Community Health Worker Grant Operational Site Visit Guide

April 2023

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Purpose of Operational Site Visits

The Health Care Authority's (HCA) Clinical Quality and Care Transformation (CQCT) team will be conducting operational site visits (OSV) with clinics participating in the Community Health Worker (CHW) Grant to support program implementation with partnering health systems. The OSV will provide participating sites with tailored technical assistance for adoption and implementation needs and grant requirements.

Site visits will be conducted biannually with each site and will last an average of an hour and a half.

Expected Outcomes

- Review health center's progress on activities in implementation plan
  - Review progress with hiring CHW if both CHWs have not been recruited
  - Get update on CHW integration within clinics
- Knowledge of successes within the health center
- Knowledge about key challenges and barriers
- Insight on CHW impact within the clinic and on patient health outcomes
- Identification of trainings, tools, resources, and other needs of the health center
- Identification of innovations and best practices for integrating and utilizing CHWs

Site Visit Process

Once a clinic has agreed to a OSV date and time, they will receive confirmation with a calendar invite. The OSV questionnaire will be sent to the team leads listed on the submitted implementation plan.

Site visits will be conducted via Teams or Zoom depending on the preference of the clinic. Clinics should review the manual and questionnaire with their staff to familiarize themselves with the content. OSV discussions will be divided into four sections:

- Administrative
    - Current workflow of staff including incorporation of CHWs
    - Progress pertaining to implementation meetings
    - Team meetings
- Information technology
    - Electronic health records (EHR) system
    - Data extraction process
    - IT needs
- Data reporting
    - Documentation and reporting
    - Process for quarterly reporting deliverables
- Technical assistance and training needs
    - Tools, resources, and training needs identified by clinic

Clinics are not required to work through the questions. They are only intended to provide clinics insight to the type of questions that may be asked during the visit.

Pre-Site Visit steps

1. Community Health Integration (CHI) program manager will email health clinics 4-6 weeks prior to schedule visit.
2. CHI program manager will send an email including confirmation of the site visit, a calendar invite, OSV manual, and agenda 2 weeks prior to site visit.
3. CHI program manager will provide contents concerning the tailored discussion for the site visit. For example, if CHI program manager has concerns about documentation and reporting, the clinic will be informed in the email. The clinic can then view questions for documentation and reporting to review the type of questions that will be asked.
4. Clinics are requested to review OSV questionnaire prior to visit.

On the Day of the OSV

- Arrive early—be respectful of everyone's time
- A short overview will be conducted to explain purpose of the visit
- Clinic will introduce team and their roles
- Assess behavioral health integration (BHI) workflow
- Assess concerns regarding documentation and reporting
- Assess staffing training needs
- Conduct review of staff technical assistance and training needs
- Provide evidence-based updates

Conclusion of OSV

At the conclusion of the OSV, the program manager will:

- Expand knowledge of community needs
- Give feedback to the health care facility staff, including:
    - Describe gaps in knowledge among CHWs observed
    - Note problems in record keeping or other systems
    - Suggest ways to improve clinic organization
    - Note major barriers to the effective delivery of services
- Provide technical assistance on any barriers identified during disucsions
- Help clinics develop a plan of action to address identified issues
- Discuss timeline for follow-up

Documentation Post Site Visit

The program manager will provide a post-OSV report to health clinics within two weeks of the visit.

The report will include:

- Purpose of the visit
- Attendees of the call
- Issues or challenges identified, items for follow-up, and who is responsible for any action items established to address identified barriers
- Feedback from the clinic
- Opportunities for improvement to technical assistance needs and clinic plans
- Plans to conduct a follow-up call as scheduled and inquiry about the recommendations and action plan

BHI Workflow

Name of individual completing the form
1. How and when will patients complete the initial behavioral health (BH) screening?
2. Are staff, including CHWs, trained to screen patients properly for BH conditions?
3. Who will diagnose a BH condition?
4. How is the ERH or K12 CHW engaged with and introduced to the patient?
5. Are CHWs trained to utilize certain screening tools?
6. How is information gathered and communicated to the health systems leadership (barriers, facilitators, and opportunities)?
7. What policies and procedures has your organization adopted to support implementation of the CHW model?
8. What are your organization's technical assistance needs as it relates to the CHW grant?
9. When does patient consent to meet with a BH specialist, receive a BH assessment, and proceed with treatment requested and obtained?
10. Who prescribes psychotropic medication if deemed clinically appropriate?
11. Describe the value the CHWs provide to the clinic.
12. How often does the clinical community health worker participate in clinical team meetings and/or case conferences?
13. How does your organization facilitate referrals? Does your organization have a bi-directional referral system in place?

Questions for Documentation and Reporting

Questions for Documentation and Reporting
1. Who is responsible for completing the required monthly/quarterly report?
2. Has the team experienced any challenges in using the reporting template?
3. Who is responsible for submitting the reports to the program managers?
4. Based on your experience, are there any sections of the reporting template that should be revised to capture any additional activities conducted by the clinic staff?
5. Does the clinical team have any questions or concerns about the reporting template?

Questions for Training Needs

Questions for Technical Assistance and Training Needs
1. How confident is your staff in their knowledge on the importance and role of the CHW?
2. How confident is your staff in recruiting and retaining CHWs?
3. How confident is your staff in integrating CHWs into the clinical workflow?
4. On a scale of 1 to 5, how confident are you in resolving conflicts or issues with CHWs?
5. On a scale of 1 to 5, how confident do you feel that your clinic has successfully identified a clear role for your CHWs?
6. Does staff need to be trained to screen for BH issues?
7. Is training provided in basic phone crisis management, information gathering, and service descriptions? If so, who needs to undergo this training?
8. Is escalation training provided to all staff members?
9. Is training provided on how to code for BH services?