



# Community of Practice (CoP) Integrating Addiction Treatment Services Into Primary Health Care

## Mental Health/Substance Use Disorder Integration Technical Assistance

*January 8, 2026*

Health Resources and Services Administration (HRSA), Bureau of Primary Health Care (BPHC)

**Vision: Healthy Communities, Healthy People**



# Disclosure

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*This webinar was produced for the Health Resources and Services Administration (HRSA), Bureau of Primary Health Care under contract number 47QRAA18D00FZ/75R60224F80097.*



## Session Six

# Managing Specialist Referrals



# Today's Agenda



Welcome, Recap from Previous Session, Objectives



Referrals to Treatment Based on Screening/Assessment Results



Reflection and Assessment: Interactive Discussion and Plan-Do-Study-Act (PDSA) Activity



Session Wrap-Up and Office Hours



# Your CoP Facilitators



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# Session Objectives

**Participants of today's session will be able to:**

- Apply communication strategies to manage referrals to specialized treatment based on screening/assessment results
- Describe the components of a sustainable referral network

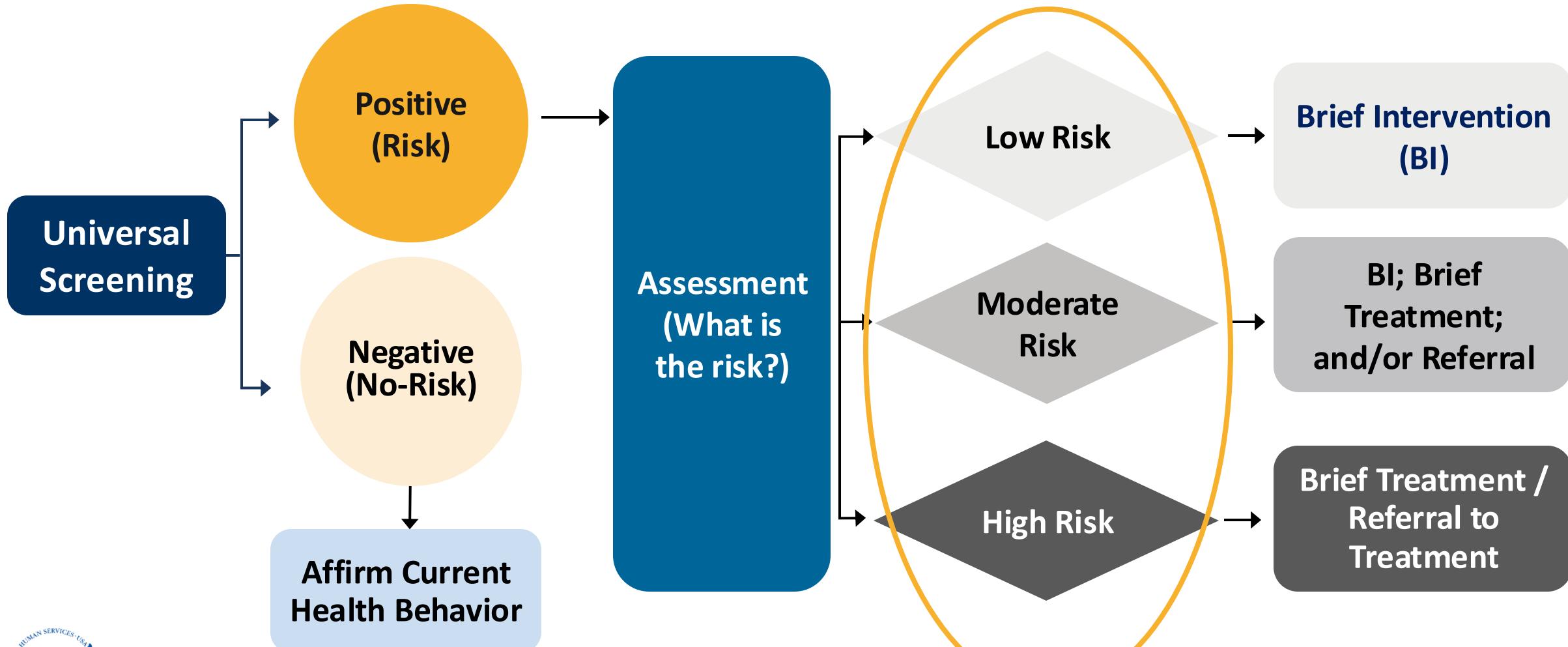


# What is Referral to Treatment?

- Connects patients to **more specialized and supportive services**
- Follows **coordinated decision-making** across different providers (e.g., medical, mental health) and services
- Goals:
  1. Determine an appropriate mental health (MH)/substance use disorder (SUD) or other specialty treatment program
  2. Facilitate patient engagement in MH/SUD treatment services



# What Level of Acuity Can Your Health Center Manage?



# Patient-Directed Referral

Referral may be a process rather than a one-time event.

## What triggered the referral?

### When?

- After initial intake/assessment
- Change in patient status

### How?

- Solicit the patient's feedback on the offered referral
- Explain the potential risks and benefits of going through with a referral
- Follow the patient with an updated treatment plan that includes a specialist and/or different level of care



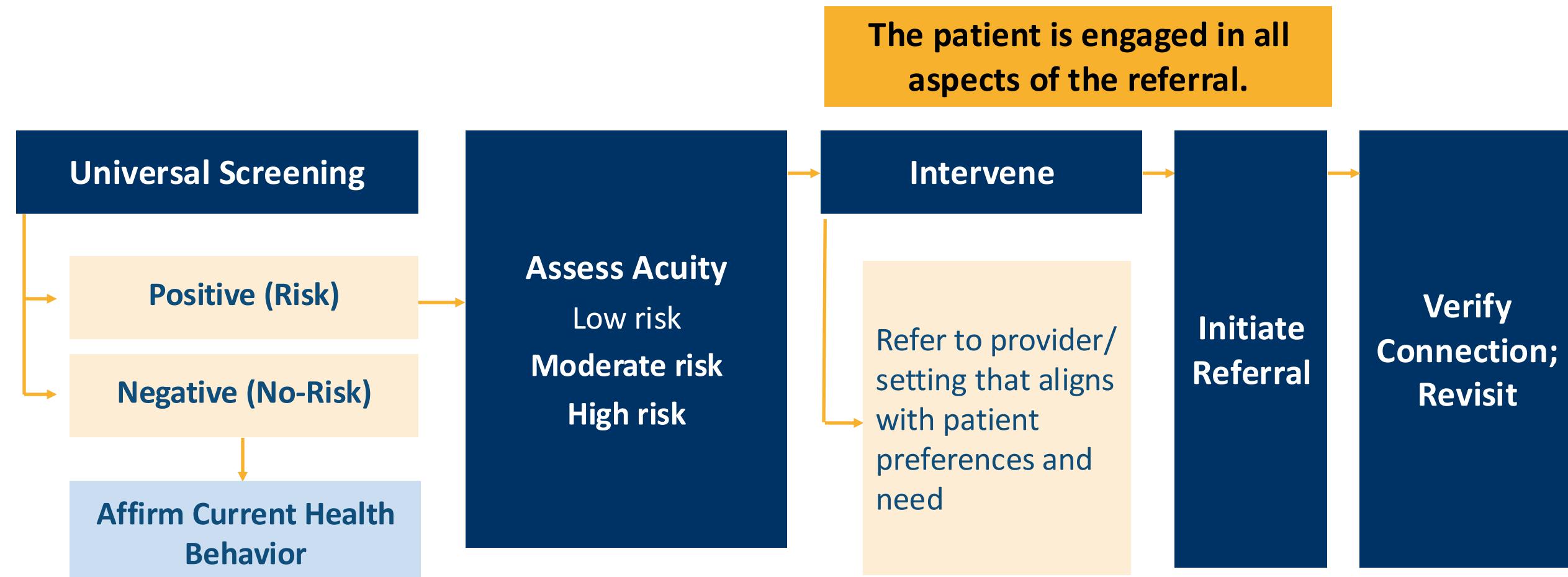
# Creating a Change Plan

The patient and provider partner on a plan that aligns with their treatment goals, perceived barriers, and improved health outcomes.

- Provide guidance on treatment intensity
- Identify barriers and support
- Offer a menu of options to address barriers
- Timeframe to reassess the plan
- Elicit feedback



# Sample Referral Workflow



# Referrals to Treatment



- How are referrals to treatment handled in your health center (i.e., in-house, community provider)?
- Who coordinates the referral?
- Do you have a feedback loop on referrals?
- What works well?
- What opportunities for improvement exist?



# Discussing Screening/Assessment Results



- A network of multiple community organizations and providers to refer to/from your health center
- Feedback loops, mutual accountability, and clear workflows support sustainability

# Key Components of a Referral Network

## Learning SUD treatment resources in your community

- Mental health and substance use disorder providers, SUD treatment, criminal justice, social support, community groups, etc.

## Developing formal agreements

- Define communication expectations (data privacy and 42 CFR Part 2)
- Standardize referral forms/templates

## Incorporating referrals into the workflow

- Who initiates? Who tracks? How does hand-off happen? What feedback is shared?
- Use an electronic health record or other tool?

## Assigning quality metrics

- Examples may include number of referrals made, number of referrals accepted, no-shows, time-to-appointment, patient satisfaction, health outcomes



# Strategies for Referral Network Management

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- Maintain an up-to-date referral directory with as many options as possible to align with patient needs
- Invest the time to discuss options with the patient and document the preferences in the care plan
- Build in feedback loops
- Revisit with the patient **and** referral provider/organization



# Reflection and Assessment

Health center's referral to treatment process



Patient's response to treatment

- What is the current progress toward the stated goals? What have you learned from the results so far?
- What is working well that you can continue or expand on?
- What needs to be adjusted or modified in your approach moving forward?



# Q&A



# Health Center Satisfaction Assessment

We'd love your feedback on  
today's session!

Please take 2 minutes to  
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Satisfaction Assessment.

You must complete the  
assessment to claim continuing  
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Thank you for your time!



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# Thank You!



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# Resources/References (1)

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- Substance Abuse and Mental Health Services Administration (SAMHSA). (2024). *Screening, Brief Intervention, and Referral to Treatment (SBIRT)*. <https://www.samhsa.gov/substance-use/treatment/sbirt>
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- National Institute on Alcohol Abuse and Alcoholism. (2025, May 9). Make Referrals: Connect Patients to Alcohol Treatment That Meets Their Needs. The Healthcare Professional's Core Resource on Alcohol. <https://www.niaaa.nih.gov/health-professionals-communities/core-resource-on-alcohol/make-referrals-connect-patients-alcohol-treatment-meets-their-needs>



# Resources/References (2)

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- Office for Civil Rights. (2024, February 8). *Fact Sheet 42 CFR Part 2 Final Rule*.  
<https://www.hhs.gov/hipaa/for-professionals/regulatory-initiatives/fact-sheet-42-cfr-part-2-final-rule/index.html>



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