

Below is a list of administrative tasks to be considered when planning a Collaborative Care implementation. This list may not be complete so each section provides an area for you to add items specific to your implementation. Similarly, there may be tasks that are not relevant to your organization.

### Leadership and Governance

- Goals for Collaborative Care program compatible with agency mission and vision
- Service area community needs assessment
- Business Case
- Support from senior governance and leadership (Board of Directors, Directors, etc.)
- Key internal stakeholders engagement
- Key external stakeholders engagement
- Proposed organizational structure with clearly defined responsibilities
- 2 – 5 year business plan
- Other:
- Other:

### Change Management

- Plan for addressing intersection of primary care and behavioral health cultures and treatment philosophies
- Staff support and buy-in
- Plan for addressing differing productivity expectations
- Impact of Collaborative Care program on existing workflows, relationships, responsibilities
- Other:
- Other:

### Service Model *(For more information on principles of care, see: <http://bit.ly/1MHC-principles>)*

- Identify staffing plan for key roles (care manager, psychiatric consultant); hire new vs. redeploy existing staff
- Which services will be in-house services versus coordination of services
- Prescribers: who prescribes? when?
- How will principle of patient-centered care be achieved? Measured?
- How will principle of population-based care be achieved? Measured?
- How will principle of measurement-based, treat-to-target be achieved? Measured?
- How will principle of evidence-based care be achieved? Measured?
- How will principle of accountable care be achieved? Measured?
- Other:
- Other:

### Clinic Approval and Authority

- FQHC?
- Zoning?
- Hospital district?
- Other:
- Other:

## Implementation Plan

- Start Date / Soft opening
- Key Milestones / Timelines
- Other:
- Other:

## Marketing / Fundraising / Branding

- Business Cards
- Flyer
- Website
- Newspaper announcements
- Networking with area providers / sources of referral
- Open house
- Development/Fundraising plan
- Other:
- Other:

## Human Resources

- Who to hire? Redeploy?
- Recruitment
- Supervision
- Credentialing
- Orientation
- Job descriptions
- Training plan
- ID Badges
- OSHA Risk determination: new policies?
- Other:
- Other:

## Legal / Insurance / Paneling

- Review plan with legal representative to insure bases covered
- Agency and provider Insurance / Liability
- Medicare/Medicaid/L&I numbers.
- Insurance Panels
- Other:
- Other:

## Quality Improvement / Quality Assurance

- QA practices/policies
- Contract Compliance
- Regulatory Compliance
- Grievances and Complaints
- QI processes?
- Other:
- Other:



## Facilities / Equipment

- Location
- Layout / Build out
- Increased / changed burden on shared patient spaces
- Increased / changed burden on shared staff spaces
- Increased Parking burden with staff / more patients
- Equipment and furniture needs
- Equipment ordering /purchasing /inventory
- Phones
- Fax
- Network access
- Computers
- General Office Supplies
- Software
- EHR access / training
- Other:
- Other:

## Support Services

- Front Desk
- Scheduling
- Transcription
- Social Services
- Other:
- Other:

## Finance and Billing

- Service coding and billing
- Payroll / AP / AR
- Startup and projected budgets
- Increased demand on finance department

## Forms and Recordkeeping

- EMR versus Paper. Integrated with MH EMR vs. separate.
- HIPAA Notices
- HIPAA BAAs
- Consent to Treat
- Assignment of Benefits / Advance Beneficiary/Finance policy
- Registration forms
- Clinical Forms (if necessary)

## Policy and Procedures

- New Medical Policies
- New workflow policies
- New Integrative care policies
- New "Code Blue" policies
- Formulary