

BEHAVIORAL HEALTH CARE MANAGER ROLE

The Behavioral Health Care Manager (BHCM) is a critically important member of the Collaborative Care team. The BHCM coordinates the overall effort of the team, ensures effective communication among team members, and coordinates all care management tasks, including offering psychotherapy when that is part of the treatment plan. The BHCM is a behavioral health professional, typically a counselor, clinical social worker, psychologist, or psychiatric nurse. Sometimes this role is shared by a licensed provider and a non-licensed provider like a medical assistant, community health worker, or a person with bachelor's level training.

CORE GOALS

- Understand the Collaborative Care Model (CoCM) and its approach to integrated physical and mental health care
- Understand the BHCM role on a CoCM team and how the BHCM interacts with other providers on the team (including primary care providers and Psychiatric Consultants)
- Review the BHCM responsibilities for CoCM around: identifying and engaging patients; assessing and diagnosing; providing measurement-based treatment to target; managing a caseload of patients

ONBOARDING STRUCTURE

The BHCM training consists of several components, as shown below. Please use this information to be sure you are completing the components as required. A breakdown of the estimated time to complete each component is provided. Many components are self-paced and can be completed over the course of multiple sessions. As you get started in your role, your clinic CIT lead, [Enter CIT Lead Name], and CHAMP study clinical trainer (Paul Barry, barryp@uw.edu) will work with you to prioritize topics and activities that best fit into your clinic schedule.

INSTRUCTIONS

Download and print two copies of this onboarding plan, one copy for the clinical supervisor and one copy for the new behavioral health care manager (BHCM). Review the plan together and jot down questions, confirm dates for calls to be scheduled with CHAMP study trainers, etc. The CHAMP study clinical trainer will orient you to the full list and help prioritize tasks.

CHAMP TRAINING AND TIME COMMITMENT | INTERVENTION - COHORT 2

Components	Training Activity	Commitment	Notes/Activity links
<p>Prepare for introductory call w/ CHAMP study clinical trainer</p>	<ul style="list-style-type: none"> Schedule introductory call with CHAMP study clinical trainer <p>PRIOR TO INTRODUCTORY CALL:</p>		<p>Email Paul Barry (barryp@uw.edu) to schedule a call</p>
	<ol style="list-style-type: none"> Make sure you can log in and access the online training modules 		<p>To access:</p> <ul style="list-style-type: none"> Complete the training registration form Watch for an email containing further instructions for: <ul style="list-style-type: none"> Creating an LMS account Using your unique enrollment code to access the training* If you need assistance, visit the FAQ page or contact us. <p><i>*Note: The online training modules are <u>free of charge</u>. Please contact us if the online course system says that payment is required.</i></p>
	<ol style="list-style-type: none"> Read chapters 1-2 of the book, <i>Integrated Care: Creating Effective Mental and Primary Health Care Teams</i> 	<p>1 hour</p>	<p>Your CHAMP study clinical trainer will email you a PDF of these chapters. Your clinic should also have a hard copy of the book.</p> <p><i>Please note: Because this material is copyrighted, it is for internal use/ training purposes only.</i></p>
	<ol style="list-style-type: none"> Access the CHAMP website 		<ul style="list-style-type: none"> Access the CHAMP website Review the General Resources tab, including the CHAMP Flyer, to familiarize yourself with the study Go to the Preparation and Training Page Find your correct Intervention Cohort Enter the password-protected BHCM page (Cohort 2, Intervention): Find and look at the CMTS Resources <p>Passcode: int2021</p>

CHAMP TRAINING AND TIME COMMITMENT | INTERVENTION - COHORT 2

Components	Training Activity	Commitment	Notes/Activity links
Introductory call w/ CHAMP study clinical trainer	<ul style="list-style-type: none"> Connect with your CHAMP study clinical trainer to review the onboarding plan and prioritize training tasks 	1 hour	Ensure you have completed the tasks above prior to this call.
Research Readiness	<ul style="list-style-type: none"> Complete the online training: <ul style="list-style-type: none"> CITI Research with Human Subjects 	5-6 hours	These online trainings are only required for staff and providers that will consent patients.
	<ul style="list-style-type: none"> Complete the online training: <ul style="list-style-type: none"> CITI Good Clinical Practice - Social and Behavioral Research 	3-4 hours	Instructions and links to the online trainings: https://champ.psychiatry.uw.edu/wp-content/uploads/2021/02/CHAMP-CITI-Training-Instructions_2021.pdf <i>*Note: These trainings may take less time, but we advise budgeting 10 hours (total) to complete them.</i>
	<ul style="list-style-type: none"> Complete the informed consent training via video call 	1 hour	After completion of the two CITI trainings, please email Kat James, kjames11@uw.edu , to set up these 2 separate one-hour calls with the CHAMP Research Team: Consent training call and REDCap training call.
	<ul style="list-style-type: none"> Complete the data collection survey tool (REDCap) training via video call 	1 hour	Please contact the CHAMP research team (Lori Ferro, lif9@uw.edu ; Kat James, kjames11@uw.edu) for any questions or concerns regarding research data collection tasks: patient eligibility, consent, registration and patient surveys and adverse events.
Clinician Training	<ul style="list-style-type: none"> Complete the online training modules for Behavioral Health Care Managers 	11 hours	You should have registered for this training prior to your orientation call with the CHAMP study clinical trainer. You can access the modules directly here: https://learn.uwpsychiatry.org/learn If you need assistance, visit the FAQ page or contact us .

CHAMP TRAINING AND TIME COMMITMENT | INTERVENTION - COHORT 2

Components	Training Activity	Commitment	Notes/Activity links
Clinician Training, cont'd	<ul style="list-style-type: none"> • Get access to the registry tool: Care Management Tracking System (CMTS) via your clinical or site supervisor. Ask for a test account and active account. • If not completed during the online training modules (as part of Assignment 3), review the registry tool resources and watch the demo videos 	<p>1 hour</p>	<p><u>CMTS Q&A video*</u>:</p> <ul style="list-style-type: none"> • https://vimeo.com/473876263/7169ebeb9b <p><i>*Note: This call was recorded for an earlier CHAMP cohort, but the content is the same</i></p> <p>Registry tool resources and tutorial videos: https://champ.psychiatry.uw.edu/training/cohort-2-intervention-clinic-resources/champ-intervention-cmts-training-resources/</p> <p>Passcode: int2021</p>
	<ul style="list-style-type: none"> • Practice CoCM Skills <ul style="list-style-type: none"> ○ Complete the “Introducing CoCM” guided practice activity ○ Watch portions of the video recording from the live training for BHCMS and psychiatric consultants: <ul style="list-style-type: none"> ▪ <i>BHCM/Psychiatric Consultant Team Training</i> (dated 9/21/20) • Complete the “CHAMP Caseload Review Guided Practice” activity 	<p>1 hour</p>	<p><u>Recording of the live training session*</u>:</p> <ul style="list-style-type: none"> • BHCM/Psychiatric Consultant Team Training (dated 9/21/2020) https://vimeo.com/467851067/46c6cbc2db Watch this portion of the video: <ul style="list-style-type: none"> ▪ 00:00 – 20:21 <p><i>*Note: This call was recorded for an earlier CHAMP cohort, but the content is the same</i></p> <p><u>Materials needed for activities:</u></p> <ul style="list-style-type: none"> • BHCM Introducing CoCM • CHAMP Caseload Review Guided Practice <p>Access the activity materials here: https://champ.psychiatry.uw.edu/training/onboarding-new-clinical-providers/cohort-2-intervention-group-onboarding/</p> <p>Passcode: int2021</p>

CHAMP TRAINING AND TIME COMMITMENT | INTERVENTION - COHORT 2

Components	Training Activity	Commitment	Notes/Activity links
Follow-up call w/ clinical trainer	<ul style="list-style-type: none"> Connect with the CHAMP study clinical trainer to review training content and onboarding tasks 	1 - 1.5 hours	<p>Your CHAMP study clinical trainer will schedule this call within <u>2 weeks</u> of your completion of the clinician training components above.</p> <p>Suggested agenda for follow-up call:</p> <ul style="list-style-type: none"> Review questions & key points from online modules Practice your introducing care exercise Review the registry activity
Behavioral Activation (BA) Training	<ul style="list-style-type: none"> Review the Behavioral Activation Manual Watch portions of the video recordings from the live trainings for Behavioral Activation 	4 hours	<p>Note: activities may be spread out over several sessions.</p> <p>Behavioral Activation (BA) Manual:</p> <ul style="list-style-type: none"> https://champ.psychiatry.uw.edu/wp-content/uploads/2020/09/BA-Manual-8.25.pdf <p><u>Recordings of the live training sessions*</u>:</p> <ul style="list-style-type: none"> BA Training Call 1 (dated 9/15/2020) <ul style="list-style-type: none"> https://vimeo.com/467810003/137185e278 <ul style="list-style-type: none"> Watch this portion: <ul style="list-style-type: none"> 0:00 - 23:30 BA Training Call 2 (dated 10/6/2020) <ul style="list-style-type: none"> https://vimeo.com/465453753/37b71c294a <ul style="list-style-type: none"> Watch this portion: <ul style="list-style-type: none"> 0:00 - 34:35 BA Training Call 3 (dated 11/3/2020) <ul style="list-style-type: none"> https://vimeo.com/475144813/02a2764db9 <ul style="list-style-type: none"> Watch this portion: <ul style="list-style-type: none"> 0:00 - 29:13

CHAMP TRAINING AND TIME COMMITMENT | INTERVENTION - COHORT 2

Components	Training Activity	Commitment	Notes/Activity links
			<p>*Note: These BA Training calls were recorded for an earlier CHAMP cohort, but the content is the same</p> <p>Review, if needed:</p> <ul style="list-style-type: none"> Brief Behavioral Interventions & Behavioral Activation online modules
<p>Follow-up call w/ BA trainer</p>	<ul style="list-style-type: none"> Connect with the CHAMP study BA trainer to: Practice BA activities and role-plays 	<p>1 hour</p>	<p>Email Tracy Simpson (BA trainer) (tracy.simpson@va.gov) to set up the call.</p> <p>The BA Guided Practice (role play) activity is located here: https://champ.psychiatry.uw.edu/training/onboarding-new-clinical-providers/cohort-2-intervention-group-onboarding/</p> <p>Other BA materials can be found in the 'Resources' column of the Training Schedule. Look for the resources connected to BA Training Calls 1 & 2: https://champ.psychiatry.uw.edu/training/cohort-2-intervention-clinic-resources/behavioral-health-care-manager/</p> <p>passcode: int2021</p>
<p>CHAMP Site Provider Survey</p>	<ul style="list-style-type: none"> Complete the CHAMP Intervention Site Provider Survey 	<p>30 minutes</p>	<p>Once your training activities are concluded, you will receive an email with a unique link for the REDCap survey. Please complete the survey within 1 month of receipt (you can save your progress during the survey and return to it, so it does not have to be completed in one session).</p>
<p>Ongoing CHAMP study calls</p>	<ul style="list-style-type: none"> You will receive invitations to the following recurring CHAMP study calls. Please look for the invitations and block your clinical schedule accordingly: <ul style="list-style-type: none"> BHCM support calls (monthly) 	<p>1 hour each, ongoing</p>	<p>BHCM Support Call Schedule: https://champ.psychiatry.uw.edu/implementation-support/cohort-2-intervention-clinics/c2i-behavioral-health-care-manager-support/</p>

CHAMP TRAINING AND TIME COMMITMENT | INTERVENTION - COHORT 2

Components	Training Activity	Commitment	Notes/Activity links
	<ul style="list-style-type: none">○ Clinical Implementation Team calls (monthly)● BA support calls		