

Name of PCC:	Clinic:	
Name of Trainer:	Type of Review: <input type="checkbox"/> ORIENTATION <input type="checkbox"/> TRAINING <input type="checkbox"/> SKILL CHECK	Date Administered:

This tool offers you, as a PCC, an opportunity to self-assess your knowledge and skills related to successful use of the Primary Care Behavioral Health (PCBH) services in your clinic. PCBH staff members include the Behavioral Health Consultant (BHC) and, in the future, may include a Behaviorist Assistant (BA). Your responses will also help your medical director develop plans for on-going training.

When first beginning to work with a BHC, PCCs need information about how to interface with the new team members. After an initial period of practice, most PCCs are ready to learn new clinical skills. This tool helps you navigate this learning process with intention and focus.

The PCC Self-Assessment Tool includes six knowledge / skill development areas. We recommend that you focus on the first four immediately after you begin to practice in the PCBH program and save areas five and six for when you have a solid foundation in the basics. The six areas are:

- I. Interface with BHC
- II. Value-Added Use of BHC
- III. Use of Assessment and Screening Tools
- IV. Documentation Skills
- V. Clinical Skills: Brief Behavioral Interventions
- VI. Clinical Skills: Pathways

A PCBH trainer will teach you the basic skills (areas one through five) when you begin to practice in a PCBH clinic setting. Four to six months later, the trainer will return and provide information and skill practice opportunities for areas five and six.

This is how we recommend that you use this tool.

1. Use it first during your initial training as a check on what you understand and what you still have questions about in areas 1-4. Make a check in the column that describes your situation at the end of training. The column options are:

Untrained: "I have not been trained to do this."
Trained: "I have been trained to do this."
Skillful: "I have the skill to do this consistently with confidence."

2. Use this tool again as a check on what you understand about areas 5-6 after your second training with the PCBH trainer. Indicate your training experience by making a mark in the column that describes your level after training.

Provide your medical director with a copy of your responses at time one and time two. At your request, the BHC and / or medical director will be able to provide you additional reading materials on the PCBH Program. A copy of the PCBH Program manual is available from the Medical Director or the BHC.

PCBH – Primary Care Clinician (PCC) Self-Assessment Tool

I. BHC Interface	Un-trained	Trained	Skillful
1. Understands the roles and responsibilities of BHC			
2. Understands process for having patients triaged and scheduled for same-day visits with the PCB and /or BA			
3. Understands how to direct patients to obtain a future scheduled appointment with a BHC			
4. Provides an accurate verbal description of PCBH services to patients and/or provides patient with the program brochure (for example, says “The BA will help you with housing”).			
5. Understands difference between “warm handoff” and cold handoff			
6. Describes PCBH services including information about the connection between biological, psychological, and social health			
7. Uses PCBH referral script language to lessen stigma and enhance patient acceptance of service			
8. Consistently offers all patients option of same-day (rather than scheduled) visit with BHC			
9. Identifies a primary target problem for BHC visit and obtains patient agreement on target problem focus			
10. Uses Referral Form or equivalent to enhance communication between PCC, patient, and BHC and clarity of target problem			
11. Refers a broad range of referral target problems to BHC (reflective of patients served at clinic), including patients with:			
a. chronic disease(s)			
b. common psychological problems; e.g., depression, anxiety			
c. complaints of family and relationship problems			
d. complaints of stress			
e. health risk behaviors; e.g., tobacco, alcohol, drugs, unsafe sex			
f. needs for skill building; e.g., parenting skills, social skills			
g. problems that interfere with successful medical visits; e.g., learning disability, health literacy limitations			
11. Uses BHC to improve patient use of medications (for example, requests BHC to explore barriers to patient adherence)			
12. Refers and / or co-teaches classes lead by BHC			
13. Understands the basic components of a BHC visit			
14. When seeing a patient after a BH visit, is able to:			
a. ask patient about implementation of behavior change plan			
b. ask patient how helpful BHC was			

PCBH – Primary Care Clinician (PCC) Self-Assessment Tool

I. BHC Interface	Un-trained	Trained	Skillful
c. support patient in practicing skills learned in BHC visit(s)			
d. use scaling question that quantifies level of patient concern about target problem when seeing patient after a visit with a BHC			
15. Understands how the BHC fits into the primary care model and able to advocate for their integration with other staff			
16. Provides information to PCBH Advisor regarding successes in integrating PCBH services into practice			
17. Seeks assistance from and provides information to the PCBH Advisor (a PCC or RN colleague) regarding how to integrate the BHC into patient care activities and / or PCBH Committee when unsure of interface of PBHC, PCC and RN			
18. Responds to surveys concerning PCBH services in a timely manner (e.g., Referral Barriers Questionnaire)			

VI. Value-Added Use of BHC	Un-trained	Trained	Skillful
22. Consistently uses BHC to enhance patient outcomes (a minimum of 15% of your panel)			
23. Uses BHC to make telephone calls to patients and to connect them to resources, as appropriate			
24. Uses BHC to complete parts of PCC and RN visits with patients (for example, provide care instructions, assess treatment response, support treatment adherence)			
25. Uses information about your use of BHC services to identify opportunities for new ways to use this resource to enhance your practice			
26. Uses BHC to reduce burden on you and other staff and, at the same time, enhance patient outcomes (for example, satisfaction, development of needed skills). Example: Ask BHC to assess and advise when you see patients with chronic pain, depression, school problems, etc.			

III. Use of Assessment and Screening Tools	Un-trained	Trained	Skillful
19. Understands Duke Health Profile and uses results to assess and plan treatment for adults			
20. Understands Pediatric Symptom Checklist and uses results to assess and plan treatment for children			
21. Understands screener associated with a specific clinic pathway and is able to use it to initiate BHC services and to evaluate treatment response			

PCBH – Primary Care Clinician (PCC) Self-Assessment Tool

IV. Documentation Skills	Un-trained	Trained	Skillful
22. Documents referral to BHC in chart note			
23. At follow-up visit with patient after initial BHC visit, documents patient response to BHC recommendations			
32. Documents brief interventions used / supported in visit			
33. Documents when visit services were related to a pathway and names pathway			
34. Routinely asks the BHC questions about behavioral interventions that might be useful to specific patients (for example, a patient you plan to see in a few minutes) and general conditions (for example, behavioral interventions for patients with sleep problems).			

V. Clinical Skills: Brief Behavioral Interventions	Un-trained	Trained	Skillful
31. Uses brief 5-minute behavior change interventions that are helpful to primary care patients, including:			
a. behavior modification			
b. clarifying values			
c. goal setting and action step planning			
a. mindfulness			
b. motivational interviewing			
c. problem-solving			
d. relapse prevention planning			
e. relaxation skill			
f. scheduling social activities			
32. Uses patient education materials as appropriate			
33. Communicates needs for patient education materials to BHC			

VII. Clinical Skills: PCBH Pathway Services	Un-trained	Trained	Skillful
24. Supports clinic leaders in developing PCBH pathways or planned approaches to care that address gaps and deploy BHC to improve outcomes for high impact patient groups (e.g., chronic pain, ADHD, depression/anxiety)			

PCBH – Primary Care Clinician (PCC) Self-Assessment Tool

VII. Clinical Skills: PCBH Pathway Services	Un-trained	Trained	Skillful
25. Provides patients with accurate descriptions of how BHC working in pathway programs will assist the PCC / RN team and patient in obtaining better outcomes			
26. Participates consistently in PCBH pilots and programs			
27. Provides needed PCBH pathway evaluation information			
28. Able to shift smoothly from focus on individual care to pathway care			