



# Leveraging Lessons Learned: Implementing Telehealth to Sustain Integrated Behavioral Health

**Stephen Shearer, Facilitator**  
**Sophia Shepard, Co-Facilitator**

**Virtual Presentation**  
**Thursday, February 18, 2021**

**Vision: Healthy Communities, Healthy People**





**We are delighted you are part of  
this exciting project.**

**Vision: Healthy Communities, Healthy People**



# Session 3

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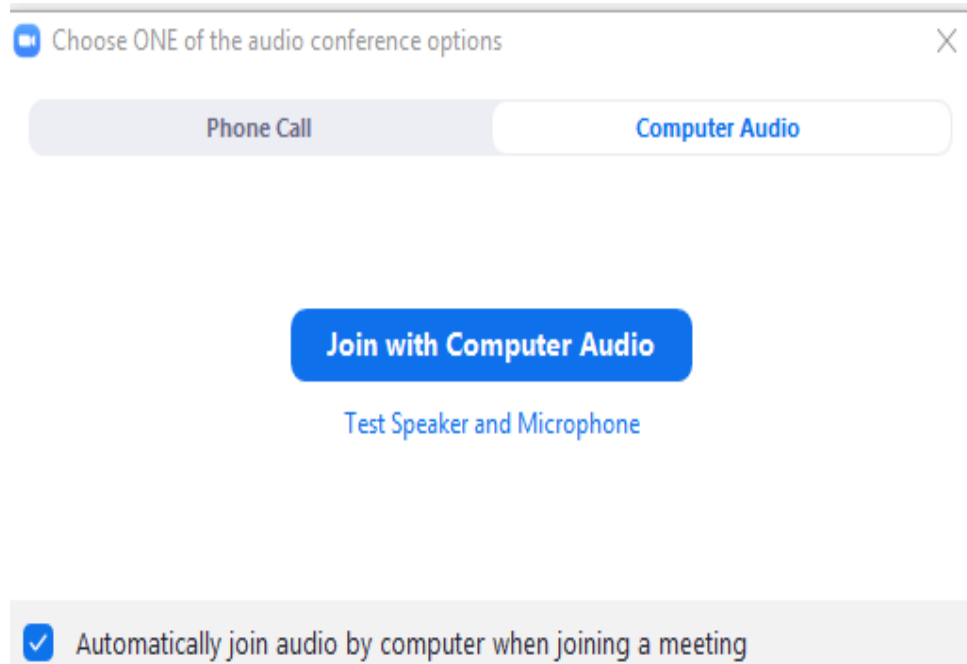
## Culture, Staffing Roles, and Change Management in Integrated Telehealth



# Connecting to Audio

By computer:

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Choose ONE of the audio conference options

Phone Call Computer Audio

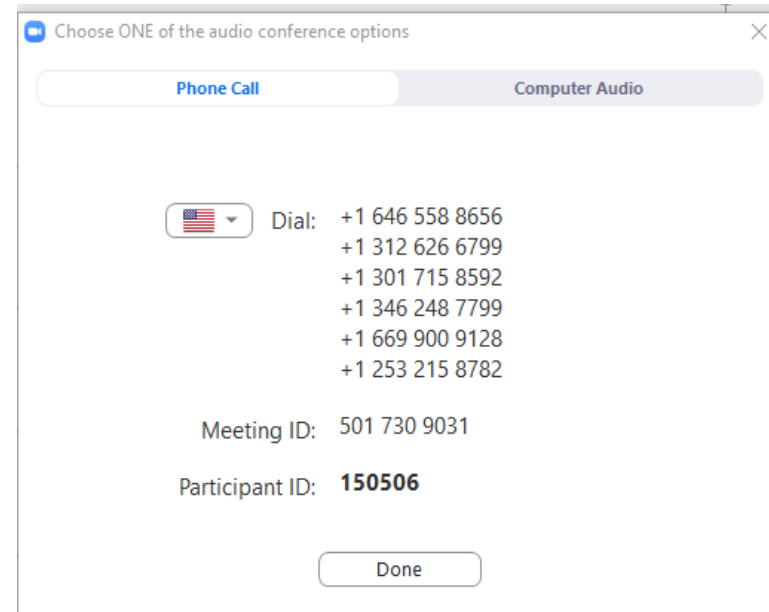
**Join with Computer Audio**

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By phone:

- Click the **Phone Call** tab, dial a listed phone number, and **Enter Meeting ID and Participant ID**.



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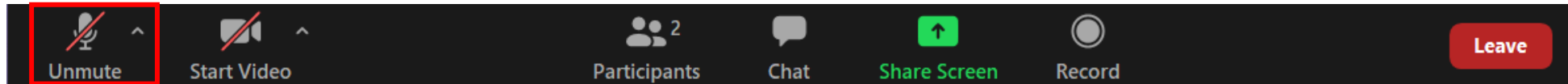
Meeting ID: 501 730 9031

Participant ID: **150506**

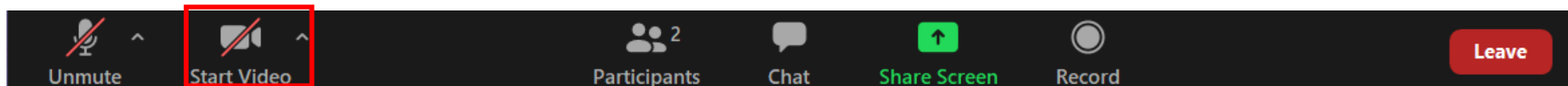
Done

# Zoom Participation

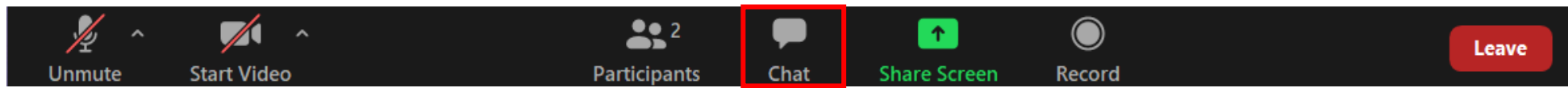
- You will begin muted. To **unmute/mute**, click the **microphone** icon located at the bottom left of your Zoom window.



- We encourage everyone to keep their video enabled. Click **Start Video** to join by webcam.



- To ask a question using the **Chat** feature, click the **Chat** icon located at the bottom center of your Zoom window.





# Session 3 Facilitators and Presenter



Facilitator: *Stephen Shearer, B.S.,*  
*CPHQ, CEAP, CCM, CJCP, LADC*  
The Bizzell Group



Co-Facilitator: *Sophia Shepard,*  
*B.S.*  
JBS International, Inc.



Presenter: *Bonni Brownlee,*  
*M.H.A., CPHQ, PCMH-CCE*  
Advocates for Human Potential,  
Inc.

# Discussion of Pre-Session Handouts and “Lifework”

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- Action Plan
- COVID-19 Self Risk Assessment Tool (Spanish and English)
- Pat Deegan’s Shared Decision Making and Psychiatry During the Pandemic
- Mindfulness and Stages of Change Illustrations

# Agenda

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- Continuing Education Credits
- Participant Check-in
- Objectives
- Subject Matter Expert (SME) Presentation and Discussion: *Culture, Staffing Roles, and Change Management in Integrated Telehealth*
- Question and Answer
- Overview of Technical Assistance (TA) Resources
- Your Valuable Feedback Is Requested
- Wrap Up/Next Steps



Source: iStock



# Poll #1

How would you describe the degree of change in organizational culture as a result of telehealth services over the past several months?

- A. No significant change.
- B. Moderate change.
- C. Major change.



# Participant Check-in



Image source: iStock by Getty Images

# CoP Participants



# Participant List

State	Organization
AK	Sunshine Community Health Center
AL	AltaPointe Health Systems
CA	Tiburcio Vasquez Health Center
FL	Osceola Community Health Services
IA	Iowa Primary Care Association
IA	Community Health Centers of Southern Iowa
IL	Esperanza Health Centers
KS	Health Partnership
KS	Flint Hills Community Health Center
MA	Community Health Programs
MA	Community Health Connections
MA	Codman Square Health Center

# Participant List

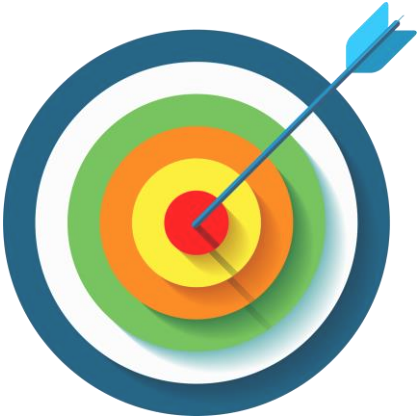
State	Organization
MA	Harvard Street Neighborhood Health Center
MO	Ozark Tri-County Health Care dba ACCESS Family Care
MO	Swope Health
MS	Central Mississippi Health Services
MT	Montana Primary Care Association
MT	Bullhook community Health Center
NM	Mora Valley Community Health Services
OH	Neighborhood Health Association
PA	Northside Christian Health Center
SC	Family Health Centers, Inc.

# Participant List

Name & Role	Organization
TX	AccessHealth
TX	Healthcare for the Homeless- Houston
WI	Community Health Systems



# Today's Learning Objectives



Source: iStock

- Define the benefits of telehealth for patients, providers/care team, and the organization.
- Describe new staff roles and competencies created through telehealth services.
- Explain the Change Management Life Cycle.

# Discussion Question

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What is the most significant change in your training/onboarding of new staff related to your organization's telehealth services in 2021 versus 2020?

# Office Hours

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- **Wednesdays 2:00–4:00 p.m. ET**
- Designed to discuss progress and/or challenges related to
  - The session topic,
  - Your team's CoP goal, and
  - Support in between session activity.

# Content Overview

Date	Topic
Feb 4 Session 1	Introduction and overview of CoP, meet other participants, COVID check-in
Feb 11 Session 2	Frameworks and Influences on Telehealth: Challenges and Opportunities
Feb 18 Session 3	Culture, Staffing Roles and Change Management in Integrated Telehealth
Feb 25 Session 4	Process and Workflows
Mar 4 Session 5	Special Behavioral Health Topics for Telehealth
Mar 11 Session 6	Technology, Data Collection Strategies, and Data Integration
Mar 18 Session 7	Provider Readiness to Engage in Telehealth
Mar 25 Session 8	Patient Experience of Telehealth
April 1 Session 9	Financial, Documentation, and Regulatory Requirements for Telehealth
April 8 Session 10	Putting It All Together: Change Management for Implementation
April 15 Session 11	Action Plans—CoP Sharing
April 22 Session 12	Action Plans—CoP Sharing

# Culture, Staffing Roles, and Change Management in Integrated Telehealth



Bonni Brownlee, M.H.A., CPHQ, PCMH-CCE  
*Senior Consultant, Healthcare Solutions Division*  
Advocates for Human Potential, Inc.

# The Benefits of Telehealth and Integrated Care

## PATIENT

- Improved access to care
- Convenience—no travel, less waiting
- Removal of stigma
- Improved medication adherence
- Reduction in depression/anxiety
- Improved quality of care
- Empowerment, more control through self-care

## PROVIDER/CARE TEAM

- Reduced no-show events
- Improved continuity of care
- Improved efficiency of care delivery
- New insight into patients' lives
- Improved quality scores
- Ease of providing care management support

## ORGANIZATION

- New revenue stream
- Reduced no-show events
- Can re-envision facility space requirements
- Human resources potential—may be able to redirect staff to different tasks
- Infection control and risk mitigation



# Challenges to Adoption of Telehealth

- Raising patient awareness of telehealth as an alternative to face-to-face visits
- Educating patients on how to manage a telehealth visit from home
- Patients with limited access to the internet or devices such as smartphones, tablets, or computers, and lack of familiarity with technology
- Availability of interpretation support
- Shifting from acute care mindset vs. whole-person care, wellness and prevention
- Defining what types of visits can be conducted virtually



Source: iStock by Getty Images

# Challenges to Adoption of Telehealth (cont'd)

- Confusion over reimbursement
- Mitigating the increased cognitive burden and digital fatigue experienced by the care team
- Shifting roles and responsibilities, honing new skills
- Managing clinical documentation, interoperability, data-sharing limitations
- Constant disruptive impact of COVID



Source: iStock by Getty Images

# How Do Staff Feel About Telehealth?

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- Confusion or lack of role clarity
- Professional self-interest
- Competing ideologies and values
- Lack of mutual trust
- Conflicting views about client interests and roles
- Poor communication amongst the care team, and/or across the organization
- Concern that patients will be non-accepting of telehealth option
- Concern over possibility of diminished quality of care

# Discussion Question

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What have you experienced (or observed) as your health center initiated telehealth services?

# Leadership Imperatives to Support Transformation to Integrated Care and Telehealth Adoption

## Look at the big picture of the national healthcare trajectory

- **Create and carry the vision at the local level**
  - Create a vision for integrated services
  - Become a Learning Organization
  - Embrace new roles: care management, community health workers, peer advocates, patient navigators
  - Enable new access strategies, including nurse visits, telehealth
- **Foster a culture of quality**
  - Empower staff to take an active role in QI processes
  - Allow protected time for staff to participate
- **Ensure diverse communication channels**
  - Co-location; enable frequent team meetings, electronic communication processes
- **Acquire and implement technology tools** to enable efficient workflows, communication, clinical documentation, data capture, and actionable reporting



# Two Disciplines—Shared Goals

## PRIMARY CARE PROVIDER

- Manages clinical care for patients, addressing a large majority of personal care needs for patients and families
- Identifies BH service needs through screening, diagnoses, observation
- Refers, warm handoffs
- Ongoing follow up
  - Conduct telehealth (TH) visits
  - Suggests virtual care as an option
  - Performs, documents, and bills for TH visits
  - In collaboration, PCP and BHP determine the type(s) of BH services and support to be provided based on the needs of the patient population

## BEHAVIORAL HEALTH PROVIDER

- Provides highly skilled behavioral support for primary care and treats patients in brief episodes of care
  - Assessment, online questionnaire
  - Cognitive behavioral therapy
  - Medication management
  - Educational webinars for clients and providers
  - Collaborative visit with client and PCP



# Staff Roles

RN/SW/CM	MA	CHW/Peer Adv	Front Desk
<ul style="list-style-type: none"><li>• Understands what conditions warrant a TH visit</li><li>• Educates patients when TH is an option</li><li>• Care management: outreach, follow up, coordination</li></ul>	<ul style="list-style-type: none"><li>• Patient troubleshooting pre-visit and during visit</li><li>• Sets TH visit expectations</li><li>• Alerts team when patient has checked in</li><li>• Conducts intake, “rooming,” and screening activities</li><li>• Facilitates warm handoffs</li></ul>	<ul style="list-style-type: none"><li>• Serves as liaison between the patient and the health center</li><li>• A cultural bridge</li><li>• Helps patients with access to care</li><li>• Identifies SDOH and recommends community resources</li></ul>	<ul style="list-style-type: none"><li>• Understands TH and provides the option to patients when appropriate</li><li>• Schedules TH appointments on the provider calendar per the appropriate protocol</li><li>• Sets financial expectations with the patient at the time of scheduling</li></ul>

# Staffing Roles and Competencies

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- New roles, new skills:
  - The “virtualist” helps facilitate the notion of virtual first so that telehealth is no longer seen as a tool of last resort
  - The “zoom-er” utilizes technology to fill the role of rooming the patient; intake; screening
  - The community health worker, peer advocate, patient facilitator
  - The Webside Manner—communication, empathy, eye contact
  - The Integrated Care Team—“team-ness” and synchronization

# Change Management: Getting Started

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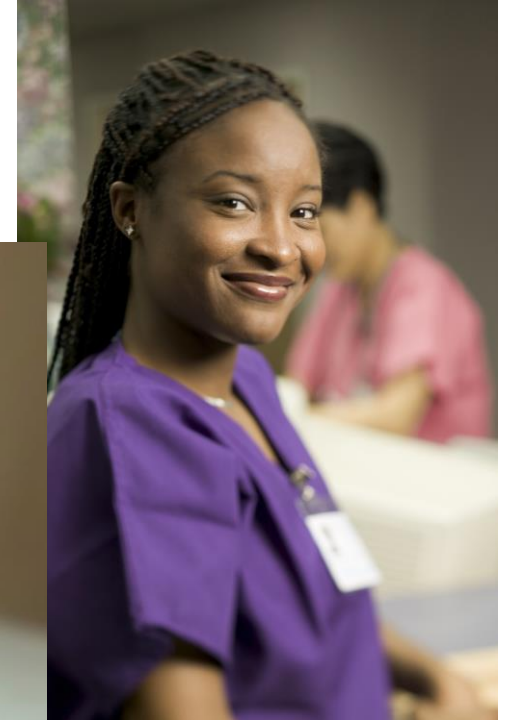
- Review the Leadership Imperatives
- Identify a champion
- Build the right team: clinician, RN, MA, front desk, IT, quality
- Empower the team
- Readiness assessment—for integrated care, for telehealth adoption
- Gap analysis, action plan
- Let's Go!

# The Project Team: **TRANSFORMERS!**

- Align vision to meet health center goals
  - Patient flow processes
  - Clinical outcomes
  - Clinic culture
- Discover the flaws
  - Understand the situation in detail
  - Generate options for action
- Facilitate action
- Monitor results
- Repeat

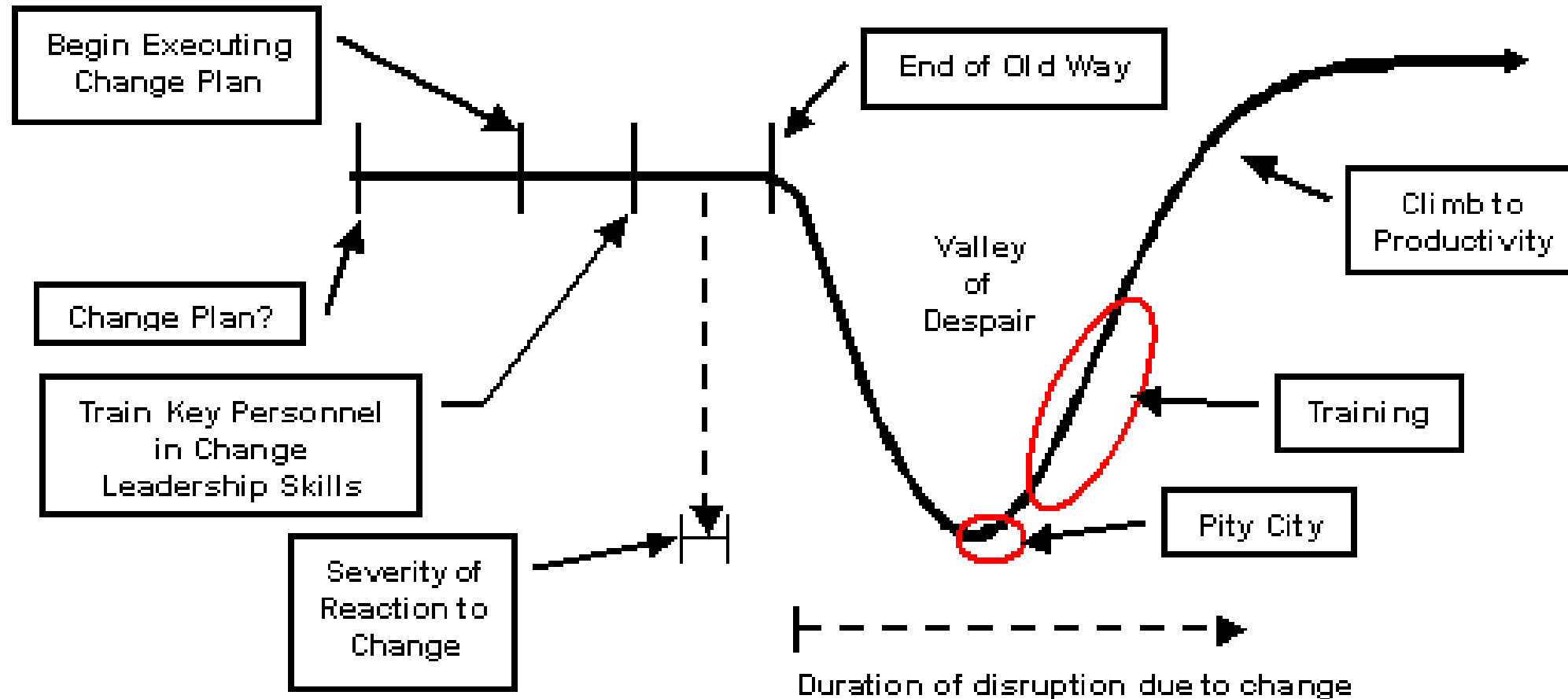


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# The Change Management Life Cycle



© Bridges, Enhancements From Val Larson 2002

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# Components of Successful Change Management

$$\text{Vision} + \text{Skills} + \text{Incentives} + \text{Resources} + \text{Action Plan} = \text{Change}$$

$$\text{Skills} + \text{Incentives} + \text{Resources} + \text{Action Plan} = \text{Confusion}$$

$$\text{Vision} + \text{Incentives} + \text{Resources} + \text{Action Plan} = \text{Anxiety}$$

$$\text{Vision} + \text{Skills} + \text{Resources} + \text{Action Plan} = \text{Resistance}$$

$$\text{Vision} + \text{Skills} + \text{Incentives} + \text{Action Plan} = \text{Frustration}$$

$$\text{Vision} + \text{Skills} + \text{Incentives} + \text{Resources} = \text{Treadmill}$$

Knoster, T., Villa R., & Thousand, J. (2000). *A framework for thinking about systems change*.





# Q&A

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# Wrap Up

- What final questions do you have?
- Next steps:
  - Please continue to work with your team to develop and update an action plan.
  - Think about how comfortable your organization is with its current telehealth patient education and consents.



Image source: iStock by Getty Images

# Reflecting on Today: Plus, Delta

- + What worked for you today?
- $\Delta$  What would you change?



# Continuing Education

- We will be offering **1.5 CE credit per session** attended for a maximum of 18 CEs for participation in all 12 CoP sessions.
- You **must** complete the Health Center Satisfaction Assessment after **each** session you plan on receiving CEs for.
- **CE credits will be distributed for all sessions at the conclusion of the CoP.**



This course has been approved by JBS International, Inc. as a NAADAC Approved Education Provider, for educational credits. NAADAC Provider #86832, JBS international, Inc. is responsible for all aspects of their programming.



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# CoP Satisfaction Assessment

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- Please complete a satisfaction assessment of today's session.
- If you plan to obtain CEUs for your time in this CoP, the Satisfaction Assessment is required.
- There are two ways navigate to the assessment:
  1. Follow the link provided in the chat here.
  2. You will be emailed a link from us via Alchemer, our survey platform.

# BPHC-BH TA Portal

<https://bphc-ta.jbsinternational.com/>

- Request TA
- Access Learning Management System (LMS) modules
- Learn more about BH TA options
  - One-on-one Coaching
  - E-learning Webinars
  - Strategies for Community Outreach
  - Virtual Site Visits to Improve Outcomes
  - Join a Community of Practice (CoP)



# TA Offerings for Health Centers

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- Webinars
- One-on-One Coaching
- Virtual Site Visits to Improve Outcomes
- Communities of Practice (CoPs)
- Strategies for Community Outreach: Social Media for Social Marketing

# Upcoming TA Opportunities!

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- **Webinars**

- **Charting the Roadmap to Value-Based Reimbursement for Integrated Care**

*March 3, 2021 at 3:00–4:00 p.m. EST*

Registration link: [https://zoom.us/webinar/register/WN\\_xC0s7kugRauCUNeeOVxFNA](https://zoom.us/webinar/register/WN_xC0s7kugRauCUNeeOVxFNA)

- **Social Determinants of Health and Addressing Health Disparities in Integrated Care Settings**

*April 7, 2021, 3:00–4:00 p.m. EST*

Registration link: [https://zoom.us/webinar/register/WN\\_gidstu1QRfGspYkBhZtQ1A](https://zoom.us/webinar/register/WN_gidstu1QRfGspYkBhZtQ1A)

*Registration links for webinars can also be found on the BH TA Portal.*

You can receive **1 hour of Continuing Education** credit for your participation







# Thank You!

**Presenter Contact Information:**

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**Bonni Brownlee** [bbrownlee@ahpnet.com](mailto:bbrownlee@ahpnet.com)

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