

# Introduction to Care Coordination and Advocacy (CCA)

**Optum Alaska April 3, 2020**

**Wroksie Jackson, LCSW**

**Eula Crippen, PhD**



# Snapshot



**Birthplace:**  
Atlanta, GA  
**Currently Live:**  
Fairbanks, AK



25+ YEARS in Behavioral Health



IF I WERE NOT DOING THIS JOB / CHILDHOOD DREAM JOB...

MUSICOLOGIST

**Favorite Quote:**

"They may forget what you said, but they will never forget how you made them feel."

— Carl W. Riechner

Relationships



**Outside of Work**

1. Like to dance
2. Like live Music
3. Travel



# Dr. Eula Crippen, PhD – Chief Psychologist

---



# Care Coordination and Advocacy Overview

---

Care Coordination and Advocacy Team

Optum Alaska Care Coordination

When Coordination is needed

Where Care Coordination Happens

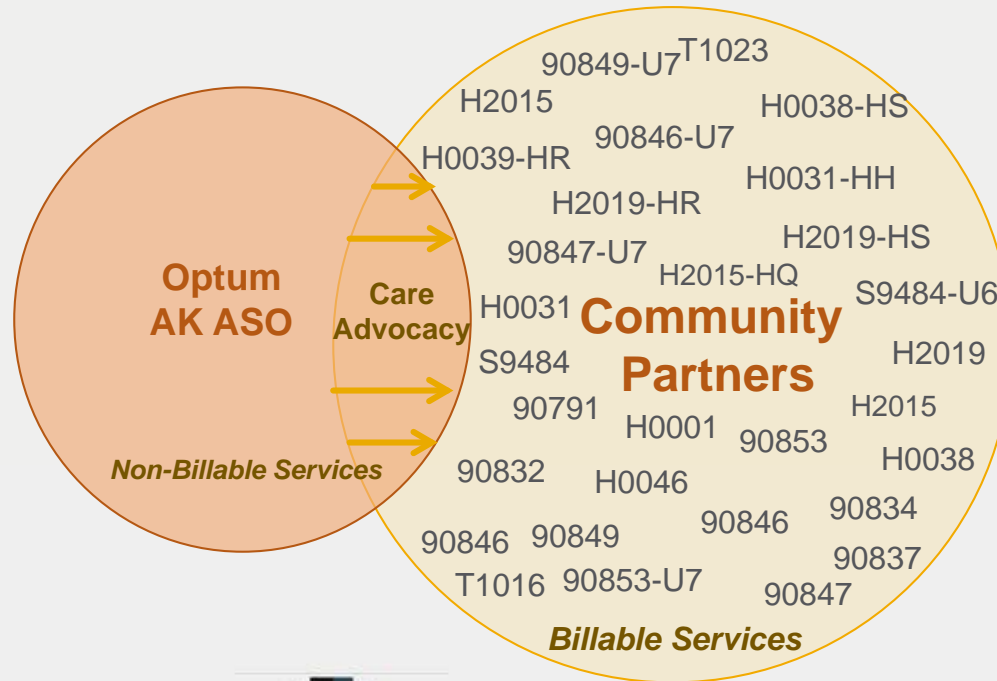
Why Care Coordination Matters

Continuum of Care Coordination

Shared Resources



# Dedicated Clinical Operations



# Behavioral Health Care Advocates

---

Master's level licensed clinicians will typically initiate CCA services with a participant, conducting assessment and plan of care;

Care Advocates will refer participant to health providers and community resources;

Through assessment and person-centered planning, help participants identify goals and make steps in their own recovery;

Advocate for participants at every level of service delivery, working directly with participants, family members, health care providers and community agencies.

# Behavioral Health Care Coordinators

---

Skilled and compassionate professionals who offer non-clinical assistance, identify and assess gaps and barriers, and coordinate services and resources that assist with the recipient's needs.

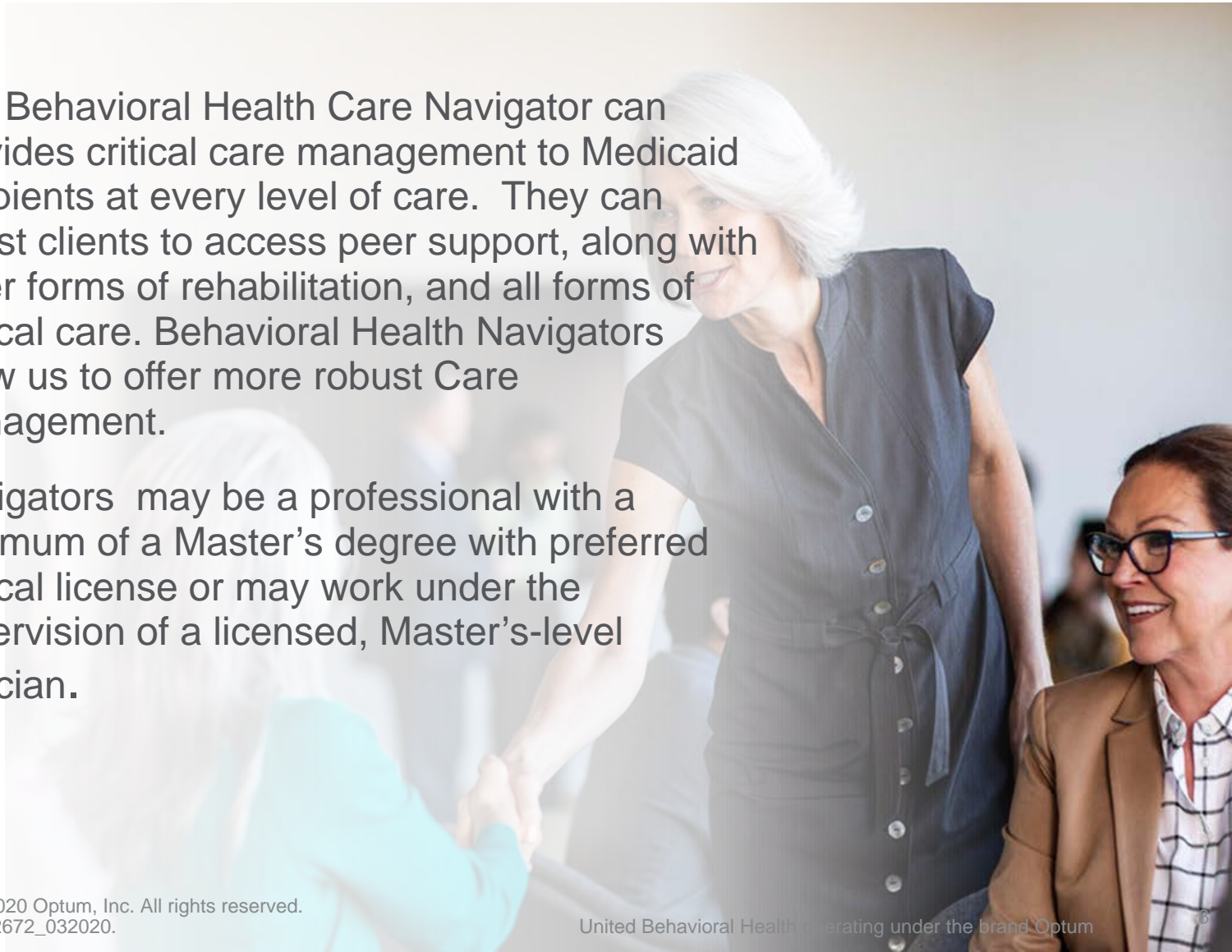
- ❖ Assists with searching for/selecting health care providers based on the recipient's needs and preferences; also assists with scheduling appointments (as needed)
- ❖ Assists with identifying and resolving clinical gaps for lower risk participants
- ❖ Locates community-based resources and services that are available to provide assistance and support to help address the recipient's medical, behavioral, and social gaps or concerns
- ❖ Engages with the Participant to assess his/her needs and identify those who may require a higher level of assistance and support from a clinician

# Care Navigators

---

The Behavioral Health Care Navigator can provide critical care management to Medicaid recipients at every level of care. They can assist clients to access peer support, along with other forms of rehabilitation, and all forms of clinical care. Behavioral Health Navigators allow us to offer more robust Care Management.

Navigators may be a professional with a minimum of a Master's degree with preferred clinical license or may work under the supervision of a licensed, Master's-level clinician.





# Peer Support Specialist

Rahne Smith

Trained, certified professionals with lived experience. He provides education, support and encouragement to individuals in recovery from substance use or mental health disorders;

Help individuals access resources within their home community that will support their recovery

Help develop Wellness Recovery Action Plan (WRAP);

Teach, encourage and practice life skills with respect for each participant's cultural frame

Build relationships with participant's family whenever possible to strengthen natural supports

Collaborate with BH team to help participant prevent escalation of symptoms that leads to crisis

Help participant cope when they are in crisis

# Sr. Wellness Coordinator

Avele Malepeai

Avele works collaboratively with Optum Alaska Care Advocates and Medicaid Providers to support Participants as they transition between levels of care (typically from residential or inpatient to lower levels of care)

Work with Participants to identify and access resources, traditional and non-traditional, that will support their recovery and mental health rehabilitation)

Works on cross-functional teams, projects and initiatives, process improvement activities, and typically requires previous health insurance experience



# Native Alaskan Liaison

Andrew Tooyak, MPH, MJEL



Andrew Helps Native Alaskan participants identify the most appropriate and accessible treatment options, both traditional and non-traditional.

Directly advocates, schedules appointments and otherwise supports tribal participants in accessing care;

Support behavioral health tribal directors and providers navigate the behavioral health delivery system;

Provides cultural perspective, training and support to rural providers;

Documents and communicates gaps in behavioral health services by region.

▪



# Child Welfare Liaison

---

Involved in all aspects of Clinical Services: UM, CM, & Provider Relations;

Foster relationships with Child Welfare agencies statewide, developing familiarity with key staff, and providing support for staff retention;

Provide linkage between OCS caseworkers and behavioral health resources;

Help OCS advocate for child placement, especially when child is facing adverse benefit determinations with Medicaid;

Provide assistance to family as needed to coordinate child's eligibility for services.

# Care Coordination and Advocacy (CCA)

---

Care Coordination and Advocacy (CCA), often referred to as Case Management (CM), embraces a whole person approach to wellness by focusing on all aspects of participant's health and well-being.

Optum CCA strives to:

- Work closely with participants to understand all aspects of their health and well-being, including: physical, behavioral and social/environmental needs
- Put the participant front and center. We use our expertise and resources to tailor solutions that provide better care, better health and better consumer experience

Reference # 1 & # 4

# Referral Windows

---

Care coordination can enhance treatment continuity across all levels of care and between behavioral and medical treatment modalities

## Initiation of Treatment

Gather the appropriate and necessary information to coordinate care with other treating professionals, especially when complex conditions are disclosed.

## During Treatment

Coordinate care periodically, paying particular attention when a medication is initiated, discontinued or changed, when treatment needs escalate or when a participant's condition has altered significantly.

## At Discharge

When a participant is discharged, transferred, or referred to another or different treating professional or level of care.

# Care Coordination (CCA) Team Functions

---

- Identify and anticipate high-risk Medicaid participants who need our help, ideally before a substance use, mental health, physical health crisis or adverse event occurs;
- Link Medicaid participants with the medical, psychological, pharmacological care and community resources they need to support their overall health;
- Communicate across systems of care, collaborating closely with participant, participant's family, Medicaid providers, state partners and community resources;
- Develop person-centered Plans of Care using our accessible online platform. Participants can choose to share their Plan of Care with family members, providers or anyone on whom they rely for support.

Reference # 1 & # 4

# Why Care Coordination and Advocacy Matters

---

## Increase Life Expectancy

- Individuals who are treated for serious mental illnesses in public mental health systems die 25 years earlier on average than members of the general population.
- About 60% of these premature deaths are from treatable medical conditions such as cardiovascular and pulmonary disease, diabetes, respiratory and infectious diseases.
- Individuals with mental illness also have higher rates of smoking, alcohol and drug use, poor nutrition, obesity and unsafe sexual behavior.
- Treatment of mental health and substance use issues should not occur in isolation from the treatment of ongoing general health issues.

Reference # 1 & # 4



# Why Care Coordination and Advocacy Matters (Cont.)

---

## Improve Efficiency in Care, Effectiveness of Treatment

- Individuals with mental health and substance use disorders rely on many organizations to provide their care
- These individuals have complex and sometimes competing medical and psychosocial needs, notably among patients with severe and persistent mental health and/or substance use disorders
- A substantial number of patients with serious medical illnesses also have behavioral health conditions
- Sharing treatment information among health care providers supports greater safety and improved outcomes for consumers
- Effective coordination of care can lead to improved health outcomes
- Improved outcomes frequently result in reduced healthcare costs

# Why Care Coordination and Advocacy Matters (Cont.)

---

## Improve Medication Management

- Coordination of care is especially important when medications are prescribed, when there are co-existing medical/psychiatric conditions, and whenever patients are hospitalized with co-existing conditions
- Communication between treating providers can minimize the risk of adverse medication interactions for patients being prescribed psychotropic medications
- Coordination of care can help to reduce the risk of relapse for patients with substance abuse disorders or psychiatric conditions

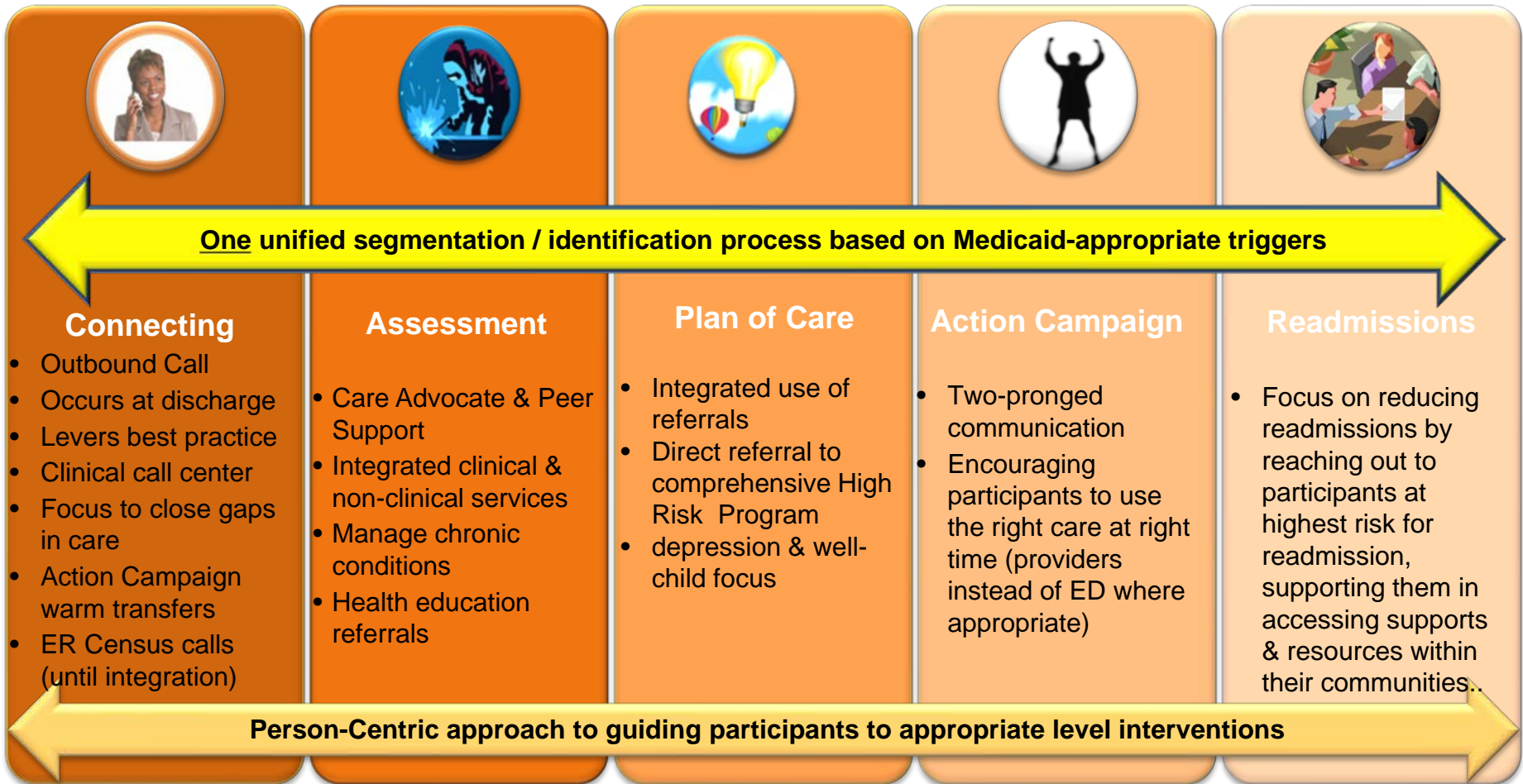
# Case Background

---

Bonnie is a 47-year old woman with a history of Substance Use Disorder, as well as prior SUD-related hospitalizations. Bonnie's substance misuse has been further complicated by:

- Marital stress - Separated from her husband
- Grief - recent death of her father
- Temporarily living with her sister
- Does not know how to drive
- She has not seen her psychiatrist in over two months due proximity
- Transport limitations

# Care Coordination and Advocacy Continuum



# Outliers

---



# Resources – Provider Express

Providerexpress.com

The screenshot shows the Optum Provider Express website. The header includes the Optum logo, 'Provider Express', and navigation links like 'Log In | First-time User | Global | Site Map'. A search bar is present. The main content area is titled 'The importance of Coordination of Care' and features a sidebar with navigation options: NAVIGATING OPTUM, AUTHORIZATIONS & BENEFITS, BILLING & CLAIMS, DATA VERIFICATION, HELP IMPROVE MEMBER ACCESS, PROVIDER RESOURCES, and NAVIGATING OPTUM ON-DEMAND. The main text explains that coordination of care among behavioral health and medical providers improves patient quality. It includes a link to download a 'Coordination of Care flyer' and a link to a 'Coordination of Care checklist'. A footer note states that members should sign a release of information form.

## Confidential Exchange of Information

The screenshot shows the 'OPTUM CONFIDENTIAL EXCHANGE OF INFORMATION FORM'. The form is designed for use by behavioral health practitioners and facilities to coordinate treatment with other providers. It includes sections for:
 

- PATIENT NAME:** and **DOB:**
- A. Treating Behavioral Health Clinician/Facility Information:** with fields for Name, Phone, Address, and Fax.
- B. PCP/Medical Practitioner or Other Behavioral Health Practitioner/Facility Information:** with fields for Name, Phone, Address, and Fax.
- C. Patient Clinical Information:** including a list of conditions (ADHD/Behavior Disorder, Substance Abuse, Psychotic Disorder, Bipolar Disorder, Depressive Disorder, Anxiety Disorder, Eating Disorder, Adjustment Disorder, Personality Disorder, Other) and a section for prescribed psychotropic medications (Antidepressant, Mood Stabilizer, Stimulant, Anxiolytic, Antipsychotic, Other) with fields for Name, Dose, and Frequency.
- 3. Expected length of treatment:** with checkboxes for <3 months, 3-6 months, 6-12 months, and >1 year.
- 4. Coordination of care issues/Other relevant information impacting care:** with a text area for notes.

The screenshot shows the 'Coordination of Care Checklist' form. It includes fields for:
 

- Client Name:** and **DOB:**
- Date of Admission to Services:** and **Clinician:**
- Questions: 'Is there a Primary Care Physician?' and 'Is there another Behavioral Health (BH) Clinician?' with Yes/No options.
- Fields for **PCP Name:** and **Other BH Clinician's Name/License:**
- Fields for **Phone Number/Fax Number:** for both PCP and Other BH Clinician.
- Questions: 'Release of Information Signed?' with Yes/No/Refused options for both PCP and Other BH Clinician.
- Field for **If Refused, Reason:**
- Table:** Two columns: 'Dates of Communication with PCP' and 'Dates of Communication with Other BH Clinician'. Below the table are two text areas for 'PCP Communication Comments' and 'Other BH Clinician Communication Comments'.
- Client Name:** field at the bottom right.



# Optum Supports and Services Manager (OSSM)

**Widget Dashboard** Dashboard Refresh Dashboard Manage Widgets

### Search My Members (OSSM)

Individual Search

First Name

Last Name

Individual ID

Date of Birth

### Appointments

Thursday March 26, 2020 ◀ ● ▶

No appointments scheduled for today.

### Program Enrollments

Status

### Recently Accessed

[View Individual Roster](#)

Name	ID	ID Type	Date of Birth	Risk Tier	Stability	Updated
No records to display.						

### Individual Changes

Thursday March 26, 2020 ◀ ● ▶

New Individual	0
Eligibility change	0
Level of Care change	0
Address change	0
Death	0

### Expiring ROIs

0 0 0 0  
◀ Mar Apr May Jun ▶

### Search All Members (C360)

First Name \*  Minimum 3 characters

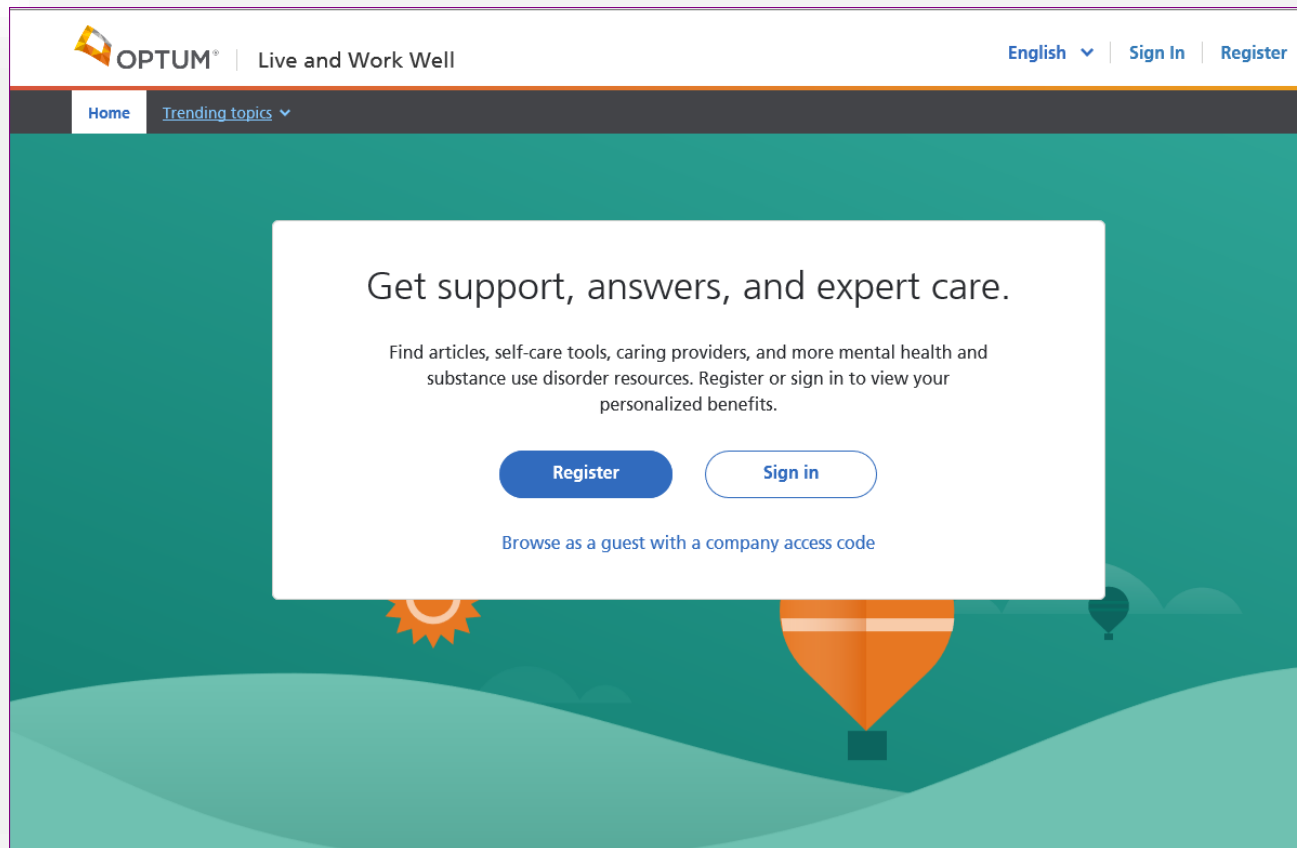
Last Name \*  Minimum 3 characters

Medicaid ID

Date of Birth

# Resource – *Live and Work Well*

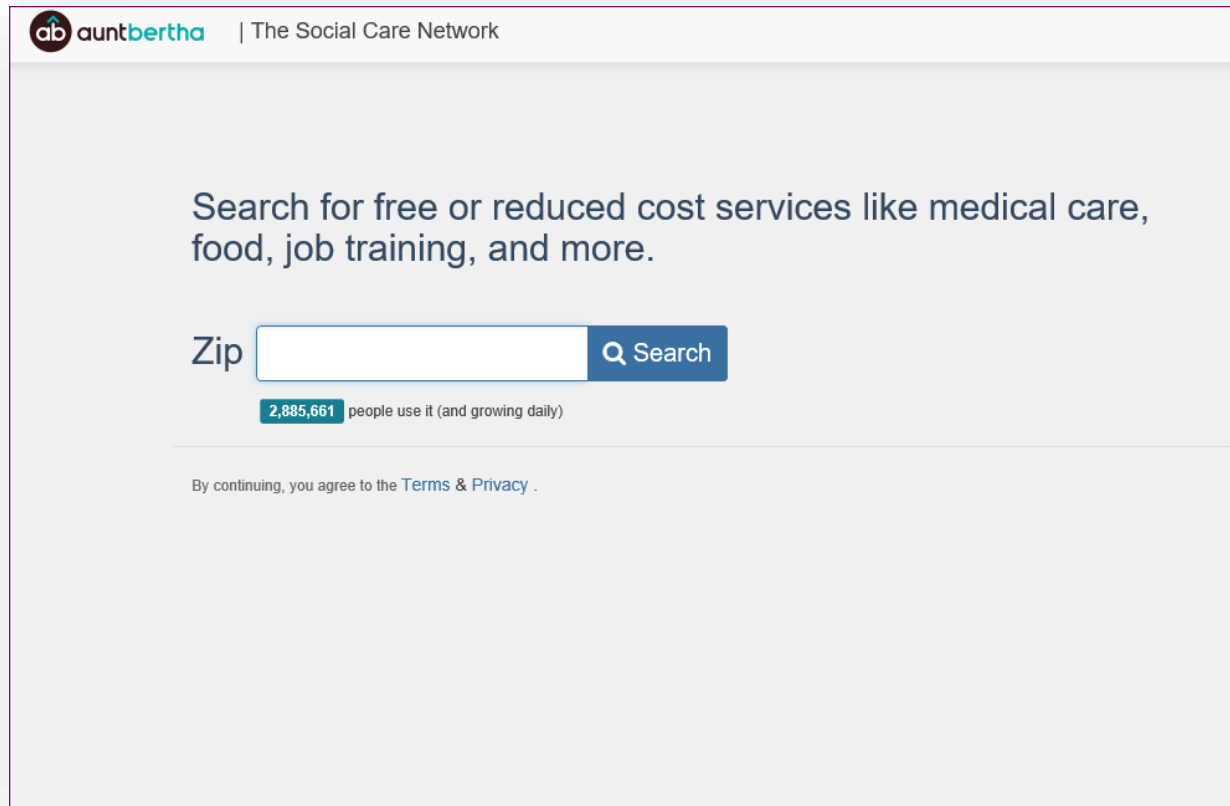
liveandworkwell.com





# Resource – auntbertha | The Social Care Network

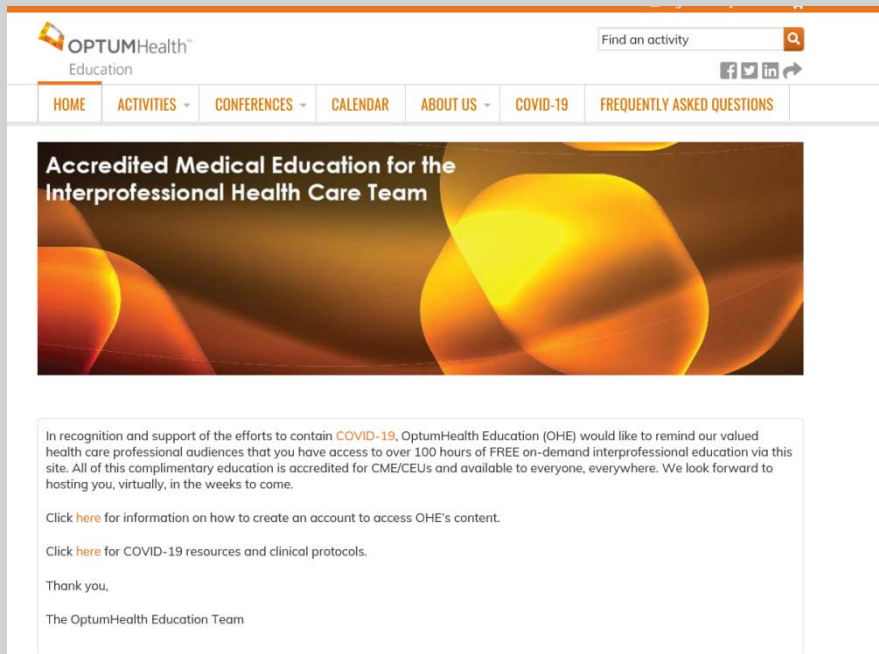
[auntbertha.com/](https://auntbertha.com/)



The screenshot shows the homepage of auntbertha.com. At the top left is the logo 'ab auntbertha' followed by the text '| The Social Care Network'. The main heading reads 'Search for free or reduced cost services like medical care, food, job training, and more.' Below this is a search form with the label 'Zip' on the left, an empty text input field in the middle, and a blue button with a magnifying glass icon and the text 'Search' on the right. Underneath the input field, a small green box contains the number '2,885,661' followed by the text 'people use it (and growing daily)'. At the bottom of the form area, there is a line of text: 'By continuing, you agree to the Terms & Privacy .'

# Additional Resources

## OptumHealth Education



The screenshot shows the OptumHealth Education website. At the top left is the logo "OPTUMHealth Education". To the right is a search bar with the text "Find an activity" and a magnifying glass icon. Below the logo are social media icons for Facebook, Twitter, LinkedIn, and a share icon. A navigation menu includes "HOME", "ACTIVITIES", "CONFERENCES", "CALENDAR", "ABOUT US", "COVID-19", and "FREQUENTLY ASKED QUESTIONS". The main content area features a large banner with the text "Accredited Medical Education for the Interprofessional Health Care Team" over a background of glowing orange and yellow spheres. Below the banner is a text box with the following content:

In recognition and support of the efforts to contain COVID-19, OptumHealth Education (OHE) would like to remind our valued health care professional audiences that you have access to over 100 hours of FREE on-demand interprofessional education via this site. All of this complimentary education is accredited for CME/CEUs and available to everyone, everywhere. We look forward to hosting you, virtually, in the weeks to come.

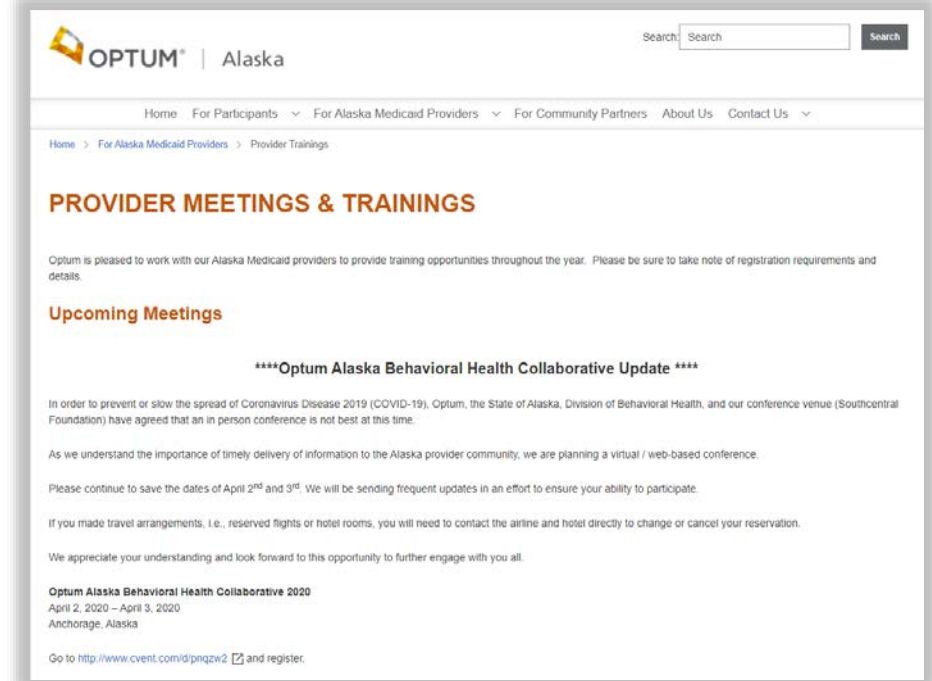
Click [here](#) for information on how to create an account to access OHE's content.

Click [here](#) for COVID-19 resources and clinical protocols.

Thank you,

The OptumHealth Education Team

## Technical Assistance



The screenshot shows the Optum Alaska website page for "PROVIDER MEETINGS & TRAININGS". At the top left is the logo "OPTUM Alaska". To the right is a search bar with the text "Search" and a magnifying glass icon. Below the logo is a navigation menu with "Home", "For Participants", "For Alaska Medicaid Providers", "For Community Partners", "About Us", and "Contact Us". The main content area features the heading "PROVIDER MEETINGS & TRAININGS" and the text "Optum is pleased to work with our Alaska Medicaid providers to provide training opportunities throughout the year. Please be sure to take note of registration requirements and details." Below this is the heading "Upcoming Meetings" and the text "\*\*\*\*Optum Alaska Behavioral Health Collaborative Update \*\*\*\*". The text continues: "In order to prevent or slow the spread of Coronavirus Disease 2019 (COVID-19), Optum, the State of Alaska, Division of Behavioral Health, and our conference venue (Southcentral Foundation) have agreed that an in person conference is not best at this time. As we understand the importance of timely delivery of information to the Alaska provider community, we are planning a virtual / web-based conference. Please continue to save the dates of April 2<sup>nd</sup> and 3<sup>rd</sup>. We will be sending frequent updates in an effort to ensure your ability to participate. If you made travel arrangements, i.e., reserved flights or hotel rooms, you will need to contact the airline and hotel directly to change or cancel your reservation. We appreciate your understanding and look forward to this opportunity to further engage with you all." Below this is the text "Optum Alaska Behavioral Health Collaborative 2020", "April 2, 2020 - April 3, 2020", "Anchorage, Alaska", and "Go to <http://www.cvent.com/id/pnqz2> and register."

# Q & A

---



# References

1. Morbidity and Mortality in People with Serious Mental Illness. National Association of State Mental Health Program Directors. Parks, J MD; Svendsen, D MD; Singer, P MD; Foti, ME MD; Mauer, B MSW. October, 2006. *Pages 1-87*
2. President's New Freedom Commission Report, 2003  
Coordinating care is the right thing to do and is an expected standard of practice
3. Collaboration between primary physicians and behavioral health clinicians makes a difference. UnitedHealthcare Network Bulletin. May, 2012. *Page 42*
4. No health without mental health. NIMH website:  
[nimh.nih.gov/about/director/2011/no-health-without-mental-health.shtml](https://www.nimh.nih.gov/about/director/2011/no-health-without-mental-health.shtml)

# Thank you

**Wroksie Jackson**

Director of Clinical Operations

wroksie.jackson@optum.com

