

Introducing Care as a Team

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Please send your **"Name, Role, Site"** in the chat box.
This is required for attendance.

CHAMP Introductions



John Kern, MD
Psychiatric
Consultant Trainer



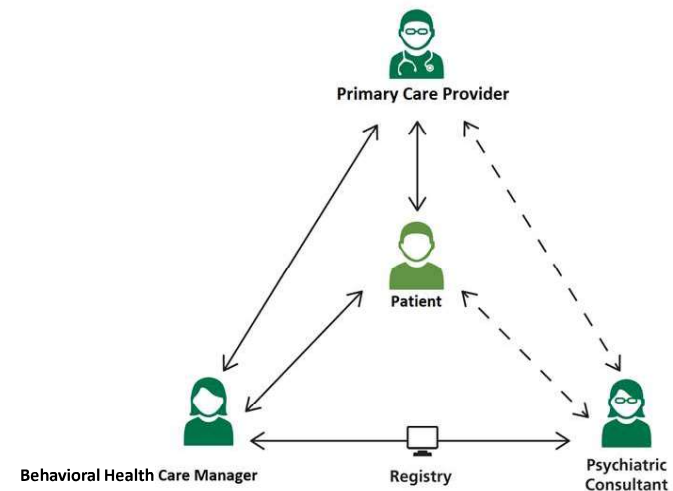
Annie McGuire, MS,
LMHC, MHA
BHCM Clinician
Trainer

Learning Objectives

By the end of this session, participants should be able to:

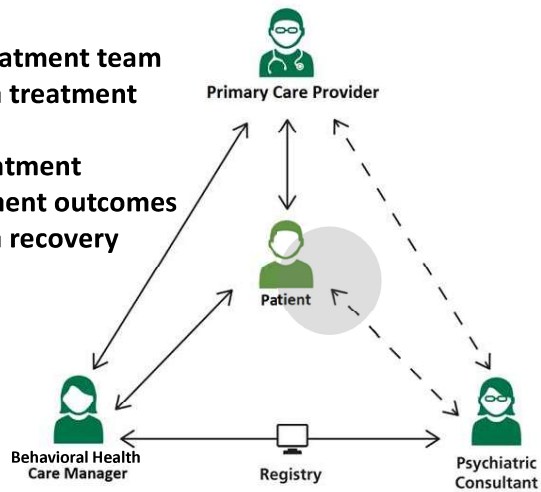
- Describe the team members and their roles in collaborative care
- Practice critical components of communication with the care team and patients

Collaborative Care Team Roles



Patient-Centered Care, Patient Role

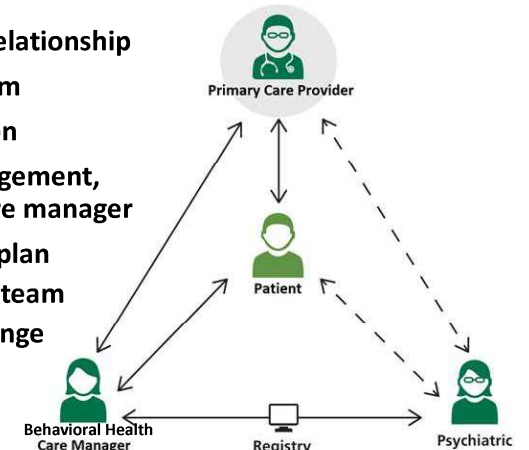
- Member of treatment team
- Collaborates in treatment planning
- Engages in treatment
- Reports treatment outcomes
- Collaborates in recovery support plan



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Primary Care Provider (PCP) Role

- Primary treatment relationship
- Links with CoCM team
- Prescribes medication
- Monitors med management, together with BH care manager
- Supports treatment plan
- Consults with CoCM team
- Supports system change



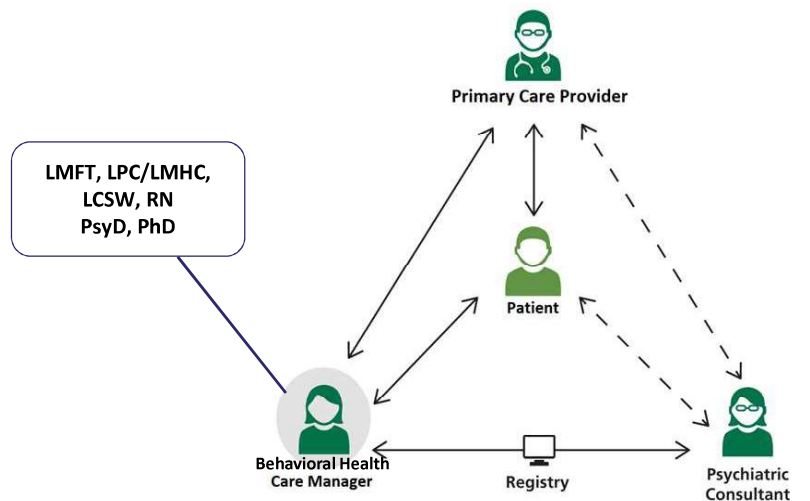
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PCP Role in Patient Engagement

- Relationship is foundation
- Identifies need for treatment with patient
- Discusses integrated approach to care
 - Introduces care manager and team roles
- Obtains verbal consent for treatment
- PCP recommendation is powerful

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Behavioral Health Care Manager (BHCM)



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General BHCM Functions

- **Track and coordinate care**
 - Facilitates patient engagement
 - Performs systematic initial and follow-up assessments
 - Systematically tracks treatment response
 - Supports treatment plan with PCP
 - Reviews challenging patients with the psychiatric consultant weekly

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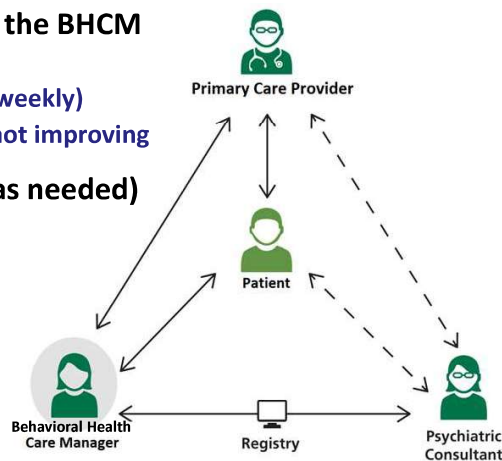
Intervention Focused BHCM Functions

- **Evidence-based brief behavioral interventions**
 - Behavioral Activation (BA)
 - Problem-solving treatment (PST)
 - Cognitive behavioral therapy (CBT)
 - Others
- **Other functions**
 - Behavioral health interventions focused on health behaviors
 - Addressing substance use
 - Social work services

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Psychiatric Consultant (PC) Functions

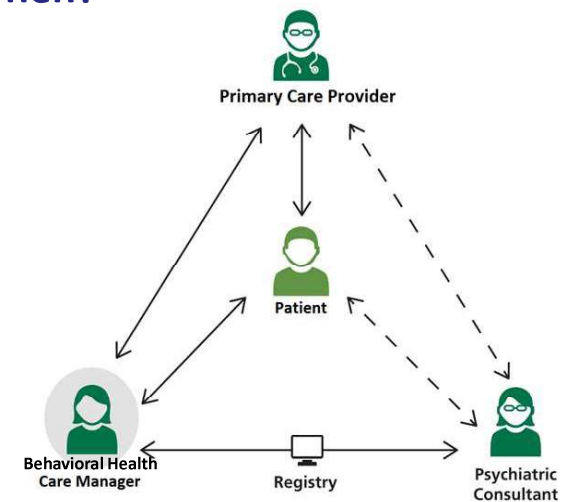
- **Review cases with the BHCM using the registry**
 - Scheduled (ideally weekly)
 - Prioritize patients not improving
- **Consult urgently (as needed) with PCP or BHCM**



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Provider to Provider Communication: How and When?

- **Modality**
 - In-person
 - Phone
 - Fax
 - EHR
 - Email
 - Staff (MA or nurse)
- **Frequency**
 - Scheduled
 - As needed



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Introducing Care Script

Criteria for a good speech

- Brief
- Clear
- PCP and BHCM tailor speech to patient
- Psych consultant tailors speech to the PCP
- PCP leads treatment team (not a referral)
- Sets realistic expectations about treatment
- Consent if patient agrees

Activity Instructions for PCPs and BHCMS

1. Read the cases (Sue/Dave)
2. Write (or revise your current) a script for introducing collaborative care to this patient
3. Practice introducing collaborative care to your team member who is role playing as Sue or Dave
4. Receive feedback on your script

PCP Introducing the Care Team

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Scripts for PCPs:
Introducing Collaborative Care to Patients and Staff

During this activity, you will create a script (or revise your current one) for introducing collaborative care to patients for the CHAMP study. Your role play partner will use the "Introducing Care Activity Cases" handout to role play as Sue or Dave. Then, you will practice delivering that speech with a member of your clinical team and receive feedback on your script.

Activity Instructions

Scenario: You have identified a mental health problem in one of your patients (Sue or Dave) and you would like to refer to your behavioral health team in a way that will enhance the chance of a successful engagement.

1. Write an elevator speech of no more than 3 sentences with the goal of engaging your patient in your integrative program.

Consider:

- The Collaborative Care team is us, not them.
- You are still the leader of the care team.
- You have confidence in the behavioral health care manager and team.

YOUR SCRIPT:

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Check your speech:
How do we know if it is a good elevator speech?

- ✓ Is it brief?
- ✓ Does it roll off the tongue?
- ✓ Does it sound like you?
- ✓ Can you memorize it?
- ✓ Does it say what you want to say?

3. Deliver your speech to a team member.
3. **BONUS:** Can you say the same thing again, more clearly, in fewer words?

Giving Feedback

Listen to your colleagues give their speeches and provide them with concrete feedback on these points:

1. What did you like about their speech?
2. Could they make their speech even more concise?
3. What other feedback would you give?

Take Home

What are other situations where an elevator speech would be useful?

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Activity: BHCM Introducing Care

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Scripts for Behavioral Health Care Managers:
Ideas for Introducing Collaborative Care and Your Role on the Team

During this activity, you will create a script (or revise your current one) for introducing collaborative care to patients for the CHAMP study. Your role play partner will use the "Introducing Care Activity Cases" handout to role play as Sue or Dave. Then, you will practice delivering that speech with a member of your clinical team and receive feedback on your script.

Below are some possible scripts for introducing the Collaborative Care Model (CoCM) and your role on the team to a patient. Review the examples below, write down your own brief script for each topic and then practice out loud with your colleagues. If you have a current script, can you make your introduction even more succinct?

Note: This exercise is to practice introductions of CoCM and your role on the team. Introductions for enrolling the patient in the broader study will be done at a later date.

Activity Instructions:

1. Write down two brief scripts for introducing care:
 - a. Introducing CoCM to the patient
 - b. Introducing your role to the patient

Consider:

- ✓ Is it brief?
- ✓ Does it roll off the tongue?
- ✓ Does it sound like you?
- ✓ Can you adapt it to different types of patients?
- ✓ Does it say what you want it to say?

2. Deliver your speech to a team member.

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Opening the dialogue about CoCM (warm connection or appointment):

- "You may not know me, my name is _____, and I'm a _____ (role). Here, at (other name), we find that patients with your symptoms get better faster when we work together as a team with you and your medical provider. Are you interested in hearing more about how that works?"
- "Hi, my name is _____ and I'm so glad you came in. It seems strange to ask for help with the kind of symptoms you're experiencing right now, so thanks for showing confidence that our team here at (other name) can help you. Let me tell you more about what to expect."

YOUR SCRIPT:

Introducing the care team and your role in it:

- "My role on the team is to help you learn more about depression and work on strategies to turn things around. I'll be working closely with your medical provider and also a psychiatrist who helps us make an accurate diagnosis and recommend medications, if you want to try that option."
- "Our team members all bring different strengths and experience, and will offer you a variety of options for managing these symptoms. My role is to work closely with you until you feel a lot better, and I'll be communicating regularly with your medical provider and our consulting psychiatrist to make that happen as soon as possible."

YOUR SCRIPT:

Giving Feedback

Listen to your colleagues give their speeches and provide them with concrete feedback on these points:

1. What did you like about their speech?
2. Could they make their speech even more concise?
3. What other feedback would you give?

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Activity: Psychiatric Consultant Introducing Role to PCP

Elevator Speeches for Psychiatric Consultants:
Explaining Your Role on the Collaborative Care Team to PCPs

Practicing this activity, you will receive a brief elevator speech. Use this as your cue word for explaining to a PCP your role as the collaborative care psychiatric consultant and the benefits this role has on workflow and patient care. Then, you will practice delivering that speech to your team's PCP and receive feedback on your speech.

Activity Instructions
Scenario: Your PCP colleague runs into you and wants to know why you insist on providing psychiatric care indirectly via the collaborative care model, rather than seeing the patient yourself.

- Write an elevator speech of no more than 3 sentences with the goal of explaining how the role of the Collaborative Care psychiatric consultant works, and how it can improve on the access to care and results seen with a traditional consult model.

Consider:

- Collaborative care has been shown to be a valuable alternative.
- A collaborative care psychiatric consultant can direct the care of many more patients than an in-person consultant.
- The wait for a referred patient to begin treatment is usually much shorter than the wait for a psychiatric visit.
- How is your PCP colleague feeling about their present access to psychiatric consultation?

Check your speech:
How do we know if it is a good elevator speech?

- ✓ Is it brief?
- ✓ Does it roll off the tongue?
- ✓ Does it sound like you?
- ✓ Can you memorize it?
- ✓ Does it say what you want it to say?

- Deliver your speech to your team's PCP
- BCOPE: Can you say the same thing again, more clearly, in fewer words?

Giving Feedback
Listen to your colleagues give their speeches and provide them with concrete feedback on these points:

- What did you like about their speech?
- Could they make their speech even more concise?
- What other feedback would you give?

Take Home
What are other situations where an elevator speech would be useful?

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Feedback During Practice Speeches

- Provide concrete feedback to your colleagues after they practice their speech:**
 - What did you like about their speech?
 - Could they make their speech even more concise?
 - What other feedback would you give?

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Zoom Breakout Rooms

- Each clinic team will have their own breakout room
- Click “Join” if prompted to enter the breakout room
- Notification for 1 minute wrap-up
- Return to main session will happen automatically
- Don’t click “Leave Meeting”
- Need help?
 - Designate 1 person to return to the main session to talk with the facilitators

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Debrief Activity

- What questions came up about introducing integrated care to patients and engaging them in treatment?
- How will you train other PCPs to introduce care to patients?
- How will you describe CoCM to other staff in your setting, such a medical assistant, pharmacists, front desk staff?

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Questions?



Next Steps

Feedback survey:

<https://redcap.link/champevalcon2>



Next Steps

Training Call	Date
BHCM Training Call	3/08/21
Psychiatric Consultant Training Call #2	3/11/21
BHCM & Psychiatric Consultant Training Call	3/17/21
CM – CMTS Call	3/22/21
PCP & Psychiatric Consultant Training Call	3/26/21
BHCM – Behavioral Activation Call #1	3/29/21
BHCM – Behavioral Activation Call #2	4/5/21
Clinical Delivery Team Call #2 (All)	4/7/21
BHCM – Behavioral Activation Call #3	4/19/21



Thank you!