

Behavioral Health Specialist (BHS) Referral Flow

Possible ways to utilize the Behavioral Health Specialist:

- **Referral to external provider**
 - For external long-term therapists, psychiatrists, treatment programs, etc. Can be general or specific to patient's insurance, location, and unique challenges.
- **In-clinic BH Services**
 - Behavioral Health Specialist can schedule a consultation with the patient to provide goal setting. At the end of that appt, BHS will work with the pt to determine a plan. May be with BHS for a brief treatment course (three sessions) or pt will leave with several outside referral possibilities that will fit their specific behavioral health needs.

Examples of issues appropriate for Behavioral Health Consult:

- Depression, anxiety, insomnia, stress management
- Work-life integration to help with overall stress and wellness
- Substance use/abuse
- Bereavement/Grief
- Suicidal ideation
- Recent psychiatric hospitalization
- Medication/treatment plan adherence
- Chronic pain
- Difficulties coping with chronic medical illness or new diagnosis
- Uncontrolled diabetes
- Medically unexplained symptoms
- Difficulty controlling hypertension
- Smoking cessation
- Obesity
- Anything else you can think of—just let us know how we can help!

Two ways to refer:

1. Warm handoff - In patient's appointment, PCP introduces Behavioral Health program if need is identified and ask them if they would like to speak with the BHS on site (see script below). Introduce BHS to patient if BHS is at the clinic and available. From here, BHS can provide pt. with quick tools or set up a consult.

OR

2. Send the BHS a task requesting follow up with patient (patients are more receptive to BH outreach if provider introduces the program in appt., letting them know the BHS will follow up with them within the next few days).
 - a. BHS will outreach twice to patients via phone. If there is no response, will task back to provider alerting them that pt did not respond to outreach.

PCP may then try for a warm hand off at future office visit or just complete the task for now as patient may not be ready at this time. Often, we will hear back from patients at a later date when they *are* ready and interested in BH assistance.

Scripting/Tips for Referrals:

- b. We've found that patients are more likely to follow through on BH referral when the PCP has introduced the BHS and/or described the services in an engaging, positive way.
- c. "We are lucky to have _____ in our office who is an expert in helping people with _____ (depression, anxiety, bereavement, stress reduction, work/life integration, insomnia). Are you interested in talking with her about some strategies you can try?"
- d. Use words like "goal setting," "action planning," "coping strategies", "stress management techniques" rather than therapy or counseling.
- e. Tell your patients that your BHS is skilled, warm, helpful, wonderful or whatever words ring true for you. Give them examples of times you have seen the BHS help other patients. Your patients trust you and your advice; we want the BHS to be an extension of you and your care and the more you can express that, the more likely that your patient will be optimistic about BH services and therefore more likely to engage.

What to expect from communication with the Behavioral Health Specialist:

- Task back to let you know if patient has scheduled an appt or if they have been unresponsive to outreach. BHS will close the loop on referrals this way so you know where things landed.
- Chat in daily huddle or moments in passing.
- Notes to be kept in Greenway under "Behavioral Health Progress Note". Will be routed to PCPs after BH session.
- Information about any safety concerns raised and the established safety plan. Please cosign BH notes when a safety assessment and plan are referenced to show your review and agreement with the plan.
- Updates on therapeutic themes and progress as needed

Considerations:

- The BH team does not provide couples or family counseling but can help with referrals to providers in the community who offer these modalities.