



# Behavioral Health Integration Guideline CHECKLIST



## 8 ELEMENTS OF INTEGRATION

### Integrated Care Team

- Practice commitment to culture of teamwork and integrated care
- Clearly defined roles for all team members, including clinicians and non-licensed staff
- Shared workflows between primary care and behavioral health teams; regularly scheduled team huddles and pre-visit planning include all team members (on-site or virtual)

### Patient Access to Behavioral Health as a Routine Part of Care

- Clear referral and scheduling process for behavioral health services
- Same day access to behavioral health services (on-site or virtual); at minimum same day care plan development
- Behavioral health services scheduled in a way that best meet the patients need (in person, phone, or virtual), especially in first month of treatment

### Accessibility and Sharing of Patient Information

- Patient health information and shared care plan accessible by all care team members through EHR or shared clinical care management system at the point of care
- Regularly scheduled consultations between clinicians to jointly address shared care plan
- Systematic tracking of patient progress toward treatment goals

### Practice Access to Psychiatric Services

- Systematic access to psychiatric consultation services for primary care providers (on-site or virtual)
- Clear referral and coordination process to specialty care for complex symptoms and diagnoses
- Bi-directional communication for all referrals

### Operational Systems & Workflows to Support Population-Based Care

- Proactive patient screening for alcohol/substance use disorder and select mental health conditions
- Systematic clinical protocols to record, track and follow-up on screening results
- Systematic clinical protocols to track patients with targeted conditions (i.e. registry) and engage with patients who are not improving

### Evidence-Based Treatments

- Evidence-based interventions adapted for patient population (age, religion, language, culturally appropriate)
- Quantifiable use of behavioral health symptom rating scale to track patient improvement
- Treatment includes goals of care and support appropriate patient self-management strategies

### Patient Involvement in Care

- Patient voice informs the care plan/goal development and patient input central to care plan
- Shared decision making between patient and team, where appropriate
- Patient identified barriers to care related to social support needs are assessed and documented, and staff assist patient in accessing and navigating these social supports.

### Data for Quality Improvement

- Systematic tracking of organizational data, such as patient access to behavioral health
- Systematic tracking of patient feedback
- Quality improvement structure to achieve organizational access goals and other identified outcome standards



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## NEXT STEPS TO FULL INTEGRATION

### Knowing Where to Start: Assessments

AHRQ Self-Assessment Checklist for Integrating Behavioral Health and Ambulatory Care

[https://integrationacademyd8.ahrqstg.org/sites/default/files/2020-09/self\\_assessment\\_checklist\\_1.6.16.pdf](https://integrationacademyd8.ahrqstg.org/sites/default/files/2020-09/self_assessment_checklist_1.6.16.pdf)

Maine Health Access Foundation (MeHAF) Site Self-Assessment

<https://www.hca.wa.gov/assets/P4R-physical-behavioral-health-integration-practice-site.pdf>

Qualis Health Patient-Centered Medical Home Assessment (PCMH-A)

<http://www.safetynetmedicalhome.org/sites/default/files/PCMH-A.pdf>

### Implementation Guides

Agency for Healthcare Research and Quality: Integration Playbook

<https://integrationacademy.ahrq.gov/products/playbooks/behavioral-health-and-primary-care>

American Academy of Pediatrics: Mental Health Initiatives Tools for Primary Care

<https://www.aap.org/en-us/advocacy-and-policy/aap-health-initiatives/Mental-Health/Pages/Primary-Care-Tools.aspx>

AIMS Center: Collaborative Care Implementation Guide

<https://aims.uw.edu/collaborative-care/implementation-guide>

SAMHSA-HRSA Center for Integrated Health Solutions: Guide for Safety-Net Primary Care

<https://www.thinglink.com/channel/622854013355819009/slideshow>

Qualis Health: Implementation Guide to Behavioral Health Integration

<http://www.safetynetmedicalhome.org/sites/default/files/Implementation-Guide-Behavioral-Health-Integration.pdf>

Read the Bree Collaborative Behavioral Health Integration Report and Recommendations here:

<https://www.qualityhealth.org/bree/wp-content/uploads/sites/8/2020/01/Behavioral-Health-Integration-Final-Recommendations-2017-03.pdf>