

APPENDIX E:

Foundational Elements of Primary Care and Behavioral Health Integration

The following are the foundational elements that signify integration of primary care and behavioral health in each of five practice areas or domains of care delivery. These elements were defined by the Massachusetts Patient-Centered Medical Home Initiative (PCMHI) Behavioral Health Work Group in consultation with Mountainview Consulting and Work Group member Dr. Alexander Blount, as essential for a primary care provider to effectively integrate behavioral health services.

I. Relationship and Communication Practices

Triaged Access at Emergent, Urgent and Routine Times

- PCPs and behavioral health service providers have established a reliable positive working relationship and regular communication exchange among one another.

Smooth Hand-off

- PCPs routinely discuss patient care issues with behavioral health service providers prior to and after same-day hand-offs or prior to a scheduled initial visit.

Sharing Expertise

- PCPs are comfortable routinely requesting advice from behavioral health providers about intervening with patients who present with behavioral health and medical concerns.

Training Activities

- Behavioral health service providers provide periodic training and education for medical staff on behavioral health topics (e.g., at a provider meeting, through a monthly newsletter or a lunch time training on a topic of interest to PCPs).

Program Leadership

- PCPs have a defined steering group and medical champion for the practice's behavioral health integration activities.

II. Patient Care and Population Impact

Routine Screening and Referral for Adult Behavioral Health Issues

- Patients are routinely screened prior to or during annual physical exams with a standardized tool for both depression and alcohol use.

Behavioral Health Skills Used by the Care Team

- PCP staff providing direct service are trained in patient activation and health behavior change techniques.
- PCPs and (other members of the care team as appropriate) deliver evidence-based interventions in consultation with behavioral health service providers.

III. Requirements to Ensure Effective Community Integration

Self-Help Referral Connections

- PCP practices have available and regularly use referral information for self-help groups, and offers books, pamphlets and websites that foster patient self-help

Community Group and Resources Connections

- PCPs provide linkages that facilitate the connection of patients with community resources such as gyms, churches, housing and food support.

Specialty Mental Health and Substance Abuse Referral Connections

- PCPs establish and use referral and information-sharing protocols with an array of mental health and substance abuse specialty services.

IV. Care Managers

Coordination of an Integrated Treatment Plan

- Integrated treatment plans (plans that include medical and behavioral health goals) are effectively coordinated by the clinical care manager.

Use of Behavioral Health Skills

- Behavioral health skills are used by the clinical care manager when working with patients.

Use of Community Resources

- The clinical care manager is aware of behavioral health-focused community resources and regularly utilizes them.

V. Clinic System Integration

Schedule Accessibility

- The PCP can facilitate the scheduling of a behavioral health visit for a patient at the time of a patient visit.

Leaders are committed to integrated care

- PCP staff leadership understands the value of the behavioral health service to patients and will commit to maintaining effective BH integration.

Staffing or Affiliations

- PCPs have sufficient behavioral health provider staffing and / or referral opportunities for/ relationships with other BH services outside of the practice.

Chart Note Integration

- The behavioral health service provider chart notes are placed in the same location as PCP chart notes.

Process Integration

- Within a given practice, PCPs and individual behavioral health service providers use the same screeners and outcome instruments to follow progress.