

PCMHI Same Day Step by Step Implementation Checklist:

Activity	Deliverable	Responsible Party	Timeline
1. Evaluate current same day access availability for mental health within PCMHI settings utilizing the PCMHI5 metric and identify stretch goal for implementation.	a. Review facility's local performance on same day access to mental health within PCMHI by reviewing PCMHI5 data available here .		One Week
	b. Hold meeting between PC and MH chiefs (and PCMHI lead if present) to identify stretch goal for implementation of same day access in PC for MH		One Week
2. Create flow map of current and desired state for same day access to MH in PC	a. PC Chief, MH Chief, and PCMHI lead create current/desired state flow maps.		Two Weeks
	b. Current/Desired state flow maps emailed out for review to PC staff and PCMHI providers to ensure this reflects their experiences (note please ensure inclusion of nursing and scheduler as well)		Two Weeks
3. Identify methods for expanding same day access with input from PC and PCMHI providers	a. Identify PCMHI providers and a subset of PC providers to work on creating methods for expansion of same day access and discuss vision for implementation, describing how this will improve access and outcomes		Three weeks
	b. Review common national suggestions for same day access expansion. <ul style="list-style-type: none"> • Full open access • Alternating Scheduled and Unscheduled 30 minute appointments. • Access Based on Clinic Flow • Open Access Pager • Care Management Access <p>See resource document from Center for Integrated Healthcare.</p>		
	c. Select same day access solution which best meets needs of the clinic		Three Weeks

4. Develop SOP for implementation of same day access	a. Create draft SOP with PCMHI and PC providers, including schedulers, and nursing, for same day access implementation		One Month
	b. With administration, rebuild PCMHI clinics to allow for same day access.		One Month
	c. Finalize SOP with PC chief, MH Chief, and PCMHI lead		One Month
5. Assess training needs and provide training of staff in same day, warm hand offs	a. Review PCMHI providers current comfort with 30 minute appointments and comfort with same day, warm hand off. If needed, have providers complete this national training: VeHU Training: Session 13082: The 30-Minute PC-MHI Appointment – Warm Hand-Off, Initial Assessment and Patient-Centered Action Planning		Five Weeks
	b. Meet with Primary Care Providers, Nursing Staff, and Schedulers to train in methods for warm hand off		Five Weeks
	c. Meet with scheduling staff to discuss how to enter clinic appointments for same day, if training is needed		Five Weeks
	d. Review with all providers how to engage care management resources.		Five Weeks
6. Implement pilot of same day access.	a. Begin pilot of same day access with daily huddles to discuss barriers and methods to address these quickly.		Two Months
	b. At the end of week one conduct a team meeting to discuss any modifications may be needed for the SOP		Nine Weeks
	c. Adjust SOP as needed based on feedback		Two Weeks
7. Review wait time data for new referrals to PCMHI and same day access numbers. Assess pilot implementation.	a. Review one month outcomes utilizing same day metric increases		Three Months
	b. Review three month outcomes utilizing same day metric increases		Six Months
	c. Meet with PC and MH leadership to discuss outcomes and adjust SOP as needed based on outcomes		Six Months