



# Operational Strategies for Integrated Care Hiring and Onboarding

Mental Health/Substance Use Disorder Technical Assistance

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Health Resources and Services Administration (HRSA), Bureau of Primary Health Care (BPHC)

**Vision: Healthy Communities, Healthy People**



# Disclosure

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*This webinar was produced for the Health Resources and Services Administration (HRSA), Bureau of Primary Health Care under contract number 47QRAA18D00FZ/75R60224F80097.*



# Submitting Questions and Comments

- Submit questions by using the questions-and-answer (Q&A) feature.
- If you experience any technical issues during the webinar, please message us through the chat feature.

# Presenters



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**Rob McAdam, LCSW**

# Today's Agenda



Welcome



Overview of Best Practices for Integrated Care Hiring & Onboarding



Effective Hiring and Onboarding Approaches at Aviva Health



Q & A

# Objectives

- Name several best practices for hiring and onboarding to support an effective integrated primary and behavioral health care approach.
- Understand how to practically apply best practices through Aviva Health's experience, as one example of how hiring and onboarding helped establish a sustainable integrated care approach.



# Polling Question #1



**Does your current hiring process highlight and reflect an organizational value of working in a team-based, integrated care environment?**

- a) Yes
- b) No
- c) Not sure

# Polling Question #2



Does your current onboarding process reflect and highlight an organizational value of working in a team-based, integrated care environment?

- a) Yes
- b) No
- c) Not sure



# Polling Question #3



**Does your behavioral health new hire orientation process provide an overview, introduction, and specific training on your health center's integrated care approach?**

- a) Yes
- b) No
- c) Not sure

# Polling Question #4



**Does your medical staff new hire orientation process provide an overview, introduction, and specific training on your health center's integrated care approach?**

- a) Yes
- b) No
- c) Not sure

# Polling Question #5



**Does your medical and behavioral health staff new hire orientation process provide an opportunity to meet and shadow a range of staff across the entire integrated care team?**

- a) Yes
- b) No
- c) Not sure

# Integrated Care Hiring Best Practices

Labor Pools	Job Descriptions	Interviewing
<ul style="list-style-type: none"><li>• Balance patient care needs, licensing, &amp; credentialing requirements, &amp; local labor pool options</li><li>• Academic (even high school) partnerships where appropriate</li><li>• Leverage internships</li><li>• Expand staff role/types for care integration work</li></ul>	<ul style="list-style-type: none"><li>• Clearly state and emphasize the health center's integrated care approach</li><li>• Include integrated care competencies (e.g., brief consultation, collaboration, &amp; communication expectations)</li></ul>	<ul style="list-style-type: none"><li>• Provide to candidate: overview of organization and values, describe your care approach, clearly state skills/qualities needed for success in role</li><li>• Solicit from candidate: skills &amp; experience (e.g., handoffs, huddles, documentation, communication); qualities &amp; characteristics (e.g., collaboration, adaptability, interest in fast-paced environments)</li></ul>

# Integrated Care Onboarding Best Practices

## Orientation

- In-depth overview of integrated care approach

## Shadowing

- Medical (e.g., medical assistants, primary care providers), behavioral health, case/care management, clinical support (e.g., community health workers, peers), front desk/scheduling, pharmacy, nutrition, etc.

## Training

- Integrated care workflows, referral and handoff processes
- Communication tools, standards, and expectations
- Documentation to optimize integrated care reimbursement

## Team Building

- Introduction in huddles and interdisciplinary team meetings
- Scripts and shared language to refer to integrated care practices and care team members



# Effective Integrated Care Hiring & Onboarding Practices at Aviva Health



# About Aviva Health (Umpqua Community Health Center)

- Federally Qualified Health Center in Roseburg, Oregon
- County seat, population ~25,000
- Predominantly rural county
- County population of ~112,000
- Cover **5,134 square miles** in total area
- 10 locations throughout the county
- Served over 18,000 patients in 2024
- Primarily underserved populations
- Behavioral Health Department has two programs
  - Primary Care Behavioral Health
  - Outpatient Behavioral Health (OBH)
- Family medicine residency program
- Broadly a teaching clinic

# Let's Talk About Recruiting, Onboarding, and Retention!

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## Overarching Principles

- Organizational context is important
- Know your organization
- Know who you're recruiting
- Structure the process
- Learn from the results
- Continuous tracking & improving
- Plan for the future / be flexible





# Providers Live and Work within the Organizational Context

- Where is your health center located?
- Who do you serve?
- What are your mission, vision, and values?
- What type of entity is your health center?
- What is your health center's role within the community?

## Understand/communicate what it means to be... (a rural community)

- It may mean recruiting primarily locally as well as more broadly.
- Do you intentionally recruit regionally and nationally?

## Consider what makes your community unique?

- Geographic area?
- Community characteristics?
- Other defining features?


# Know Your Organization

**Recruiting starts well before the applicant is in the room for an interview.**

- **Reputation**
  - It's a lot easier if your organization has a good reputation
  - It's a lot easier if your employees love your organization
- **Your employees can be your best recruiting tool**
- **Do you know what applicants may think about your organization?**

# Structuring the Process: Recruitment Tactics (1)

- We have developed a job posting for every relevant provider type
- This allows us to generate more hits on our recruitment

 <b>AVIVA</b> HEALTH Hope. Health. Life.			NONPROFIT SUMMIT	ABOUT	CAREERS	SERVICES	PATIENT RESOURCES	LOCATIONS	OUR PROVIDERS
BH									
Behavioral Health Assistant			Roseburg, OR						
Clinical Social Worker Associate (CSWA) - Primary Care Behavioral Health			Roseburg, OR						
Licensed Clinical Social Worker (LCSW) - Outpatient Behavioral Health			Roseburg, OR						
Licensed Clinical Social Worker (LCSW) - Primary Care Behavioral Health			Roseburg, OR						
Licensed Marriage and Family Therapist (LMFT) - Outpatient Behavioral Health			Roseburg, OR						
Licensed Marriage and Family Therapist (LMFT) - Primary Care Behavioral Health			Roseburg, OR						
Licensed Professional Counselor (LPC) - Outpatient Behavioral Health			Roseburg, OR						
Licensed Professional Counselor (LPC) - Primary Care Behavioral Health			Roseburg, OR						
Outpatient Behavioral Health Therapist			Roseburg, OR						
Outpatient Mental Health Intern			Roseburg, OR						
Primary Care Behavioral Health Consultant			Roseburg, OR						
Psychologist - Outpatient Behavioral Health			Roseburg, OR						
Psychologist - Primary Care Behavioral Health			Roseburg, OR						

# Structuring the Process: Recruitment Tactics (2)



Prefer to recruit people who live locally



Highlight some of our more attractive benefits in the first few sentences of the job advertisement



Develop strategic partnerships to help recruit



Cultivate relationships through participation in various committees, groups, coalitions, and meetings with local and regional organizations

# Structuring the Process: The Interview

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**We spend about 15-20 minutes on this opening dialogue.**

- Brief Introductions Name, Title, Role
- Organization Overview (Vice President)
- Overview of the Integrated Care Program (Primary Care Behavioral Health Director)
  - The role, day to day flow, supervision, training, the core competencies
- Overview of the Outpatient Behavioral Health (OBH) Program (OBH Supervisor)
  - Highlights the differences between the two

# Interview Strategy Explained

- Many applicants don't really have direct experience with integrated behavioral health.
- Gauge applicants':
  - Reactions
  - Questions
  - Body language
  - Interest
  - Enthusiasm
- We invest the time in explaining our integrated behavioral health care approach to ensure a mutually good fit.
  - This approach helps ensure the new hire and team are aligned, setting the stage for smoother collaboration and more efficient results.

# Structuring the Process: Interview Style

We conduct integrated care interviews differently than an OBH interview

We use a customized set of questions and score from 0 to 5.

*What is your preferred pace of work?  
What is the daily patient load you are used to meeting?*

- 0 – No knowledge or experience*
- 1 – Very little knowledge or experience*
- 2 – Some knowledge or experience*
- 3 – Good knowledge or experience*
- 4 – Very good knowledge or experience*
- 5 – Excellent knowledge or experience*

Similarly, general impressions are also scored from 0 to 5 based on:

- ✓ *Verbal communication*
- ✓ *Fit with organization*
- ✓ *Friendliness*
- ✓ *Flexibility*
- ✓ *Poise*



# Interview Results

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We have hired

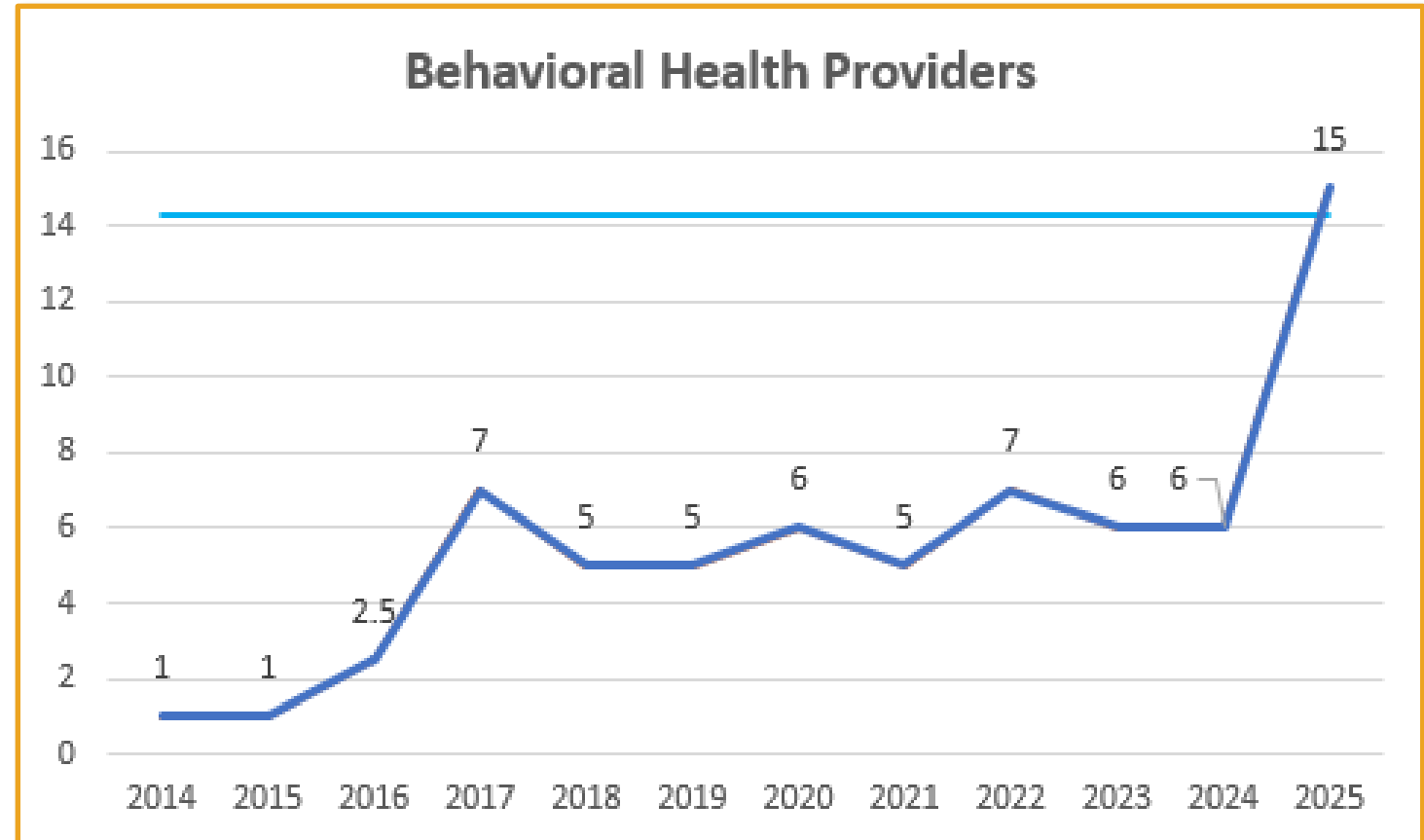
**9 of 11 providers**

between October 2024 and October 2025



# Retention and Growth

- October 2024 to October 2025
- Retained 5/6 existing providers
- Added 5 new providers
- Actively interviewing
- Target growth ~ 6 months
  - 3 integrated care providers
  - 1 licensed OBH provider



# Sample Onboarding Schedule

## Days 1-2

- Mandatory training (highly structured)
- New hire orientation

## Weeks 1-2

- Meet and greets with all departments

## Weeks 2-4

- Shadow nearly all behavioral health providers
- Shadow support staff/front desk
- Integrated care providers complete select readings, trainings videos, and direct observations specific to integrated BH

## First Year

- Direct training and support related to medical conditions and the health and behavioral interventions for them
- Upskilling – Baseline Virtual Training Modules (i.e., Social Emotional Health 0-5 Training)



# Onboarding Elements

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- Clinical documentation training
- Sharing macros
- Weekly referral meeting
- Weekly individual supervision
- Bi-weekly group supervision (associates/licensure)
- Bi-weekly team meeting
- Each new hire meets with the Vice President of Behavioral Health around the 90-day mark

# Champion Roles Supporting Organizational Value of Integrated Behavioral Health

## Director of integrated care

- Preceptor within Family Medicine Residency Program

## Most senior integrated care provider

- Grown within the organization
- Key role in building and maintaining the integrated care environment

## OBH – Clinical Supervisor

- Experience as an integrated care provider
- Facilitates group supervision across the Behavioral Health Department
- Facilitates clinical hand-off from integrated care to OBH

## Support Staff

- Knowledgeable and informed
- Emphasize continuous quality improvement

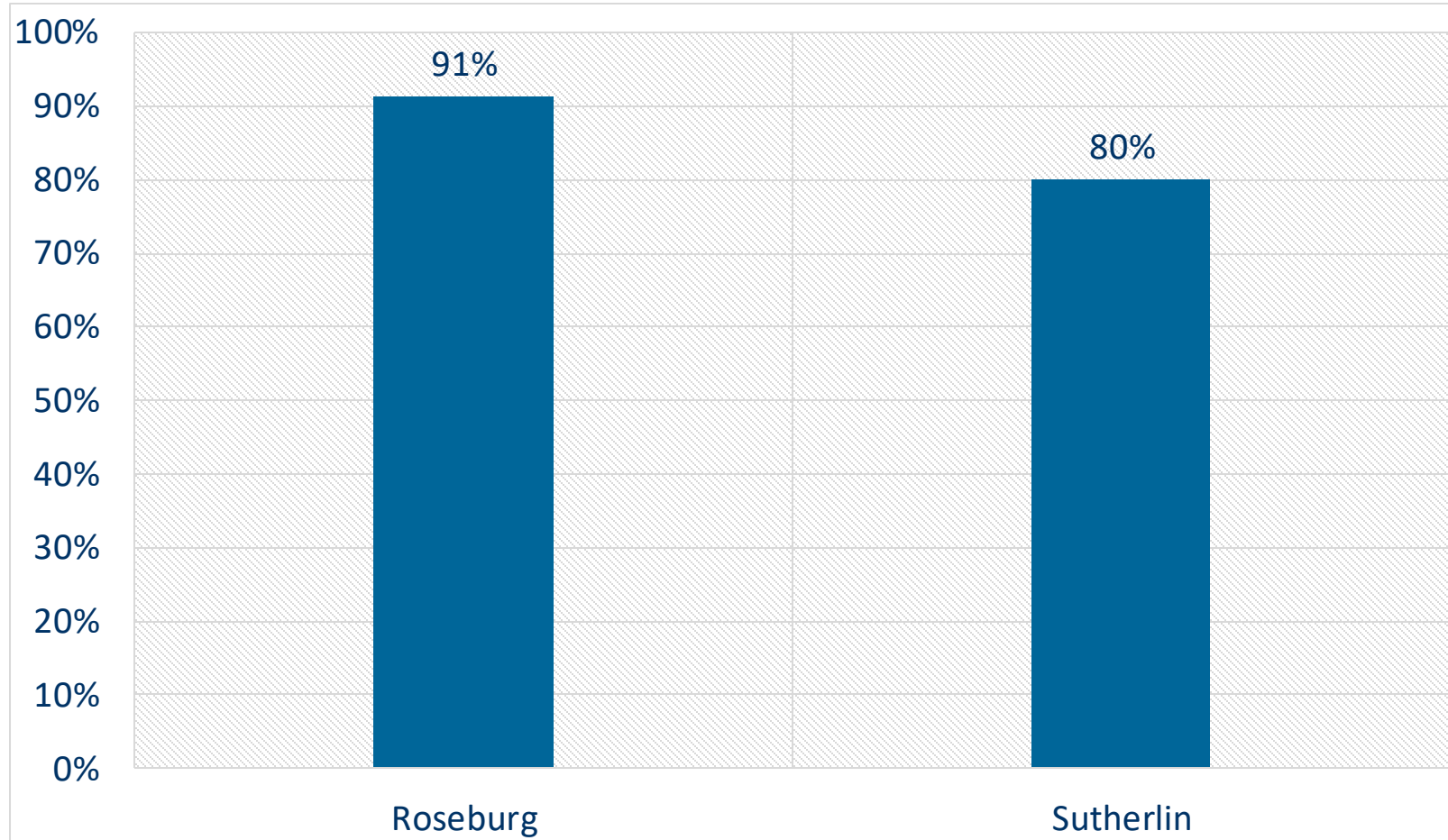


# Benchmarking Behavioral Health Integration in Community Health Centers Survey Results (9/16/2025)

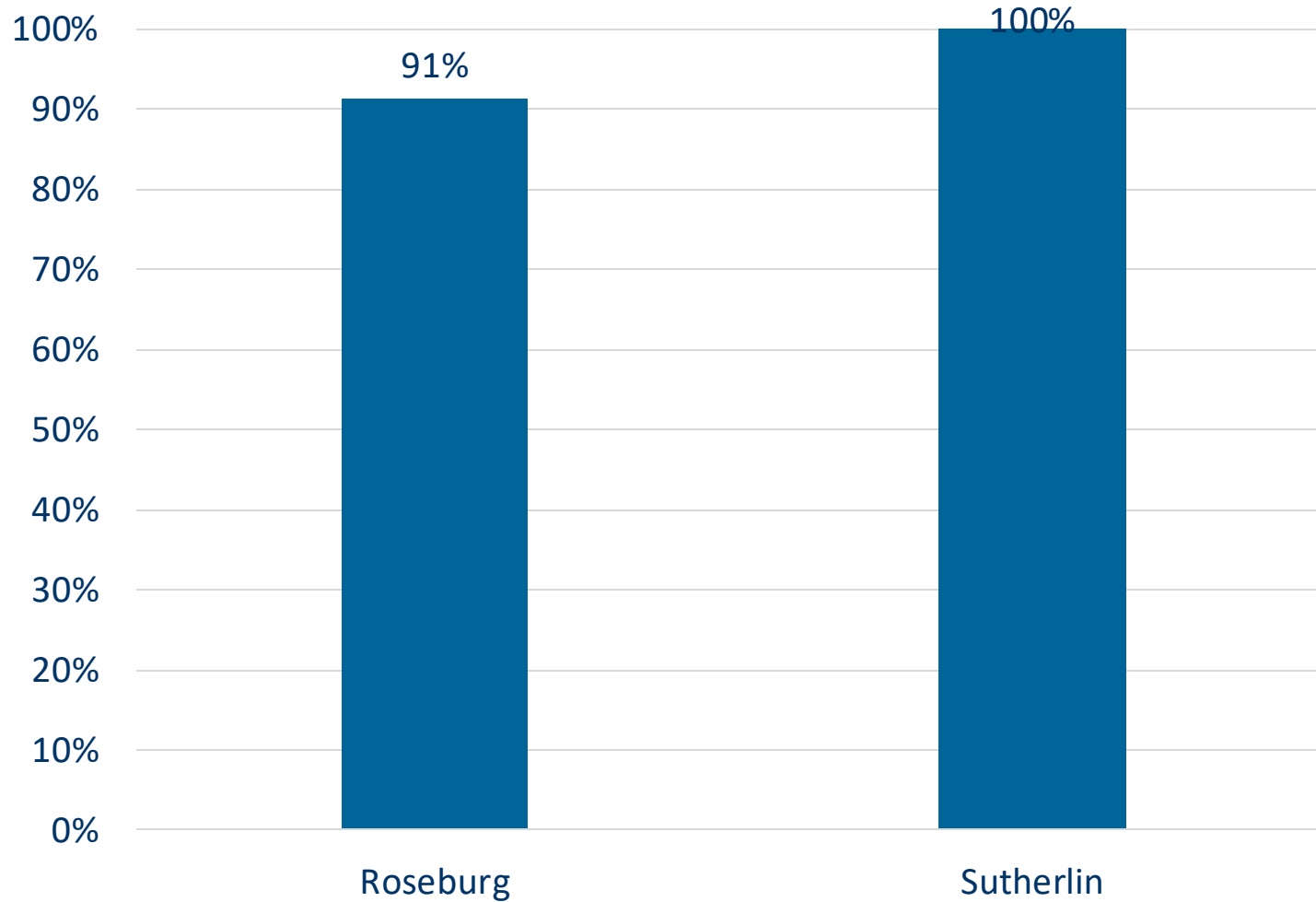


# Collaboration Results

At our site behavioral health and medical clinicians **actively collaborate** about patients when needed



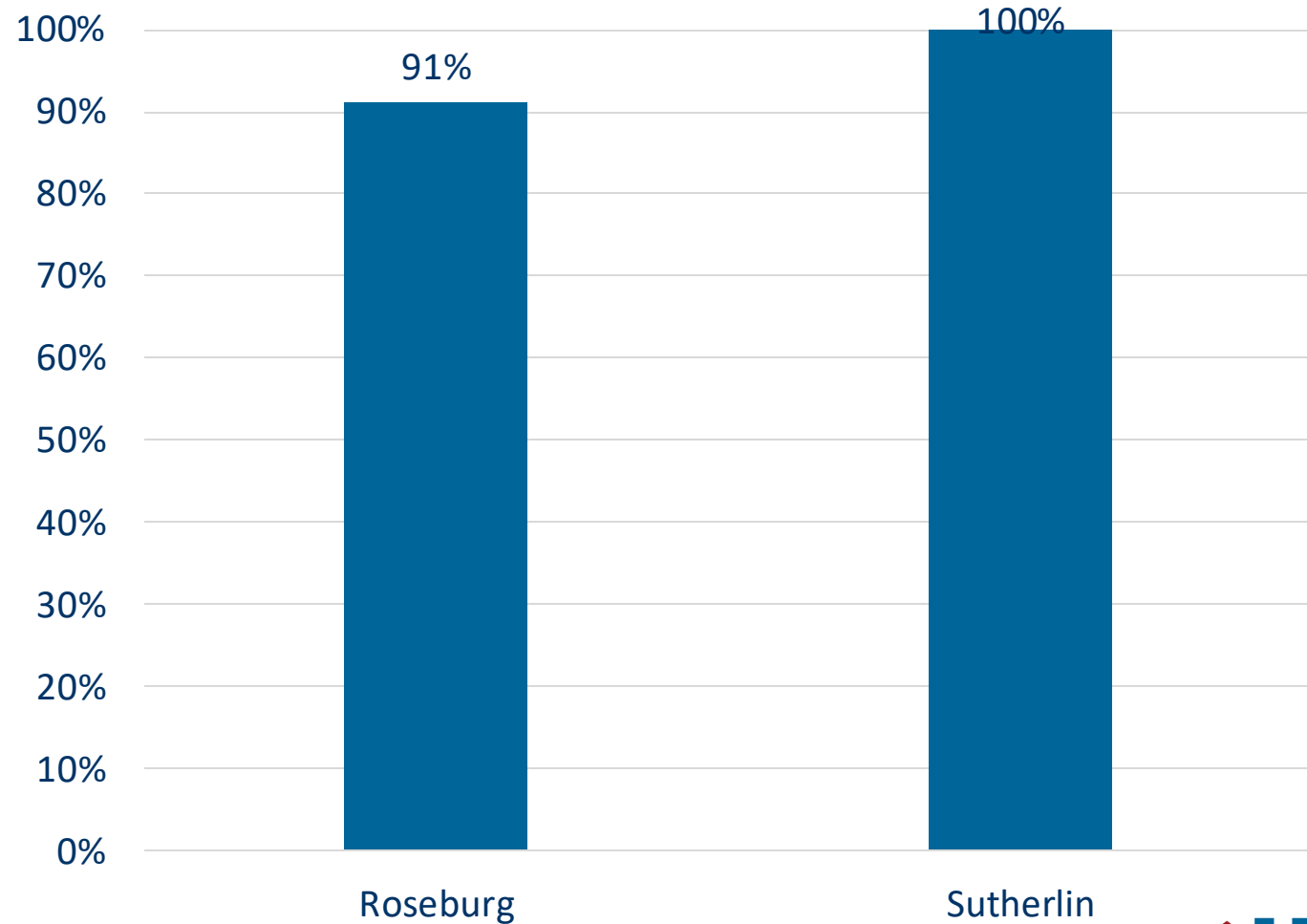
# Documentation Results



At our site patients' medical AND behavioral health **documentation are shared** with both medical and behavioral health clinicians

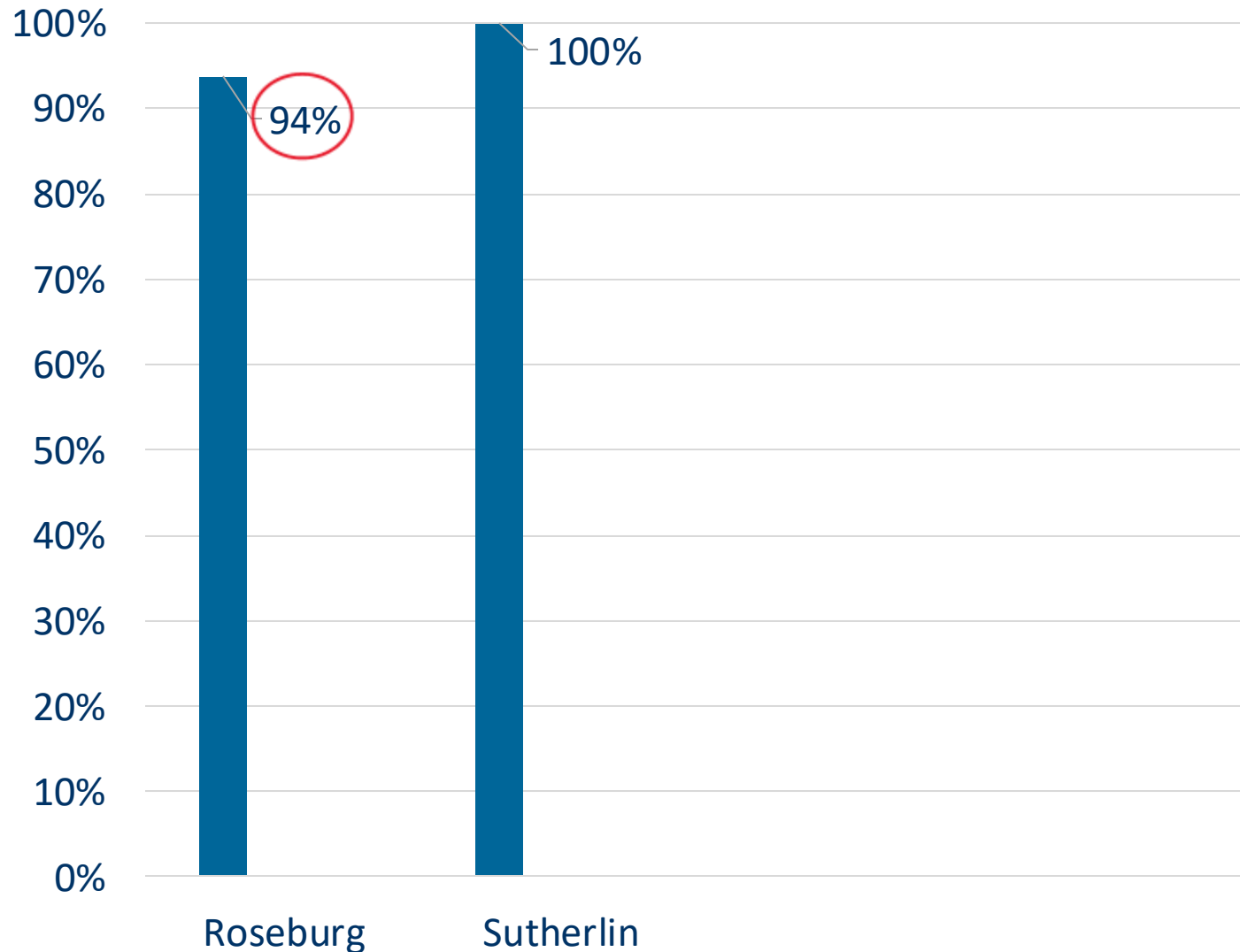
# Shared Treatment Plan Results

At our site behavioral health and medical clinicians **work from shared treatment plans** for patients with behavioral health and medical needs





# Offer Patients Behavioral Health Services Results



At our site we ensure  
patients who need  
behavioral health  
services are offered  
them

# Patient Satisfaction & Experience Survey Results (April - June 2025)



AVIVA HEALTH

## Patient Satisfaction & Experience Survey

PCBH Report Q2 2025

Satisfaction Questions

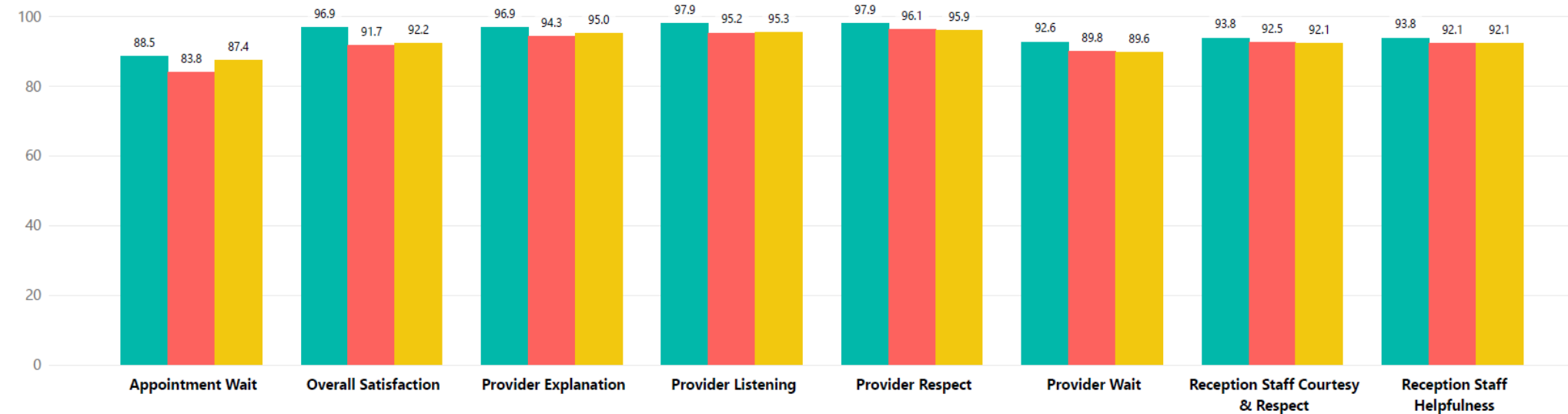
### Description of Question Types and Statistics:

**Satisfaction Questions** - Questions using a scale of Excellent, Good, Fair, Poor

**Mean Score** - Represents the weighted average of all the responses for a question using a 100-point scale.  
The weights used are: Excellent (100); Good (75); Fair (50); Poor (25)

### Current Quarter Satisfaction Questions Benchmark Comparisons (Mean Scores)

● Department Score ● State Benchmark Score ● National Benchmark Score



# Patient Satisfaction & Experience Survey Feedback (April - June 2025)

Encounter Date	Site	Positive Feedback
6/26/25	Roseburg	The staff was helpful and kind.
6/13/25	Roseburg	I like the welcoming feeling from the staff we encountered.
6/12/25	Roseburg	██████ and ██████ were quick, efficient, and positive.
6/10/25	Roseburg	The process from check-in to check-out is consistent. ██████ listened to what we were going through and did not push us towards her course of action; she ensured we were involved in the plan-making process. She also took the time to connect with my child, ensured he was actively engaged in the process, and helped him understand his diagnosis.
6/5/25	Roseburg	I was treated very well. The visit was quick and efficient. I enjoyed my time with ██████ she is easy to talk to and easy to listen to. I like what she has to say, and we have a good rapport.
5/30/25	Roseburg	I liked how quick the visit was.
5/30/25	Roseburg	The entire staff is friendly and listens.
4/30/25	Roseburg	Everyone is friendly and courteous. They always help me.

Encounter Date	Site	Opportunities for Improvement
6/13/25	Roseburg	I understand that we have a limited number of behavioral health options, but for a 9-year-old with extensive anxiety, having to wait over 30 days is not good.

# Key Takeaways

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- Understand organizational and contextual foundation
- Know who you're recruiting
- Customize your recruitment & onboarding for integrated behavioral health
- Use data to drive your decision-making
- Plan and be able/willing to change course
- Success will likely hinge on your champions

# Q&A



# Resources/References

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- Agency for Healthcare Research and Quality (AHRQ). (2025, September). *Obtain Behavioral Health Expertise and Build a Culture of Integration*.  
<https://integrationacademy.ahrq.gov/products/playbooks/behavioral-health-and-primary-care/implementing-plan>.
- AHRQ. (2023, June). *Section 1: Overview of Key Concepts and Tools*.  
<https://www.ahrq.gov/teamstepps-program/curriculum/communication/overview/index.html>.

# Health Center Satisfaction Assessment

**We'd love your feedback  
on today's session!**

Please take 2 minutes to  
complete the Health Center TA Satisfaction  
Assessment.

**You must complete the assessment to claim  
continuing education credit.**

**Thank you for your time!**



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# Thank You!



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