PBHCI Sustainability Checklist

What Is This?
The Sustainability Checklist lists many of the most important elements of your clinical organization that need to change to support integration in your clinic.

It is used to identify the work that must be done to accomplish integration. This is the "what," in "what are we trying to accomplish."

How Do I Use It?
Review and discuss factors with your executive leadership and integrated care team members. Usually your CEO, COO and CFO will need to be involved in all or parts of your sustainability plan. At the beginning of projects, factors concerning Environment, Strategy, and Leadership Practices can be a good place to start. The work you select here will inform your Project Plan.
- Start by identifying up to five items for your team to focus on first. Review this list of considerations and check mark the "Key Item?" checkbox for the most important items.
- Rank your selected items with a score of 1 to 5, for 1 being the items you want to focus on first, 2 being second priority, and so on.

Environment - What does our external environment require of us?

Key Item?	Rank Importance 1-5	Environment Sustainability Factors
		Do you know the implications of Medicaid expansion in 2014 on your agency?
		Are you participating in your state's health home discussions?
		Are you in contact with likely Accountable Care Organizations in your area?
Please describe your efforts on this factor		

Strategy - What gives us direction?

Key Item?	Rank Importance 1-5	Strategy Sustainability Factors
		Is integration embedded in your strategic plan?
		What is your agency's vision & mission? Does it need to change to include integration elements?
		Do you have a business plan for growing your integration business? Have you quantified the impact of Medicaid expansion on your business plan in 2014?
		Do you know how much money your organization needs to make in order to support your integrated care vision?
		Is integration part of the service every consumer receives? Are consumer wellness programs part of your service array? Are consumers trained in Whole Health Action Management?

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202.684.7457

Substance Abuse and Mental Health Services Administration
SAMHSA
www.samhsa.gov   1-877-SAMHSA-7 (1-877-726-4727)

HRSA
Health Resources & Services Administration

		Does your organization support the health and wellness of your employees?
Please describe your efforts on this factor		

Leadership Practices, Culture and Communication - Congruent with strategy?

Key Item?	Rank Importance 1-5	Leadership Sustainability Factors
		Have you formed a change team that is sufficiently empowered to influence integration in your clinic?
		Is your governing board engaged and knowledgeable about integration?
		Are supervisors supporting staff during integration, including reviewing client health goals during supervision?
Please describe your efforts on this factor		

Policy and Process - Are we capable?

Admin and Clinical Policy

Key Item?	Rank Importance 1-5	Admin and Clinical Policy Sustainability Factors
		Do your administrative policies support integration? (Confidentiality policies, Billing and Reimbursement policy, Ethics policy)
		Do your clinical policies including care coordination, annual lab work, prescribing, smoking, treatment plan policy – Does it include at least one health goal?
		Does your annual lab assessment include metabolic syndrome indicators?
		Are blood pressure and BMI measurements completed at each medical visit?
		Are health and wellness goals in your treatment plans?
		If you do not plan to sustain services at the end of your grant how will you ethically assist consumers to find other health care providers?
Please describe your efforts on this factor		

Billing

Key Item?	Rank Importance 1-5	Billing Sustainability Factors
		Are you billing for all possible behavioral health services provided? Primary care visits?
		Are your Medicaid and Medicare numbers appropriate linked to the service provided?

		If partnering with and FQHC, do you understand FQHC billing rules and regulations?
		Does the FQHC understand the CMHC billing rules and regulations?
		Have you walked through your workflow and identified who, can pay for each step of your process - with your clinical and billing staff at the same time?
		Do you know what existing billing codes for integrated health are billable in your state and to which third party source?
Please describe your efforts on this factor		

Technology

Key Item?	Rank Importance 1-5	**Technology Sustainability Factors**
		Are you using a certified EHR?
		Can your system generate registries for staff to use to support integration?
		Can you generate a Coordination of Care Document (CCD)?
		Does your clinical record support documentation of physical health related services?
		Can your system generate an electronic bill after the completion of a documented event?
Please describe your efforts on this factor		

Quality Improvement

Key Item?	Rank Importance 1-5	**Quality Improvement Sustainability Factors**
		Does your quality improvement program include benchmarks for integration activities?
		Does your quality improvement data drive change processes?
Please describe your efforts on this factor		

Structure - Are we enabled? Are roles and responsibilities clear? Are we organized so we can meet strategy?

Key Item?	Rank Importance 1-5	**Structure Sustainability Factors**
		Do your job descriptions for case managers, therapists, nurses and doctors include key tasks associated with integration?
		Have nurses transitioned from "mental health nurses" to "integrated health nurses"?
		Are the medical staff required to monitor physical health issues?

		Have you identified the baseline caseloads for both primary care and behavioral health clinicians?
		Are your clinicians seeing enough patients to meet the financial need?
Please describe your efforts on this factor		

Skills - Are staff able to do the desired work?

Key Item?	Rank Importance 1-5	Skills Sustainability Factors
		Does your staff development program include integration trainings?
		Have case managers and therapists been trained on health navigation/care coordination?
		Are your billing staff trained on correct billing procedures such as the proper CPT code, linked with the proper diagnostic code and the proper credential?
		Are you as an agency and your providers empanelled with all of the appropriate managed care plans?
		Does your staff development program include integration trainings?
Please describe your efforts on this factor		

People - How do we attract and develop our talent?

Key Item?	Rank Importance 1-5	People Sustainability Factors
		Do your performance evaluations include integration tasks?
		Does your new staff orientation include integration?
		Where are new staff coming from? Do they have an integration mindset?
Please describe your efforts on this factor		

Rewards – How do we recognize people for supporting the change?

Key Item?	Rank Importance 1-5	Rewards Sustainability Factors
		How engaged are staff currently?
		How well designed and aligned are incentives and informal rewards to drive needed behaviors necessary for achieving the strategy?
Please describe your efforts on this factor		