

Scripts for behavioral health clinicians to refer to primary care clinicians within a primary care clinic

In many integrated health care settings, behavioral health (BH) services are only available to patients who also receive primary care from the organization. There are rarely enough behavioral health resources for existing clinic patients, let alone those who are not currently receiving medical care there. In addition, many clinicians feel that when clients receive behavioral and medical services under the same roof, the quality of care is higher due to the ease of communication (electronic and otherwise) and convenience for the patient. Sometimes in these systems the patient's first and sometimes primary contact is with a behavioral health provider. In this case, it becomes the BH clinician's responsibility to successfully refer the patient to a primary care provider (PCP), either to establish care or for a consult. The following sample scripts were developed for BH providers and front office staff.

Script 1, BH clinician, to establish care with PCP: (towards the end of session): *Can we change course for a minute so I can give you some important information? (wait for agreement). I know the call center/receptionist let you know that all clients who obtain BH services here also receive medical care here. I wanted to ask you if you have thoughts about your preferences for doctors. I can make some recommendations. (wait for information about gender or age preferences, location or specialties). Thank you for telling me that. I will walk you up to reception and they can help you make an appointment with a PCP who works at (this clinic). They will have access to my notes, and I will make sure to write what you and I talked about - that you (need refills for your medications/need an EKG to make sure no heart problems/follow up to recent ER visit, etc.).*

Script 2, BH clinician, client already established, referral back to PCP indicated: (towards the end of session, unless an appropriate opening is shown earlier in the visit). *Can we change course just for a minute so we can talk about our plan for next steps? (wait for agreement). You shared with me that [reiterate the medical problems the client expressed, such as the medication not being effective or producing unwanted side effects, etc.]. It sounds like you would like to discuss this with your physician, and in that case we can make an appointment today when you leave here to see your him/her. How does that sound?*

Alternate reason for referring to PCP: *When I look at your health record it looks like it has been over six months since you have seen your PCP. As we continue to work together on your [whatever their issues are], I would recommend that you see your PCP for a regular physical, just to make sure your problem [specify] is not being caused by another medical condition. What are your thoughts about this?*

Script 3, Front office/reception/call center, to establish care with PCP: *I would be happy to make you an appointment with one of our BH clinicians. What have you heard about also receiving medical care at our clinic? (wait for what client already knows). Can I give you some information about this? (wait for agreement). At our organization, in order to see our BH clinicians, clients also need to receive their medical care here. What are your thoughts about this? (wait for agreement). Great! I would be happy to make an appointment with one of our medical providers as well so you can establish care with them too.*