Planning and Implementation Pre-Launch Checklist

Care Partners: Bridging Families, Clinics, and Communities to Advance Late-Life Depression Care

The Planning and Implementation Pre-launch Checklist (PDF version) was developed to help guide your organization(s) through the implementation of your enhanced collaborative care program.

As you plan and perform each of the activities below, please check off each one as it occurs and document content requested within the checklist or in an associated appendix.

The items you will work through in this pre-launch checklist will also inform development of a brief guide to share your program with both new staff following turnover and with other organizations interested in learning about and possibly implementing innovations like your program.

1. Lay the Foundation (June & July)

CMTS Registry

☐ Complete license for use of CMTS registry and submit to University of Washington Licensing Office by July 13, 2018 license@uw.edu. Click here for licensure: https://bit.ly/2skOUn2

☐ Identify Account Administrator for CMTS registry and communicate name and email address of Account Administrator to Kat James at kjames11@uw.edu by July 1, 2018. The Account Administrator responsibilities include setting up accounts for all site users, maintaining appropriate permissions and responding to any questions or account issues.

☐ Account Administrator:
  o Review training recordings and CMTS user guide for the account administrator role by July 6, 2018: http://aims.uw.edu/care-management-tracking-system
  o Create test accounts for all users by July 13, 2018 and send them the CMTS training / orientation information: http://aims.uw.edu/care-management-tracking-system

Planning for Support Calls and Webinars

☐ Identify care team members for your Care Partners implementation that will be committed to participating in training, ongoing implementation support, and the learning community. Send each person’s name, email address, phone number, position, and project role to Kat James at kjames11@uw.edu by July 1, 2018.

☐ Key stakeholders, such as the project lead, administrative lead, and care team members plan to join the Welcome Webinar scheduled for Monday, July 16, 2018, 3:00-4:00pm PST.
  o For details on how to join, click here.
  o To listen to a recording of the webinar, click here.

☐ Prior to the July 16th Welcome Webinar, the project lead must watch the Introduction to Collaborative Care Module 1 in the Learning Community Site (LCS). Other care team members should watch this module prior
Project leads schedule the first **practice coach call** (60-minutes) by **July 13, 2018** to occur between **July 17 and July 31, 2018**. Practice coach calls will be bi-weekly for approximately 3-4 months then drop to monthly. Attendees for first call will be: care managers and project lead(s). The psychiatric consultant should plan to attend at least one coaching call by **August 31, 2018**. Please contact Kat James at kjames11@uw.edu to schedule.

Project leads schedule recurring **practice coach calls** (60-minutes) following the initial call. Please contact Kat James at kjames11@uw.edu to schedule.

Project leads schedule the first **psychiatric consultation support call** (30-minutes). The first psychiatric consultant support call is with **John Kern**, MD psychiatric consultant trainer. For subsequent calls, Dr. Kern will join already scheduled case reviews. Psychiatric consultation calls will be monthly then drop to quarterly. Please contact Kat James at kjames11@uw.edu to schedule. **Psychiatric Consultants** watch Role of the Psychiatric Consultant training module in the Learning Community Site (LCS) prior to this call with Dr. Kern.

Project leads schedule your first annual **leadership call** (30-minutes) to occur late September, early October following the Annual Meeting on September 14, 2018. Please include your site project lead, project champion and backup champion. Please contact Kat James at kjames11@uw.edu prior to **August 17, 2018** to schedule.

### Care Partners and AIMS Center Website Resources

- Visit the [Care Partners website](#) for valuable resources:
  - CMTS including FAQs on CMTS
  - Required CMTS fields
  - Eligibility / screening tools for Care Partners
  - Workflow development
  - Problem Solving Treatment (PST)
  - Tip sheets from Phase 1 Care Partners

- Visit the [AIMS Center website](#) for more Collaborative Care resources:
  - [Care Manager Essentials](#)
  - [Implementation Guide](#)
  - [Financing Strategies for Collaborative Care](#)
  - [Financial Modeling Workbook](#)

### Hiring

- For team members that have yet to be hired, start the hiring process **as soon as possible**. New hires will need to complete relevant pre-launch activities and be familiar with the project prior to the Annual Meeting on September 14, 2018.
  - [Sample job descriptions](#) for care managers, and psychiatric consultants
  - [Sample job interview questions](#) for care managers

### Annual Meeting

- Identify staff (at least 2 staff members from each organization) who will attend the Care Partners Annual Meeting, **September 14, 2018, 8am-5pm, PST**
  - Location: Long Beach Marriott, 4700 Airport Plaza Dr, Long Beach, CA 90815
  - Complete online registration for all attendees by **July 31, 2018**. Only one person should be registered at a time using this form: [https://redcap.iths.org/surveys/?s=DFKYH4KM48](https://redcap.iths.org/surveys/?s=DFKYH4KM48)
If you would like to book a room, please click the following Marriott link to reserve a room: https://goo.gl/rPcqSR. Please reserve your room before **August 16, 2018** to secure a room at the meeting hotel at the room block rate.

**Evaluation**

☐ Send contact information for your site evaluation lead (*may be same person or different person as implementation lead*) to Kat James at kjames11@uw.edu by **August 17, 2018**. The evaluation lead will primarily help schedule phone interviews with key stakeholders on the project as a part of the evaluation and may also support data inquiries regarding evaluation utilizing the CMTS registry data.

2. Plan Clinical Practice Change (July & August)

**Develop Clinical Vision Statement**

☐ Develop a Vision Statement for your Care Partners program implementation and email your draft vision statement to Kat James at kjames11@uw.edu by **August 17, 2018**.
  
  o On the first call, the practice coach will introduce the Vision Statement that your team will work on collaboratively for your Care Partners program implementation. The vision statement helps communicate your goals both internally and, when appropriate, externally. Internal communication about your program goals can enhance buy-in from providers and leadership as well as improve continuity of the program when you face turnover.
  
  o Your draft vision statement will be included in your Annual Meeting presentation and we will post your final version on the Care Partners website (https://aims.uw.edu/care-partners).
  
  o Click [here](https://aims.uw.edu/care-partners) to reach a worksheet for collaborative care implementations your team may reference when creating its vision statement.
  
  o Click [here](https://aims.uw.edu/care-partners) for some sample vision statements from other clinics doing Collaborative Care. Remember that your vision statements may look a bit different from these since you are partnering to share care management tasks with CBOs or family members.

**Developing Clinical Workflow Plan**

☐ Develop your Clinical Workflow Plan on the recurring practice coach calls. An overview of the development process will be discussed on your first practice coaching call. Include the final Workflow Plan in your Annual Meeting slide presentation on September 14, 2018.

☐ Complete the worksheets #3 and #4 to develop your Clinical Workflow Plan – worksheet #4 optional: [Steps #3-4: Team Building Worksheets and Action Plan](https://aims.uw.edu/care-partners).

☐ Send completed Worksheet #3: Clinical Workflow Plan, workflow diagram and draft slides for the Annual Meeting to your practice coaches and Kat James at kjames11@uw.edu by **August 17, 2018**.
  
  o Include the EHR and all patient registries (i.e., CMTS) as a means of communication about the patient in the workflow.
  
  o Include all forms of communication that may be used around the patient and family member (if applicable).
  
  o It is helpful to develop a diagram from the patient's perspective. Click [here for a sample Collaborative Care workflow](https://aims.uw.edu/care-partners) at a primary care clinic and [here for sample workflows from cohort 1 of Care Partners involving a clinic and CBO](https://aims.uw.edu/care-partners).
Develop or adapt an existing emergency protocol with considerations for primary care clinic staff, CBO staff or a family member (if applicable) and send protocol to Kat James at kjames11@uw.edu by August 17, 2018.

Developing Sustainability Plan

- Develop your Sustainability Plan on the recurring practice coach calls. Include goals for the end of the three-year grant period to continue the intervention when the grant funding has concluded and how leadership will be involved. Include the final Sustainability Plan in your Annual Meeting slide presentation on September 14, 2018.

CMTS Registry

- All CMTS users should complete their CMTS test account training activities, including entering test patient information, in the CMTS test account by August 24, 2018.
- All CMTS users will need to join our CMTS Q&A Webinar August 29, 2018 from 8-9am PST.

Systems

- Create a plan for maintaining confidentiality of patient information within the partnering organizations and for communicating the plan with all staff involved in patient care. Send plan to Kat James at kjames11@uw.edu by September 13, 2018.
- Create internal communication plan about program (i.e. launch, vision, workflow, etc.). How are you going to get the word out to the other people in your organization (i.e. PCPs, leadership, front desk, etc.)? Send plan to Kat James at kjames11@uw.edu by September 13, 2018.
- Create external communication plan about program, as relevant, (i.e. patient education and recruitment). Send plan to Kat James at kjames11@uw.edu by September 13, 2018.
- Describe your organization(s) existing quality improvement processes and how you will build on these processes when developing and evaluating your new program. Create a preliminary plan for ongoing program monitoring post-launch and evaluation (e.g. existing QI committee, Board of Directors). Send plan to Kat James at kjames11@uw.edu by September 13, 2018.

Evaluation

- Develop your patient consent for collection of patient de-identified CMTS data for the evaluation using the patient consent templates that can be found here. The template can be edited as needed by your organization. Please send final version to Kat James at kjames11@uw.edu by August 17, 2018.

3. Train Your Clinical Team - (August & September)
Care Partners Annual Meeting Pre-Work

- All staff who will attend the in-person annual meeting or are part of the care team complete pre-work (see below for details) before September 14, 2018.
  - Watch training modules in the Learning Community Site by August 16, 2018.
    - All attendees and care team members watch Introduction to Collaborative Care Module 1 in the Learning Community Site.
    - PCP Champions watch Role of the PCP training module (PCP Champions are optional attendees at the annual meeting but should watch this training regardless of attendance).
    - Care Managers and HAAF Community Partners watch Role of the Care Manager training module.
    - Project Leads watch Role of the PCP, Care Manager, and Psychiatric Consultant training modules.

- Develop Annual Meeting slides for 15-20-minute presentation during the September 14th Annual Meeting (click here for slide template for cohort 2). Send draft slides to practice coaches and Kat James kjames11@uw.edu by August 17, 2018. Send final slides to practice coaches and Kat James by August 31, 2018.

- Before launching your program, make a plan for the following:
  - Insuring support staff and other clinical staff (e.g., medical assistants, nurses) understand their roles in the enhanced collaborative care program and/or how clinical workflows will be impacted.
  - PCP training – let your practice coaches know what you need in terms of training (e.g., Role of the PCP training module, a webinar, a conference call, other resources for you to share). PCP Champions should outline a plan to inform the PCPs in their clinics about their enhanced collaborative care implementation. Send plan to Kat James at kjames11@uw.edu by September 14, 2018.

PST (Problem-Solving Treatment) Training and Certification

- Identify any staff interested in Problem-Solving Treatment (PST) certification. These should be licensed providers offering psychotherapy when that is part of the treatment plan. Submit their names and email addresses to Kat James at kjames11@uw.edu by September 21, 2018.

- Block the schedules of PST trainees to allow time to prepare for and attend role play calls (PST training requires between 17 to 22 hours of clinician time over the course of six or more months).
  - First call is TBD.
  - See Care Partners calendar for subsequent call dates.

CMTS Registry Training

- Users (e.g., care managers, psychiatric consultants, program leaders) complete self-paced training by August 24, 2018
  - Review relevant training recordings about how to use the registry (based on role): http://aims.uw.edu/care-management-tracking-system
  - Review relevant user manual.
  - Care Managers: use Sample Care Manager Scenario on the page link above to enter fake patient into the Test Site registry.
  - Care Managers: enter additional fake patients into registry until comfortable with key functions.
Users and account administrator participate in live Q&A webinar on **August 29, 2018**
- Attendees: account manager, project leads, psychiatric consultants and care managers

### 4. Launch Your Care - September & October

- Review Step 4 Action Plan (optional) and Step 3 Clinical Workflow Plan.
- Review Steps 1-3 of this pre-launch checklist to insure that everything is complete (person responsible: Project Lead).

### 5. Ongoing Maintenance & Ongoing Training - October and after

- Attend recurring **practice coach calls** (60-minutes). Practice coach calls will be bi-weekly for approximately 3 – 4 months, then drop to monthly. Attendees: care managers and project lead(s).
  - Discuss site-specific training needs / goals with practice coaches on the coaching calls and any continued workflow developments as needed.
- Attend quarterly Learning Community web-based discussions:
  - First webinar is **November 8, 2018**. Learning Community web-based discussions occur quarterly.
  - Attendees: care managers and project leads at a minimum, though others may be invited and sites may identify others interested in attending (e.g., patient navigators or medical assistants).