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**Emily Q Settlement Team:**  
**TBS Accountability, Communications, and Training (TACT) Task Group**  
*DRAFT Meeting Notes – July 8, 2009; 1:00 – 4:00 PM*

In October 2008, two task groups were formed to create and monitor the development of an accountability structure and training and outreach strategy to implement the Court-approved Nine-Point Plan. In June 2009, the DMH merged the ASIS and TACT task groups to better manage resources due to the State's fiscal situation, loss of staff resources, and the recognition that both task groups were addressing integrated issues. –Sean Tracy, Chief DMH Office of Strategic Planning & Policy

**Attendance:** Sheila Baler (APS), Yvette Bell (DMH), Melinda Bird (ACLU by phone), Bill Carter (CiMH), Ismael Castro (AGO), Lynn Farr (EMQ Families First), Betsy Fitzgerald (LA County by phone), Joe Ford (5 Acres), Glenn Fujii (DMH), Mike Gorodezky (APS), David Gray (facilitator), Catherine Hendon (DMH), Sulayman Konte (DMH), Steve Korosec (facilitator), Rita McCabe (DMH), Paul McIver (LA County by phone), Janet McKinley (DMH), Jim Preis (Mental Health Advocacy Services, Inc. by phone), Jonathan Nibbio (Family Care Network), Rick Saletta (Special Master), Gail Schifsky (DMH), Nicette Short (CA Alliance for Child and Family Services), George Siler (Youth for Change, Butte County), Tom Sodergren (Casa Pacifica), Todd Sosna (CiMH by phone), Sean Tracy (DMH), Melinda Vaughn (AG's Office), Rick Williams (APS by phone), Barbara Zweig (DMH Legal).

#### **Action items**

- 1. In August 2009, TACT will discuss the roll of Family/Youth (recruited by APS Healthcare) in the Nine Point Plan implementation process.**
- 2. DHCS will check whether the current TBS brochures are available in Spanish.**
- 3. DMH will be preparing a report to the Court in October 2009. TACT and the Settlement Team have twice reviewed the outline. First draft is scheduled to be completed in July 2009; DMH will circulate to TACT for review.**
- 4. The TBS Orientation will be posted to the website when finalized, originally scheduled for April 2009, currently scheduled for July/August 2009.**

#### **Welcome, Introductions, and Business Issues**

1. Review of Agenda
2. Brief overview of new TACT charter. Members agree to adopt charter as is; DMH will move charter for signature.
3. Budget environment: Acknowledgement of resource constraints and the need for efficient workload management.

## Discussion

### 1. TBS Documentation Manual

- a. Posted June 30, 2009 to the DMH TBS website. The public comment period will remain open through July 20, 2009.
- b. Settlement Team provided direction for version 1.0:
  - i. Keep the manual concise and user-friendly.
  - ii. Normalize the service like other EPSDT services.
- c. Feedback to-date includes mostly grammar edits, suggestions for progress notes, and comments on Medical Necessity.
  - i. DMH is reviewing feedback internally.
  - ii. DMH Program Compliance found model progress notes that will be incorporated into the manual as examples.

### 2. TBS-Equivalent Criteria

- a. A subgroup of TACT members presented a draft proposal of TBS-equivalent criteria for the Special Master to use when considering county TBS-like services for helping them achieve the 4% benchmark.
- b. Please send feedback to [TBS@dmh.ca.gov](mailto:TBS@dmh.ca.gov) by July 15, 2009.
  - i. Possibly combine first three bullets into an introductory paragraph that explains class eligibility.
  - ii. Change: "Focuses on one to two behaviors ~~and never more than two~~ at a time."
- c. Data issue: How do we count the certified TBS-equivalent services?
  - i. This data will be outside the current databases.
  - ii. TBS-equivalent services will need to be counted manually.

### 3. Data Dashboard Update

- a. Track I is completed.
  - i. Statewide was posted in March 2009.
  - ii. Ten Level II focus MHPs were posted in May 2009.
  - iii. The remaining 17 Level II MHPs will be posted in August 2009; this will be discussed with MHPs at the Level II Webinar on July 29, 2009.
  - iv. Level I MHP data dashboards are scheduled to be posted in September 2009.
- b. Track II Data
  - i. This dashboard consists of three items.
  - ii. After receiving and processing data from DSS, DMH delivered 25,112 RCL 12+ (FY06 – current) individuals' data to APS Healthcare.
  - iii. APS Healthcare found a 93.3% match to Medi-Cal Eligibility File based on Social Security number alone. After adding matches based on date of birth and first four characters of first and last name, APS Healthcare achieved a 99.4% match.
  - iv. APS Healthcare will present to TACT on August 12, 2009.

### 4. Training Strategies

- a. DMH is scheduled to host a Level II MHPs webinar on July 29, 2009. The webinar will cover DMH TBS Information Notices, Local TBS Meetings, and have a question and answer portion. The agenda will be posted to the DMH TBS website prior to the webinar.
- b. DMH and CiMH are planning a TBS training for Kern and Tulare scheduled for August/September 2009.

- c. DMH provided an analysis of major themes of training survey responses to-date. Themes include a need for documentation and charting training, as well as a request for training to be located in individual counties.
- d. Training Strategies Brainstorm Ideas
  - i. Build on what we have developed—the manuals and data dashboards.
  - ii. Take advantage of technology: host web trainings, Q & A call series, etc.
  - iii. Look at county data (dashboards and Local TBS Meeting Reports) and help the county create a TBS plan for themselves. The goal will be to increase access and utilization in the county. Counties can team up, work together, and share information.
  - iv. Training for agency partners
  - v. Have a mixture of regional and more targeted trainings.
  - vi. Begin with documentation training to engage the MHPs.
  - vii. Train MHP staff and providers together.
  - viii. Perhaps we could host a conference call where MHPs/stakeholders can answer the training survey questions.
- e. Please provide any additional feedback regarding training strategies to Sean Tracy, DMH, by July 15, 2009.

## **5. Best Practices/Coordination of Care Proposal**

- a. Discuss proposal to combine Best Practices Manual with Coordination of Care.
- b. This manual would create awareness about TBS in other local systems, and perhaps increase access and utilization.
- c. TACT would like to include this coordination of care component in the manual, but would also like to keep best practices as a theme throughout the manual.

## **6. August Prep**

- a. Discuss Family/Youth role in Nine Point Plan implementation.
- b. Small County Strategy
- c. Review County Local TBS Meeting Status & Plans

## **7. DMH Update**

- a. DMH will post the Exit Plan Information Notice on July 9, 2009, and an e-mail blast will be sent to the TBS subscription list.
- b. DMH will release their July 2009 newsletter this month.
- c. DMH updated the online TBS provider list and out-of-county contact list on June 30, 2009.
- d. DMH is on schedule to complete a preliminary draft of the Annual TBS Nine Point Plan implementation report on July 13, 2009.
- e. DMH, David Gray, and Steve Korosec completed the voice over for the TBS Nine Point Plan Orientation on July 8, 2009. DMH IT is working to get this into a user-friendly format for posting to the DMH TBS website.

**Adjourn**