



SAMHSA-HRSA
CENTER for INTEGRATED
HEALTH SOLUTIONS

**Cohort IX Webinar Series:
Strategies and Workflows for
Consumer Engagement and
Retention**

December 14, 2016

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**Slides for today's webinar are available
on the CIHS website at:**

[http://www.integration.samhsa.gov/pbhci-learning-
community/webinars](http://www.integration.samhsa.gov/pbhci-learning-community/webinars)

Got Questions?
Please type your questions into the question box and we will address them.



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Today's Presenter

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What we will cover:

- Engaging people in integrated services
- Minimizing internal steps for referrals to encourage engagement
- Strategies to keep people engaged

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Unlike the movies, this is not the way engagement in health and wellness starts....



Three steps to engagement:

Culture

Services

Marketing



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Step 1: Creating a culture to support wellness

Immersion of integration for the whole agency



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Step 1: Creating a culture to support wellness

First Impressions

- Agency / Clinic name
- Building / Lobby
- Offices
- Newsletters
- Community Partners

Clinical Services

- Health questions embedded
- All staff are health-competent
- Motivational Interviewing
- Nutrition and exercise are woven into services



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Step 2: Offering services that people will want to participate in

- Taking the time to build relationships
- Using data to find out what people need / want
- Stage-based interventions
- Staff who understand and can roll with the complexity of mental illness
- Making it fun
- Creating opportunities in the community



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Step 3: Marketing your services

- Keep your message simple
- Marketing to your staff
 - Be sure to include your psychiatry staff
 - Have staff market to other staff, who market to potential enrollees
- Marketing to your community partners
 - Have community partners market to potential enrollees
- Marketing to potential enrollees
 - Incentivize enrollees to market to other potential enrollees

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Referral workflows



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Three steps to creating a referral workflow

Avoid
Pitfalls

Natural
Opportunities

Clinical
Opportunities



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What doesn't work....

- Having your clinic services be separated from your day-to-day business
- Referral forms to complete
- Ambiguous requirements
- Lengthy wait
- Expectation of transfer



You have to do what you say you are going to do.....

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Workflow strategies

Natural opportunities

- Open clinic layouts
- Promoting / hiring from within
- Sharing staff resources
- Bringing health to where people are



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Workflow strategies

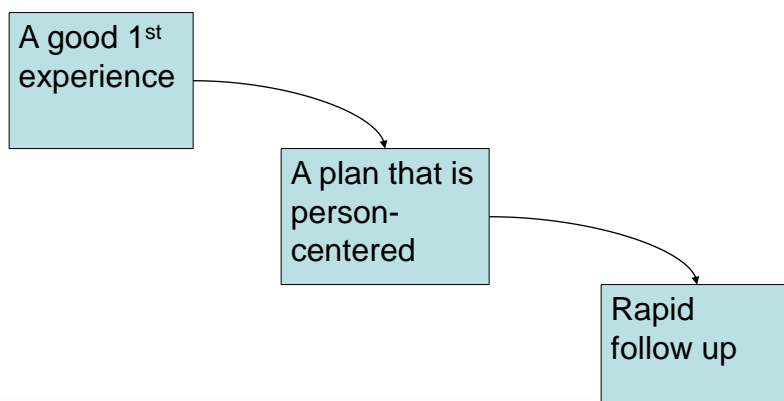
Clinical Business Opportunities

- Open access
- Peer support up front
- Warm hand-offs
- Daily huddles
- What happens in the clinic supports the plan
- Regular (but brief) case review



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Strategies to keep people engaged



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A good first experience



- Easy access
- Easy / safe to get to
- Welcoming staff
- No redundant paperwork / questions
- The data collection process is embedded in the workflow
- Incentives for participation that support health
- Identification and planning for barriers to attending appointments (*Mini no-show screener*)

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A plan that is person-centered

- The person developed his / her own plan
- The plan includes the support of relationships
- Goals and outcomes of health are embedded in life areas of the plan
- Goals and outcomes are achievable in a short amount of time
- Interventions are reflective of what state of change the person is in

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Rapid Follow Up

- Following the plan
- Care coordination
- Drop-in groups / open groups
- Identification of barriers
- Celebrating success
- Incentives for re-assessment that support health



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Resources

SAMHSA-HRSA Center for Integrated Health Solutions

- Consumer engagement
www.integration.samhsa.gov/health-wellness/consumer-engagement
- Motivational Interviewing
<http://www.integration.samhsa.gov/clinical-practice/motivational-interviewing>

National Council for Behavioral Health

- Motivational Interviewing
www.thenationalcouncil.org/areas-of-expertise/motivational-interviewing/
- MTM – Same Day / Next Day Access
<http://www.thenationalcouncil.org/areas-of-expertise/same-day-access/>
- Case-to-Care Management
<http://www.thenationalcouncil.org/training-courses/moving-case-management-to-care-management/>

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