

Community of Practice (CoP) Behavioral Health Strategies in Primary Care

October 14, 2025

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

Office Hours

3:00 p.m. to 3:30 p.m. ET

Session Seven

Assessing Patient Needs and
Developing a Plan to Support
New Skills in Practice

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>.



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Session Facilitator

Laura Ross, MS, LMFT, CCTP, CTMH

Technical Expert Lead

JBS International, Inc. (JBS)



CoP Overview and Schedule

- This CoP occurs every other **Tuesday from July 22 to October 28.**
- The CoP sessions run from **2:00 to 3:00 p.m. ET.**
- *Optional office hours* will take place from **3:00 to 3:30 p.m. ET,** immediately after each CoP session.

SESSIONS:

1. *Identifying and Addressing Common Behavioral Health Conditions of Health Center Patients*
2. *An Approach to Team-Based Care*
3. *Use of Structured or Semi-Structured Interventions*
4. *Stages of Behavior Change & Increasing Patient Motivation for Improving Health Outcomes*
5. *Core Evidence-Based Behavioral Health Intervention Strategies – Part 1*
6. *Core Evidence-Based Behavioral Health Intervention Strategies – Part 2*
7. ***Assessing Patient Needs and Developing a Plan for Supporting New Skills in Practice***
8. *Plan to Practice: Next Steps for Enhanced Care*

Today's Agenda



Session Six Reflection

- Core Evidence-Based Behavioral Health Intervention Strategies: Problem-Solving and Behavioral Activation
- Opportunities for Plan-Do-Study-Act (PDSA) Cycles



Patient-Directed Treatment Planning



Clinical Follow-up to Support Skills Transfer



Peer-to-Peer Discussion

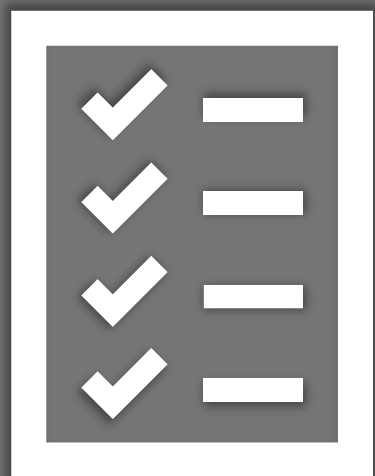
Session Objectives

Participants of today's session will be able to:

- Describe patient-directed treatment planning.
- Identify elements of an effective treatment plan/care plan.
- Design and implement a collaborative team approach to follow up with patients to support the adoption of new skills in practice.



Patient-Directed Care Planning



A patient-directed care plan includes patients' health priorities, health center priorities, incremental strategies, and available resources.

- Enhancing patient engagement in care plan development and implementation
- Planning for contextualized care
- Aligning care with patient health priorities
- Negotiating relevant goals

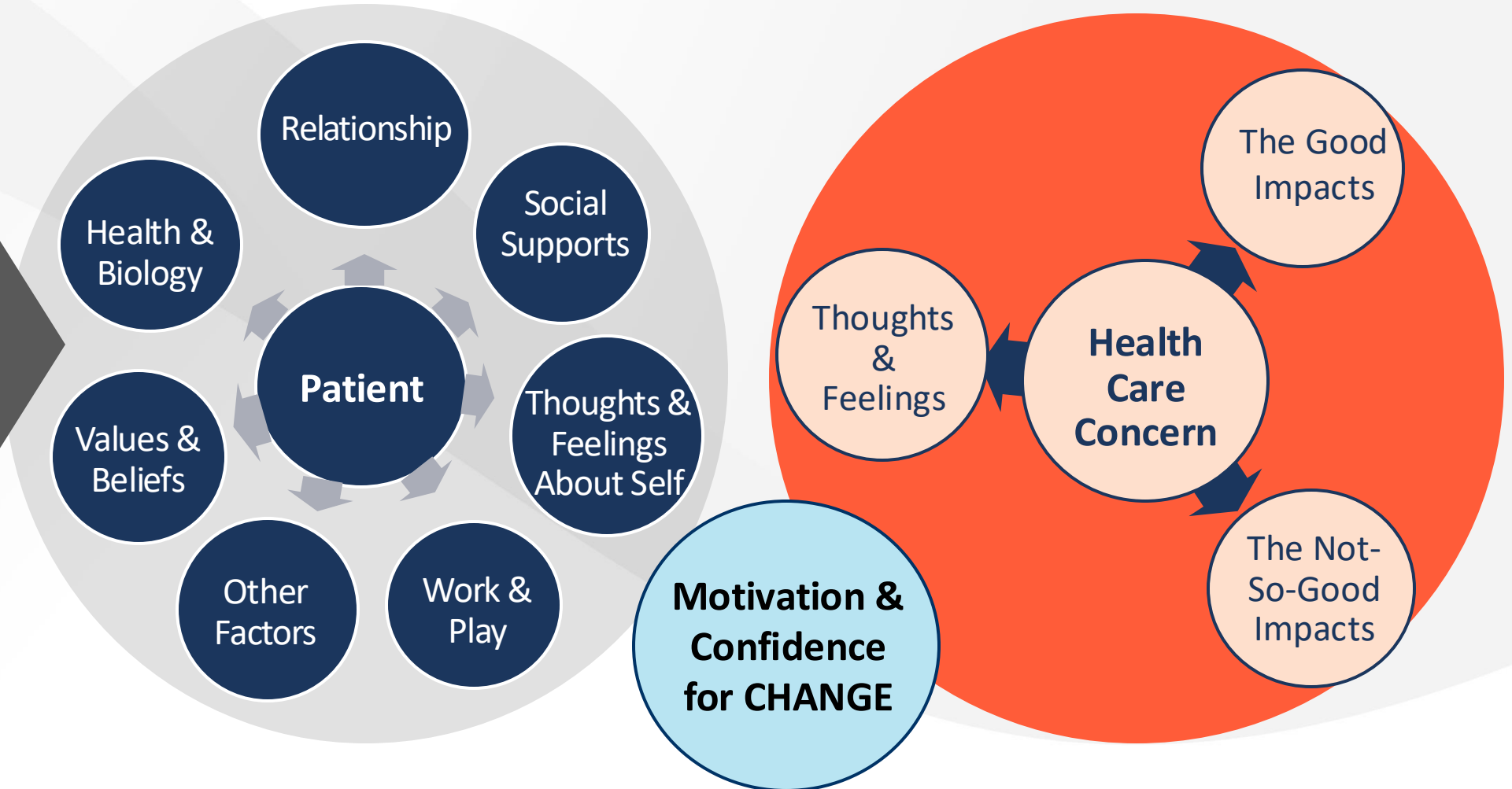
An Evidence-Based
Conversational
Platform for
Problem-
Solving:
Motivational
Interviewing
(MI) & MI Spirit



Contextual Understanding Is Broader than Biology

EXPERIENCES

- As adults
- As children



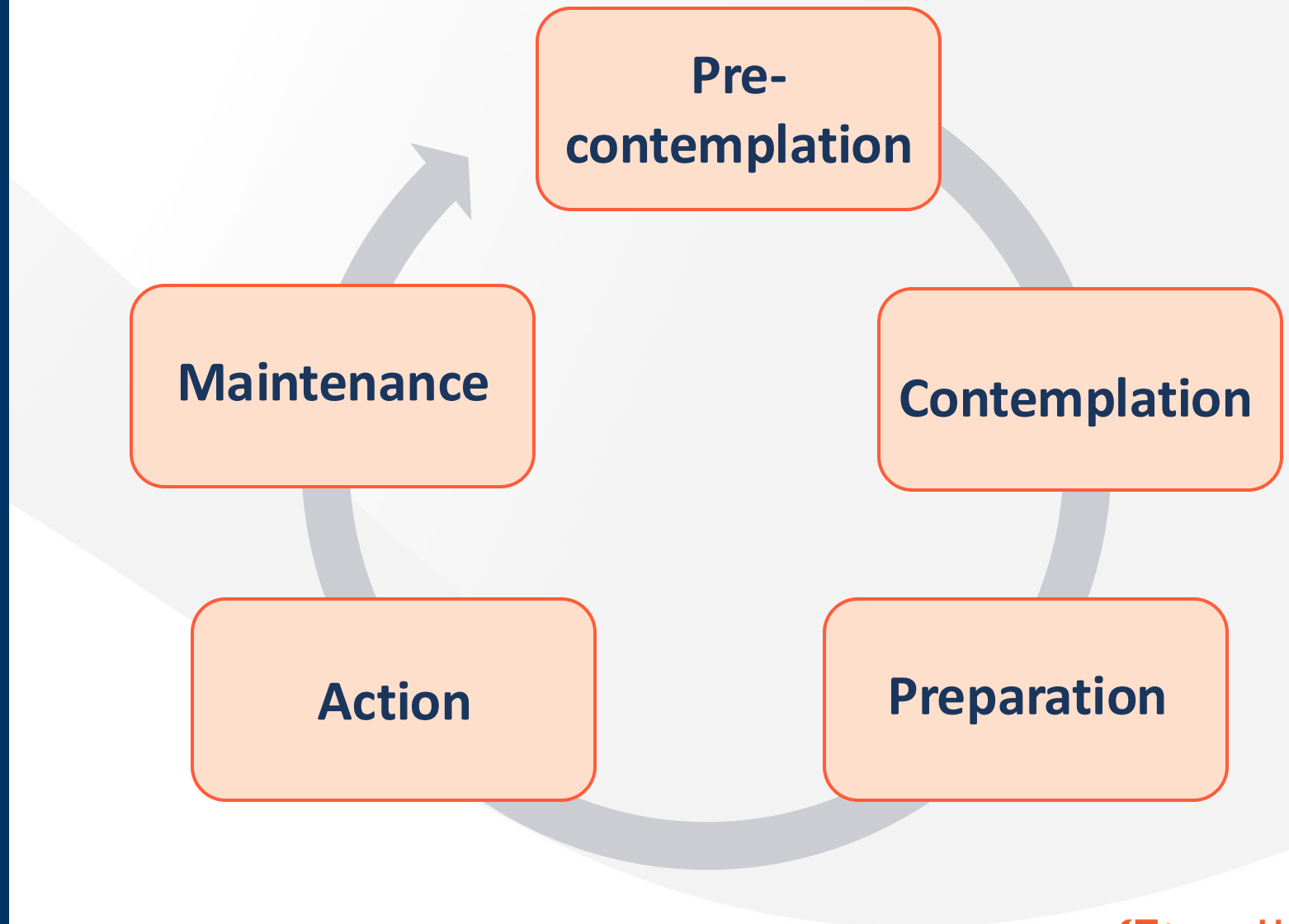
Recall Screening Data to Inform Patient Care

- Screening, as the first step of workflow, determines risk level of behavioral factors.
- Interventions, levels of care, and referrals for specialty care follow risk stratification.



In Which Stage(s) Might We Introduce Behavior Change Strategies to Patients?

Selecting Clinical Interventions Strategically



Brief Negotiated Interview (BNI)

- The BNI, a semi-structured interview process based on MI, is an evidence-based practice that may be performed in as little as 5 to 15 minutes.



Personal Awareness Through Behavioral Therapy

Cognitive Behavioral Therapy (CBT)

CBT to address intrapersonal skills: building personal awareness (mindfulness), skill-building, and self-monitoring progress.

- **Alignment with patient's treatment goals**
- Intervention supporting skills development:
 - Acquiring skills that support health behavior
 - Managing powerful emotions, such as fear or anger
 - Addressing negative and self-defeating thoughts (e.g., depression)
 - Enhancing social support / accountability partners

Use of Structured and Semi- Structured Interventions

- Integrating MI and CBT
- Focus on aligning health care/patient goals
- Conducting skills-focused therapy



Collaboration/Partnership



Autonomy/Acceptance



Empowerment



Compassion

Behavioral Activation (BA)

A practical application for treating depression and anxiety



What Is Behavioral Activation?



A structured, therapeutic intervention that supports skill building, active learning, and patient empowerment.

- Focuses on reducing escape and avoidance behaviors, self-defeating thoughts, and mood-dependent behavior.
- Relies on action planning outside of the clinical session to:
 - Change self-limiting, negative thoughts and behaviors
 - Connect with sources of reward in their lives
 - Solve life problems
 - Increase self-efficacy

Patient-Directed Care Plans

Creating Goals for the Care Plan

SMART Goals: Be specific regarding strategies and tasks that will be used to reach one's goals.



Specific



Measurable



Achievable



Realistic



Time-Limited

Sample Change Plan

Sample Change Plan Worksheet

- The behavior change I want to make:
- How important is it to make these changes? (1–10 scale)
- How confident am I that I can make these changes? (1–10 scale)
- The reason(s) I want to make these changes are:
- The steps I plan to take in changing are:
- Resources/people I may need to help me (person; kind of help):
- How I will know my plan is working:
- Some potential barriers to carrying out my plan are:

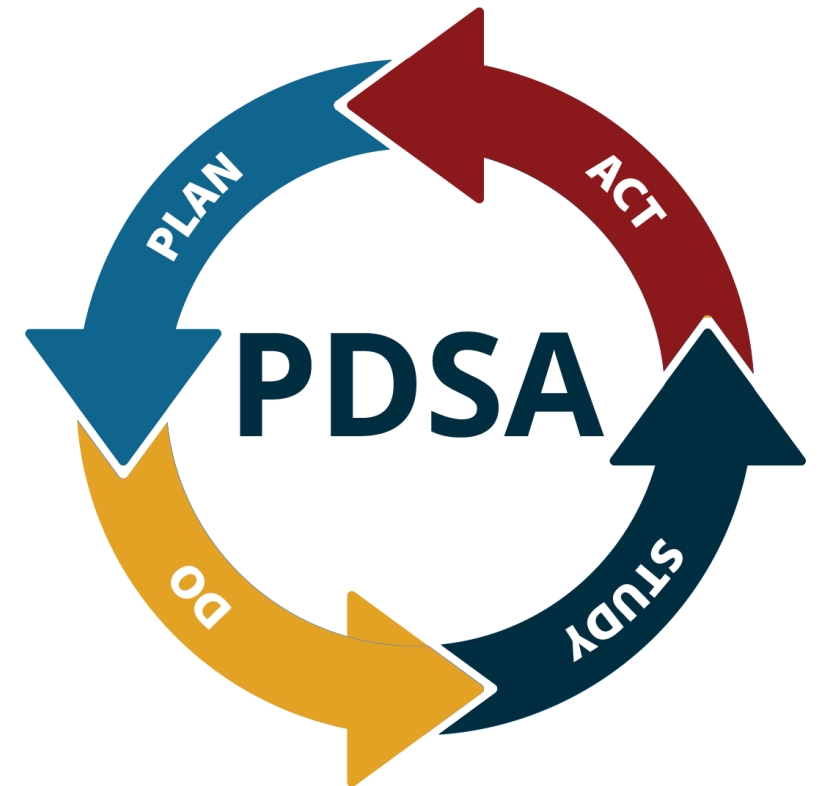
Care Plan Follow-up

Strategies for Care Plan Follow-up

- Identify the patient's preferred modality for follow-up (e.g., secure messaging, phone call).
- Confirm the frequency of follow-up with patient and/or referral provider(s).
- Ensure care team access to the care plan in the electronic medical record (EMR).
- Notify care team of care plan effective date and expectations for follow-up (which care team members can/will be involved, frequency, documentation of outcome, and notification of the care team that a follow-up has been completed and can be accessed in the EMR).
- Establish a lead point of contact for care plan adjustments/alternate planning based on the patient's experiences with barriers and progress with milestones.

Care Plan Reflection and Assessment (1)

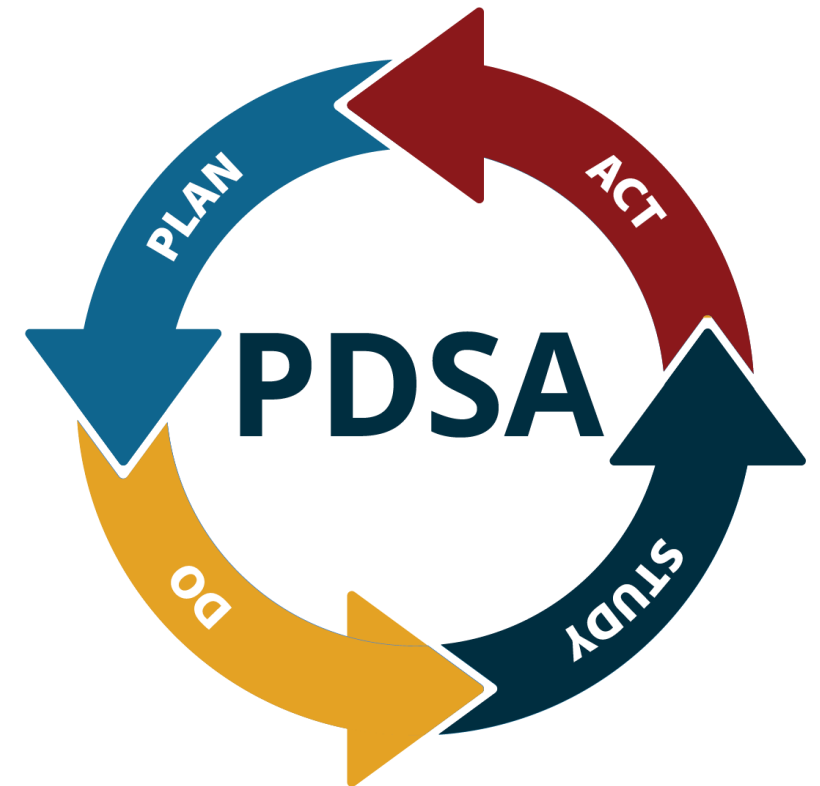
- Currently, what factors are used to inform patient care planning? What screening tools, data, or other factors may strengthen care plans?
- How does your care team identify and incorporate a patient's health priorities in care planning?



Care Plan Reflection and Assessment (2)

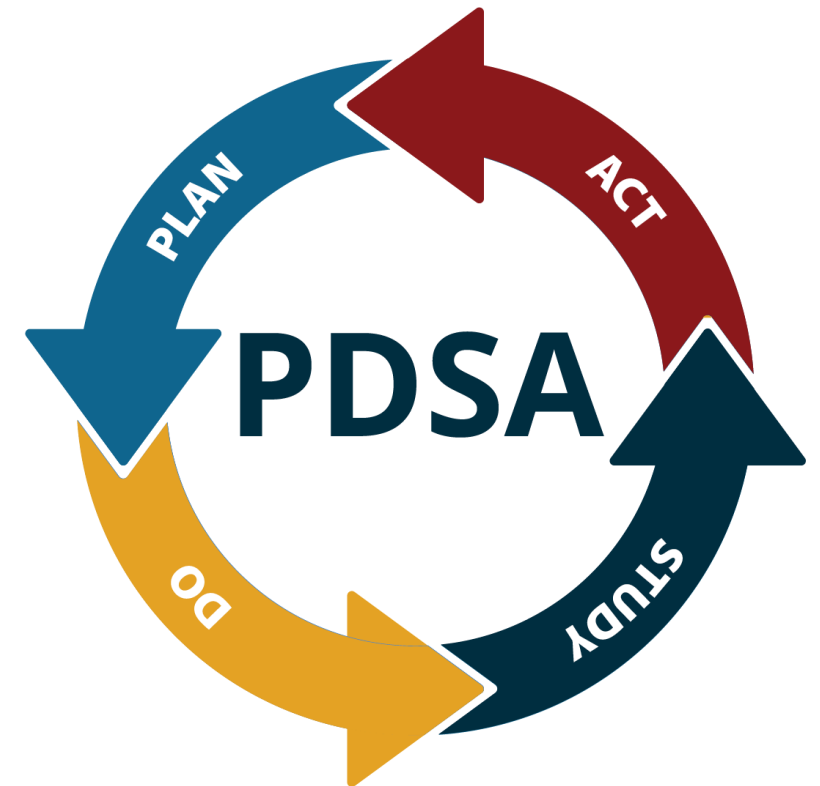
Which of the following approaches/structured interventions might be employed to identify SMART goals for a patient-directed care plan?

- Motivational Interviewing
- Brief Negotiated Interview
- Cognitive Behavioral Therapy
- Behavioral Activation



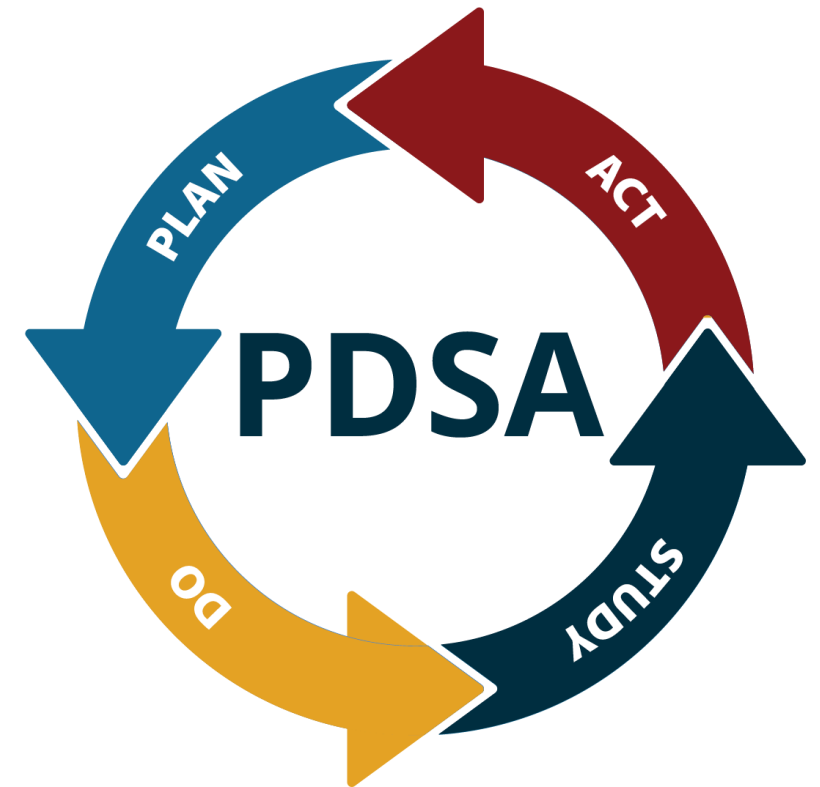
Care Plan Reflection and Assessment (3)

- Which members of the care team may participate in the follow-up on the patient's care plans?



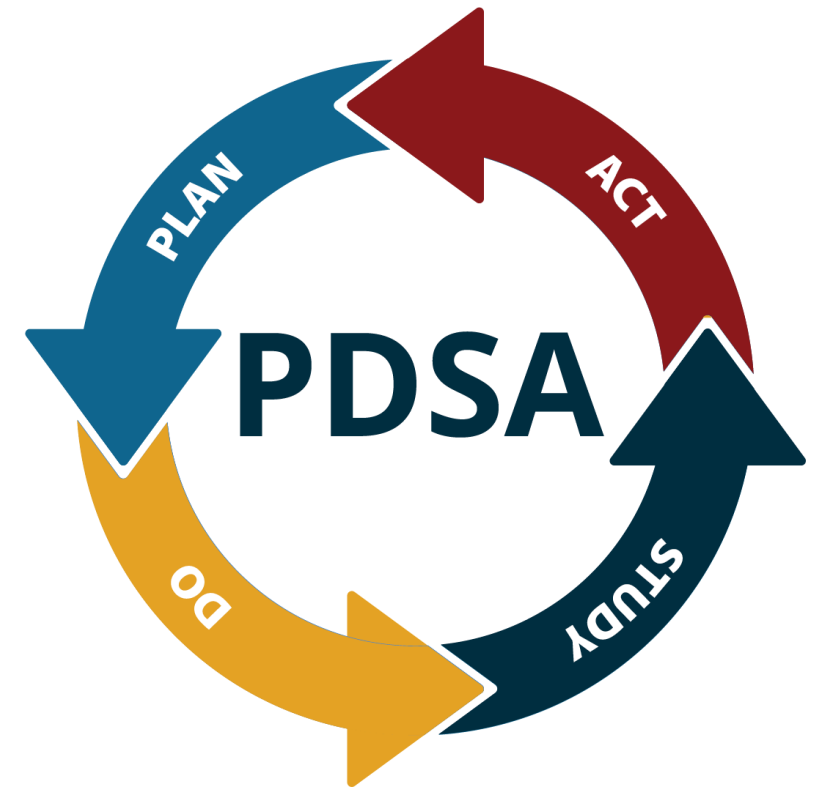
Care Plan Reflection and Assessment (4)

- How might patient-directed care planning improve health outcomes for your patients?



Care Plan Reflection and Assessment (5)

- What one or two action steps might your health center take to enhance patient-directed care planning with your patients?
- What one or two action steps might you take to enhance patient-directed care planning in your center?



Q&A



Resources: Integrated Care Models

- National Institute on Drug Abuse (NIDA). (n.d.). *NIDAMED: Clinical resources*. <https://nida.nih.gov/nidamed-medical-health-professionals>
- SAMHSA. (2019). *Enhancing motivation for change in substance use disorder treatment* (Updated 2019). Rockville, MD: SAMHSA. <https://library.samhsa.gov/sites/default/files/tip-35-pep19-02-01-003.pdf>

Accessing Training and TA Opportunities



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



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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/CoP3Session7>

Thank you!

We'll see you on October 28,
2:00 to 3:00 p.m. ET



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Tuesday, October 14, 2025
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