

Integrated Behavioral Health Action Coalition (IBHAC)

October 24th, 2024 | 10 AM - 11:30 AM



10:00 AM	WELCOME AND INTRODUCTIONS	<i>Suzette Reuschel-DiVirgilio Program Director Health Improvement Partnership</i>
10:05 AM	CASE MANAGEMENT ACADEMY & TRAINING	<i>Holly Hughes, LCSW Holly Hughes & Co.</i>
10:40 AM	THE LAY COUNSELOR ACADEMY	<i>Elizabeth Morrison, PhD, LSCW, MAC Co-creator The Lay Counselor Academy</i>
11:15 AM	PATH CAIAIM TECHNICAL ASSISTANCE MARKETPLACE	<i>Amy Mancina, MPH Operations Specialist Health Improvement Partnership</i>
11:30 AM	CLOSING	<i>Hayley Mears, MA Sr. Program Manager Health Improvement Partnership</i>

Case Management Academy

Holly Hughes, LCSW

Holly Hughes & Co.

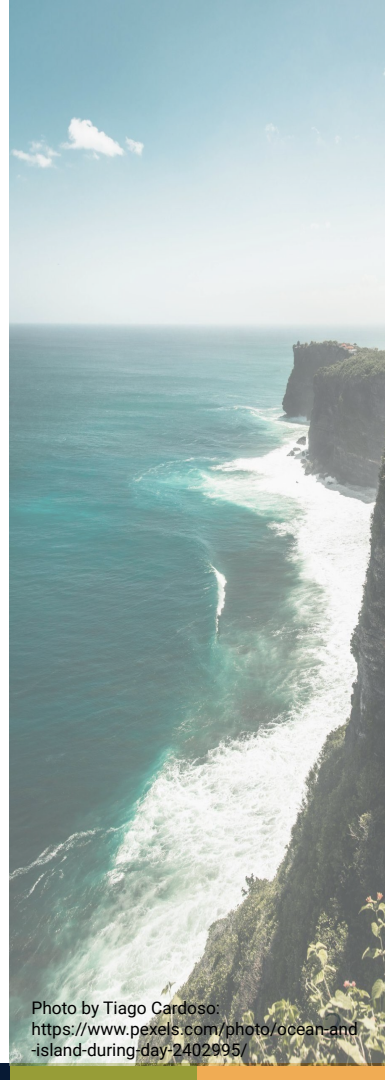


Photo by Tiago Cardoso:
<https://www.pexels.com/photo/ocean-and-island-during-day-2402995/>



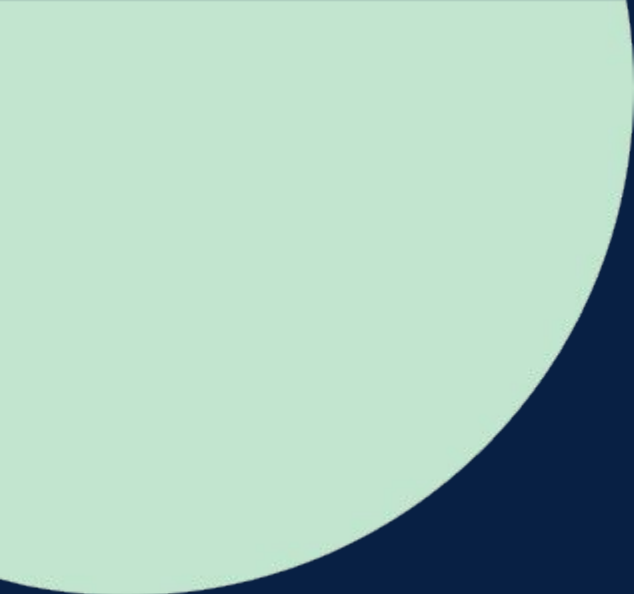
Lay Counselor Academy

Elizabeth Morrison, PhD, LSCW, MAC
The Lay Counselor Academy



— THE —
LAY COUNSELOR
ACADEMY





What is a Lay Counselor?

Someone who provides mental health counseling, who learned outside of the licensure pathway.







Experience, training,
learning & practice

School, school, more
school & a license:
PhD, LCSW, MAC



We don't care
what it is called!



Peers + MH Counseling



CHW+ MH Counseling



Teacher's Aide + MH Counseling



First Responder+ MH Counseling

Lay Counseling is



Mental Health

COUNSELING



Why?

We are in a
Mental Health Emergency

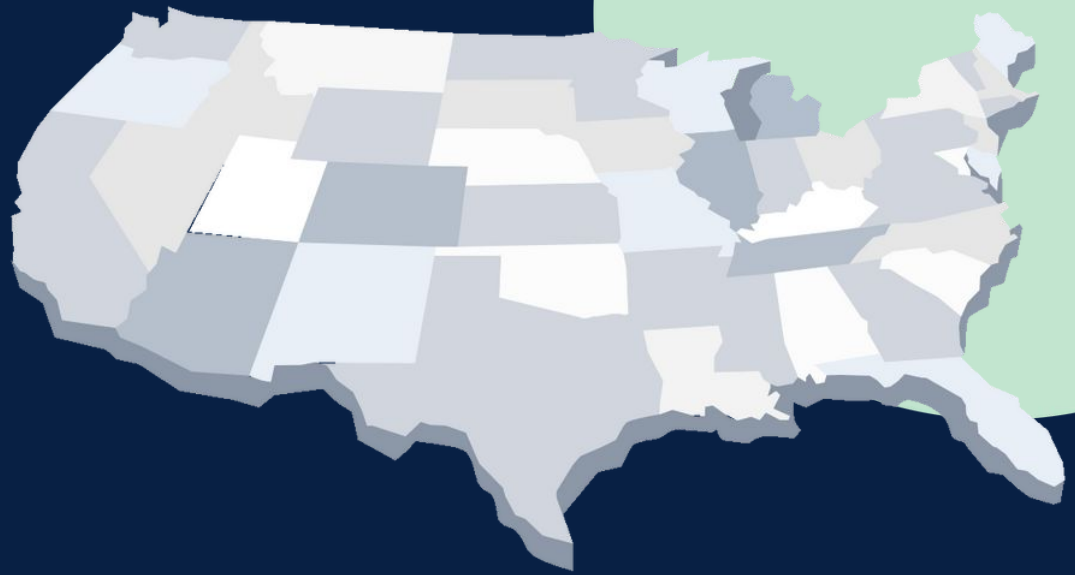




- Suicide is the 2nd leading cause of death between ages of 10-24
- 45-50% of adults report a mental health struggle
- 70% of people say they, or someone in their family, have an addiction



Mental Health Clinician Shortage



A workforce that doesn't reflect the community

The impact of
Systemic Racism



Problems in the MH field....



Overuse of
standardized
assessments



Over-emphasis on
pathology vs. strengths



Erosion of relational
practices



Why does therapy work?



No license needed

- ✓ Therapeutic Alliance
- ✓ Non-judgment
- ✓ Unconditional Positive Regard
- ✓ Anti-Bias Practices
- ✓ Strength-Based



What are the EBPs?

- ✔ Trauma-Informed Care Practices
- ✔ Cognitive Behavioral Therapy
- ✔ Motivational Interviewing
- ✔ Supportive Counseling
- ✔ Person-centered Counseling
- ✔ Reflective listening
- ✔ Behavioral Activation



No license needed

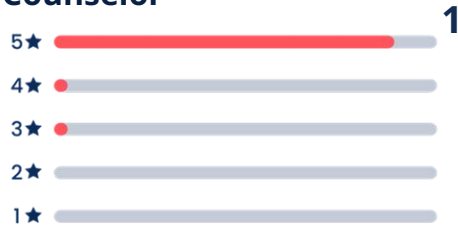






How would you rate quality of counseling services you received?

Lay Counselor  4.9

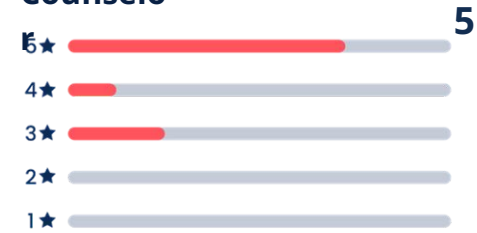



Licensed Therapist  4.9

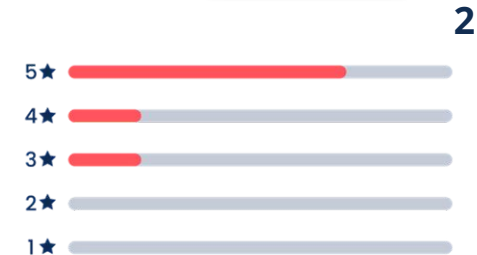


How much has counseling helped you?

Lay Counselor  4.4



Licensed Therapist  4.5



What do we know?

Does it work? Yes!

Research from India, South Africa and the US has shown effectiveness for decades.

Is it Safe? Yes!

Humility and curiosity, and a growth mindset mean Counselors are always learning and growing.

Is it Ethical? Yes!

The majority of people with mental health needs are not being served. There are thousands of people who could provide care.

Is it Legal? Yes!

Counseling is a broad term that many in the helping field use.



Can anyone do it?

NO!!!

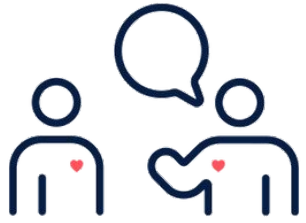
Mental Health Counseling takes enormous skill and is a lifelong practice. Not everyone, *(no matter how much training)*, can do it well!



Qualities of the most effective counselors:

- 1 Highly Skilled Interpersonally
- 2 Committed to non-judgment (bias) practices
- 3 Committed to Personal Growth
- 4 High Self-Awareness & Self-Reflection
- 5 Humility is a Central Stance





Example Practice!

Sharer: Share about someone who is important to you.

Practice: *Empathic Reflection &*

Open-Ended Question

**Advice
Relating**



Open-Ended Questions:

- Tell me more (about)....
- How (did you/are you)....
- What are your
thoughts about...



- ∅ How many...
- ∅ When did that happen....
- ∅ How old were your kids...
- ∅ Do you get along with your parents...
- ∅ How long did you work there....
- ∅ What type of...

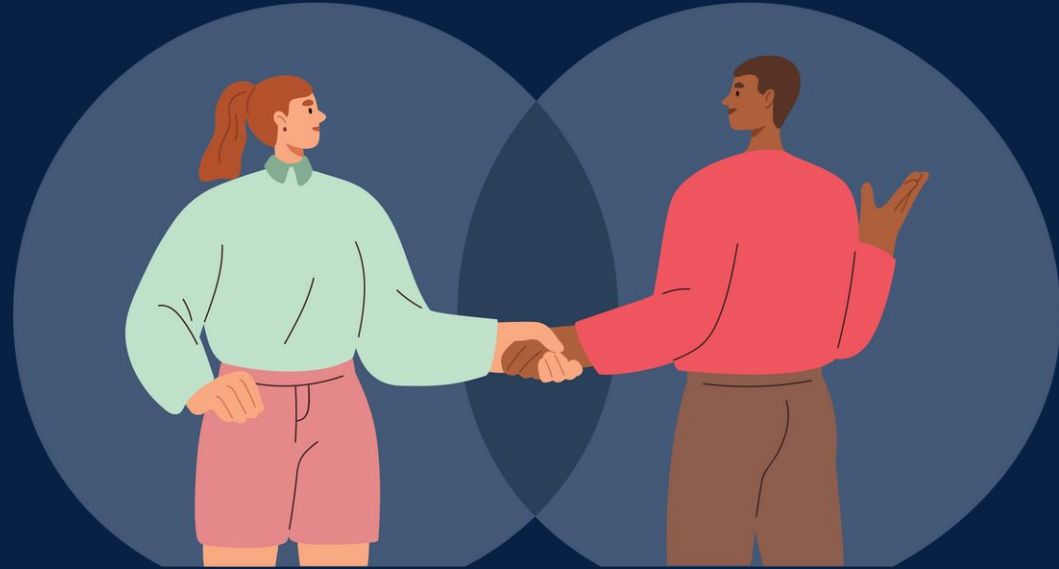


Why...?



Empathic Reflection

- Summarizing
- "it sounds like...."
- "I hear you...."



~~∅ You need to tell him how you feel....~~

~~∅ You probably have to....~~

~~∅ Have you thought of.....~~

~~∅ Don't you think....~~

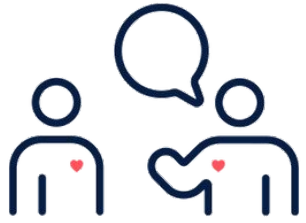
~~∅ Maybe you could....~~

~~∅ When I struggled with that, I....~~



I can totally relate...





Practice!

Sharer: Share about someone who is important to you.

Practice: *Empathic Reflection &*

Open-Ended Question

**Advice
Relating**



- ü 14 weeks
- ü One 3-hour live session a week
- ü 1.5 hours of reflective learning each week

= 65 hours.



Course Components



Weekly Live Sessions



Personal Counseling



Reflective Learnings



Observational Feedback Opportunity (OF0!)



Between Session Partner Practice



Pod Groups





THE
LAY COUNSELOR
ACADEMY

Sign In

The Lay Counselor Academy

Not just anyone can be a good counselor, but a good counselor can come from anywhere. The Lay Counselor Academy helps you build and amplify your skills for supporting others so that more people can access the help they deserve.

Enroll for free





1 of 15



Automatic Zoom



< Go to Dashboard

LCA en Español

0% complete

Search by lesson title



La Academia de Consejero Laico - Esquema del Curso y Lista de Socios del Módulo 0/1 ^

LCA - Esquema del Curso PDF

Módulo 1: Introducción a la Consejería Laica 0/6 v

Módulo 2: Enfoques Básicos de la Consejería 0/11 v

Módulo 3: Entrevista Motivacional, Ayuda con los Trastornos Adictivos 0/11 v



LA ACADEMIA DEL CONSEJERO LAICO

Plan de Estudios,

COMPLETE & CONTINUE →

www.emorrisonconsulting.com

!!DHCS is paying for the LCAi!



PATH CalAIM Technical Assistance Marketplace

Amy Mancia, MPH

Health Improvement Partnership

Photo by Aleksandar Pasaric:
<https://www.pexels.com/photo/scenic-view-of-ocean-during-daytime-2707645/>



CalAIM PATH Technical Assistance Marketplace

What is the Technical Assistance (TA) Initiative?

The **PATH Technical Assistance Initiative** enables entities that are providing or that intend to provide **ECM/Community Supports under CalAIM** to access technical assistance from an array of **qualified TA Vendors**.

TA Vendors are promoted via a **virtual “TA Marketplace,”** which serves as a one-stop-shop environment where eligible entities can access TA resources.

The TA Marketplace is designed, launched, and managed by **Public Consulting Group (PCG)**, the Third-Party Administrator, with **oversight from DHCS**.

- Approved TA Vendors enter into a General Agreement with PCG that enables them to provide TA under the CalAIM PATH TA Marketplace.

TA Resources Organized Under TA Domains

The TA Marketplace offers TA in seven TA Domains*:

- » Building Data Capacity: Data Collection, Management, Sharing, and Use
- » Community Supports: Strengthening Services that Address the Social Drivers of Health
- » Engaging in and Navigating CalAIM through Medi-Cal Managed Care
- » Enhanced Care Management (ECM): Strengthening Care for ECM “Populations of Focus”
- » Promoting Health Equity

Cross-Cutting Competency: Rural Communities

The TA Marketplace also includes TA Vendors with expertise / experience specific to rural communities in all TA Domains.

Note that TA Domains may be revised over the life of the TA initiative as new TA needs emerge.

**A detailed description of each TA Domain is available on the TA Marketplace website*

Modalities for Accessing TA Resources



» **“Off-the-Shelf” TA Projects** Ready to go, TA offerings packaged for convenient, efficient delivery

» “Off-the-Shelf” projects are **more standardized resources** like trainings, well-defined program models or data tools, or best practices guides that are relevant in a variety of settings with little to no customization



» **“Hands-On” TA Projects** – Customized TA projects tailored to the unique needs of the TA recipient

» “Hands-On” projects require the TA Vendor to work together with the TA recipient to develop a **unique Scope of Work (SOW) and Budgets** to describe the project and corresponding deliverables

» **“On-Demand” TA Resources** – Static TA resources made available directly through CA-PATH website

» “On-Demand” TA resources **do not require any direct contact** between the Recipient and Vendor and will eventually be available as part of a TA resource library

Eligible TA Recipients

TA Recipients may include, but are not limited to:

- » City, county, and other government agencies
- » County and community-based providers (including but not limited to public hospitals)
- » Community-Based Organizations (CBOs)
- » Correctional agencies and other Justice Involved stakeholders
- » Tribal Designees and Indian Health Programs

- » **Option 1:** Contracted with an MCP or other entity to provide ECM / Community Supports
- » **Option 2:** Actively engaged with an MCP or other eligible entity to explore the possibility of contracting to provide ECM / Community Supports
- » **Option 3:** Other entities that are not contracted or engaged with an MCP or other entity may receive special approval from DHCS to receive TA.
- » MCPs are not eligible to receive TA support through the TA Marketplace.

What to do if you are not yet working with an MCP, but are interested in TA:

- » Request DHCS approval to receive TA through the TA Marketplace by completing this [survey](#). The survey requests information about your MCP contracting status, ECM/Community Support services, and other organizational information.
- » Once DHCS has reviewed and made its determination, you will receive an email from the TA Marketplace. If your request is approved, a signed Attestation Form confirming that DHCS has provided written approval will be attached to the notification email, Sign the Attestation Form provided by the TA Marketplace team as indicated, Complete the TA Recipient Eligibility Application and upload the Attestation Form signed by both the TA Marketplace Team and your organization when prompted.
- » Entities applying using Option 3 must deliver the types of services that would enable them to eventually contract with an MCP or other eligible entity to provide ECM/Community Supports in order to be approved by DHCS to receive TA. Note that TA should advance the organization's ability to contract with an MCP or other eligible entity to provide ECM/Community Supports. Organizations seeking to access TA to build their capacity more generally will not be approved under this process.

UPDATE: TA Marketplace Recipient Application Documentation & Process

- The TA Marketplace recently updated how organizations may provide supporting documentation and information to apply as a TA recipient.
- **Planning to Contract (Option 2)**
 - The TA Marketplace received feedback that TA recipients engaged with a MCP have had difficulty obtaining a signed attestation form. Organizations may now submit the Planning to Contract attestation form **OR** a Letter of Intent with a MCP as proof of their engagement. Below are more details on the two pathways to submit supporting documentation as a Planning to Contract applicant:
 - **Attestation Form:** Download the [attestation form](#) (also available on the [TA Marketplace website](#)). The applicant must sign on page 2, and the MCP the applicant is engaged with must sign on page 3.
 - **Letter of Intent:** If providing a Letter of Intent with the MCP as proof of engagement, the letter must include at least the following:
 - Name of MCP
 - Name of potential TA recipient organization
 - Language noting the TA recipient is currently or intends to be a contracted provider for ECM and/or Community Support services with the MCP
 - Signature of MCP's authorized representative.
 - Once you have the signed attestation form or Letter of Intent, the organization may [apply to be a TA recipient](#) and select "Planning to Contract." Next, upload either the Planning to Contract Attestation Form **OR** Letter of Intent.
- **Approved by DHCS (Option 3)**
 - Applicants that are currently not contracted or engaged with a MCP, but intend to contract with a MCP to provide ECM/or Community Supports to Medi-Cal members, may be eligible to be a TA recipient.
 - Previously, organizations interested in obtaining DHCS approval sent an email with their organizational details to the TA Marketplace.
 - Now, organizations interested in obtaining DHCS approval must [complete this survey](#) (also available on the [TA Marketplace website](#)). The survey requests information about the MCP's contracting status, ECM/Community Supports services, and other organizational information. Once DHCS has reviewed and made its decision, you will receive further communication from the TA Marketplace. Please submit any questions to ta-marketplace@ca-path.com.

Three Step Process for Accessing TA

The process of applying for TA is broken into three smaller, more manageable pieces to minimize the application burden for TA Registrants and move forward DHCS/PCG approvals more quickly.

- 1. TA Recipient Eligibility Application** – Confirm the eligibility of prospective TA Registrants per the DHCS-established eligibility criteria and collect standard data for all registered TA Registrants.
- 2. TA Project Eligibility Application** – Vet the ideas for TA Projects put forward by entities already approved as TA Registrants for appropriateness within the CalAIM PATH framework so that such entities do not invest substantial time and effort developing a scope of work (SOW) and budget for TA Projects that will not be approved.
- 3. TA Project SOW and Budget** – Enable DHCS/PCG to review and weigh in on how TA funds will be spent at a detailed level prior to approving a TA Project.

TA Vendors & OTS Projects

- » As of July 2024 (Rounds 1-4), there are:
 - **117** TA Vendors on the Marketplace
 - **539** Off-the-Shelf projects on the TA Marketplace

TA Domains	TA Vendors	OTS Projects
Domain 1: Building Data Capacity: Data Collection, Management, Sharing, and Use	52	82
Domain 2: Community Supports Strengthening Services that Address the Social Drivers of Health	43	66
Domain 3: Engaging in CalAIM through Medi-Cal Managed Care	49	83
Domain 4: Enhanced Care Management (ECM) Strengthening Care for ECM “Populations of Focus”	47	117
Domain 5: Promoting Health Equity	39	32
Domain 6: Supporting Cross-Sector Partnerships	44	38
Domain 7: Workforce	35	121
Total	N/A*	539

**Vendors can be approved across multiple domains*

TA Project SOWs and Budgets Reviews | Update

568 TA Project SOWs and Budgets submitted as of 6/24/24

- » **483** TA Project SOWs fully executed
- » **30** TA Project SOWs awaiting signature
- » **10** TA Project SOWs in re-work or on hold
- » **30** TA Project SOWs in PCG review
- » **5** TA Project SOWs recommended to DHCS for approval
- » **14** Withdrawn*

**Total \$ Requested:
\$47,410,399.27**

**Total \$ Executed:
\$39,176,100.57**

**A project is withdrawn by the recipient and/or vendor due to various reasons such as no longer pursuing the project or to resubmit a new PEA to reflect the support needs not originally requested.*

Step 1: Submitting a TA Recipient Eligibility Application

- » Online application is submitted via the TA Marketplace website
- » All TA Recipient Eligibility Applications must include a signed Attestation Form:
 - **Option 1:** Attestation Form is signed by the Applicant; the signature page from the Applicant's contract with an MCP or other entity must also be uploaded to the application
 - Organizations can upload the **Option 1** Attestation Form at <https://www.ca-path.com/ta-marketplace>.
 - **Option 2:** Attestation Form is signed by the Applicant and by the MCP or other entity with which the organization is exploring contracting OR Letter of Intent signed by MCP with [required detail](#).
 - Organizations can upload the **Option 2** Attestation Form or LOI at <https://www.ca-path.com/ta-marketplace>.
 - **Option 3:** Attestation Form is signed by the TA Marketplace team to confirm DHCS approval to receive TA
 - The TA Marketplace team will email the **Option 3** Attestation Form to organizations that receive written DHCS approval to receive TA
- » TA Recipient Eligibility Applications are reviewed to ensure that the applicant organization's eligibility is confirmed by supporting documentation and to verify the identity of the applicant organization
- » By signing a TA Recipient Eligibility Application, an organization is agreeing to the TA Marketplace General Terms and Conditions. There are available at <https://www.ca-path.com/ta-marketplace>

Becoming approved as a TA Recipient is a one-time-only process

We recognize that the TA Recipient Eligibility Application process can be challenging.

- » The [PATH Sign Up and Password Reset Guide](#) walks through much of the process, including the process for utilizing the Authenticator App
 - The free Microsoft Authenticator App must be downloaded separately.
 - The PATH Sign Up and Password Reset Guide can be found in the Reference Materials section of the [TA Marketplace website](#)
- » Organizations that are still experiencing difficulties can also send a note to ta-marketplace@ca-path.com, and a member of the TA Marketplace team will help them troubleshoot
- » **Multi-factor authentication (MFA) is a requirement of California's State Information Security Office.**

How do organizations not yet engaged with an MCP request DHCS approval to receive TA?

- » Organizations that would like to receive TA through the TA Marketplace should complete this [survey](#). The survey requests information about your MCP contracting status, ECM/Community Support services, and other organizational information.
- » Once DHCS has reviewed and made its determination, you will receive an email from the TA Marketplace.
 - For those organizations approved by DHCS to receive TA, PCG will attach **a signed Attestation Form** to the approval email to document DHCS approval.
 - Such organizations should **upload this signed Attestation Form** to their TA Recipient Eligibility Application.

Step 2: Submitting a TA Project Eligibility Application Overview



TA Project Eligibility Applications are completed and submitted online via the TA Marketplace website

- » The next slides walk through the TA Project Eligibility Application questions and key review principles.
- » The slides following provide a visual of the online process for completing the TA Project Eligibility Application for Off-the-Shelf TA Projects only.
- » A detailed slide deck on submitting a TA Project Eligibility Application for both Off-the-Shelf TA Projects and Hands-On TA Projects will be made available on the TA Marketplace website in the upcoming weeks.
- » **DISCLAIMER: Please note, the TPA does not endorse the specific vendors or services selected in the following examples.**

Off-the-Shelf TA Project versus Hands-On TA Project questions

Off-the-Shelf TA Projects

- » Please identify the TA Domain, TA Vendor, and Off-the-Shelf TA Project you would like to access
- » Please explain how the requested TA will strengthen your organization's ability to provide high quality Enhanced Care Management (ECM) or Community Supports services (Max 350 words)
- » Will the requested TA complement, support, or expand upon a previous TA project?
- » Will the requested TA complement, support, or expand upon a CITED or JI grant or learnings from a Collaborative?
- » Expected start date

Hands-On TA Projects

- » Please identify the TA Domain and up to three preferred TA Vendors
- » Please describe the proposed Hands-On TA Project, including the goals of the project and the organizational needs the project is intended to address (Max 500 words)
- » Please explain how the requested TA will strengthen your organization's ability to provide high quality Enhanced Care Management (ECM) or Community Supports services (Max 350 words)
- » Please identify the expected size of the TA Project (check boxes)
- » Will the requested TA complement, support, or expand upon a previous TA Project?
- » Will the requested TA complement, support, or expand upon a CITED or JI grant or learnings from a Collaborative?
- » Expected start date

Key Review Principles

» Off-the-Shelf TA Projects

- Has the TA Recipient clearly articulated how the requested TA will enable to them to either:
 - Contract with an MCP or other eligible entity to provide Enhanced Care Management (ECM) and/or Community Supports, or
 - Strengthen their ability to provide high-quality ECM and/or Community Supports

» Hands-On TA Projects

- Has the TA Recipient clearly articulated how the requested TA will enable to them to either:
 - Contract with an MCP or other eligible entity to provide Enhanced Care Management (ECM) and/or Community Supports, or
 - Strengthen their ability to provide high-quality ECM and/or Community Supports
- Can we understand the nature and scope of the TA being requested based on the description provided?
- Is the TA being requested feasible to completed based on the manner in which it is framed in the application?

Submitted TA Project Eligibility Applications Review Process and Next Steps

- » Submitted applications are reviewed for the following:
 - **TA Project has the capacity to strengthen the TA Recipient's ability to contract with an MCP or other eligible entity or to provide high quality ECM or Community Supports services**
 - **TA Project description includes well-defined goals for the project and the projects seems feasible to implement (*Hands-On requests only*)**
 - TA Project includes public- or member-facing materials or poses a risk of duplication of funding or conflict of interest
 - Requested TA Vendor is available to take on the work

- » If an application is approved, the TA Marketplace team sends an approval confirmation via email to the TA Recipient and the requested TA Vendor with guidance for next steps

- » If an application is not approved, the TA Marketplace team sends an email to the TA Recipient with feedback for application re-work

Submitted TA Project Eligibility Applications

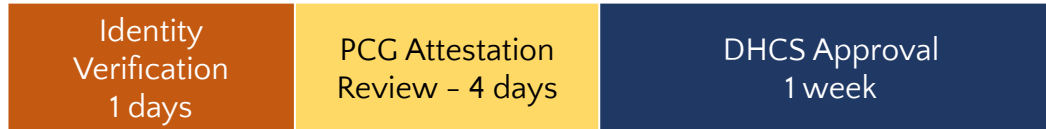
Next Steps for Approved Applications

- » TA Recipients will work closely with their selected TA Vendor to develop a detailed Scope of Work and Budget for the approved TA Project
 - TA Vendors are expected to complete and submit the TA Project SOW and Budget in the [TA Vendor console](#)
 - TA Recipients are required to approve the completed TA Project SOW and Budget in the [TA Recipient console](#)
- » PCG and DHCS will review submitted TA Project SOWs and Budgets and provide all approvals in the [TA Vendor & Recipient consoles](#) as well as is writing via an email
 - Approved TA Project SOWs and Budgets will be formalized via signed contracts using Adobe Sign. The TA Vendor, Recipient, and TPA must all sign for the project to be considered executed and active.
 - TA Project SOWs and Budgets that were not approved will be returned to the TA Vendor and TA Recipient in the console as "Action Required" and feedback for rework will be emailed. Note: TA Recipients must approve all changes submitted by the Vendor before the TPA reviews.

Timeliness of Application Review

Recipient Eligibility Applications

Average review time was under 2 weeks, which was primarily dependent on the receipt of identity verification data and the quality of attestations submitted. Where an organization submitted a blank or incorrect attestation, the timeline from submission to approval was significantly longer.



Project Eligibility Applications

Average review by PCG staff was 5 business days, followed by 5 business days to receive DHCS approval. This process proceeded quickly for most applicants, as the majority of requests were for Off-the-Shelf projects, for which the project goals are clearly defined and outlined. Projects with longer reviews at the PEA step of the process were due to unclear goals or applications that contained requests for multiple disparate projects. If PEAs require rework, this timeline repeats.



Timeliness of Application Review (cont.)

Scopes of Work and Budgets (standard review)

Average review by PCG staff was 5 business days, followed by 5 business days to receive DHCS approval. This process proceeded quickly for most applicants, as the majority of requests were for Off-the-Shelf projects, for which the review is expedited, as project goals are clearly defined and outlined. If SOW & Budgets require rework, this timeline repeats.



Scopes of Work (SOW) and Budgets (heightened scrutiny)

SOW and Budgets may be flagged for heightened scrutiny by the DHCS Team, if concerns are raised at the PEA stage, if there is a concern about duplication of funding from CITED or another grant, or if the project will produce member facing materials. If SOW & Budgets require rework, this timeline repeats.

There are a lot of TA Vendors on the TA Marketplace. What is the best way to find the type of assistance our organization needs?

- » TA Vendors are organized into seven TA Domains based on their demonstrated experience and expertise.
- » We recommend reviewing the Off-the-Shelf TA Projects available in the TA Domain(s) that come closest to your organization's area(s) of technical assistance need.
- » Additionally, in January 2024, TA Vendor service and project filters will be applied to the TA Marketplace. Currently, a static document with the TA Vendor project and services is available on the [TA Marketplace](#).
- » If you don't find what you're looking for in the available Off-the-Shelf TA Projects, you can review the TA Vendors in the TA Domain(s) to see if there is one (or more) that might be able to design a Hands-On TA Project that fits your needs
- » You can also reach out to the TA Marketplace team at ta-marketplace@ca-path.com for help with selecting a TA Vendor

Resources

- » For technical support or questions, please email ta-marketplace@ca-path.com
- » [PATH TPA Website](#)
- » [DHCS CalAIM PATH Webpage](#)



Integrated Behavioral Health Workforce Workgroup

Tuesday, November 12th, Online 10-11 AM

Tuesday, December 10th, Online 10-11 AM

Please email mjerezano@hipscc.org for calendar invites



THANK YOU!

Please email mjerezano@hipscc.org resources you would like to share with IBHAC Members