

Training Handout for the Online Training for Behavioral Health Care Managers

Thank you for taking the time to learn about Collaborative Care (CoCM) through our online training.

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This handout is a supplement to the AIMS Center's Online Training for Behavioral Health Care Managers. It should not be used as a standalone training tool. We recommend using this handout to take notes during the training as well as to reference after training access concludes.

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About the AIMS Center

The purpose of the AIMS Center is to inspire providers, researchers, and decision-makers to transform healthcare and improve patient outcomes. We accomplish this by translating and researching evidence-based approaches to behavioral health integration. To learn more about the AIMS Center and our work, you can visit our website: <https://aims.uw.edu/>

Questions About the Online Training?

- Website: <https://aims.uw.edu/online-bhcm-modules>
- Email: aimstrng@uw.edu



AIMS CENTER
UNIVERSITY of WASHINGTON
Psychiatry & Behavioral Sciences

Primary Care Team Engagement

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1

In This Module

✓ Understanding your role in PCP engagement

✓ The importance of strong PCP involvement

✓ The culture of primary care

✓ Strategies for engaging PCPs

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2

Culture Clash

Primary Care

• Action culture

– urgency, pace

– immediate intervention

– refer to other providers for specialty care

Specialty Care

• Narrative culture

– more time for assessment

– slower pace

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3

Busy Life of a PCP

PCP Challenges:

- Large patient panels (1,500 – 2,500)
- Fast-paced (20-30 encounters per day)
- Huge range of responsibilities
 - Medical, behavioral, and social problems
- Hard to track multiple problems at every visit

“Everything comes at me and I bat at the problem before me.”

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Busy Life of a PCP

Ways Collaborative Care Can Help PCPs:

- Practical, accessible solutions
- Help tracking patient’s behavioral health issues
- Team support
- Effective communication

Collaborative Care:

- *Brief behavioral interventions*
- *Registry*
- *Team approach*
- *Coordination emphasized*

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Primary Care Presentations

Word cloud containing terms: headaches, diabetes, hypertension, cough, infection, osteoarthritis, mental health, cholesterol, backaches, substance use, flu, rash, migraines, well-child, and annuals.

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6

Initial PCP Responses to Collaborative Care

- May be excited about collaborative care
- May not know about collaborative care
 - May not know your role in the team
 - May not realize how you can help
- May be wary of additional burden

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PCP's Role in Patient Engagement

- PCP recommendation is powerful
 - Introduce care manager and team roles
- Existing relationship is foundation for alliance with the collaborative care team

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PCP's Role in Diagnosis

Gather information

Exchange information

Generate a treatment plan


Provide intervention

- PCP may have long history with patient

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3




STRATEGIES FOR ENGAGING PCPs

Building Your Toolkit

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“Toolkit” to Engage PCP

- **Introductory package of materials for PCPs**
 - Descriptions of model and roles from PCP perspective
 - Suggestions for “warm connection” language to introduce care manager, engage patients in care
- **List of ideas for strategies to work with your PCPs**

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11



Practice Introductions (Elevator Speech)

Scenario: In the break room at your new clinic, you are introduced for the first time to a PCP with whom you will be working. She says, “Nice to meet you. I have five minutes until my next patient. What’s up with this collaborative care thing?”

What are three things you could say to help build your working relationship?

Consider

- Explaining your role
- How collaborative care is different from treatment as usual in primary care
- How can you be useful to them
 - Workflow improvements
 - Conduit to psychiatric consultant
 - Warm handoffs

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12

Communication with PCPs

- **Need a clear method**
 - Notes in EHR, copy of a note, other?
- **Communicate significant changes in patient’s clinical and functional status or care plan**
 - Prioritize which changes need to be brought to the attention of the PCP
 - Maintain consistent contact with the PCP, as needed, to address the care needs of your shared patient

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Brief Presentation to PCP: Example Summary

- Patient name and ONE sentence psychosocial history
- Baseline clinical measures
 - e.g., PHQ-9 Score
- Provisional diagnosis; current symptoms
- Current treatment(s) and length of time
 - Symptoms that aren’t improving
 - Problematic side effects
 - Psychiatric consultant recommendations (if relevant)
- Question or purpose of communication

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Practice Discussing Communication Preferences

Imagine that you are discussing communication preferences with a new PCP on your team.

What are three questions you could ask the PCP about how to communicate clinical information to them?

Feedback


- How do you want information communicated to you?
- When is the best time for us to talk?
- How do I know when I can interrupt you?
- Do you want to hear the whole case, or just the recommendation?

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Connecting the PCP and Psychiatric Consultant

- Most of this is through notes and recommendations
- Facilitate direct contacts when needed




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Making Yourself Indispensable

- Respond to extra requests
- Make sure you are available at certain times of the day to be interrupted
- Help PCPs develop the skill of quick and effective referral
- Point out that you can respond to patients that take large amounts of PCP time




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17

Reality Check

- We're asking a lot of primary care providers
 - Behavior change
 - Treatment to target - new way of thinking
 - Chronic care model
 - PCP may or may not see value in new model
 - New team members may be viewed as external, not entirely under PCP control



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18

Your Toolkit for Engaging PCPs So Far

- Collect a set of introductory materials for new PCPs
- Have your “elevator speech” ready (i.e., how to quickly convey what collaborative care is, your role on the team, and how you can be of use to the PCP)
- Know your PCP’s preferences for communicating clinical information
- Be brief in case presentations
- Connect your PCP and psychiatric consultant as necessary (Have the psychiatric consultant’s phone and email handy at all times!)
- Be accessible and responsive

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19

Tips for Engaging with Other Team Members

- Other important team roles: nurses, medical assistants, interpreters, front desk staff
- Make sure everyone on team is:
 - Up to speed on your role in collaborative care
 - Consistent in messaging about collaborative care
 - Aware of when you are available and responsive
 - Clear about the communication plan for sharing clinical information

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20

Tips for Engaging with Other Team Members (cont’d)

- Nurses and medical assistants:
 - Work closely with PCPs
 - Often are responsible for facilitating warm handoffs (more so than PCPs)
 - May also have close relationships with patients
 - Often can be involved in introducing collaborative care to patients
- Front desk and support staff:
 - Can be involved (e.g., scheduling, reminder calls, handing out PHQ-9s)

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21

This concludes the module.

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