

A Behavioral Health Integration Primer for Health Centers

Amber Murray, RN, BSN, MA, PMP, Facilitator

Wednesday, September 10, 2025

2:00 p.m. to 3:00 p.m. ET

Session Five

Introduction to a Systems
Approach of Integrated
Care: Clinical Systems

Continuing Education (CE)

- We offer behavioral health (BH) continuing education units (CEUs) for participation in BH/substance use disorder (SUD) integration technical assistance (BH/SUD TA) events.
- You must attend the event and complete the online Health Center TA Satisfaction Assessment Form after the event (2–3 minutes).
- A link with instructions will be provided at the end of the session.
- CE certificates will be sent within 5 weeks of the event from the Health Center BH/SUD TA Team via Smartsheet <user@app.smartsheet.com>.



This course has been approved by JBS International, Inc. as a NAADAC Approved Education Provider, for educational credits. NAADAC Provider #86832, JBS international, Inc. is responsible for all aspects of their programming.



JBS International, Inc. has been approved by NBCC as an Approved Continuing Education Provider, ACEP No. 6442. Programs that do not qualify for NBCC credit are clearly identified. JBS International, Inc. is solely responsible for all aspects of the programs.

Your CoP Facilitator

Amber Murray, BSN, MA, PMP

Program Director & Senior Technical
Expert Lead

JBS International, Inc.



Session Objectives



Participants of today's session will be able to:

- Understand how a systems approach supports sustainability and improved outcomes, especially for patients with chronic, comorbid conditions.
- Identify clinical systems of integrated care in your setting.
- Discuss strategies to enhance clinical systems of integrated care in your setting.
- Use the Plan-Do-Study-Act (PDSA) worksheet to assess the strengths and opportunities of clinical systems in your setting.

Today's Agenda



Check-in & Attendance



Clinical Systems of Integrated Care



Reflection, Assessment, & PDSA Planning



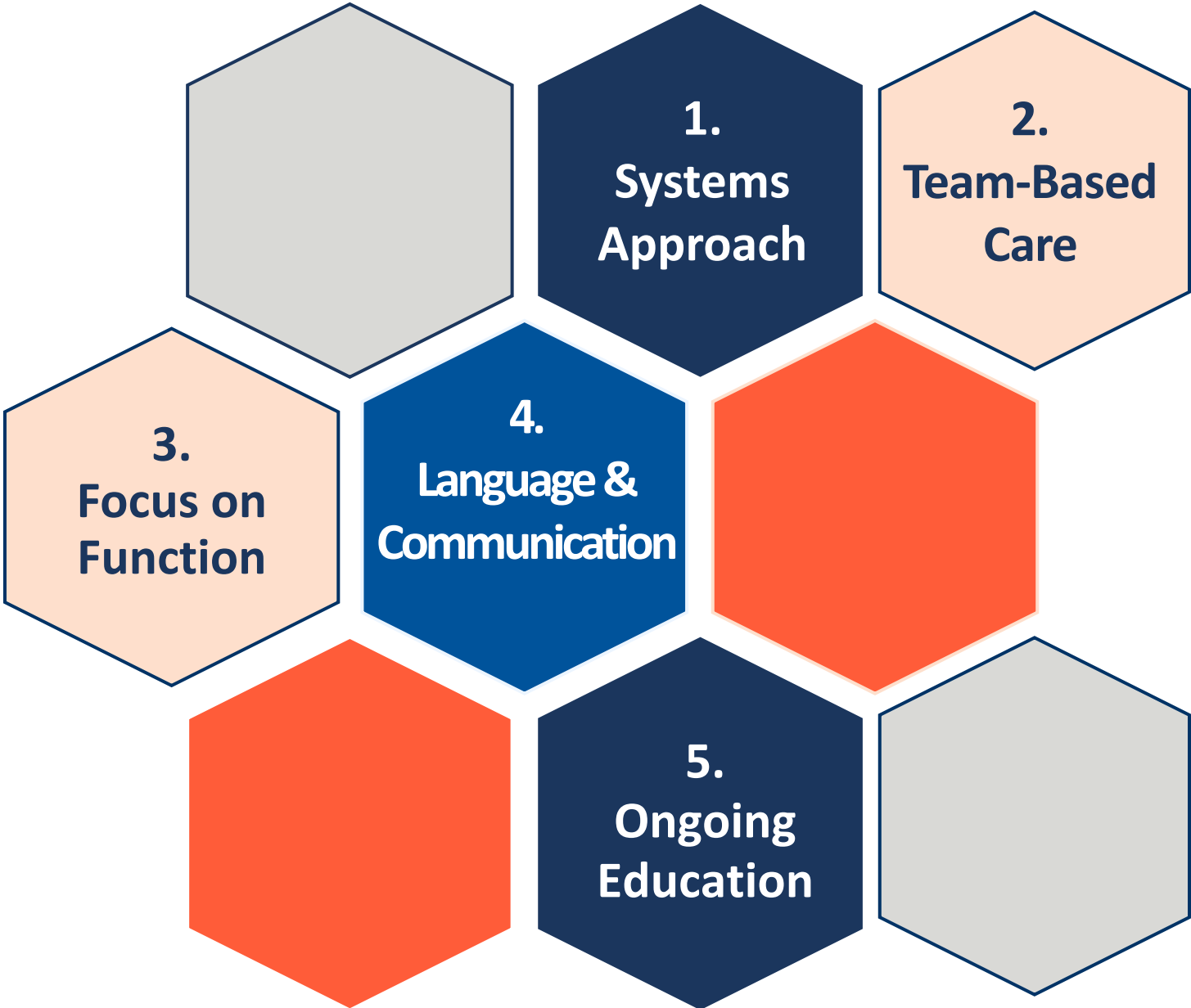
Session Wrap-Up, Questions



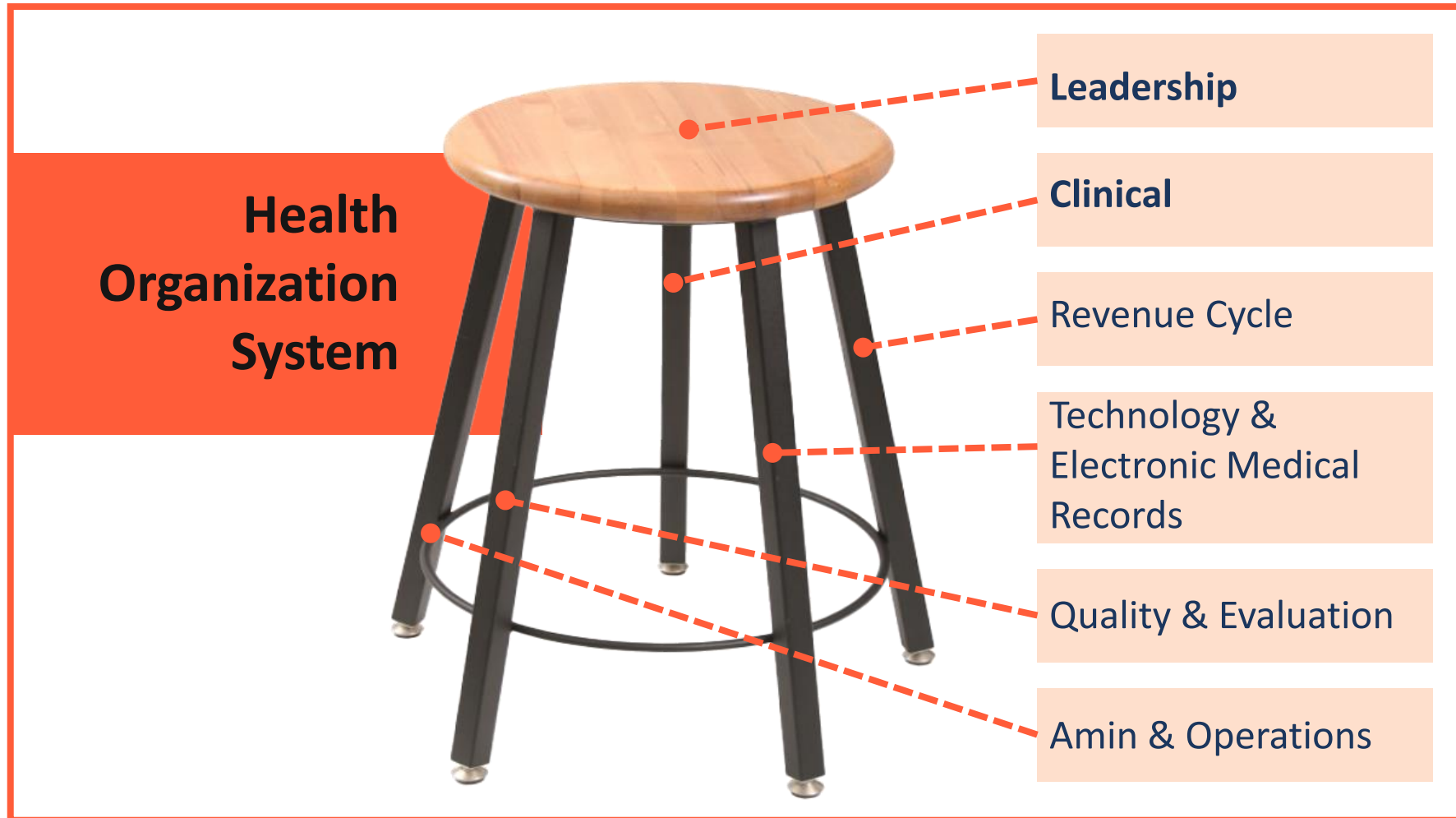
Office Hours and Interactive Discussion

Foundations of Integrated Care

Combined, these foundations build a **strong, sustainable integrated care environment.**



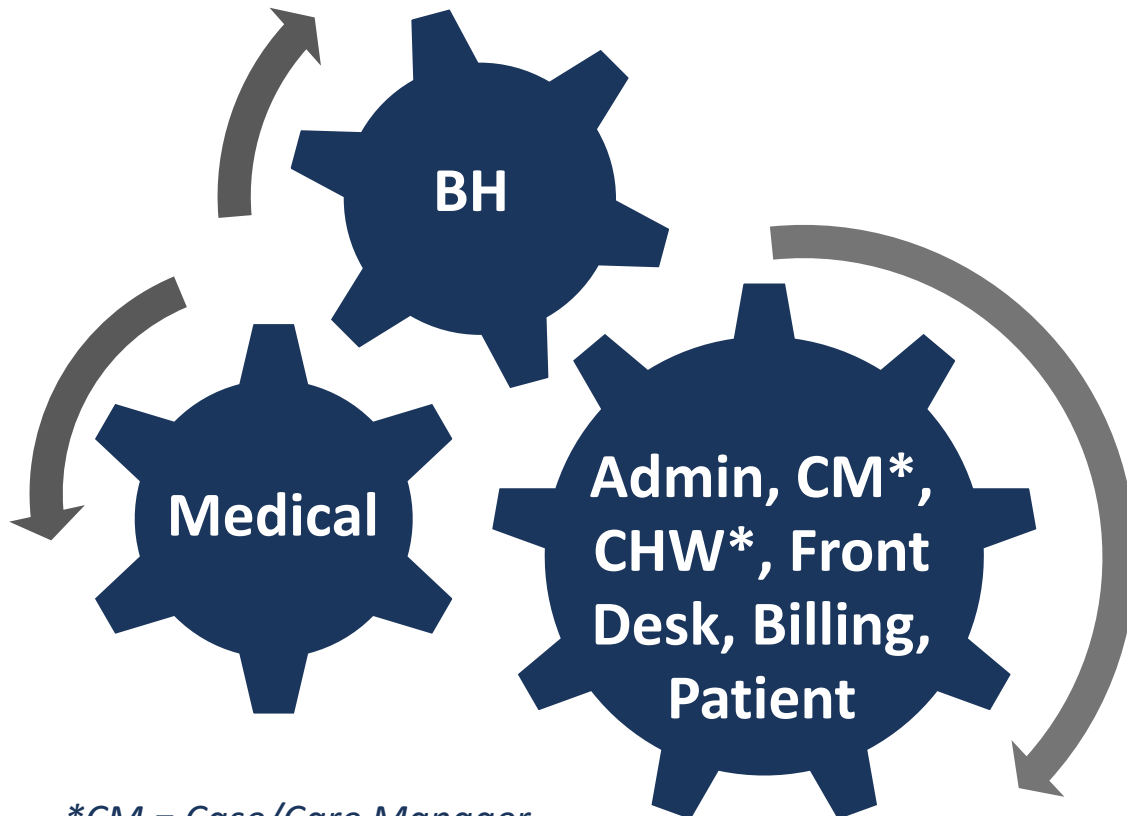
This Week We Focus on Clinical Systems



“Every system is perfectly designed to get the results it gets.”

- W. Edward Deming

What Are Integrated Clinical Systems?



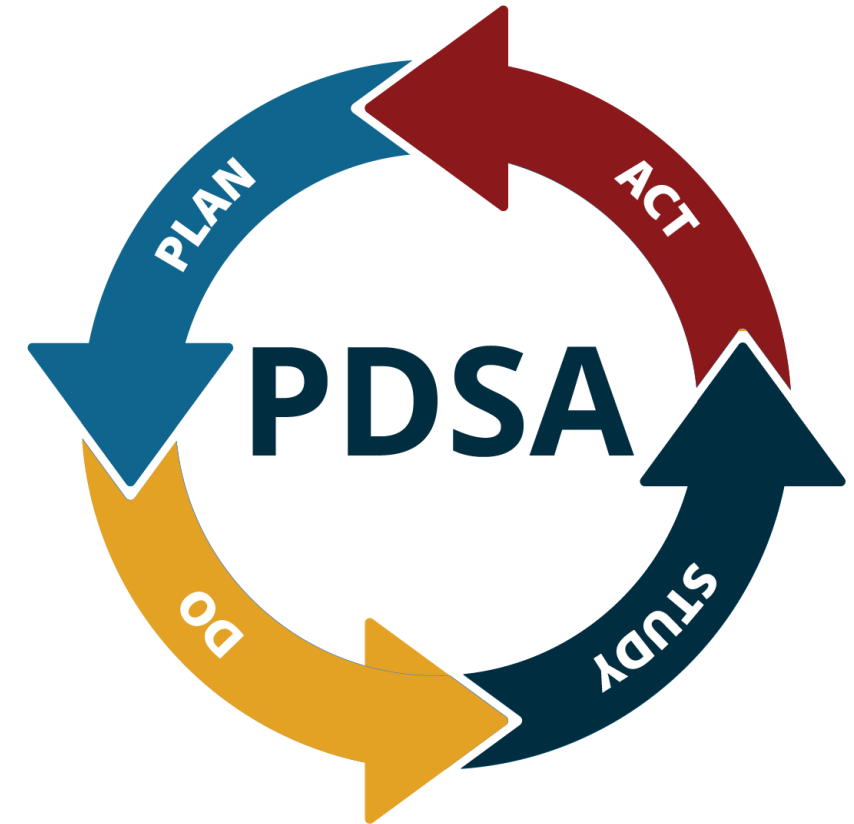
**CM = Case/Care Manager,
CHW = Community Health Worker*

Effective, sustainable integrated care systems leverage all members of the care team with a strong focus on function over title and shared responsibility for patient care.

Is each member working to the highest capacity of their function?

Integrated Clinical Systems Reflection and Assessment

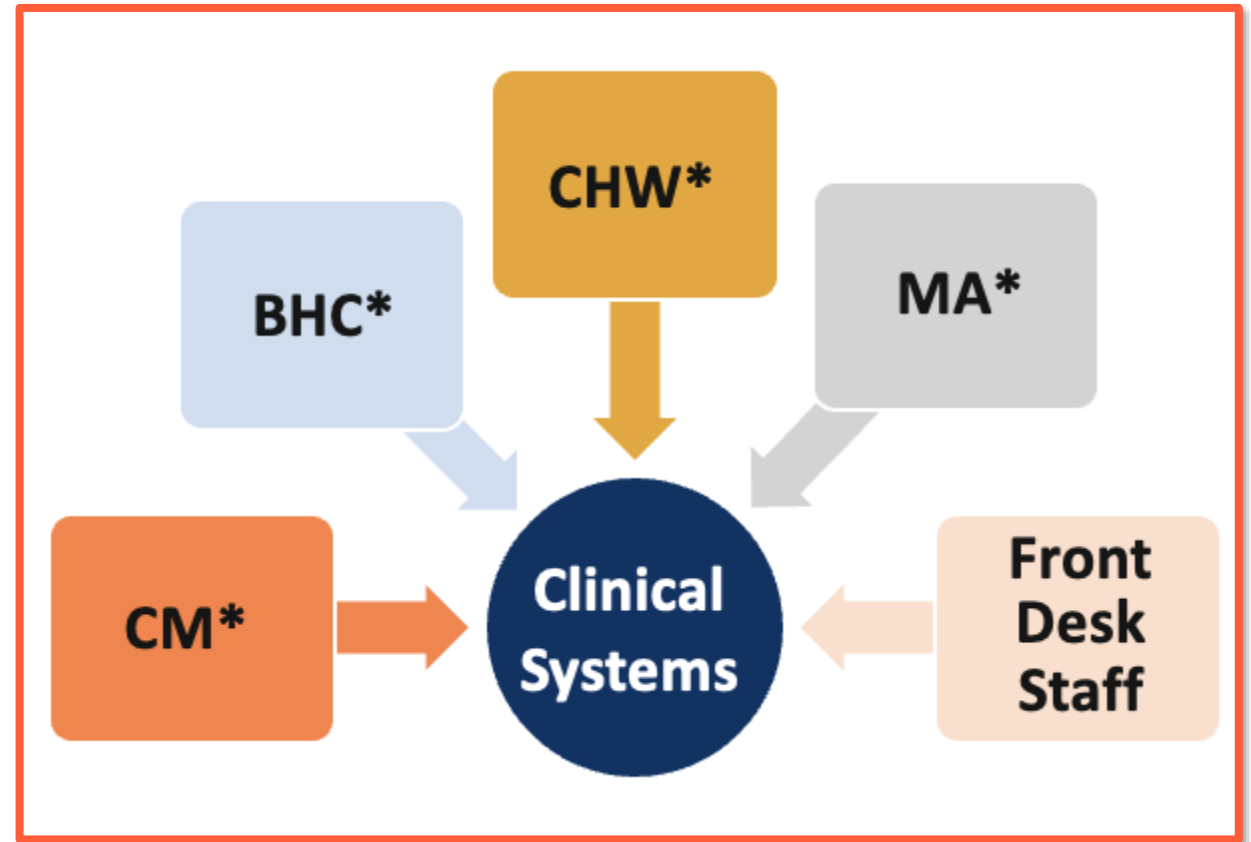
- Thinking of the 'legs' of your clinical system:
 - Primary care/medical
 - Behavioral health (BH)
 - Other clinical specialties (e.g., dentists, optometrists, dieticians, etc.)
 - Clinical support (e.g., peers, care managers, patient navigators, etc.)
- Which of your clinical systems 'legs' is the strongest? Why?
- Which one may need some support or reinforcement? Why?



Integrated Clinical Systems: Focus on Function

Who on the team can be leveraged to support clinical systems?

- Implement brief interventions—breathing exercises, screening, connecting to resources, and making referrals
- Conduct outreach to obtain results, reports, and/or updates from external agencies
- Follow up on treatment plan actions and goals
- Track appointment adherence
- Identify other community and organizational supports



**CM = Case/Care Manager, BHC = Behavioral Health Consultant, CHW = Community Health Worker, MA = Medical Assistant*

Strategies to Support an Integrated Clinical System

Effective Integrated Clinical Workflow



Identify patients who would most benefit from BH support

- Populations of focus
- Screening tools and results
- Health databases



Engage patients in treatment/
handoff to care team



Provide treatment/brief
interventions



Monitor and adjust care to
meet changing patient needs



Document and communicate



Assess and revise
scheduling/workflow to fit
patient and provider needs

Integrated Systems Clinical Workflow: Identifying Need

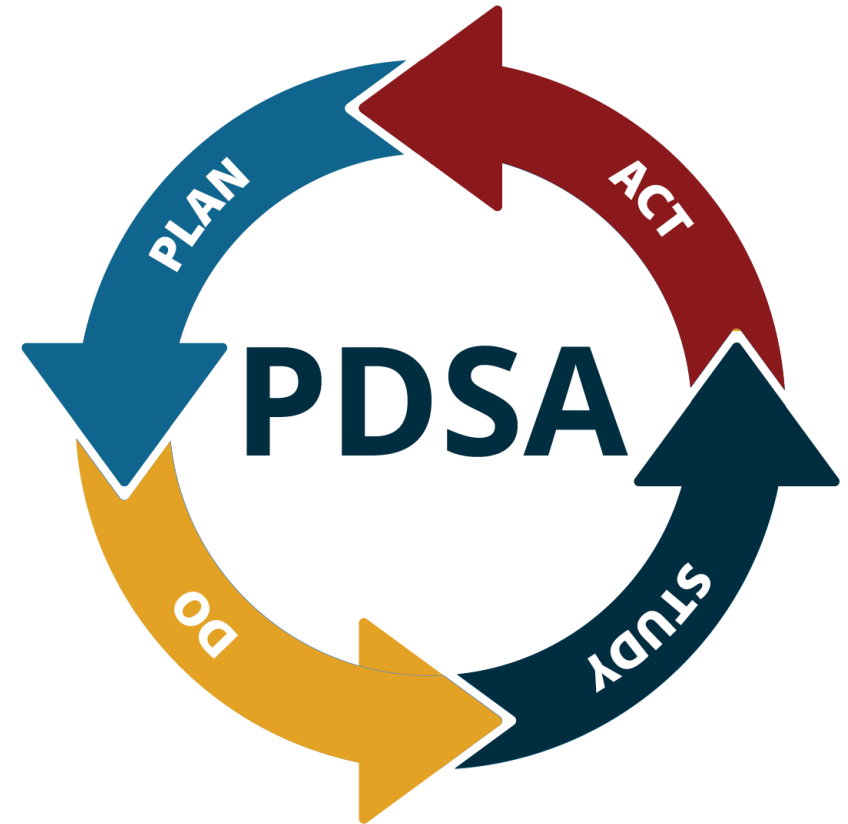
Identify patients who would most benefit from BH support

- Populations of focus
- Screening tools and results
 - Medical
 - BH
- Health databases
- Patient request
- Care team observations



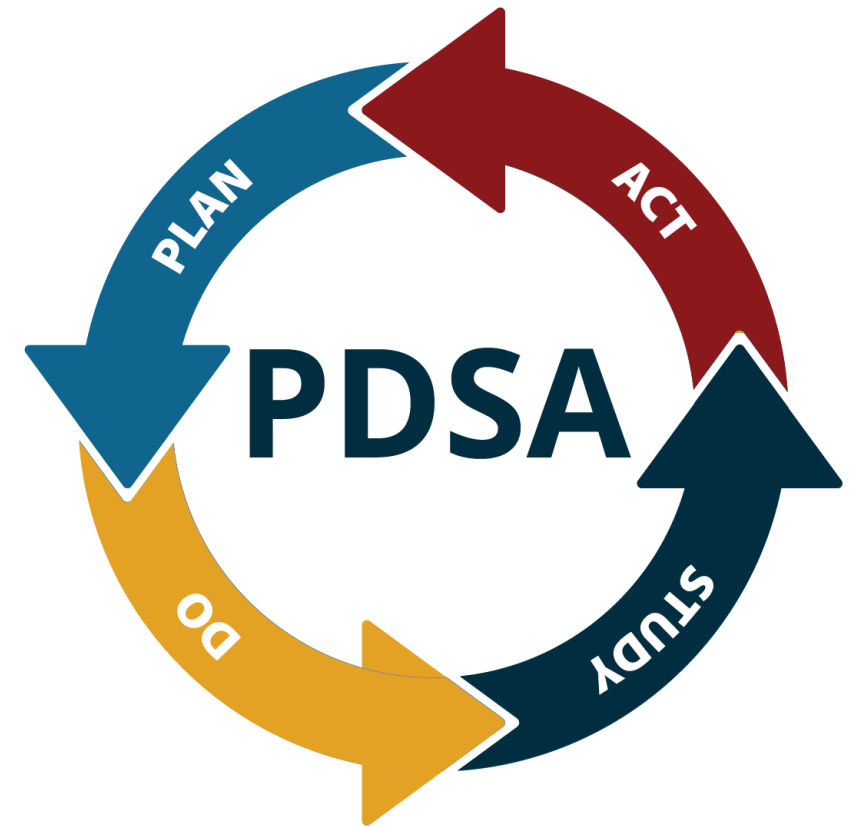
Clinical Systems Workflow Reflection and Assessment

- From whose perspective is an integrated care clinical workflow designed?
 - Patient perspective
 - Provider perspective
 - Clinical support team perspective
- Which care team members within an integrated system inform the workflow?



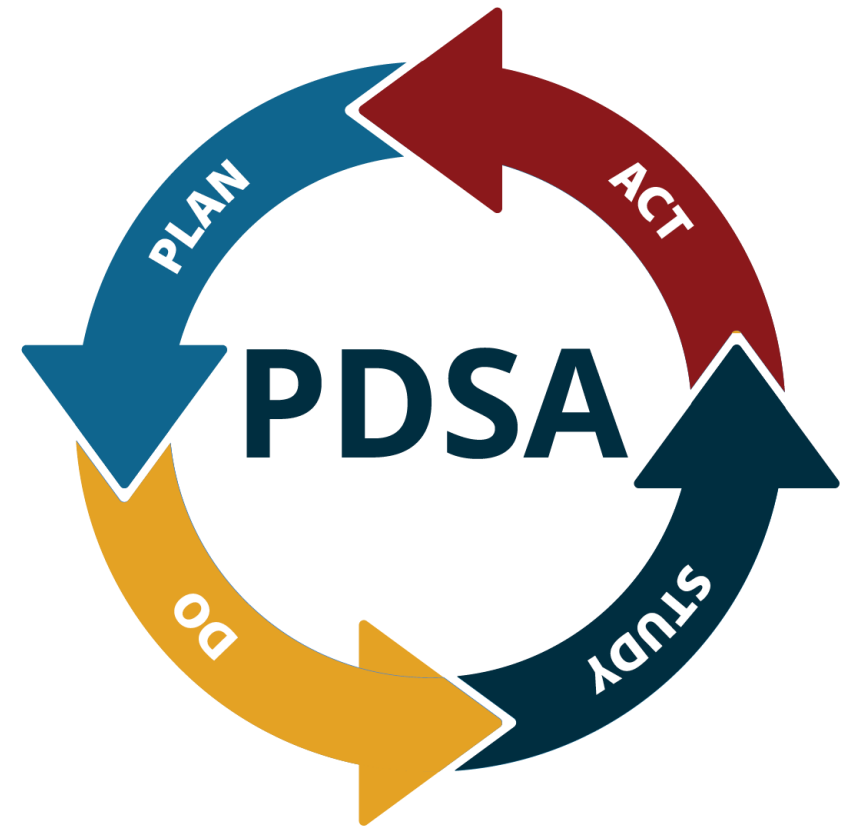
BH Introduction and Handoffs Reflection and Assessment

- Who, how, and when is BH introduced to the patient?
- What clinical pathways are established to identify which patients will receive referral to BH?
- How and between whom are medical and BH handoffs conducted?
- How can you leverage non-clinical support team members to optimize provider time spent with patients in billable encounters?



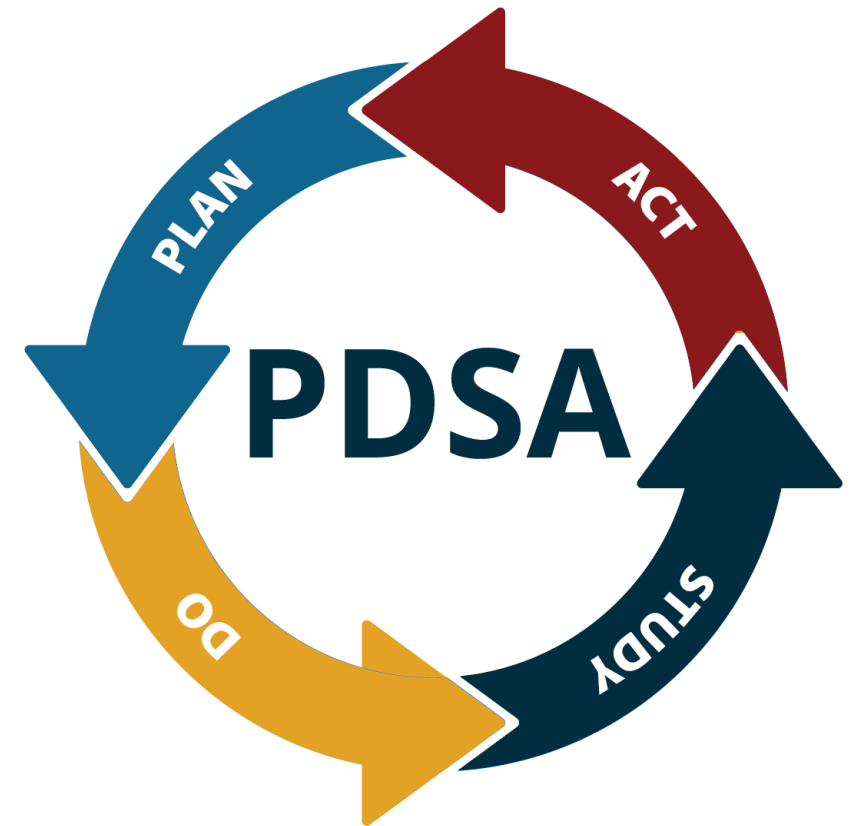
BH Service Provision Reflection and Assessment (1)

- Which interventions specifically require a behavioral health consultant (BHC)?
- Who can be trained to deliver brief interventions (e.g., breathing techniques for anxiety or hypertension)?
- Are BHCs providing 15- to 30-minute brief encounters?



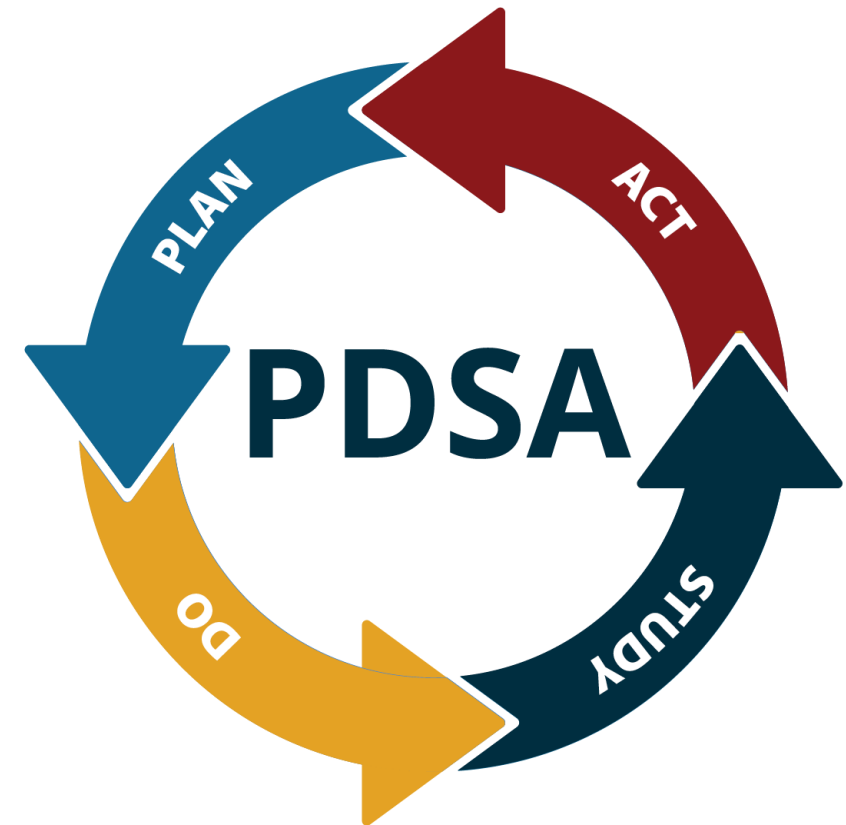
BH Service Provision Reflection and Assessment (2)

- What protocols and time protections are in place for BHCs to provide follow up and short-term treatment?
- Who on the care team can assist with referrals once a BHC identifies the need for a level-of-care escalation?
- What support is provided to the patient during this transition?



Collaborative Care Plan Reflection and Assessment

- Are care plans shared, reflecting all concerns and goals?
 - Medical
 - BH
 - Dietary
- Which team members are involved in care planning and how?
- What mechanisms are in place to monitor and adjust the care plan to meet evolving needs?



Integrated Clinical Systems Strategies: Communication Loop



Enhancing communication among team members

How does your care team collaborate around patient care?

- Verbal or written communication
- Huddles or team meetings
- Shared workspace
- Electronic health record
- Pre- and post-referral communication – closing the loop
- Intentional scheduling practices to promote a team approach

Integrated Clinical Systems: What to Communicate

- What information is included when making a referral within the care team?
 - Diagnosis
 - Screening results
 - Current issue/concern warranting the referral – yours and the patient's
 - Desired outcome
- How are results of a referral and description of interventions documented?
 - Does staff receive training on proper documentation that will optimize reimbursement?

Using communication tools efficiently and effectively improves **patient care**, facilitates **collaboration**, and enhances **sustainability**

Integrated Clinical Systems: Communication Follow Up

Communication within the team and with community providers:

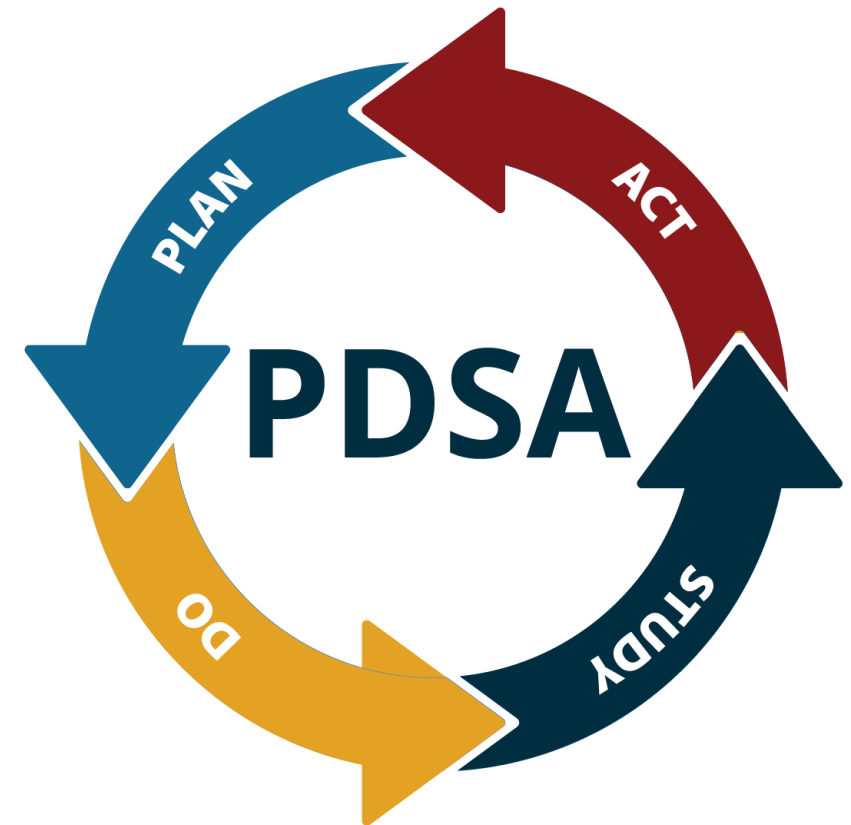
- Who on the care team does, or could be trained to—
 - Make referrals within the care team?
 - Follow up on internal/external referrals
- How are patients included in the communication loop?
 - Whom do patients contact if they encounter challenges accessing referrals? Attending appointments? Following a treatment plan?
 - What mechanisms are in place for patients to report progress and successes with referrals?



Communication Reflection and Assessment

In thinking about the communication pathways in your health center:

- What does your team do well?
- What could be improved?
- Are there new communication strategies you could adopt at your health center?



Training to Support Clinical Systems

**Ongoing
Training &
Education
Supports
Development
of an
Integrated
Care
Environment**

Training begins with the hiring process.

Develop & require onboarding training in your integrated care model.

Provide ongoing refresher trainings in integrated care for all staff, including communication and collaboration skill-building.

Support cross-clinical in-service opportunities.

The Rule of 7: A message must be received at least 7 times, in 7 different ways, to be “heard” and result in behavior change.

Resources/References

Agency for Healthcare Research and Quality. (2022, June). *Implementing the Plan for Integrating Behavioral Health in Your Ambulatory Care Setting*. The Academy. <https://integrationacademy.ahrq.gov/products/playbooks/behavioral-health-and-primary-care/implementing-plan-integrating-behavioral-health-your-ambulatory-care-setting>.

See topics under "Preparing the Infrastructure in Your Setting"

Continuing Education (CE) Opportunity

- We offer BH CEUs for participation in BH/SUD TA events.
- You must attend the event and complete the online Health Center TA Satisfaction Assessment form after the event (2–3 minutes).
- A link with instructions will be provided at the end of the session.
- CE certificates will be sent within 5 weeks of the event from the Health Center BH/SUD TA Team via Smartsheet
<user@app.smartsheet.com>



This course has been approved by JBS International, Inc. as a NAADAC Approved Education Provider, for educational credits. NAADAC Provider #86832, JBS international, Inc. is responsible for all aspects of their programming.



JBS International, Inc. has been approved by NBCC as an Approved Continuing Education Provider, ACEP No. 6442. Programs that do not qualify for NBCC credit are clearly identified. JBS International, Inc. is solely responsible for all aspects of the programs.

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.

Thank you for your time!



<https://www.surveymonkey.com/r/CoP1Session5>

Accessing Training and TA Opportunities



EMAIL US

bphc-ta@bizzellus.com



VISIT THE TA PORTAL

bphc-ta.bizzellus.com



SUBSCRIBE TO THE HUB IN FOCUS

bphc-ta.bizzellus.com/subscribe

Scan the QR code to subscribe and watch for updates in the Hub in Focus regarding additional TA opportunities



Thank you!

See you on

Wednesday, September 24

2:00 p.m. to 3:00 p.m. ET



Office Hours
Wednesday, September 10, 2025
3:00 p.m. to 3:30 p.m. ET