JAMIE WEINSTEIN: Hi, everyone. Welcome to the SAMHSA-HRSA Center for Integrated Health Solutions, MAI-CoC Virtual Community of Practice. Today's community of practice is on Staff Retention, Sustaining Integrated Care, It is My Job. Our faculty member is Ann Hogan. And this is Jamie Weinstein of the MayaTech Corporation speaking.

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The presenter, Ann Hogan, has no financial conflict of interest to disclose.

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Our presenter today is Ann Hogan. Miss Hogan has over 25 years' experience in the human resources field, including training, employee relations, conflict resolution, employee development, strategic planning, as well as benefits and compensation management. She is a certified senior professional in human resources for the Human Resource Certification Institute, and holds professional memberships in the Society of Human Resource Management, the American Society of Healthcare Human Resources Administration, and the American Society of Training.

She holds a master's degree in education and human resource studies, Colorado State University, with a focus on organizational performance and change. She is a graduate of Metropolitan State College of Denver, and holds a Bachelor of Science degree in management, also from Colorado State. Additionally, she is a graduate of the 2011 University of Washington Community Health Leadership Institute certificate program. And in 2012, she completed the Geiger Gibson Fellowship program through the George Washington University.

And now I'll turn it over to Ann.

ANN HOGAN: Thank you so much, Jamie. That is such a wonderful introduction to our program today, which we are going to be talking about sustaining integrated care, and how it is my job to do so.

So I want to thank SAMHSA and HRSA and MayaTech for this webinar today. It’s going to be fabulous. We'll be rocking and rolling through the agenda here.
And some of these things that we'll talk about today are, what are the elements to include in your job descriptions or in your position description? We're going to talk about how to develop performance evaluations, kind of the compensation plan that goes along with that, and using the position description as a guide and a use for training. And then, also, how to use the position description when developing interview questions, so that the best candidate for the position can always be selected.

So how do we provide position descriptions? Why do we develop them? Well, we develop them for several reasons. One, it identifies all the responsibilities of the position. And that's always important. When people walk in to their job, they want to know, what exactly are the responsibilities? What are my expectations? The position description allows that to be laid out for people.

It establishes both the manager and the employee expectations. Again, as an employee, you want to know, what are the expectations of the position, right? And as a manager, you need to be clear with employees to let them know what your expectations are. The position description begins to do that for you.

It also serves as a tool. It helps you determine if the position is exempt, nonexempt, what their skills, abilities, knowledge, all of that information. And we'll talk about that a little bit deeper here during the webinar. So the position description is incredibly important in determining how that position functions within an organization.

How do you actually develop a position description? That's the hard part. So when you start, the first thing to do is to do a job analysis. And what a job analysis really includes is maybe interviewing current employees that are in that position or sitting down and putting in paper what is your vision for that position. Describing the tasks, the duties that are required, why the position exists, what's it meant to accomplish, all of those different things, and then putting that all together.

And the last bullet is there is very important. Be specific, yet allow for flexibility. So you don't want to make the position description so concrete that someone says, well, that's not in my job description, right? You don't want to hear those words. But you want to talk in more general terms about what the position is to be doing, and not make it so specific so that it then creates a problem because someone doesn't feel like they could go outside of that description.

So the next part is, we're going to talk about kind of some resources for a patient-centered integrated behavioral health care job description. The first resource is from SAMHSA. This is a great sample job description for care coordination. And so it talks about clinical teams, coordination teams, and other positions. And they have great resources for position descriptions.

The next one is the Integrated Behavioral Health Principles & Tasks from the AIMS Center. And that's from the University of Washington. They have behavioral health case managers, they have primary care providers, and other resources. It's just an oodle of resources there.

Additionally, there's the Principles of Care and Core Components Tasks. And that is a really neat document that the AIMS center does have. It talks about the tool. And actually, I'll talk about the tool a few times today. Because it outlines your principles of care. It outlines your core
components and tasks that are done. It's more of a performance evaluation that can be used to integrate that behavioral health care to include in the patient-centered team that's providing evidence-based treatments. So it's a great tool.

It has, for example, under patient-centered care, the primary care and behavioral health providers collaborate effectively using shared care plans. And how do you put that in a job description? You could use exactly that. And you could say, collaborate effectively with the primary care and behavioral health providers to have shared care plans. That would be a sample of a description in your job description.

If you're talking about evidence-based care, the tool says, patients are offered treatments for which there is credible research evidence to support their efficacy in treating the target condition. You could revise that to say, you are going to use evidence to support their efficacy in treating the target condition. That's how you'll use this tool to actually write your job descriptions.

For instance, it also has under patient identification in a diagnosis, which is a very important piece, screening for behavioral health problems using a valid instrument. You could actually use that exact language in your job description, because that is a component of what that position is actually doing. So using those tools to help you and assist you in writing job descriptions can be very crucial.

The next thing is, what do you want to actually include in the position description? Your general description of duty is really why is the position even created, right? What is their role? So it's very general. It's very broad. It's really, what is the essence of the position?

Then you need your reporting structure. So who does this position really report to? Do they report to a CMO? Do they report to a psychiatrist? Do they report to the CEO? Do they report to a patient care team member? You need to look at all of that, and really determine who does that person directly report to?

Additionally, do they supervise anyone? So if there's a reporting structure— if they're also looking at people that work for them and with them, those people you'll also identify that they are a supervisor of, and you can state those positions.

The next part is the Fair Labor Standards Act. Now this is something that really your human resources department or your finance department or some administrative role will really determine the FLSA determination, which is, is this position exempt or nonexempt? A lot of your positions will be nonexempt if they are a staff or an hourly position, but that doesn't necessarily mean. It has to do with the duties that are performed. So if you're a patient care person that has a professional designation, it could be that you are also an exempt employee.

So there's three different types of exemption, executive, professional, or administrative. And those three are very important. And you have to meet certain requirements to be an exempt employee. And an exempt employee means that the employer does not need to pay overtime to you. And it also allows them to not pay overtime once you go over 40 hours in a week.
So there's good and bad about being exempt or nonexempt. But make sure that your FLSA portion of that job description is accurately depicted. And you may need to have other assistance from people to help you with that.

Additionally, your essential functions of the job or of the position. This is really crucial. This is, what does the job really entail? What is really essential for the position?

And the best way to describe this is by an example, OK? So if you are doing patient-centered integrated behavioral health, your job, your essential function of the job is to meet with patients, meet with your care, team, provide the best care for those patients available, right? It is not necessarily to go get the mail every day at 3:00. That may be part of the position of what that does each day, but that's not essential. So that's not in the job description. Or if it is, it might be at the very end saying, administrative duties as assigned. So when you write the essential functions, think about, again, why that job exists, and what is really, really important for that job.

The next one is competencies. And to describe competencies, we are going to use knowledge, skills, and abilities. Now, knowledge, skills, and abilities, they seem sometimes hard to come up with, right? So your knowledge may be your knowledge base. For me, I have 25 years of HR experience that probably would never go into a position description. But maybe someone who has knowledge or has a bachelor’s degree or a master’s degree in a certain area. That's more your knowledge, right?

Your skills. What are the skills that are necessary for that position? And then the abilities. And the best way for me to describe this, because it does get difficult sometimes to separate the three, is a very basic example that I heard many, many years ago. And it sticks in my head, because it makes sense.

Say you're going to paint your house. You have the knowledge to go to a big box store and buy outdoor paint that is for a house. So that's the knowledge that you have, right? The skill is you have the ability to take that paintbrush and paint strokes back and forth, OK?

Now to put it together, though, your ability is actually not only using the knowledge and the skill, so you can paint the house, but your ability shows how well you can actually do it. For instance, can you paint and make those strokes across the house without having the paint run? Do you know the appropriate amount of paint to put on the brush to do that? That's your ability. And so sometimes those three can be really confusing.

So think of that basic example when you're writing down knowledge, skills, and abilities. Your knowledge is what you know needs to be done. And how you write that in a position description is it may be education-based, it may be they need knowledge of certain areas within their position, right?

The skill is the actual doing. That's the easy part. You made need a Excel spreadsheet or Word or the ability to get through your EMR. You may need all those different skills, right? Your computer skills. The abilities is actually putting all that together to make it work. And so I hope that example helps when you're writing a job description.
Your education requirements. This is a really crucial one, because you want to put it where it's appropriate, right? I once had a supervisor who wanted to put everyone at our front desk to have a bachelor's degree. That makes it impossible to recruit. So make sure your education requirements fit the position.

If they have to have a master's degree, then that's fine. Put down they have to have a master's degree. Don't necessarily put it so tightly held that they need a master's degree in, say, if you're hiring for a CFO in finance. What if they have a degree in accounting? What if they had a mathematical degree and they still took the CPA?

So you don't write it so tight that you kind of get caught up in the position description. Again, the position description can be used at times if someone has a legal challenge on the position. So write your education requirements the lowest denominator, if that makes sense, and then you have the flexibility to hire that person that may not meet the exact degree, but has a sample degree.

Now, in your case, you might have a lot of licensure requirements. And you have to make sure that those licensure requirements are written out, because that is a requirement of the position. But make sure that when you're writing those patient care team job descriptions that you're making it so that you're opening up the position a little bit when the requirements come about, because otherwise you get this fabulous person who has the knowledge, skills and ability, and maybe the education requirement isn't fitting correctly into your system, but it will work, or they are still able to obtain that licensure, or they're still able to work with patients. Just think about your education requirements.

And the same thing goes with language requirements. We want a diverse language with all of our patients. But sometimes we don't allow people to sometimes learn the language, also. So what skills can we teach someone versus what skills do they have to have when they walk in the door? And that's always important.

And again, the date, it's just a matter of recordkeeping as far as what date the position description was updated, so there's no confusion, so no manager is using an older position description than, say, the one that you updated last week. And again, make sure everybody knows it's been updated, also. But always make sure you have a date on that.

Now, when we go to using the position description as an interview guide, this is really important. Using the position description as the interview guide, you're going to use that, and you're going to look at those essential functions that are required of the position, and that's how you're going to determine your questions. What is important to perform in the position? Determining what you need to gather from the candidates. That's a real crucial piece. So sit down and start developing your interview guide. Any time that you spend getting ready and prepared for that interview will help you gain the information.

I can say that a lot of people do an interview, and they maybe interview six people. And they come back and they say, we think they're all great. And I'd ask them what they know about the people, and they really don't have any substance. And this is where the interview guide is really important. You develop that substance. It makes you think before you actually go into an interview and start asking people questions, what is it that you want to gather? So think about that very clearly. What
is it that you want to gather from this person? What questions can you ask that then will get you the information that you need?

And then, also, make sure you're taking notes, and you're asking people-- it doesn't have to be the exact same questions, but they need to be consistent with each person. So make sure you have that interview guide put together. And they can just be simple as far as one sheet of paper with your kind of standard eight questions or 10 questions or however many you want.

And then make sure you develop a rating scale that goes with those interview questions that you can determine, does this person meet this or do they not? And it gives you an idea as you go further when you're actually down to that selection process. It doesn't mean you have to always pick the person that has the most points on your rating scale, but at least it gives you a way to kind of make a decision.

So if you have someone who rates really high, but you have someone who comes in a close second, that close second may be the person that just is a better fit for your organization. It may be more of a culture fit. It may be they had a vivacious personality. It may be that they had a very quiet personality. Whatever that was, that might be the determining factor between those two people. But make sure that you are recording that information.

Then when you're starting the interview, it's important that you start using the STAR interview technique or some type of behavioral interviewing technique. When you do the STAR interview, and you don't want to do necessarily a ton of STAR interviews or interview questions within your interview process or your interviews will end up taking, like, two hours at least, pick a few things.

Say you want to know about teamwork. If you just asked a closed-ended question of do you work well as a team member, you're going to get an absolute yes. Hardly anybody is ever going to say no to that, right? What you might want to do, as a STAR interview technique, is you want to use a situation, a task that happened. What was the action, and what was the result of that process? What did you actually work on to accomplish? And what was the result of that?

So you might want to say something to the effect of, tell me about a time you worked well on a team. What did you work on? What was the outcome of that team process? And what was the result of that team process? What did you actually work on to accomplish? And what was the result of that?

You may also want to ask a follow-up question, something to the effect of, that was when you worked well on a team. When were on a team and maybe it didn't work so well? Tell me about that process. And so you want to gather more information. You want to use those open-ended questions.

There are certain things that you do want to use closed-ended questions for, such as have you ever been accused of Medicaid fraud or have you ever been convicted of Medicaid fraud? Those are very clear yes/no answers. Are you able to make it to work between the hours of 8:00 and 5:00, yes or no? Those are not very situational questions, right? You can't have open-ended to that. But the STAR interview, that's exactly what you want. You want those open-ended questions to be able to gather information and ask follow-up questions.
So if you want more STAR interview techniques or questions, Google is full of them. But they are used. But don't use them so much that the interview takes forever.

And they do take practice. So if you start using the STAR technique, make sure you practice, and make sure you’re getting information that you want back from that candidate. And I'd say, practice even on some peer coworkers, and ask them these questions, and see what responses they have. You can tell if you’re really using the technique correctly, and asking in that situation, what is the path, the action, and the result? So that's just a tip to start using those. But again, use them minimally.

And then develop performance evaluations from the position description. Again, there is-- and Jeannie, I can send a link to this document. But we can put up, also, with the webinar, which is from the AIMS Center. Again it's the patient-centered Integrated Behavior Health Care Principles & Tasks. And this is sort of a tool that can be used. You can modify it. But it would certainly help you begin to develop your position evaluations.

So you're going to determine how the performance is going to be measured. It may be, like on this document, none, some, or most often, or all the time. Or you may want to use a rating scale of, like, say, one to five. But then, again, use something rubric that kind of tells what that one through five actually is. So that one, you know that you're rating accurately, because you want information to base that on. You don't want it just to be coming from your gut, I think this person does this. That's not a good way to do a performance evaluation. You want actual data that tells you that this person does these tasks, and how well they do them.

So rubric really helps. And it helps the employee, also, because then they know. They know where they fall, because they have a description of what they need to do on the rubric in order to meet expectations or exceed expectations.

And then use the items that are concrete versus variable. So there's certain items that are very concrete in the position, right? If you require that people greet patients, say, for instance, when they walk in the clinic, that's a very concrete example. You want to make sure employees know what's being measured from the beginning. Again, the rubric can be very helpful. And this can be part of your ongoing process with employees. When you bring someone into your organization, make sure that they understand the expectations.

And what a better way is to give them a performance evaluation from the beginning. Allow them to see the document that they're going to be rated upon. Allow them to see the rubric that shows what they actually need to do to make that meets expectations, exceeds expectations. And it's the perfect time to do it. Because when you think about a new employee, they're energetic. They want to do well. But a lot of times we don't provide them with any information as to what that actually looks like and means. So make sure that you're discussing how they will be evaluated, what tools you will use, and how they fit into that process, and how often it will be done.

And again, a performance evaluation, at no time, nothing on that should ever surprise someone. If they are not performing as well as they need to be, you need to be addressing that with someone. And I think that all of us that have ever received a performance evaluation would agree that we want to know, before we actually get that document, how we're doing.
And as a manager or someone who's supervising people or working in that patient care team, it's important to talk about the performance of the team. And you can do that— it doesn't have to be a very formal performance evaluation, like, every week. But certainly when you huddle, when you get together, talk about those performance expectations. And then if there's someone that's not meeting those, pull them aside individually. Talk to them about what they need to do to accomplish those. Ask them how you can support them.

If you have other members on your team who are just rocking it out, make sure you're acknowledging them for the hard work and what they're doing. And find out, maybe they have some tips and tricks that could help this other person accomplish that same goal.

So think about that in a little bit broader sense as far as performance evaluations. Sometimes we think about it just as a one time a year event. And we don't want to do that.

So to review the items that we went through is the items to include in the position description. These are just some resources. So you have the SAMHSA website. Of course, the HRSA website has not necessarily job descriptions, but I think it can link to different ones. The AIMS Center certainly does have some that are sustaining patients for integrated care.

Other resources that are out there. Also, the AIMS Center through the University of Washington. You can look at NAC for other resources. You can just Google job descriptions for patient integrated care, also.

Or talk to your other people within your community, and share job descriptions. The only thing that HR will balk at is you absolutely cannot share wages. But you certainly can share job descriptions or get ideas on performance evaluations. You don't want to copy someone else's, but creature your own. Make it personal to your organization. But at the same time, share that information, and create your own if it isn't already something that can be shared.

How to develop. We talked about performance evaluations. And there's a lot of different ways you can develop a performance evaluation. The important thing is is that it gets down to the essential functions of what that job is about, that's really key, and that it's easy to understand as far as as an employee, as a manager, any other patient care team. Everybody knows what they're being evaluated on, and how that rating scale's been developed.

Your compensation plan. Make sure that you're working with HR or finance to determine those compensation plans. And make sure they're fair and equitable. Now, is there necessarily going to be equal across everyone? No, but you want to make it equitable and consistent.

Your training. It's really important that when you look at your position description, you look at your evaluation, sometimes that gives you a lot more focus. I shouldn't even say sometimes. Most times that gives you a lot more focus as to where your training needs to be. What do you need to train your team on this year? What do you need to ask the organization to support as far as training? When you look back at the essential functions, why does this job actually exist?

And when I look at my performance evaluations of my team members, and I say, this is where we're not doing so well, that gives you a great way to target in that training, and not spend
training dollars on just kind of other things that are interesting. And that's always good. But make sure that you're focusing on what it is that job needs, and going for that first.

Then your interview questions. That's key. Look at your essential functions of the job. Start thinking about, what questions can I ask that will really tell me if this person can perform this part of the job?

Too often, again, we use very broad questions in interviews. We don't really get down to anything to find out if this person can really perform the functions of the job. And if we want to hire right, that's how we're going to do it. And so we really want to target those questions, again, looking at the position description, using that as the first and foremost document that's used to develop all this other stuff. And so it's really important to look at that, determine what that job is, ask the questions appropriately, and you will begin to make better decisions when you hire people.

With that, that's our review for today. Jamie, do you want to talk about the next steps and what else is happening after this webinar?

JAMIE WEINSTEIN: Sure, and I want to thank you so much, Ann, for the wonderful webinar. It was full of rich information. So thank you.

So next steps. After this webinar, please follow the link to provide feedback on the virtual webinar. I would really appreciate that feedback, and use it to make changes for our future webinars and programming.

We then encourage you to participate in the online Q&A chat session with Ann Hogan. And you can do that by contacting me, Jamie Weinstein, at jweinstein@mayatech.com. Recordings and slides for the Staff Retention CoP webinar is available online on the CIHS website at the link below.

If you have any additional questions, you can feel free to contact me, Jamie Weinstein, or my colleague, Gretchen Vaughn, at the addresses on your screen.

And for more information and additional resources, please visit http://www.integration.samhsa.gov or email integration@thenationalcouncil.org.

Thank you for joining us today. Again, please take a moment to provide your feedback by completing the survey at the link below.