CoCM Implementation Checklist

This comprehensive checklist will guide you through Collaborative Care (CoCM) implementation. It outlines key considerations, essential steps, and program requirements to confidently bill for services while ensuring fidelity to the model. For more information and implementation support, visit mmhpi.org/cocm or email cocm@mmhpi.org.

Getting Started

❑ **Identify champions** and engage key **clinical and finance stakeholders**.

❑ **Assess in-house capabilities** for delivering CoCM and potential needs for vendor solutions.

❑ **Identify and evaluate registry options;** decide whether to build within or alongside EHR or partner with a vendor.

❑ **Engage compliance** team early to ensure alignment with organizational policies.

❑ **Assess access to start up funds** and explore implementation grants and investments as needed.

❑ **Understand your payers** by learning billing requirements and reimbursement rates.

❑ **Consider population and geographical nuances** and tailor your program to specific needs, demographics, and local resources (or lack thereof).

❑ **Define inclusion and exclusion criteria** for CoCM program participation.

❑ **Build a de-escalation pathway** with a structured approach for crisis management.

❑ **Develop safety and relapse prevention plans** to enhance well-being and minimize relapse.

Billing Requirements

❑ **Establish CoCM team** and ensure they meet state licensure/training requirements and proximity standards for billing for CoCM services.

❑ **Utilize patient registry** to track patient participation, clinical outcomes, and BHCM time.

❑ **Complete initiating patient visit with referring provider**, including mental health screening and documentation of patient verbal consent for referral to CoCM.

❑ **Administer monthly validated assessments** to guide clinical decisions and track progress.

❑ **Implement weekly systematic case reviews** between the BHCM and psychiatric consultant.

❑ **Meet time thresholds** for **CoCM codes** and **bill** monthly with the PCP as the billing provider.