**Behavioral Health Integration (BHI)**

**Implementation Plan**

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| --- | --- |
| **Team Name:** |  |
| **Date Updated:** |  |
| **Version:** | Version 1.4, updated 9/13/2023 |

**About the BHI Implementation Plan**

* An implementation plan is crucial for integrating behavioral health services into a health care system**.**
* The implementation plan provides a structured roadmap with a detailed sequence of steps and actions required for successful integration.
* This structure provides clarity on action items and roles/responsibilities, streamlines the process, and ensures that necessary tasks are completed in the right order.
* By completing the Integration Plan, the organization
  + Prepares for the BHI pilot at the practice/clinic site
  + Identifies successful practices and lessons learned
  + Develops a “playbook” for spreading BHI to other practice / clinic sites

**Instructions**

* As part of CalHIVE BHI, each team will complete a Behavioral Health Integration Implementation Plan, which will guide teams to strategic decisions and capture next steps to advance the integration project.
* The Implementation Plan should be completed by the team (in Improvement Advising sessions or in internal team meetings).

**Implementation Plan Sections**

* *Note*: The Implementation Plan will include several sections, each of which will be due at different times with different focus areas.
* This document will be updated throughout CalHIVE BHI collaborative.
* The final Implementation Plan (all sections) will be due June 2024.
* [Section 1: Integration Model](#sec1)
* [Section 2: Pilot Site Selection & Planning](#sec2)
* [Section 3: Staffing](#sec3)

**SECTION 1: Integration Model**

* Objective: Decide on organization’s behavioral health integration model
* Due: **Complete Section 1 (with Action Plan)** – Due by Fri. 9/29 to your Improvement Advisor
  + **Questions #1-4** –Due by Fri 9/01 (before In-Person Meeting) to your Improvement Advisor
  + **Questions #5-15** – To complete during Tues. 9/12 In-Person Meeting

| **Area** | **Team Response** |
| --- | --- |
| 1. Who are the internal stakeholders identifying our organization’s behavioral health integration needs?   Consider…   * Who is the highest-level advocate in our organization? |  |
| 1. What are the needs of our patients and providers around behavioral health integration?  * Patient population – *examine recent screening data and other known data sources* * Providers/staff – *consider looking at recent staff surveys or conduct a mini focus group* | * Patient population * Providers/staff |
| 1. Which populations of patients are we targeting?  * Patients with common chronic mental illnesses, such as depression and anxiety * All patients with behaviorally influenced health conditions | * Target Population: |
| 1. Do we have a pilot practice/clinic site identified to launch behavioral health integration? What site is it? 2. If yes, add additional detail about this location’s…  * Providers * Patient volume * Accessibility * Physical set up * Telehealth * IT support  1. If not, what information do we need to collect to select a practice/clinic pilot site? | * Yes * No * Site name: * Site details: |
| EHR and Billing Infrastructure | |
| 1. Does your EHR system provide the flexibility to customize billing codes or templates to align with the unique requirements of the PCBH or CoCM billing structure? | * Yes * No   Current State:  Changes Needed: |
| 1. Are you able to track and monitor billing activities related to PCBH or CoCM services through your EHR system, including claim submissions, rejections, and reimbursements? | * Yes * No   Current State:  Changes Needed: |
| If looking to select the Collaborative Care Model (CoCM): | If not selecting CoCM, skip to next Question 11. |
| 1. Can we commit to regular access to a psychiatric consultant? How? | * Yes * No * Current state: * Changes needed: |
| 1. Can we commit to hiring a Behavioral Health Care Manager (BHCM)? | * Yes * No * Current state: * Changes needed: |
| 1. Can we adhere to using a patient registry for patient follow-up? | * Yes * No * Current state: * Changes needed: |
| 1. Can our billing systems allow for CoCM billing to happen under the PCP? | * Yes * No * Current state: * Changes needed: |
| If selecting PCBH: | Skip if selecting CoCM |
| 1. Can we commit to hire or recruit (internally or externally) an embedded licensed BH clinician? | * Yes * No * Current state: * Changes needed: |
| 1. Can we provide physical space in the office to support collaboration? | * Yes * No * Current state: * Changes needed: |
| Decisions |  |
| * 1. Our organization’s behavioral health integration model will be: * Will we need additional approval for this decision, and if so, by which groups? | * CoCM * PCBH * Additional notes: |
| 1. What organizational or staffing changes will we need, if any? |  |
| 1. What additional information do we need before we can select an integration model? |  |

**Action Plan**

* Complete the next two months of work that needs to happen to launch planning for your BHI integration model.

| *Due Date* | *Lead & Task* |
| --- | --- |
|  | * Lead: * Task: |
|  | * Lead: * Task: |
|  | * Lead: * Task: |
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|  | * Lead: * Task: |
|  | * Lead: * Task: |

**SECTION 2: Pilot Site Selection & Planning**

* Objective: Identify current knowledge and areas for discovery regarding the BHI pilot practice/clinic site selection and planning
* Due: Due by Fri. 9/29 to your Improvement Advisor

|  |  |
| --- | --- |
| Our pilot site will be…. |  |

| **What we know about the pilot site:** | **Still need to know about the pilot site or changes needed:** |
| --- | --- |
| 1. **BHI Vision**  * Understanding of BHI Vision * Buy-In | |
|  |  |
| 1. **Pilot Site Staffing**  * Current staffing set-up, clinical champion, behavioral health role/staff type | |
|  |  |
| 1. **Pilot Site Background**  * Capacity for change (support, stability, willingness for change) * Performance (quality measures) * Capability | |
|  |  |
| 1. **Patients**  * Patient demographics (e.g., number served, language spoken, payers) | |
|  |  |
| 1. **Place & Space**  * Physical space: current set-up * Physical space: how changes happen * Telehealth set up: for patients and for internal referrals | |
|  |  |
| 1. **Collaboration**  * How care teams communicate (e.g., EHR, secure message) /collaborate (e.g., huddles) | |
|  |  |
| 1. **Pilot Site Clinical Workflows**  * Current screening process (e.g., depression and anxiety) * Patient rooming workflow | |
|  |  |

**Action Plan**

* Outline the next two months' action steps for comprehending the pilot site.

| *Due Date* | *Lead & Task* |
| --- | --- |
|  | * Lead: * Task: |
|  | * Lead: * Task: |
|  | * Lead: * Task: |
|  | * Lead: * Task: |
|  | * Lead: * Task: |
|  | * Lead: * Task: |
|  | * Lead: * Task: |
| *Changes Needed* | *Lessons Learned* |
|  |  |

**Section 3: Staffing**

* Objective: Outline current state and changes needed around integration staffing for pilot site
* Due by Tues. 10/31 to your Improvement Advisor
* Section 3 Resources: Many resources for Staffing are on the CalHIVE BHI website ([Learn/Staffing](https://www.pbgh.org/calhive-bhi/#learn))

| **Area** | **Team Response** |
| --- | --- |
| *Key Planning Activities* |  |
| **Organizational Chart**   1. How have you incorporated behavioral health integration into the organization’s broader infrastructure (e.g. HR, Compliance, Credentialing, Policies and Procedures)? 2. Identify changes needed to the current organizational chart, including reporting relationships (e.g., oversight and training, leadership support, new roles, etc.)  * Complete [Org Chart](https://www.pbgh.org/wp-content/uploads/2023/09/Section-3_Org-Chart-at-Pilot-Site.pptx) (Slide 3)  1. Identify how new roles will be filled (recruit internally or externally) |  |
| **Care Team Model/Pod**   1. Identify the Care Team(s), based on selected integration model and pilot site 2. Identify Team Member Roles  * Complete Team Based Care Team Member Role Definition Template [worksheet](https://www.nationalcouncildocs.net/wp-content/uploads/2019/12/Team-Based-Care-Team-Member-Role-Definition-Template.docx) (from the National Council)  1. Complete a diagram to represent the care team  * Complete [Template](https://www.pbgh.org/wp-content/uploads/2023/09/Section-3_Org-Chart-at-Pilot-Site.pptx) (slide 5 or slide 7 based on model) |  |
| **Recruiting**   1. List out next steps for the recruiting process 2. Identify necessary involvement from:  * HR? * Credentialing? * Finance? * Hiring Department? * Other? |  |
| **Job Descriptions**   1. Update necessary job descriptions, including: licensure, competencies, experience, salary range (dependent on selected model) |  |
| *Recruiting (if needed)* |  |
| 1. Post job posting 2. Update recruiting/hiring process 3. Update Interview Questions |  |
| *Hiring (if needed)* |  |
| 1. Make a workplan for hiring, including:  * Review candidates * Conduct interviews * Make offer * Hire |  |

**Action Plan**

* Outline the next two months' action steps for staffing.

| *Due Date* | *Lead & Task* |
| --- | --- |
|  | * Lead: * Task: |
|  | * Lead: * Task: |
|  | * Lead: * Task: |
|  | * Lead: * Task: |
| Lessons Learned | Changes Made |