



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

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



Todd "Akiva" Mandell, MD



Jenny Twesten, MPH

Session Objectives

Participants of today's session will be able to:

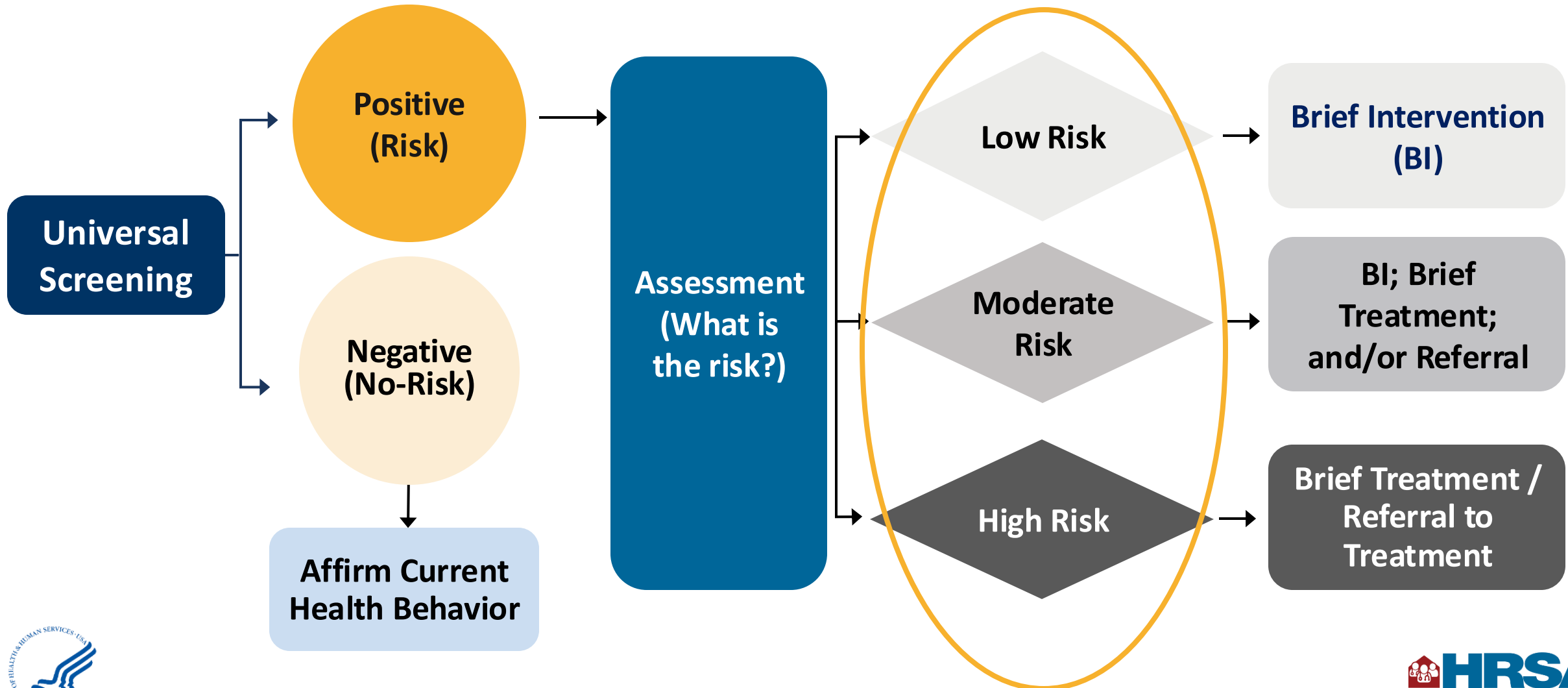
- Apply communication strategies to manage referrals to specialized treatment based on screening/assessment results
- Describe the components of a sustainable referral network



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?

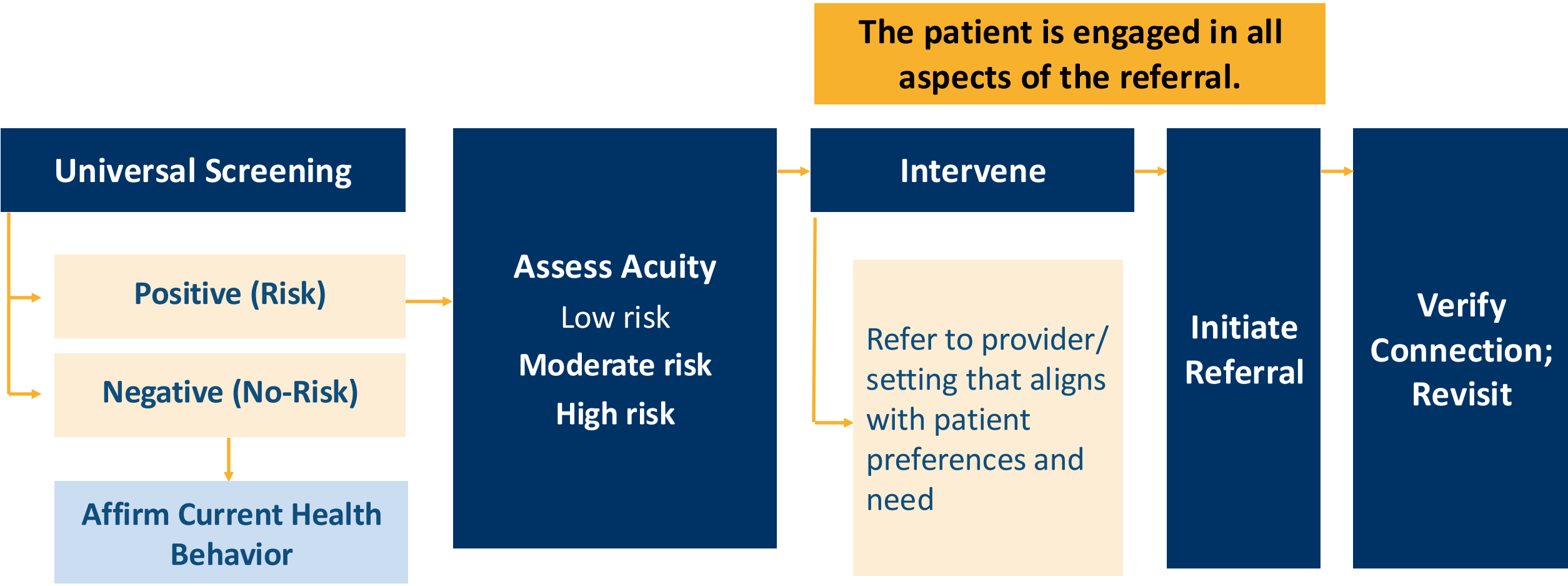
- Solicit the patient's feedback on the offered referral
- Explain the potential risks and benefits of going through with a referral
- Follow the patient with an updated treatment plan that includes a specialist and/or different level of care

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

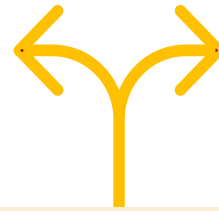


Strategies for Referral Network Management

- 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
complete the Health Center TA
Satisfaction Assessment.

**You must complete the
assessment to claim continuing
education credit.**

Thank you for your time!



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Thank You!



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