

BHC Start-Up Checklist

Weeks 1-2: BE VISIBLE AND GET THE LAY OF THE LAND

1. Complete any corporate orientation tasks assigned.
2. Complete assigned clinic systems trainings (Human Resources, EHRs, etc.).
3. Work with management to identify a centrally located workstation.
4. Work with management to identify a centrally located clinical space.
5. Participate in any PCBH training activities provided.
6. Complete 15- or 30-minute meetings with key clinic and PCBH personnel.
7. Shadow clinic team members.
8. Shadow BHC(s) from your system to observe.
9. Shadow BHC(s) from your system to practice documenting during visits.
10. Shadow BHC(s) from your system to practice completing a visit.
11. Study PCBH program manual or draft a manual if one has not already been made; pass along to leadership (see ESM Example of a PCBH Program Manual 2023).

Weeks 3-4: BE A PRIMARY CARE INFLUENCER

1. Organize files with copies of educational tools you can use with staff and patients (ESM GATHER The Essentials of Primary Care Behavioral Health; ESM Poster Announcement of Start of BHC Services; ESM Half-Page Patient Facing Poster or Handout).
2. Post BHC Announcement poster (ESM Poster Announcement of Start of BHC Services).
3. Place BHC brochures in exam rooms and waiting areas (ESM BHC Brochure for Patients and Families); if brochure not available, create one.
4. Talk with teammates about using BHC services (ESM BHC Visits WHO WHAT WHEN HOW; ESM Tips for Talking with Patients about BHC Services).
5. Practice the BHC introduction for initial visits (ESM BHC Visit Introduction to Patients).
6. Begin seeing patients (with a ramp-up schedule).
7. Make multiple copies of your Daily Practice Management Sheet (ESM Daily Practice Management Sheet). Start each morning with a fresh copy on your clipboard.
8. Survey PCPs and RNs to learn what patients they most want BHC services for (ESM Pathway and Class Services Survey).
9. Attend huddles and encourage PCPs to interrupt as needed for same day appointments with you.
10. Use “Request of the Week” communication strategy at huddles (ESM BHC Request of the Week).

11. Offer to preview schedules with PCPs to identify warm handoffs, particularly with PCPs who use BHC less.
12. Practice administering and scoring behavioral health measure(s) to improve your speed and confidence; practice providing strength-based feedback for different results.
13. Coach PCPs and RNs on what to say to patients about BHC services.
14. Push for increased variety in types of referrals from all PCPs & RNs (ESM New Ways to Use the BHC).
15. Check quality of your first chart notes using PCBH Chart Review Tool (ESM PCBH Chart Review Tool).
16. Check exam rooms to make sure BHC brochures are available (ESM BHC Brochure for Patients and Families). Carry copies with you to share with the people you meet, both staff and patients.
17. Consider what classes or workshops you might offer in response to survey results from teammates (ESM Pathway and Class Services Survey).
18. Speak for 3-5 minutes at a provider meeting (if there is one) and provide an update on rate of warm handovers (WHOs).
19. Shadow more PCPs and other team members when not busy.
20. In free moments, do additional learning (ESM Additional Learning Options for BHCs).
21. Arrange to meet or talk by phone with an advanced BHC or clinical lead to discuss your thoughts and plans when you start using the GATHER Reflection and Planning Tool.
22. Talk with interpreters about BHC services.
23. Reflect on how your work with support staff is going; express your gratitude for their support.
24. Find out more about affiliated or community specialty MH services.
25. Visit or call important social service organizations that you are likely to use.
26. Form a PCBH Implementation Team and set a time for an initial meeting.
27. Rate skill levels on the BHC Core Competency Tool (ESM Behavioral Health Consultant Core Competency Tool). Share needs for training with supervisor or advanced BHC (see Chap. 11).
Week 5 and Beyond: EVALUATE, EXPAND, AND EVOLVE
1. Develop needed or requested patient education materials.
2. Ask for standing time in provider and staff meetings.
3. Develop a PCBH newsletter to distribute regularly to staff, PCPs and perhaps leadership.
4. Spend more time with an advanced BHC to observe a class or clinical pathway activity (virtually if need be).
5. Conduct pilot studies of an initial PCBH Pathway and problem solve scale up with leadership.
6. Develop workshop/class services; explore possibility of a class-based medical services (see Chap.

10 for more information).
7. Continue to work with the Implementation team. To track your progress, use the PCBH Integration Tool monthly (see <i>ESM PCBH Integration Tool</i>).
8. Explore starting a simple and more complex PCBH pathway (see <i>Chap. 10</i> for more information).
9. Discuss ways the BHC can assist management and explore ways to fine-tune workflows involving the BHC.
10. Administer the Barriers to Use of BHC Survey (BUB) and develop a plan to address identified barriers (<i>ESM Barriers to Use of BHC Survey</i>).
11. Use program evaluation data to refine and evolve PCBH services.

Fig. 8.1 BHC Start-Up Checklist