

# A Collaborative & Strength Based Approach for Implementation of Successful Care Coordination

July 20, 2021

Rebecca Hernandez  
Program Manager

Deanna Parga  
HMG Community Liaison

Jaquely Norton  
Screening Registry Coordinator



# Today's Presenters



Rebecca Hernandez  
Program Manager  
HMG Orange County



Deanna Parga  
Community Liaison  
HMG Orange County



Jaquely Norton  
Screening Registry Coordinator  
HMG Orange County

# Objectives

- Understand how a collaborative training approach can be implemented within the Help Me Grow model
- Learn training topics covered while onboarding new care coordinators
- Learn components in training successful care coordinators
- Realize key elements of care coordination through mock calls

# Why A Collaborative Training Approach?



# Training Topics

# Training Topics



## **Introduction to Help Me Grow Orange County**

- Core components and staff roles
- HMG meetings/case conferences
- 2-1-1 Orange County Partnership
- Funders/ Children and Families Commission

## **Understanding Child Development**

- Nature of early childhood
- Risk and resilience
- Six domains/milestones
- Surveillance/screening/evaluations

## **System for Tracking Access to Resources- STAR**

- Intake, Inquiry and Care Coordination
- Intakes via Online Portal

## **Variations in Child Development/Developmental Disabilities**

- Overview of most common disabilities
- Eligibility requirements for RCOC, School District, CCS
  - Details of the processes for referring to mandated services
- Help Me Grow key terms

# Training Topics continued



## **Utilizing STAR as a Care Coordinator**

- Definitions (Concern, Referral Categories, Connected, etc.)
- Intake conversations and the need for probing questions
- Dropdown selection
- Documentation after the phone call has ended
- Case scenarios

## **Overview of Orange County Resources\*\***

- Need to know resources for developmental services (8 hours total)
- Steps for direct referrals with specific agencies

## **Searching the Resource Inventory**

- iCarol and using taxonomy
- Basic need resources
- Using the HMG filters

## **Listen to live calls (2-1-1 and Care Coordinators)**

- Opportunities throughout training period

## **Communicating via the Phone (2-1-1)**

- Use of phone system at call center

\*\* Will be covered in more detail in future slides

# Training Topics continued



## **Tips for Organizing Care Coordination**

- Necessary folders-- blanket emails, referral forms and flyers

## **Preparing for the Initial Call (Mock calls and STAR entries)\*\***

- Opportunities throughout training period
- Step by step observation of STAR entry
- Mock Calls with STAR entries

## **Developmental Screening Practices by Help Me Grow**

- Providing developmental screening as a referral-hard copy vs. online link
- Documentation of each HMG screening project

## **Child Abuse Registry and Mandated Reporting (online)**

### **ASQ-3 & ASQ-SE2 Training\***

### **Community Visits with Liaisons\***

### **Connection Cafe\***

## **Building the Resource Inventory (2-1-1)**

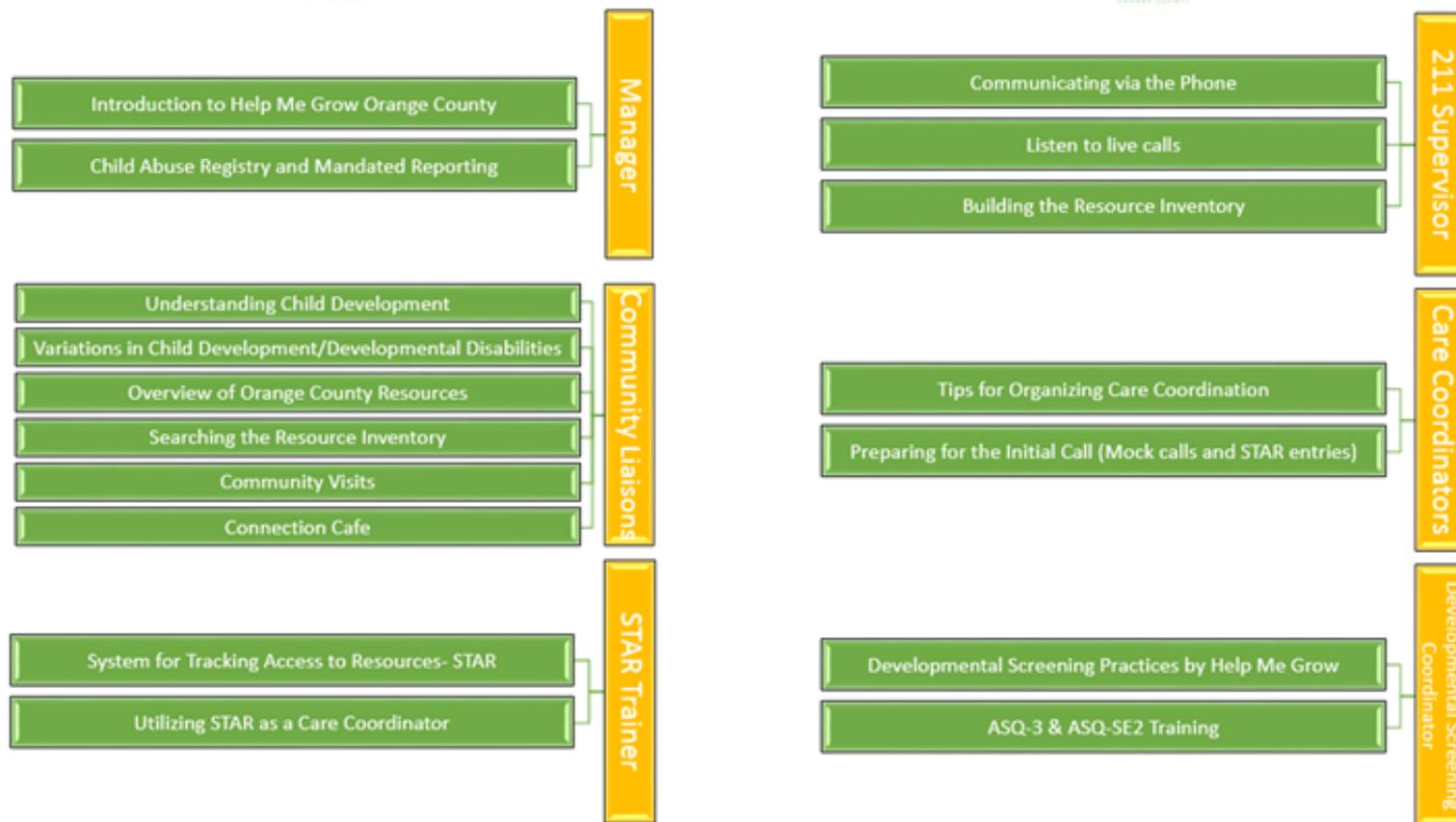
- Process for adding HMG identified resources

\*As scheduled

\*\* Will be covered in more detail in future slides

# Linking Staff to Training Topics

# Linking Staff to Training Topics



# A Closer Look: Training Topics

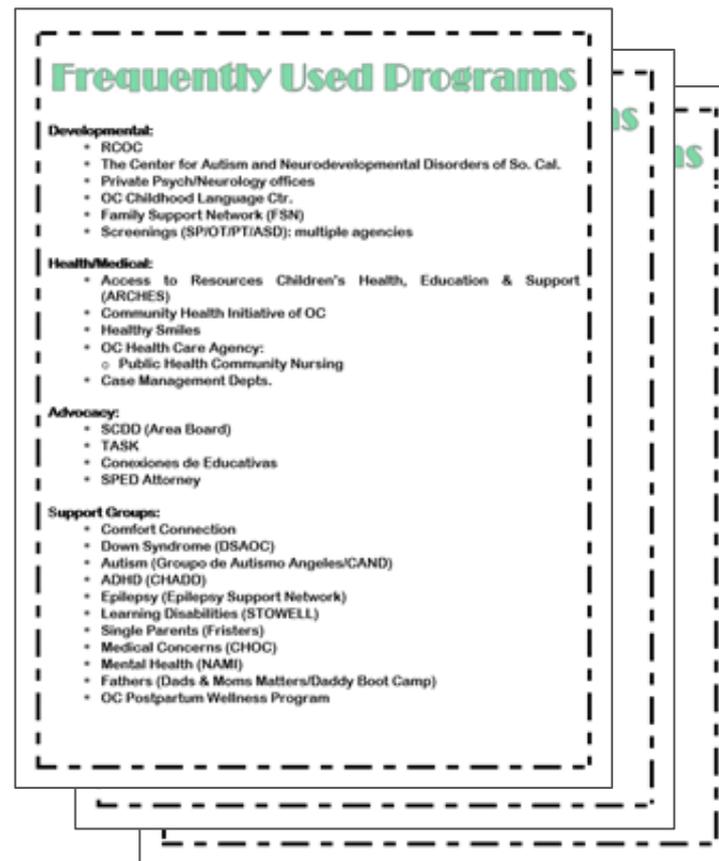
- Overview of Resources
- Case Review
- Mock calls

# Overview of Resources

- Liaisons cover need to know resources for developmental services (8 hours)
- List has been updated over time to be more comprehensive
- Similar agencies are clustered with headings
- Trained by category
- Steps for direct referrals with specific agencies
- Insurance - medicaid/medical; HMO/PPO

# Overview of Resources continued...

- List of categories:
  - Developmental
  - Health/Medical
  - Advocacy
  - Support Groups
  - Behavioral/Mental Health
  - Parent Education
  - Parent/Child Participation
  - Basic Needs
  - Education
  - Child Care
  - Museums
  - Additional Providers
  - Supplemental Resources



## Frequently Used Programs

**Developmental:**

- RCOG
- The Center for Autism and Neurodevelopmental Disorders of So. Cal.
- Private Psych/Neurology offices
- OC Childhood Language Ctr.
- Family Support Network (FSN)
- Screenings (SP/OT/PT/ASD): multiple agencies

**Health/Medical:**

- Access to Resources Children's Health, Education & Support (ARCHES)
- Community Health Initiative of OC
- Healthy Smiles
- OC Health Care Agency:
  - Public Health Community Nursing
- Case Management Depts.

**Advocacy:**

- SCDD (Area Board)
- TASK
- Conexiones de Educativas
- SPED Attorney

**Support Groups:**

- Comfort Connection
- Down Syndrome (DSAOC)
- Autism (Grupo de Autismo Angeles/CAND)
- ADHD (CHADD)
- Epilepsy (Epilepsy Support Network)
- Learning Disabilities (STOWELL)
- Single Parents (Fristers)
- Medical Concerns (CHOC)
- Mental Health (NAMI)
- Fathers (Dads & Moms Matters/Daddy Boot Camp)
- OC Postpartum Wellness Program

# Case Review for New Care Coordinators



- When Care Coordinators begin taking live calls, they do not provide referrals while on the phone with the caregiver

## Individual Consultations for new Care Coordinators:

- Mid-week consultations:
  - Consultation for all calls taken M, T, and W mornings
  - Consultation for any cases closed M, T, and W mornings
- Before-Case-Conference consultations:
  - 1 hour before group case conference
  - Consultations for all calls taken W afternoon, TH, and F morning
  - Consultations for any cases closed W afternoon, TH, and F morning

# Case Review continued...

- Case Conference
  - Every Friday, end of day
  - All Care Coordinators and Community Liaisons attend
  - Care Coordinators take turns presenting cases from the week
  - Collaborative effort to provide feedback and suggestions
  - Opportunity for Care Coordinators to learn from each other
  - Maintains consistent documentation in STAR
  - Portion of Case Conference also includes overview of new resources and updates

# Case Review continued...



**Protocol for Case Reviews**

**Purpose:** To allow for the Help Me Grow team to provide consistent feedback to Care Coordinators during case reviews, especially while onboarding new team members. Checklist will be utilized during Phase 1 and Phase 2 reviews.

**Phase 1 case consultation after initial intake and while pending referrals:**

Need following protocols/definitions:

- "Presenting Issues/Concerns"
- "Referral Categories by Type of Service"

Care Coordinator will be prepared with:

- Intake fields mostly complete – although status will be incomplete during this review
- Care coordination log (cc log) entries up to date
- Draft/ideas of possible referrals and document as "general research" in cc log

- Concerns accurately identified and documented
- Review if additional questions were asked/needed (probing questions)
- CC log accurately documents work and set tickler for call back
- Consider and prioritize referrals to avoid overwhelming caller
- Walk through iCarol research process to get referrals (taxonomy/filters/etc.)
- Care Coordinator is prepared with resources to present to caller
- Referral categories accurately identified and documented
- Review text box populating referral letter
- Care Coordinator is prepared to send referral letter (caregiver and physician)

**Phase 2 case consultation for closing cases:**

Need following protocols/definitions:

- "Gaps and Barriers for National Common Indicators"
- "HMG Outcome of Determination of Connected/Pending to at least one service"
- "Determination of Connected"

Care Coordinator will be prepared with outcome entries entered prior to case review.

- Review follow up conversations and why is case being closed
- Check outcomes for each category
- Check outcomes for each concern
- Check barriers/how addressed
- Review cc log entries and confirm referral letter and fax were sent/documented
- If applicable: Outcome letter was sent to primary care provide  
- Unable to reach letter was sent to caregiver
- Ensure status is changed to 'closed' with correct reason

V. 3/7/19

- Most appropriate while onboarding new team members
- Allows the HMG team to provide consistent feedback to Care Coordinators during case reviews
- Phase 1 case consultation after initial intake and while pending referrals
- Phase 2 case consultation for closing cases

# Mock Calls

- Conducted once other training topics are complete
- Usually conducted in 2-hour time segments
- Pre-written call scenarios are used as starting point of conversation
  - Ex. 18-month-old who does not hold a spoon or help with undressing
- Care Coordinator is utilizing the STAR demo site for documentation and has access to the resource inventory
- A mock call checklist is used for quality assurance
- When Care Coordinator performs consistently on the checklist, they are released to take calls

# Mock calls continued...



Help Me Grow  
ORANGE COUNTY

## HMG Call Scenarios- Training Worksheet

Name: \_\_\_\_\_ Date: \_\_\_\_\_

**Adaptive Concerns**

- 11 month old that gags on food with texture
- 3 year old that will only eat bacon
- 4 year old that is not interested in potty training

**Behavior/Social Emotional Concerns**

- 10 month old that is fussy, cries and hard to soothe
- 2 1/2 year old that bites other children
- 3 year old that bangs his head against the floor
- 4 year old that does not make eye contact, wanders, elopes & does not play with others
- 5 year old that is exhibiting anxious behaviors at home & school after parent separation

**Cognitive/Learning Concerns**

- 5 year old who does not know the letters of their name & has a hard time identifying colors & numbers
- 7 year old that struggles with reading, omits letters when writing words and struggles with homework

**Communication Concerns**

- 18 month old that does not respond to his name
- 26 month old that has three words
- 3 year old that does not follow simple commands
- 4 year old that vocalizes but adults outside the home cannot understand them

**Motor Concerns**

- 8 month old that does not hold an object to bring to its mouth
- 1 year old with tremors
- 18 month old who does not hold a spoon or helps with undressing
- 2 year old with poor balance

**Parent Support Concerns**

- Parent who is not sure his/her child is typically developing
- Parent who can't find babysitting because of child's behavior
- 3 year old who has tantrums at the grocery store
- 3 1/2 year old who is not sleeping through the night
- 4 year old who has an IEP but receives minimal services



Help Me Grow  
ORANGE COUNTY

## Mock Call Checklist

CDCC: \_\_\_\_\_  
Reviewer: \_\_\_\_\_  
Date: \_\_\_\_\_  
Concern type: \_\_\_\_\_

	Yes	Sort of	No
<b>Opens and conducts Intake/Inquiry</b>			
Opening: Introduces Help Me Grow Orange County			
Opening: Gives name			
Opening: Asks, "How may I help you?"			
Opening: Explains intake process			
Opening: Obtains consent (including pediatrician)			
Opening: Accurately determines if Intake or Inquiry			
Middle: Provides opportunity for caller to explain their concern about their child			
Middle: Asks appropriate probing questions to gather more information			
Closing: Explains needed "research" step and will call parent back with resources			
Closing: Asks if we can help with any other concern			
<b>Professional and Helpful</b>			
Uses a friendly, professional tone and maintains patience			
Shows empathy makes reflective statements and builds rapport with caller			
Speaks clearly, with confidence and professionalism			
Uses formal wording ("Yes" instead of "Yeah", "Used" instead of "Iz")			
Actively engages the caller and reflects need(s)			
Avoids thinking noises and filler words			
Does not share personal opinions, make suggestions or offer advice			
Refocuses the conversation when appropriate			
Represents HMG and our services well and accurately in statements			
<b>Overall</b>			
Accurately Assesses Concern(s)			
Completes Intake or Inquiry (when appropriate)			
Logs Data Accurately (Intake fields, Inquiry fields, concerns, care coordination log, etc.)			
<b>Other:</b>			
<b>Total</b>			
<b>Point Value</b>	2	1	0

# Audio of Mock Call #1 (11 minutes)

## **Brief description:**

- Mother with concerns about her three-year old son regarding behavior (tantrums)
- Additional communication concern identified
- Heard about HMG from flyer at the library
- Two parent family
- Health insurance – private PPO
- Multiple referrals given
- Physician unaware of issues / mom agrees to share with pediatrician

## **Key elements to be highlighted:**

- Open ended questions during initial intake
- Empathetic responses
- Through discussion and explanation of related developmental concerns
- Complete description of process to access services
- Parent has opportunity to ask questions and to choose referral

# Discussion

# Audio of Mock Call #2 (13 minutes)

## **Brief description:**

- Mother asking for evaluation for autism for 5-year-old son
- Two parent family
- Health insurance
- Physician referred
- Sibling added to intake and given developmental screening by HMG

## **Key elements to be highlighted:**

- Mother is a good historian – allowed to speak freely with a few clarifying questions
- Non-judgemental and gentle tone
- Active listening
- Identifies opportunity for sibling to be screened
- Parent has opportunity to ask questions and CC responds with the need for evaluation

# Discussion

# Care Coordinator Post-Training Survey



Questions?