

Behavioral Health Consultant (BHC) Core Competency Tool

Name of BHC:	Clinic:
EVALUATION CONDUCTED BY	
<input type="checkbox"/> SELF PRE-TRAINING DATE ADMINISTERED:	<input type="checkbox"/> BY TRAINER (NAME):
<input type="checkbox"/> SELF POST-TRAINING DATE ADMINISTERED:	DATE ADMINISTERED:

This tool is used to evaluate the core competencies of the Behavioral Health Consultant (BHC). The BHC Core Competency Form will be used as follows:

1. You will evaluate and rate yourself before and after core competency training.
2. Your PCBH trainer will rate your skills at the conclusion of core competency training. Your goal is an average score of 2.0 or better on scored items in each of the seven competency areas at the end of the week. Some areas will be “N/A” or “not applicable,” as you generally can’t attain competence in some areas without practicing PCBH skills for 4-6 months.
3. Your PCBH trainer(s) will re-rate your skills after you have been in practice for 6 months.
4. We encourage you to review this list of competencies and to set your own learning objectives. Your pre-training ratings will help your trainer plan strategies for addressing your individual training needs optimally
5. This tool will also be used for input on your annual performance appraisal.

Core Competency Assessment Schedule			
Before 1 st Full-Week Training	After 1 st Full-Week Training	After 6 Months of Practice	Annual Performance Appraisal
Evaluate Self	Evaluate Self Trainer Evaluates	Evaluate Self Trainer Evaluates	Supervisor Evaluates

The BHC-A Core Competency Tool includes seven basic areas of knowledge and skill development	Competency is assessed using a rating scale of 1 to 3
I. Clinical Domain: Brief Interventions Skills II. Clinical Domain: Pathway Services Skills III. Documentation Skills IV. Consultation Skills V. Team Performance Skills VI. Practice Management Skills VII. Administrative Knowledge and Skills	1. Needs further training 2. Achieves objectives 3. Excels

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ENTER RATING: **Needs Further Training (1 point)** **Achieves Objectives (2 points)** **Excels (3 points)**

Name of BHC-A:		Clinic:	
SUMMARY OF DOMAIN RATINGS	SELF Pre-Training Average Rating	SELF Post-Training Average Rating	TRAINER Post-Training Average Rating
I. Clinical Domain: Brief Interventions Skills			
II. Clinical Domain: Pathway Services Skills			
III. Documentation Skills			
IV. Consultation Skills			
V. Team Performance Skills			
VI. Practice Management Skills			
VII. Administrative Knowledge and Skills			
TRAINEE SIGNATURE		DATE	
TRAINER SIGNATURE		DATE	

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I. CLINICAL DOMAIN: BRIEF INTERVENTIONS		SELF Pre- Training	SELF Post- Training	TRAINER Rating and Comments
Skill Area	Skill			
Role Definition	1. Gives PCBH brochure to patient to all new patients			
Role Definition	2. Says PCBH introductory script accurately and smoothly			
Role Definition	3. Answers patient questions about PCBH services accurately			
Bio-psycho-social Perspective	4. Conveys an understanding of the connection between biological, psychological, and social health			
Use of Assessments	5. Completes outcome measures in a timely manner; Scores accurately; Uses results to assess treatment response			
Use of Screeners	6. Completes screeners as requested; Scores accurately; Uses screeners to help assess treatment response			
Life Context Interview	7. Uses life context questions to obtain a snapshot of patient's life in initial contact (5-10 minutes)			
Health Risk Questions	8. Asks health / health risk questions			
Identification of Factors Affecting Healthcare Use	9. Asks questions, as indicated, to identify factors that might impede patient use of healthcare services (e.g., head injury, learning disability, health literacy limitations)			

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I. CLINICAL DOMAIN: BRIEF INTERVENTIONS		SELF Pre-Training	SELF Post-Training	TRAINER Rating and Comments
Skill Area	Skill			
Target Problem Identification	10. Identifies referral problem; Uses scaling question to quantify level of patient concern			
Three Ts	11. Uses Three Ts / target problem analysis questions to formulate possible interventions			
Problem Summary	12. Makes problem summary statement and asks for patient verification			
Intervention Development	13. Links recommended interventions to results of analysis			
Evidence-based Interventions	14. Uses evidence-based interventions suited to primary care (and, as indicated, briefly cites and explains evidence to patient)			
Patient Engagement	15. Asks patient to choose among possible interventions			
Behavioral RX Pad	16. Uses behavioral prescription pad or equivalent to note intervention (or supports patient in noting)			
Patient Confidence	17. Uses scaling questions to assess patient confidence in behavioral plan			
Helpfulness	18. At end of visit, asks patient to respond to scaling question regarding helpfulness of visit			

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I. CLINICAL DOMAIN: BRIEF INTERVENTIONS		SELF Pre- Training	SELF Post- Training	TRAINER Rating and Comments
Skill Area	Skill			
Patient Education	19. Uses patient education materials as appropriate			
Target Problem Follow-up	20. Uses scaling question to assess level of patient concern about referral problem in follow-up visits			
Patient Adherence	21. In follow-up visits, asks patient about implementation of behavior change plan			
Support of Behavior Change Plans	22. Provides face-to-face and/or telephone call support to patients concerning implementation of behavior change plans			
Cultural Competence	23. Attempts to understand the patient’s cultural perspective on health and health problems and/or seeks resources as needed			
Cultural Competence	24. Uses information about patient’s culture to understand patient’s expression of psychological distress and/or seeks resources as needed			
Cultural Competence	25. Adapts assessments, screeners, and interventions to patient’s cultural perspective and/or seeks resources as needed			
I. CLINICAL DOMAIN: BRIEF INTERVENTIONS – Total Points:				
Average (divide by 25, or the number of skills rated if fewer):				
BHC-A Comments / Concerns				

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I. CLINICAL DOMAIN: BRIEF INTERVENTIONS		SELF Pre- Training	SELF Post- Training	TRAINER Rating and Comments
Skill Area	Skill			
Trainer Comments / Recommendations				

II. CLINICAL DOMAIN: PATHWAY SERVICES		SELF Pre- Training	SELF Post- Training	TRAINER Rating and Comments
Skill Area	Skill			
Population-based Care	26. Can state the difference between a case-focused approach and a population-based approach to patient care			
Population-based Care	27. Able to identify opportunities for providing care along a continuum from primary prevention to tertiary care			
Quality Improvement Methods	28. Can briefly describe ways to measure clinical performance and assess quality of care (e.g., Find, Organize, Clarify, Understand, Select, Plan, Do, Study, Act or FOCUS-PDSA)			
Population-based Care	29. Participates in development of pathways intended to promote health / prevent health decline			
Pathway Activities	30. Participates in development of pathways for chronic conditions			
Pathway Activities	31. Participates in development of pathways for high impact / high prevalence conditions other than chronic disease			
Pathway Activities	32. Provides assessment and intervention activities according to pathway instructions			

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II. CLINICAL DOMAIN: PATHWAY SERVICES		SELF Pre-Training	SELF Post-Training	TRAINER Rating and Comments
Skill Area	Skill			
Pathway Activities	33. Participates in evaluation of pathway programs (for example, providing documentation and summarizing information)			
Multi-patient Intervention Skills	34. Works with PCCs, RNs, MAs, and BHC-As to provide primary care class services (e.g., drop-in stress management class, group medical visits for chronic pain patients)			
II. CLINICAL DOMAIN: PATHWAY SERVICES – Total Points:				
Average (divide by 9, or the number of skills rated if fewer):				
BHC-A Comments / Concerns				
Trainer Comments / Recommendations				

III. DOCUMENTATION SKILLS		SELF Pre-Training	SELF Post-Training	TRAINER Rating and Comments
Skill Area	Skill			
Concise, Clear Charting	35. Completes brief, specific, accurate notes that enhance team-based care			

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III. DOCUMENTATION SKILLS		SELF Pre-Training	SELF Post-Training	TRAINER Rating and Comments
Skill Area	Skill			
Prompt Charting	36. Completes notes immediately following clinical activity / patient service			
SOAP Format	37. Uses SOAP format or other format expected in Electronic Health Record for all patient visits			
Same-day or Scheduled	38. Documents that visit is same-day or scheduled			
Visit Context	39. Documents visit type: Individual, group, couple, family, telephone			
Initial or Follow-up	40. Documents that visit is initial or follow-up			
Service explained, patient consent	41. If initial visit, documents that PCBH services explained and patient gave verbal consent			
Follow-up Visit #	42. If follow-up visit, documents # of follow-up visit (1st, 2nd, etc.) and date of last visit with patient			
Brief Interventions	43. Documents brief interventions used in visit			
Pathway Services	44. Documents that services were related to a pathway and names pathway			

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III. DOCUMENTATION SKILLS		SELF Pre-Training	SELF Post-Training	TRAINER Rating and Comments
Skill Area	Skill			
Recommendations to Patient	45. Documents specific recommendations to patient			
Recommendations to PCC	46. Documents that visit summary was provided to PCC / RN (e.g., copy of chart note or verbal summary)			
Signature	47. Signs chart note			
Future Appointment	48. Documents plan for future appointment with BHC-A (or indicates no plan of future)			
Future Appointment with PCC	49. Documents plan for future appointment with PCC (or indicates no plan of future)			
Referrals	50. Documents referrals facilitated in patient visits (including MH clinic or SA program)			
III. DOCUMENTATION SKILLS - Total Points:				
Average (divide by 16, or the number of skills rated if fewer):				
BHC-A Comments / Concerns				

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III. DOCUMENTATION SKILLS		SELF Pre- Training	SELF Post- Training	TRAINER Rating and Comments
Skill Area	Skill			
Trainer Comments / Recommendations				

IV. CONSULTATION SKILLS		SELF Pre- Training	SELF Post- Training	TRAINER Rating and Comments
Skill Area	Skill			
Referral Clarity	51. Listens carefully to PCC or RN regarding specific referral concern and / or uses Referral Checklist to specify referral concern for BHC-A visit			
Response to Referral	52. Responds directly to referral question in chart note and in feedback			
Assertive Follow-Up	53. Ensures PCCs receive feedback on patients; Interrupts PCC, when indicated, for urgent patient needs			
Feasible Recommendations	54. Provides recommendations tailored to the pace of primary care (e.g., PCC can implement recommended strategy in 5 minutes or less)			
Participation in Meetings	55. Regularly attends clinical team meetings (based upon clinic standards)			
Brief Presentations	56. Effectively delivers pertinent brief presentations in staff meetings (for example, on evidence for behavioral treatments)			
Provides PCBH Orientation	57. Provides orientation on PCBH program to all new clinic employees			

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IV. CONSULTATION SKILLS		SELF Pre-Training	SELF Post-Training	TRAINER Rating and Comments
Skill Area	Skill			
Curbside Consultations	58. Offers productive, on-demand, and concise consults to PCCs and RNs on both general and patient specific issues, using clear, direct language			
Value-Added Orientation	59. Effectively utilizes downtime by collaborating in PC team activities; such as working on projects/products that improve the PCBH program.			
IV. CONSULTATION SKILLS – Total Points:				
Average (divide by 9, or the number of skills rated if fewer):				
BHC-A Comments / Concerns				
Trainer Comments / Recommendations				

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V. TEAM PERFORMANCE SKILLS		SELF Pre-Training	SELF Post-Training	TRAINER Rating and Comments
Skill Area	Skill			
Fit with Primary Care Culture	60. Understands and operates comfortably in fast-paced, action-oriented, team-based culture of primary care			
Knows Team Member Roles	61. Knows the roles and functions of primary care team members and both assists and uses other team members			
Responsiveness	62. Readily responds to PCC, RN, MA, and BHC-A requests			
Availability	63. Is available during all hours worked in clinic; Uses white board to communicate whereabouts when appropriate; Uses pager to enhance accessibility			
V. TEAM PERFORMANCE SKILLS – Total Points:				
Average (divide by 4, or the number of skills rated if fewer):				
BHC-A Comments / Concerns				
Trainer Comments / Recommendations				

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VI. PRACTICE MANAGEMENT SKILLS		SELF Pre-Training	SELF Post-Training	TRAINER Rating and Comments
Skill Area	Skill			
Triage Efficiency	64. Demonstrates efficiency in triage of patients			
Telephone Visit Efficiency	65. Adheres to a protocol that supports efficient coverage of planned topics and notes start and stop times			
Patient Visit Efficiency	66. Adheres to a protocol that supports efficient coverage of planned topics; Notes start and stop times			
Timely Response to PCC / RN Requests	67. Uses logs to track progress in addressing PCC / RN PCBH program requests			
Guided by Outcomes	68. Uses outcomes to identify strategies for improving PCBH practice (for example, ratio of same-day to scheduled, initial to follow-up, non-pathway to pathway visits)			
Patient Registries	69. Uses patient registries as planned by PC team			
Collaborates on Registries	70. Collaborates on data entry on registries worked by multiple team members			
Community Referrals	71. Makes use of community resources			
Maintains resource lists	72. Develop and maintain up-to-date lists of patient resources (co-located and community)			

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VI. PRACTICE MANAGEMENT SKILLS		SELF Pre- Training	SELF Post- Training	TRAINER Rating and Comments
Skill Area	Skill			
Seeks Assistance	73. Seeks assistance from PCBH Advisor or Program Committee concerning practice management concerns			
VI. PRACTICE MANAGEMENT SKILLS – Total Points:				
Average (divide by 10, or the number of skills rated if fewer):				
BHC-A Comments / Concerns				
Trainer Comments / Recommendations				

VII. ADMINISTRATIVE KNOWLEDGE AND SKILLS		SELF Pre- Training	SELF Post- Training	TRAINER Rating and Comments
Skill Area	Skill			
Template	74. Assures that schedule supports appropriate same-day to scheduled visits ratio (usually 1:1 ratio)			
Adheres to CLINIC Policies and Procedures	75. Adheres to all CLINIC policies and procedures			
Risk Management Protocols	76. Able to describe and discuss how and why informed consent procedures for MH and SA differ from PCBH services; Understands limits of PCBH services			

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VII. ADMINISTRATIVE KNOWLEDGE AND SKILLS		SELF Pre-Training	SELF Post-Training	TRAINER Rating and Comments
Skill Area	Skill			
Risk and Safety	77. Provides risk assessments as indicated by patient presentation; Develops appropriate safety plans			
Documentation	78. Routinely and accurately completes documentation on the same-day of service delivery			
VII. ADMINISTRATIVE KNOWLEDGE AND SKILLS – Total Points:				
Average (divide by 5, or the number of skills rated if fewer):				
BHC-A Comments / Concerns				
Trainer Comments / Recommendations				