies, productivity reporting, referrals, telehealth, and AI-assisted documentation
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The Roadblocks Before Zoobook

Before Zoobook, Next Chapter faced a familiar challenge for growing behavioral health agencies: too many critical workflows were manual, scattered, paper-based, or difficult to measure.

- Custom forms and payer-required paperwork were difficult to update quickly.
- Multiple branches and level-of-care changes needed clearer documentation workflows.
- Commercial billing denials created rework and administrative pressure.
- Growth required faster billing and easier revenue collection to support sustainable staffing expansion.
- Employee profiles, payroll, scheduling, leave requests, and staff data needed one secure place.
- Compliance and CARF-related data needed faster retrieval and better reporting support.
- Training materials, teaching metrics, policy documents, and completion tracking were hard to manage consistently.
- Mental health appointments had a reported no-show challenge near 50%.
- UDS results were paper-based, taking physical space and slowing access to results.
- Medication orders, agency productivity, and referral source tracking needed more structured workflows.

Why Zoobook Was the Right Fit

Zoobook was selected because it combined clinical, operational, financial, and compliance workflows into one configurable system. Instead of forcing Next Chapter to work around rigid templates, Zoobook allowed the agency to adapt the platform to its programs.

Need	Zoobook Response	Reported Impact
Custom documentation	Form Builder and Business Rules enabled fast template and field updates.	Most Optum-to-Carelon form updates completed in under 1 hour; up to 75% faster turnaround.
Multiple locations and care levels	Branch and level-of-care data could be tracked separately while keeping records organized.	40-60% more efficient workflows.
Billing denials	Integrated billing workflows improved structure and reduced rework.	Up to 85% more efficient billing process.
Scalable growth and revenue collection	Faster billing workflows and easier collections gave leadership more confidence to grow the team.	5x workforce growth: from 5 employees at Zoobook start to 25 employees today.
HR/payroll operations	Employee records, schedules, time-off requests, approvals, and role-based access were centralized.	60-75% lower administrative workload.
Compliance and CARF support	Alerts, reports, and organized records made evidence retrieval easier.	30-50% more time available for client care.
Training and teaching materials	Materials, tests, and completion tracking were managed in one system.	80% more efficient training management.
No-show appointments	Appointment reminders and scheduling visibility supported better attendance.	30-50% no-show reduction from a 50% baseline.
UDS results	Lab integration or manual upload moved results into the chart.	60% faster result retrieval and documentation.
Prescriptions	DoseSpot e-prescribing reduced manual medication-order work.	45-60% less prescription administrative time.
Policies, productivity, referrals	Policy, reporting, roster, appointment, and referral modules centralized oversight.	75% policy efficiency, 55-65% faster productivity tracking, and up to 70% referral efficiency.

Operational Impact by Department

Area	Before Zoobook	After Zoobook	Measured / Reported Result
Clinical documentation	Manual effort and inconsistency risks across forms and summaries.	Form Builder, Business Rules, and AI Clinical Summary supported standardized documentation.	40-50% fewer documentation errors; 60-80% faster task completion.
Revenue cycle	Denied claims and missing-documentation follow-up consumed staff time.	Integrated billing and cleaner documentation workflows improved claim handling.	Up to 85% more efficient billing workflow.
Agency growth	A five-person team needed systems that could scale without adding manual burden.	Faster billing, easier revenue collection, and connected operations supported growth.	Staff grew from 5 to 25 employees, a 5x increase.
HR and payroll	Multiple tools and manual approvals slowed staff management.	Employee records, schedules, leave requests, payroll workflows, and approvals were centralized.	60-75% reduction in HR administrative workload.

Area	Before Zoobook	After Zoobook	Measured / Reported Result
Compliance / CARF	Data retrieval and compliance evidence were harder to organize.	Alerts, reports, and centralized records supported faster oversight.	30-50% more time available for client care.
Training	Training materials and completion metrics were hard to publish and track.	Training materials, tests, and completion tracking were managed in Zoobook.	80% more efficient training management.
Appointments	No-shows affected program performance and continuity of care.	Appointment reminders and visibility improved scheduling discipline.	30-50% no-show reduction from a 50% baseline.
UDS / labs	Paper UDS results used space and slowed retrieval.	UDS results were available digitally through integration or manual upload.	60% faster retrieval and documentation.
Medication orders	Nursing time was spent preparing manual orders for pharmacy use.	DoseSpot integration supported secure e-prescribing.	45-60% reduction in medication-order admin time.
Policies	Policies were difficult to centralize and keep visible to staff.	Policy module stored administrative, clinical, employment, and agency policies.	Up to 75% more efficient policy management.
Productivity and referrals	Reports and referral contacts were scattered.	Roster, appointment, productivity, and referral reports were easier to access.	55-65% faster productivity tracking; up to 70% more efficient referral management.

Feature Highlights

AI Clinical Summary Generation

Produced clearer, standardized summaries and helped reduce documentation errors by approximately 40-50%.

Reports and Analytics

Gave leadership visibility into appointments, completed and incomplete notes, staff productivity, referral sources, UDS results, and training completion.

Telehealth Services

Supported smooth virtual consultations through Zoom rooms and links, helping maintain continuity of care during pandemic-era and ongoing remote-care needs.

Form Builder and Business Rules

Allowed Next Chapter to update templates quickly, hide or prompt fields when needed, and respond to payer changes with less operational disruption.

Customer Testimonial

“Zoobook has helped our agency streamline operations and improve efficiency across our behavioral health practice. With integrated billing, real-time patient progress monitoring, compliance tracking, mobile access, and centralized documentation, our team can spend less time on administrative work and more time delivering high-quality, patient-centered care.”

- Kathleen Mores, Operations Manager, Next Chapter Behavioral Health

The Bottom Line

Next Chapter Behavioral Health’s experience shows how a flexible EHR can become an operational backbone for a behavioral health agency. Zoobook helped consolidate clinical documentation, billing, HR, compliance, training, UDS tracking, policies, referrals, telehealth, and reporting into one connected platform.

The reported impact is strong: Next Chapter grew from 5 employees to 25 employees, a 5x workforce increase, while tasks were completed 60-80% faster, documentation errors reduced 40-50%, billing workflows improved by up to 85%, HR administrative workload reduced 60-75%, and staff gained better visibility across programs and locations.

Future Plans

Growth Area	Next Chapter Direction
Expand telehealth	Offer more virtual consultations and remote-care options where appropriate.
Leverage reporting	Use analytics to track outcomes, identify trends, and optimize workflows.

Growth Area	Next Chapter Direction
Enhance training	Improve staff training with interactive programs and automated completion tracking.
Boost client engagement	Use reminders and patient access tools to reduce no-shows and improve access to care.

Prospective Customer Message

If your behavioral health organization is dealing with custom paperwork, payer changes, billing rework, revenue-collection pressure, no-shows, compliance tracking, HR complexity, or limited reporting visibility, Zoobook can help bring those workflows into one secure, measurable, and flexible platform built to support growth.

Metric Note

Results in this case study are customer-reported outcomes from interview notes with Next Chapter Behavioral Health's operations manager. Ranges are shown as the customer reported them. Individual results may vary.