



Self-Assessment Checklist for Integrating Behavioral Health and Ambulatory Care

About the Integration Self-Assessment Checklist

The Self-Assessment Checklist for Integrating Behavioral Health and Ambulatory Care (referred to as Integration Self-Assessment Checklist) is based on [AHRQ's Lexicon for Behavioral Health and Primary Care Integration](#). The Integration Self-Assessment Checklist is linked to AHRQ's Integration Playbook so practices can customize their implementation approach for their setting. The self-assessment checklist can be used before, during, or after implementation of the integrated program.

The checklist includes 37 questions. It will take about 10 minutes to complete in one sitting.

How to Use the Checklist

Use the Integration Self-Assessment Checklist to learn where your organization stands with respect to all aspects of integration. This is useful as you navigate integrating behavioral health into your primary or ambulatory care setting.

- Consider having all members of your Planning and Implementation Team complete the checklist and discuss the responses.
- As you plan for integrating behavioral health in your setting, use the checklist and discussion with the Planning and Implementation Team to identify areas of focus and priority.
- As you continue implementing integration into your setting, use the Integration Self-Assessment Checklist to assess your progress and identify areas for improvement.

Planning for Integrating Behavioral Health in Your Ambulatory Care Setting

1. We have a vision for integrating behavioral health that is shared across the organization.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

2. We have an implementation plan for integrating behavioral health.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

3. We have established an integration planning and implementation team.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

Establish Operational Systems to Support Integration

4. We have defined the types of patients who will receive integrated care.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

5. We have defined the roles for clinicians and staff in the integrated care team.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

6. The workspace in our practice maximizes contact between behavioral health providers and medical clinicians.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

7. Our appointment scheduling system allows patients to see the integrated care team right away.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

8. Our practice has a common medical record for behavioral health and medical care.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

Plan for Financial Sustainability

9. We have billing tools or payment systems to get reimbursed for integrated care services.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

10. We have a system for sustained financing of integrated care.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

Collect and Use Data for Quality Improvement

11. We systematically collect data on all patients identified to receive integrated care services.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

12. We systematically track health outcomes for all patients receiving integrated care services.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

13. We use collected data to improve quality of care provided to all patients in need of integrated care.

[If your practice does not collect data, please skip to question 15.]

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

14. We use collected data to improve workflows and processes for delivering integrated care.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

Educate Patients and Families about Integrated Ambulatory Care

15. We have a plan to educate all patients in need of integrated care and their family members on the benefits of integrated behavioral health and primary (or other ambulatory) care.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

16. We educate all patients in need of integrated care and their family members on the benefits of integrated behavioral health and primary (or other ambulatory) care.
[If your practice does not have a plan to educate patients and family members, please skip to question 17.]

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Never	Sometimes	Usually	Always

Obtain Behavioral Health Expertise and Build a Culture of Integration

17. We have identified the type of behavioral health services we need for our practice.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

18. We have trained our primary care and behavioral health providers to work as a team to provide integrated care.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

19. We have a culture of collaboration and teamwork in our practice.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

20. Behavioral health providers are available right away to be a part of our integrated care team.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Never	Sometimes	Usually	Always

Establish Protocols to Identify Patients Who Could Benefit from Integrated Care

21. We have developed a protocol to identify patients who could benefit from integrated care.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

22. We use the established protocol to identify patients who could benefit from integrated care.

[If your practice does not have an established protocol, please skip to question 23.]

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Never	Sometimes	Usually	Always

Tailor the Care Team to Meet the Needs of Patients Identified for Integrated Care

23. We have developed a process for creating an integrated care team matched to the needs of the identified patient.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

24. We use the established process to create integrated care teams matched to the needs of identified patients.

[If your practice does not have an established process, please skip to question 25.]

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Never	Sometimes	Usually	Always

Develop Shared Care Plans for Patients in Need of Integrated Care

25. We have developed a protocol for creating shared care plans for patients in need of integrated care.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

26. The shared care plan is located in a single medical record.

[If your practice does not create shared care plans, please skip to question 29.]

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

27. We engage our patients when creating the shared care plan.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Never	Sometimes	Usually	Always

28. Primary care and behavioral health providers both work from the shared care plan.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Never	Sometimes	Usually	Always

Build Patient Understanding of Setbacks and How to Deal with Them

29. We have developed a plan to educate integrated care patients who have improved to recognize signs of a setback and manage it.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

30. We use the established plan to educate integrated care patients who have improved to recognize a setback and manage it.

[If your practice does not have an established plan, please skip to question 31.]

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Never	Sometimes	Usually	Always

31. We monitor all integrated care patients who have improved to quickly identify signs of a setback.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Never	Sometimes	Usually	Always

Track Patients Identified for Integrated Care and Monitor Their Outcomes

32. We have developed a protocol to quickly identify integrated care patients who are not improving with treatment.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

33. We use the established protocol to quickly identify integrated care patients who are not improving with treatment.

[If your practice does not have an established protocol, please skip to question 35.]

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Never	Sometimes	Usually	Always

34. We use the established protocol to adjust the care plan for patients who are not improving.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Never	Sometimes	Usually	Always

35. We have developed a plan to identify integrated care patients who do not adhere to the followup schedule.

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No	We are working on it	Yes

36. We use the plan to identify integrated care patients who do not adhere to the followup schedule.

[If your practice does not have a plan, please skip this question.]

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Never	Sometimes	Usually	Always

37. We use the plan to reach out to integrated care patients who do not adhere to the followup schedule.

[If your practice does not have a plan, please skip this question.]

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Never	Sometimes	Usually	Always