**State-level Actions**

Promote awareness and use of evidence based SM resources

Support delivery partners & develop delivery infrastructure

Coordinate systematic statewide efforts related to SM resources

Establish & maintain active referral systems (Compass/QL systems)  
Get payers on board (strategic partners: PEBB/OEBB, HERC, CCOs)  
Document & spread promising practices

Share success stories

**Patient follow-up**

QI to improve clinic workflows

Clinic Workflow Training

Report participation status and outcome - Close Loop

Client intervention (to gain consent/buy-in)

SM Referral Process

SM Roles System Map – DRAFT 10/23/15

**Resources to support local and state actions**

Contractors to support local efforts (OPCA, OHSU, OSU, PCC, YMCA)

Compass SM Portal and promotional resources

Guidance on assessing local needs & targeting efforts

Guidance on billing & payment practices

Business case for SM programs

**Please note: For the purposes of this document, “self-management” includes tobacco cessation services.**

Client identification & Needs assessment

**Buy-in:**

Health delivery, insurance & social service systems

(decision-makers)

Referring organizations: CBOs, clinics, hospitals (their directors/leadership)

Individual referral sources: health & social service workers (those who directly engage with patients/clients)

Active referral: Compass, online, fax, EHR e-ref

SM Intervention