

SAMHSA Primary and Behavioral Health Care Integration Program 2013 Grantee Meeting

Hyatt Regency Phoenix Phoenix, AZ DRAFT AGENDA

Sunday, September 22, 2013

8:30 AM – 4:00 PM **Whole Health Action Management (WHAM) Workshop for Peer Support Specialists (Day 1)**

Faculty: Jean Dukarski and Patrick Hendry

This two-day workshop consists of ten sessions that teach skills to self-manage whole health outcomes and create new health behavior through peer support groups. Participants get all materials needed to facilitate the WHAM process in their communities and receive ongoing technical assistance from SAMHSA-HRSA Center for Integrated Health Solutions (CIHS) staff and through a peer support listserv.

8:30 AM – 4:00 PM **Whole Health Action Management (WHAM) Workshop for Project Leaders**

Faculty: Larry Fricks, Deputy Director, CIHS

This one-day workshop orients project staff to the WHAM concept and imparts strategies for providing support to peer leaders and how to embed WHAM into the PBHCI program.

TIME TBD **Check-In for Grantee Meeting**

Monday, September 23, 2013

8:30 AM **Check-In for Grantee Meeting**

8:30 AM – 3:30 PM **Whole Health Action Management (WHAM) Workshop for Peer Support Specialists (Day 2)**

9:00 AM – 11:30 AM **Pre-Conference Institute on Sustaining Health Integration Activities**

Faculty: Kathleen Reynolds, Vice President, Health Integration and Wellness Promotion, National Council for Behavioral Health

This institute will address practical health reform changes, leadership, financing, and organizational change strategies grantees may wish to consider when designing post-grant sustainability plans. All project leaders are invited to attend.

12:30 PM **General Session Kick-Off**

Presenters: Trina Dutta, Government Project Officer, Primary and Behavioral Health Care Integration, SAMHSA; Laura Galbreath, Director, CIHS; Pamela Hyde, Administrator, SAMHSA (via video)

- 1:00 PM Introduction Bingo**
- 1:30 PM Population Management within Medicaid Health Homes**
Presenter: Joseph Parks, Chief Clinical Officer, Missouri Department of Mental Health
 In January 2012, Community Mental Health Center Healthcare Homes began providing services to 15,051 enrollees in Missouri. Dr. Parks will discuss what changes Missouri has experienced with system transformation and how providers are using data to manage the health of their clients.
- 2:25 PM Break**
- 3:00 PM Graduation of Cohort I Grantees – Lessons Learned**
- 4:15 PM Where are We Now? A Snapshot of Primary and Behavioral Health Care Grantees**
Presenter: Deborah Scharf, Clinical and Health Psychologist, Behavioral and Social Scientist, RAND Corporation
 A presentation of the data PBHCI grantees submitted to RAND and how it will help inform practice improvement strategies.
- 5:30 PM Adjourn**
- 6:00 PM National Council Networking Reception for Grantees, Guests and Staff (Optional)**

Tuesday, September 24, 2013

- 6:30 AM Wellness Walk/Run**
- 7:30 AM Check-In for Grantee Meeting**
- 8:30 AM General Session Welcome**
Presenters: Trina Dutta, SAMHSA and Elinore McCance-Katz, Chief Medical Officer, SAMHSA (via video) (*Invited*)
- 9:00 AM Addressing Health Disparities through Health Integration**
Presenter: Octavio N. Martinez, Hogg Foundation for Mental Health
- 10:00 AM How Managed Care is Planning for Integration**
Presenters: Linda Rosenberg, National Council for Behavioral Health and TBD
- 10:45 AM Break and Networking**
- 11:00 AM Concurrent Grantee Presentations**
Health Homes and PBHCI
Presenter: Jeff Levine, Bronx Lebanon Hospital Center
 In times of increasing budgetary constraints, PBHCI participants face barriers in the sustainability of their efforts to provide wellness programs for clients. A transition to direct payment for such services will be needed. Dr. Levine will discuss the opportunities and pitfalls of the new Health Home initiative for Medicaid patients. He will also discuss how

working with regulatory agencies can expand the horizon of reimbursable services within the mental health setting.

Ohio's Direct Services Workforce Initiative and Health Care Integration

Presenters: Sandy Stephenson, Southeast, Inc.; Jeff O'Neil, Greater Cincinnati Behavioral Health Services; Mary Hull, Center for Families and Children; Frank Sepetauc, Community Support Services; and Phyllis Panzano, Decision Support Services, Inc.

This presentation will report findings from a recent, expert-based, exploratory study of new and emerging job duty and worker competency requirements for direct services workers who are involved with SAMHSA-funded PBHCI programs and whose jobs are likely to be affected as Ohio implements its Centers for Medicaid and Medicare Services (CMS)-approved Health Home Benefit for adults with serious and persistent mental illness.

Psychiatric Nursing in the Integration Workforce

Presenter: Kelly Paananen, Downtown Emergency Service Center

Part of Cohort III of the SAMHSA PBHCI grant program, this grantee has carefully evaluated the strengths and limitations of the nurse care manager role, and has sought a sustainable model. The presentation will focus on the essential responsibilities and core competencies of the evolving role of medical care managers at community mental health centers.

Grant Operations: A Program Coordinator's Point of View

Presenters: Christian Barnes-Young, South Carolina Department of Mental Health; Matthew Rich, Austin Travis Integral Care; and Jeff Reece, Chief Executive Officer, Chesterfield General Hospital

Two PBHCI grantee communities will discuss some of their challenges and solutions to providing integrated care. In South Carolina there are unique challenges facing integrated care providers in rural areas. In Austin, Texas, two systems who are different in every way - from culture, workflows, and populations served to financing, health records, and the disciplines that make up the teams – are working towards integration. Come hear how these grantees are implementing strategies to make integrated care work.

12:00 PM Networking Lunches (*optional*)

Grab lunch on your own and head to an informational session with your peers from fellow PBHCI teams. Distinct lunches organized for:

- Project Directors
- Evaluators
- Primary care providers
- Peer wellness coordinators
- Grantees without primary care partnerships
- Consultation with SAMHSA's Office of Grants Management

Salvador Ortiz, Grants Management Specialist

Individual drop in sessions to discuss any question you may have about your grant operations, from drawing down funding to requesting a no-cost extension.

- Cohort I Grantees
- CEOs with Linda Rosenberg

1:30 PM

Concurrent Grantee Presentations

Merging Cultures in an Integrated CSB Program: Primary Care Perspective

Presenter: Susan Girois, Norfolk Community Services Board

Embedded primary care in a specialized behavioral health institution is one model for integrating care for people with serious mental illnesses. Differences in culture between primary care and traditional behavioral health service provision can lead to tensions in the integrated workplace if not identified and addressed with team members. This dynamic presentation explores these differences from the primary care perspective using case scenarios and real-life challenges encountered in an integrated clinic.

Strategies to Facilitate the Use of Population-Based Health Indicator Data to Improve Health: Lessons from Experience and Implementation Science

Presenters: Sandy Stephenson, Southeast, Inc. and Phyllis Panzano, Decision Support Services, Inc.

Hear how Southeast Inc., a Cohort I PBHCI grantee, engaged the strategic use of population-based data to improve the health of adults with severe and persistent mental illness. In particular, this presentation will focus on their strategies for the systematic collection and application of physical health indicators data and in encouraging clinicians, the PBHCI Team, and the organization as a whole to use the in conjunction with behavioral health and biographical information to improve health at the population and sub-group levels.

Standardizing the Procedures for Preventive Care for Clients with Hypertension in Integrated Care Settings

Presenters: Olga Fenton and John Kern, Regional Mental Health Center

This session provides a step-by-step guide for integrated care practitioners caring for adults with mental illnesses and co-existing hypertension. It offers a logical process for screening for risk factors, making appropriate referrals, and applying treat-to-target guidelines for hypertension. The session provides strategies for targeted assessments for use by nurse care managers, case managers, and behavioral health staff in integrated care. An example of “standard operating procedures” for preventive care of hypertension in integrated treatment planning is given.

Addiction Medicine: The Bridge to Integrating Care and Improving Health Outcomes for the SMI Population

Presenters: Deborah Borne, San Francisco Department of Health; Inna Bleykhman and Crystal Homes, South of Market Mental Health; and Suzannah Patterson, Clinical Pharmacist, Community Behavioral Health Services

Presenters will review the components of their Addiction Medicine program; the integrated approach to screening, referral and treatment and the successes and barriers of implementing and sustaining the program. Participants will be encouraged to share their own experiences, and will leave with ideas and plans for their own agencies.

Decision Support Tools: Adapting Health Records for Integrated Care

Presenters: Jeannie Tse, Rosemarie Sultana-Codero and Elisa Chow, Institute for Community Living

Electronic health records stand at the forefront of integrated care solutions. The Institute for Community Living, Inc. has developed a user-friendly electronic toolkit that supports behavioral health workers’ integrated decision-making in real time during clinical

encounters. These tools will be presented in an interactive style, with encouragement for participants to discuss their own tools and processes. Handouts will present a framework that agencies can use to develop their own decision support tools. Participants will create action steps for the adaptation of health records to promote integrated care at their own agencies.

2:30 PM **Break**

2:45 PM **Breakouts: Regional Learning Communities**

Enjoy an intimate conversation with other grantees, SAMHSA government project officers and learning community liaisons. Each breakout features Q&A with a government project officer on how to work together for grantee success and a segment on using health outcome data to inform primary and behavioral healthcare integration services improvement.

- HHS Regions 9 and 10 (West) — Trina Dutta, SAMHSA and Aaron Williams, CIHS
- HHS Regions 5, 6, 7 and 8 (Central and Midwest) — Roxanne Castaneda, SAMHSA; Linda Ligenza, Jeff Capobianco and Hannah Mason, CIHS
- HHS Region 4 (Southeast) — Marian Scheinholtz, SAMHSA and Colleen O'Donnell, CIHS
- HHS Regions 1, 2, and 3 (Northeast and Mid-Atlantic) — Tenly Pau, SAMHSA; Jenny Crawford, Tony Salerno and Emma Green, CIHS

5:00 PM **Adjourn**

6:00 PM – **Cohort V Health Disparities Poster Decorating Session**
8:30 PM

Wednesday, September 25, 2013

6:30 AM **Wellness Walk/Run**

8:30 AM **Check-In**

9:00 AM **SAMHSA's New Requirement for Addressing Health Disparities**

Presenters: Trina Dutta, SAMHSA and Laura Galbreath, CIHS

10:00 AM **Cohort V: Addressing Health Disparities Posters**

11:00 AM **Consumer Engagement in Whole Health**

Presenter: Nanette Larson, Director of Recovery Support Services, Illinois Department of Human Services Division of Mental Health

12:00 PM **Lunch and Fun**

Grab lunch on your own, and return for one of the following:

- Wellness Walking Programs
- Relaxation Response with Bio Dots
- Health Videos

- Cohort VI Meeting
- Consultation from SAMHSA's Office of Grants Management
Salvador Ortiz, Grants Management Specialist
Individual drop in sessions to discuss any question you may have about your grant operations, from drawing down funding to requesting a no-cost extension.

1:30 PM

Breakout Sessions A

Engage in learning and sharing opportunities. Each session offers can't miss content, resources and expertise.

Primary Care Curriculum Review for Primary Care Providers in Integrated Settings

Presenters: Lori Rainey and Primary Care Consultants

Dr. Rainey and Primary Care Consultants will present an overview of a new curriculum for primary care providers working in behavioral health settings and will request participant feedback.

Connecting Substance Use into PBHCI: Implementing Medication Assisted Treatment (MAT) in a County Behavioral Health System

Presenter: Chris Esguerra, Deputy Medical Director, San Mateo County Behavioral Health and Recovery Services

Medication Assisted Treatment (MAT) is a part of a holistic approach to treating people with substance use disorders. The San Mateo County PBHCI site identified the lack of use of MAT as a gap in the care they provide within the Behavioral Health and Recovery Services system in San Mateo County despite integration between mental health and alcohol and other drug services. As such, Dr. Esguerra will present their strategy on how they addressed this gap, provide specific examples and outcomes that have also served to enhance primary care services, and detail their use of their Long Acting Injectable Naltrexone (Vivitrol) pilot to further promote MAT as a standard part of quality integrated care.

Population Management for Co-Occurring Diabetes and Mental Illness: Implementing a Registry to Increase Adherence to Diabetes Standards of Care

Presenter: Jessica A. Jonikas, University of Illinois at Chicago, Center for Psychiatric Disability and Co-Occurring Medical Conditions

Ms. Jonikas will provide an overview of the UIC Center's study to improve diabetes management at the clinic and patient levels by introducing a diabetes registry and care coordination protocol for adults with mental illnesses served in integrated health clinics.

Sustaining Your Tobacco Cessation Activities

Presenter: Chad Morris, Behavioral Health and Wellness Program, University of Colorado

This session will offer suggestions for keeping your tobacco cessation activities and programs going after the completion of PBHCI funding.

Social Marketing

Presenter: Heather Cobb, Senior Director, Creative and Strategy, National Council for Behavioral Health

Learn to use your PBHCI data and stories to engage colleagues, management, the board of directors, legislators, community stakeholders and the press.

2:30 PM Break

2:45 PM Breakout Sessions B

Engage in learning and sharing opportunities. Each session offers can't miss content, resources and expertise.

Using Data to Drive Continuous Quality Improvement

Presenters: Trish Cortes and Jessica Sahutoglu, Washtenaw Community Health Organization; and Brandie Hagaman, Mike Harding Community Support and Treatment Services.

This session will demonstrate how WCHO and CSTS use data for program interventions, to track consumer progress and for quality improvement. CSTS' Disease Management program has targeted "deep end" consumers through a stratification process that looks at overall health, perception of health, diagnosis of health conditions and use of health system. The dashboard pulls data from the Electronic Medical Record as well as the TRAC system. The presentation will provide examples of how the dashboard is used in clinical decision making.

Creating Academic Partnerships: Clinical and Workforce Benefits

Presenter: Alice Geis, Trilogy, Inc.

Health care systems are increasingly being called upon to provide well-coordinated interdisciplinary care which includes wellness services. Nursing students from Rush University have been integrated into Trilogy's Integrated Health Program, with opportunities for the inter-professional experiences deemed so important to the future workforce. Come hear how one grantee is developing successful partnerships between an integrated care program and academic centers. Opportunities and barriers to success will be discussed, along with the potential for new or expanded partnerships for PBHCI teams.

**Population Management for Co-Occurring Diabetes and Mental Illness:
Implementing a Registry to Increase Adherence to Diabetes Standards of Care**

Presenter: Jessica A. Jonikas, University of Illinois at Chicago, Center for Psychiatric Disability and Co-Occurring Medical Conditions

Ms. Jonikas will provide an overview of the UIC Center's study to improve diabetes management at the clinic and patient levels by introducing a diabetes registry and care coordination protocol for adults with mental illnesses served in integrated health clinics.

The Use of Peers in Your Tobacco Cessation Activities

Presenter: Chad Morris, University of Colorado

This session will explore how including peers in your tobacco cessation program planning and delivery can impact the overall program and outcomes.

Social Marketing

Presenter: Heather Cobb, National Council for Behavioral Health

Learn to use your PBHCI data and stories to engage colleagues, management, the board of directors, legislators, community stakeholders and the press.

4:00 PM Evaluation and Farewell (Grantees are requested to stay through the full day)

5:00 PM Adjourn

8:30 AM-
5:00 PM

**Navigating Integration: Need-to-Have Leadership Skills for PBHCI Directors
(Optional)**

Faculty: Jeanne Supin, President and CEO, Watauga Consulting, Inc. and Mohini Venkatesh, Senior Director Public Policy, National Council for Behavioral Health

PBHCI Directors create sweeping change -- clinical, financial, operational, and cultural. This 1-day intensive workshop will help strengthen your ability to lead, inspire and build successful primary and behavioral healthcare integration. Enhance vital leadership skills, including: articulating a vision, planning and managing change, getting buy-in without formal authority, turning conflict into collaboration, ensuring financial integrity, and effectively managing teams, data, processes, and improvement. Explore your own leadership strengths through didactic and experiential learning with peers who share your experiences and your passion. *Note: this session is open to Cohort 5 and 6 Project Directors, or newly hired directors from Cohort 2-4 sites. Limit one staff per grantee site.*

DRAFT