



Let's Get  
Ready!

---



# Workflow Considerations

## Who, What, Where, When, How

Step 1: **Patient Identification** and enrollment into CoCM using a priority patient population approach

Step 2: **Registry Documentation.** Complete and document patient information into the EMR. The information will continue to be used throughout CoCM to manage individual patient and population health

Step 3: **Primary Care Team.** Collaboratively with systematic case review team to determine, monitor and manage the patient personalized treatment plan.

Step 4: **Systematic Case Review.** Weekly expert team review of prioritized population, using treat-to-target approach. Make recommendations to the provider to reach treatment target

Step 5: **Back to Primary Care Team**

Step 6: **Personalized Treatment Plan.** Partner with patient to create care goals that align with their behavioral, medical, psycho-social goals to ensure patient's continued engagement in self care. Frequent scheduled follow-up to monitor and achieve behavioral health, medical and psycho-social goals.

Decision Point – Patient at goal for at least three months?

- No – Back to SCR Personalized treatment plan adjustment
- Yes – Maintenance Planning and Relapse Planning

Step 7: **Maintenance Planning and Relapse Planning:** Partner with patients to develop and document maintenance, relapse prevention and routine follow-up plan which should include:

- Personal warning signs
- My steps to keep myself on track
- How to maintain health behaviors and minimize stress

Decision pint: Patient at goal for depression/anxiety?

- Yes – back to maintenance planning & relapse planning
- No – back to SCR

# Option 1: Round About Activity

One by one, start to finish, let's walk through  
the process

# Option 2: Building Our Toolkit

- Breakout into 3 groups
  - Group 1 will create a resource directory for BH Needs
  - Group 2 will create a toolkit to support patient conversations
  - Group 3 will create a





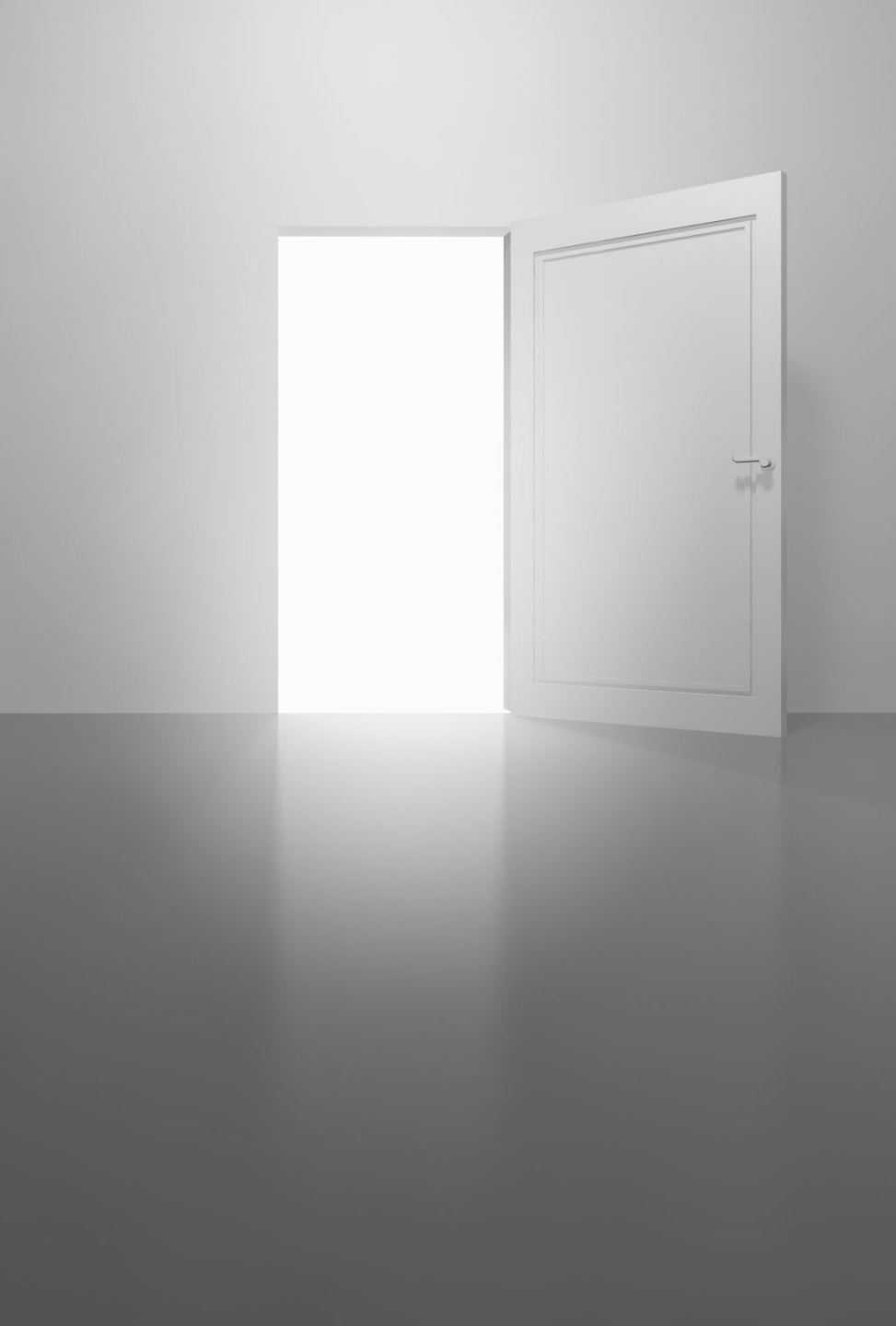
# Our Characters

Dr. Williams will play 2 lead roles – The PCP and the Psychiatrist

Robin will be our lead BHCM helpline

Sue will be our lead actress Ms. Judy Toody!

All others will be performing as key team characters, and in turn, the BHCM



# Let's Do This

---

Judy Toody has entered the room!

Get into character!

**A....nd ACTION**



# What if?

---

- Not enough referrals
- Too many referrals... “I can’t keep up!”
- My patient isn’t getting better
- I can’t reach my patient
- Systematic case review is taking too long - I can’t get to all the patients I need to review
- The provider is taking a long time to respond to treatment recommendations







# Future Training Opportunities

---

- Webinars
- Overview of SBIRT Key Components
- Training recommendations in addition to on-going webinars
- Shadowing
- Mi-CCSI consultation



# QUESTIONS??

Thank you for  
attending today's  
training!

**Reminder: Please fill  
out the evaluation  
form to receive  
certificate and CE**