



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

**Stephen Shearer, Facilitator**  
**Sophia Shepard, Co-Facilitator**  
**Bonni Brownlee, Presenter**

**Thursday, April 8, 2021**

**Vision: Healthy Communities, Healthy People**





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

**Vision: Healthy Communities, Healthy People**



# Session 10

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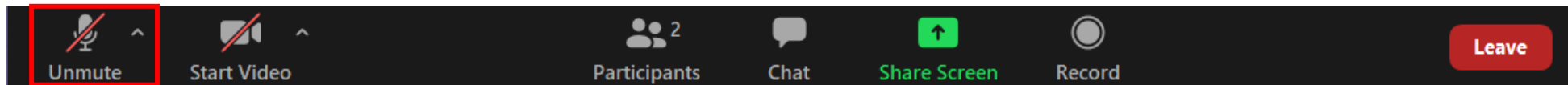
## Putting It All Together

### Change Management for Implementation

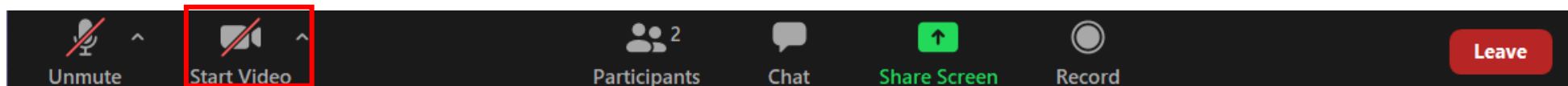


# Zoom Participation

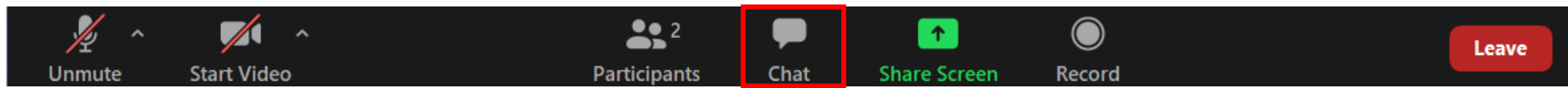
- You will begin muted. To **unmute/mute**, click the **microphone** icon located at the bottom left of your Zoom window.



- 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 10 Facilitators and Presenters



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



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



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



# CoP Participants



# Participant List

These clinics will be reporting out on their Action Plans in session 11 on **April 15, 2021**.

State	Organization
AK	Sunshine Community Health Center
CA	Tiburcio Vasquez Health Center
IA	Community Health Centers of Southern Iowa
IL	Friend Health
IL	Esperanza Health Centers
MO	Swope Health



# Participant List (cont'd)

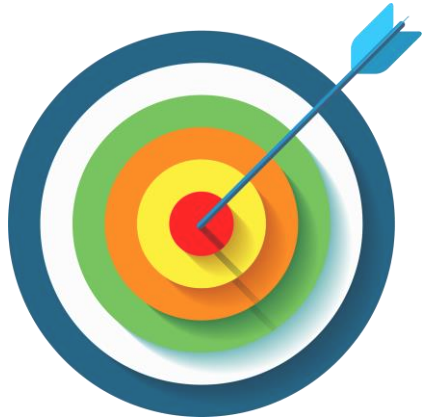
These clinics will be reporting out on their Action Plans in session 12 on **April 22, 2021**.

State	Organization
MA	Community Health Programs
MS	Central Mississippi Health Services
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.
TX	AccessHealth
TX	Healthcare for the Homeless - Houston
MO	Ozark Tri-County Health Care dba ACCESS Family Care





# Today's Learning Objectives



Source: iStock

- Identify specific steps to take to develop and implement a telehealth best-practices organization.
- Describe the importance of an improvement team developing a meaningful vision statement.
- Discuss community stakeholders with potential resources to increase patient options for audio and video sessions.
- Describe the Accountability Cycle.

# Poll Question #1

Today, after 10 CoP sessions, what do you believe is the most important next step that your clinic needs to take to support telehealth sustainability?

- A. Advocate for an **improvement team** to focus on new and long-term funding streams
- B. Advocate for **additional and ongoing staff training** in telehealth best practices
- C. Advocate for **change management leadership education and consultation** to support telehealth services
- D. Advocate for **increased and improved patient education** in the benefits of participating in telehealth services



Source: ThinkStock

# Session 10: Putting it All Together: Change Management for Implementation

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

# Getting Started

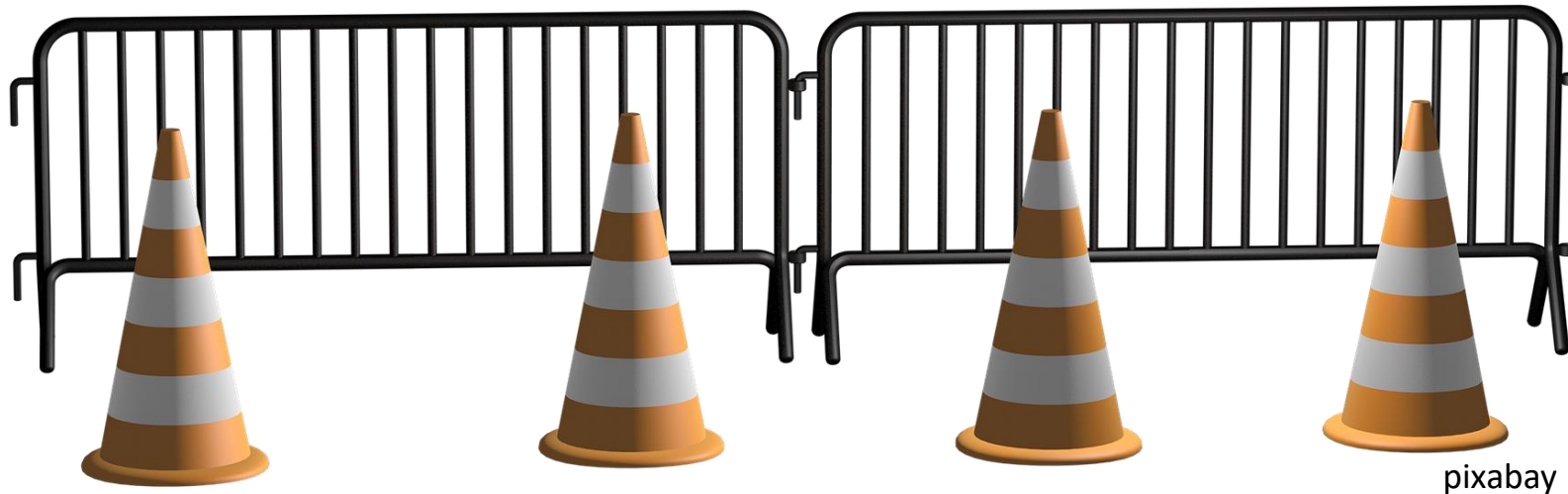
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- Identify a telehealth champion
- Designate a Telehealth Implementation Leader
- Build the right team—clinician, RN, MA, front desk, IT, quality
- Empower the team
- Design your telehealth care model
- Conduct readiness assessment and gap analysis
- Prepare an action plan
- Let's go! START SMALL



# Discussion Question

- What are your organization's potential **top three barriers** to becoming a local or national leader in telehealth services?



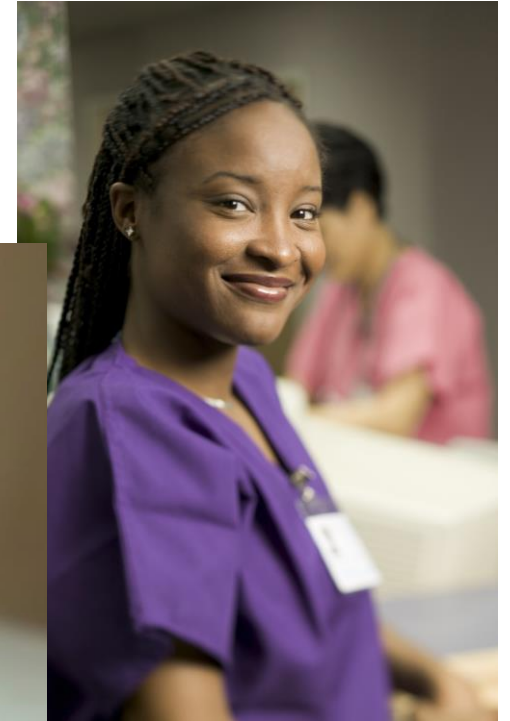
pixabay

# 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



Source: Pixabay



Source: ThinkStock

# Initial Planning Steps

## The Vision Statement

“Our Vision is to **transform health care** by enabling patients to have increased access to the **highest quality care** via a technology-enabled platform.”

## Readiness Assessment

- Telehealth Capacity Assessment Tool (TCAT)
  - Organizational readiness
  - Technology
  - Regulatory and policy
  - Financing and reimbursement
  - Clinical
  - Workforce

Source: [Telehealth Capacity Assessment Tool \(nfartec.org\)](http://nfartec.org)



# 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 interpreter support
- Defining what types of visits can be conducted virtually
- 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





# Design Your Telehealth (TH) Care Model

- **First consider your knowledge of/experience with TH thus far.**
  - Positive, negative
  - Known challenges
  - Key stakeholders meeting to review what works and what doesn't
  - The patient's perspective
- **Then design your model.**
  - Determine ratio of face-to-face vs. virtual services
  - Consider types of services to be conducted via TH
  - Prioritize investment in technology—must support providers/clinical team, also the patient
  - Anticipate new workflows, processes, procedures, behaviors
  - Review facility needs
  - Understand reimbursement from your unique payers
- **Select indicators to measure performance** and prove the TH model is a success.



# Physical Space Considerations

- Fewer exam rooms?
- More private conversation rooms/kiosks?
- A dedicated telehealth center? No patients in the building?
- Are current exam rooms suitable for TH?
  - Wall-mounted casework, computer terminals, furniture
  - Lighting? Privacy? Accessible telephone?
- Can our existing IT infrastructure ensure reliable and secure connectivity?
- For areas with limited broadband:
  - A drive-thru unit?
  - A mobile hot spot?



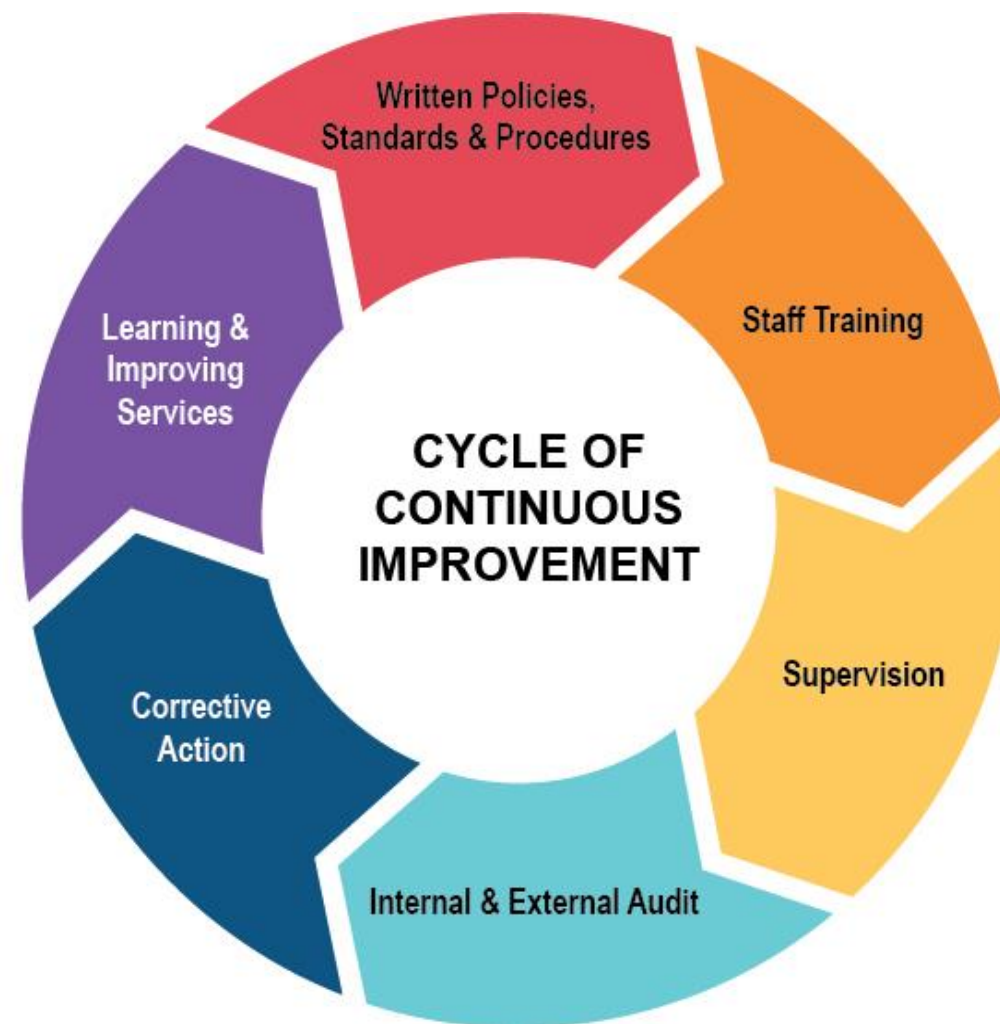
# Staffing and Workforce Development

## Conduct a skills inventory to support the TH model

- Direct patient care
  - Providers, nurses, medical assistants
  - Interpreters
  - Care managers
  - Referral coordinators
  - Health educators
- Tech support—for patients
- Tech support—for health center staff
- Data entry—front desk, medical assistants, other
- Patient engagement—introduction to TH, scheduling
- Communication—webside manner



# Establish Accountability

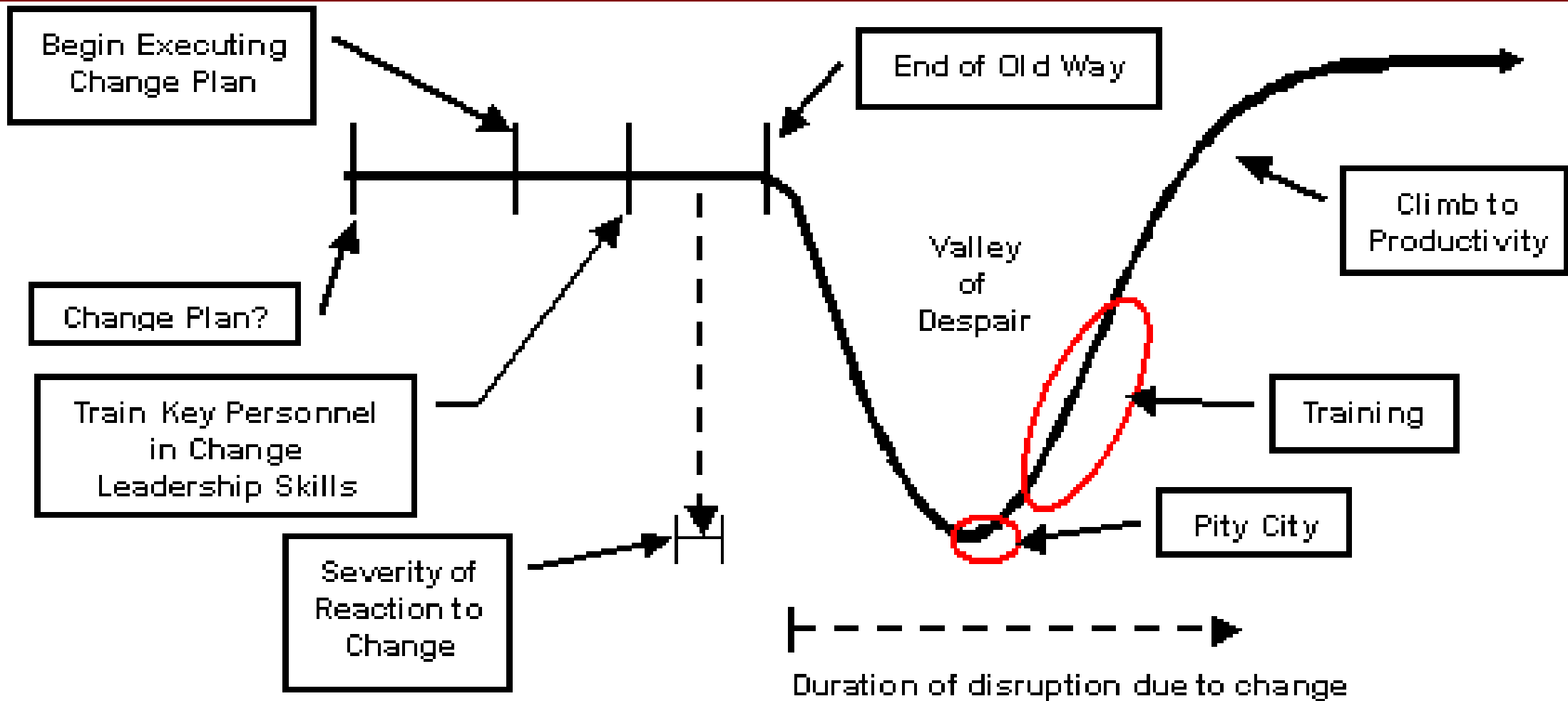


# Quality Improvement

- **Initiate small tests of change.**
  - Set up one site, conduct 4 TH visits, discuss the experience. Modify the workflow as needed.
  - Conduct 10 TH visits, discuss the experience. Modify the workflow as needed.
  - Initially limit the types of visits to be conducted via TH.
  - Experiment with provider schedules: time of day, length of TH appointments, mix of TH vs. in-person visits.
- **Consider metrics to define success.**
  - How many visits did we conduct?
  - How many hours did staff expend to conduct those visits? Salary cost?
  - How much revenue did we generate?
  - What was the no-show rate for TH visits vs. in-person visits?
  - What was the impact on ED utilization?
  - Can we conduct a patient experience survey for TH visits vs. in-person visits?
  - Can we conduct a provider/staff experience survey for TH visits?



# The Change Management Life Cycle



© Bridges, Enhancements From Val Larson 2002

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# Poll Question #2

Where in the Change Management Life Cycle do you find your organization has the most challenges moving forward?

- A. Beginning executing the Change Management Plan
- B. Ending the old way
- C. The Valley of Despair
- D. Climb to productivity



Source: ThinkStock

# Understand and Manage Resistance to Change

Vision + Skills + Incentives + Resources + Action Plan = Change

Skills + Incentives + Resources + Action Plan = Confusion

Vision + Incentives + Resources + Action Plan = Anxiety

Vision + Skills + Resources + Action Plan = Resistance

Vision + Skills + Incentives + Action Plan = Frustration

Vision + Skills + Incentives + Resources = Treadmill

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





# Discussion Question

- In *managing resistance to change* in your organization, what do you believe are the most effective tools to reduce resistance (e.g., staff education, team building exercises, professional workshops)?



# Putting it All Together for the Next Two Years...

- Are we ready to address COVID-19 related residual issues?
  - New designs in telehealth service technology and delivery.
  - Patient fears of receiving face-to-face health care services.
  - Staff fears of contagion from patients and other staff members.
  - Medical and psychosocial expertise to recognize and treat COVID-19 "long haulers".
  - Patient and staff COVID-19 vaccine hesitancy.



# Q&A

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# Wrap Up

- What final questions do you have?
- Next steps:
  - Finalize your Action Plan presentation, which will take place during Sessions 11 and 12.
  - Prepare to answer next session: Do you share your patient satisfaction data with patients and other stakeholders? If so, discuss your process.



Source: iStock by Getty Images

# Reflecting on Today: Plus, Delta

- + What worked for you today?
- $\Delta$  What would you change?
- What inspired you today that you could implement in your health center next week?



# CoP Weekly Office Hours

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- We continue to hold office hours **every Wednesday from 2:00–4:00 p.m. ET**
- Please join us to discuss or get support with
  - the session topic,
  - **preparing for your Session 11 & 12 report out, or**
  - anything telehealth related you'd like help with



# 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!

## Webinars

- **Implementing Depression Screening in a Primary Care Setting**

*Wednesday, May 5, 3:00–4:00 p.m. ET*

Registration Link: [https://zoom.us/webinar/register/WN\\_wlDnh513T8uUMYxdjKaJcg](https://zoom.us/webinar/register/WN_wlDnh513T8uUMYxdjKaJcg)

- **Strategies for Addressing Health Disparities in Medication Assisted Treatment for Opioid Use Disorders**

*Wednesday, June 2, 3:00–4:00 p.m. ET*

Registration Link: [https://zoom.us/webinar/register/WN\\_hUz8J4lvQ0eidc8x6XCkFQ](https://zoom.us/webinar/register/WN_hUz8J4lvQ0eidc8x6XCkFQ)

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





# Upcoming TA Opportunities!

## Communities of Practice (CoP)

- **Social Determinants of Health and Integrated Care**
  - *Cohort 1: Tuesdays, 4/27/21 – 6/1/21, 2:30–4:00 p.m.*  
**\*REGISTRATION CLOSED**
  - *Cohort 2: Tuesdays, 6/8/21 – 7/13/21, 2:30–4:00 p.m.*  
<https://zoom.us/meeting/register/tJYkdeivqz4jHNGwrJzV8L4gUoaxTCSCPGLu>
- **Integrated Behavioral Health and Value-Based Reimbursement: Two Sides of the Sustainability Coin**
  - *Cohort 1: Thursdays, 4/29/21 – 6/3/21, 2:30–4:00 p.m.*  
<https://zoom.us/meeting/register/tJwuCeCsrDkvGdZGr9I1dXPcdLEkmPq3nSg4>
  - *Cohort 2: Thursdays, 6/10/21 – 7/15/21, 2:30–4:00 p.m.*  
<https://zoom.us/meeting/register/tJUuduqhpjluHtwabD2xSdkmuHLR5Qju0XeD>



# 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.



JBS International, Inc. has been approved by NBCC as an Approved Continuing Education Provider, ACEP No. 6442. Programs that do not qualify for NBCC credit are clearly identified. JBS International, Inc. is solely responsible for all aspects of the programs.

# 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.
  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)



**BPHC-BH TA**  
Bureau of Primary Health Care Behavioral Health Technical Assistance

Home | Request Technical Assistance | Learning Management System | About Us | Contact Us

## Welcome to the BPHC-BH TA Resource Portal!

[View](#) [Edit](#) [Delete](#) [Revisions](#)

The Bureau of Primary Health Care (BPHC) Behavioral Health (BH) Technical Assistance (TA) portal is designed to meet the specific needs of HRSA health centers and shall focus on both mental health and substance use disorders (referred to jointly as “behavioral health”), with an emphasis on the opioid epidemic.

### Learn 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)

### Complete the Readiness Assessment



# Thank You!

Presenter Contact Information:

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

Vision: Healthy Communities, Healthy People

