Executive Summary

Lexicon for Behavioral Health and Primary Care Integration

Concepts and Definitions Developed by Expert Consensus





Executive Summary

Lexicon for Behavioral Health and Primary Care Integration

Concepts and Definitions Developed by Expert Consensus

Prepared for: Agency for Healthcare Research and Quality 540 Gaither Rd. Rockville, MD 20850

AHRQ Grant No. 1R13HS021053-01.

Prepared by: C.J. Peek, Ph.D., University of Minnesota and The National Integration Academy Council

This Executive Summary is excerpted from Lexicon for Behavioral Health and Primary Care Integration (http://integrationacademy.ahrq.gov/sites/default/files/Lexicon.pdf), which updates A Collaborative Care Lexicon for Asking Practice and Research Development Questions, in A National Agenda for Research in Collaborative Care, Agency for Healthcare Research and Quality, July 2011. http://www.ahrq.gov/research/findings/final-reports/collaborativecare/

AHRQ Publication No. AHRQ 13-IP001-1-EF April 2013

This document is in the public domain and may be used and reprinted without permission except those copyrighted materials noted, for which further reproduction is prohibited without the express permission of copyright holders.

The findings and conclusions expressed in this document are those of the authors, who are responsible for its content, and do not necessarily represent the views of AHRQ. No statement in this report should be construed as an official position of AHRQ or the U.S. Department of Health and Human Services.

The information in this report is intended to help clinicians, employers, policymakers, and others make informed decisions about the provision of health care services. This report is intended as a reference and not as a substitute for clinical judgment.

Suggested Citation

Peek CJ and the National Integration Academy Council. *Executive Summary*—Lexicon for Behavioral Health and Primary Care Integration: Concepts and Definitions Developed by Expert Consensus. AHRQ Publication No.13-IP001-1-EF. Rockville, MD: Agency for Healthcare Research and Quality. 2013. Available at: http://integrationacademy.ahrq.gov/sites/default/files/Lexicon_ExecSummary.pdf

Creators of the Lexicon for Behavioral Health and Primary Care Integration*

Macaran Baird MD, MS

University of Minnesota

University of Massachusetts

Ned Calonge, MD, MPH

The Colorado Trust

Teresa Chapa, PhD, MPA U.S. Dept. of Health & Human Services; Office of Minority

Health

Deborah Cohen, PhD***

Oregon Health & Science University

Dave deBronkart Patient representative; speaker and advocate

Frank deGruy, III, MD, MSFM University of Colorado

Barbara Degnan** Patient representative; Minnesota health care groups

Rita Havercamp, MSN, CNS**

Roger Kathol, MD, CPE

Parinda Khatri, PhD

Kaiser Permanente

Cartesian Solutions Inc.

Cherokee Health System

Neil Korsen, MD, MSc MaineHealth Stephen Melek, FSA, MAAA Milliman

Benjamin Miller, PsyD***

University of Colorado

Garrett Moran, PhD*** Westat

Charlotte Mullican, MPH**** Agency for Healthcare Research and Quality (AHRQ)
Gary Oftedahl, MD** Institute for Clinical Systems Improvement (ICSI)
Steven Waldren, MD, MS American Academy of Family Physicians (AAFP)

Jürgen Unützer, MD, MA, MPH University of Washington C.J. Peek, PhD(process leader and University of Minnesota

first author)

Members of the 2009 AHRQ Collaborative Care Research Development Conference Committee Who Authored the Original Article on the Lexicon: A Collaborative Care Lexicon for Asking Practice and Research Development Questions (In: A National Agenda for Research in Collaborative Care, Peek, 2011.)

C.J. Peek, PhD University of Minnesota (process leader and first

author)

Benjamin Miller, PsyD University of Colorado

Gene Kallenberg, MD University of California San Diego

Rodger Kessler, PhD University of Vermont



^{*}All creators are members of the AHRQ National Integration Academy Council (NIAC) with the following exceptions:

^{**} indicates a consulting expert; *** indicates Academy staff, and **** indicates the Federal task order officer.

Foreword

The Lexicon for Behavioral Health and Primary Care Integration was funded by AHRQ through the Center for Primary Care, Prevention, and Clinical Partnerships (CP3) as part of a programmatic focus on developing and promoting the field of integrating behavioral health primary care. The original version of the Lexicon was developed through an AHRQ small conference grant to the University of Colorado in 2009. Throughout the planning process for that meeting, it became clear that the experts involved were struggling to find common language and concepts related to integration that would allow them to communicate effectively. After the pilot work at the meeting to develop a shared understanding, all participants agreed that the Lexicon was an important, even critical, advancement for the field that needed further refinement.

To date, the *Lexicon* has been used with another important effort underway with funding by AHRQ – the *Atlas of Integrated Behavioral Health Care Quality Measures (IQM)* (expected to be released in 2013). The *Lexicon* will continue to be part of ongoing efforts of AHRQ's Academy for Integrating Behavioral Health and Primary Care (http://integrationacademy.ahrq.gov).

AHRQ expects the *Lexicon* will inform stakeholders such as providers, practices, health plans, purchasers, governments, researchers and others, by providing a common definitional framework for building behavioral health integration as one important way to improve health care quality. For example, implementers could use the lexicon to describe basic functions to put in place, differences in options for fulfilling those functions, and milestones for reaching full functionality.

Others have also recognized the need for shared language, e.g., the SAMHSA-HRSA Center for Integrated Health Solutions (2013), University of Washington AIMS Center, Milbank Memorial Fund (2010), and others. The creators hope that stakeholders will use the lexicon in their own ways in their own work as they converse with others who are developing this field as a whole.

Charlotte A. Mullican, MPH, Senior Advisor for Mental Health Research Center for Primary Care, Prevention, and Clinical Partnerships Agency for Healthcare Research and Quality

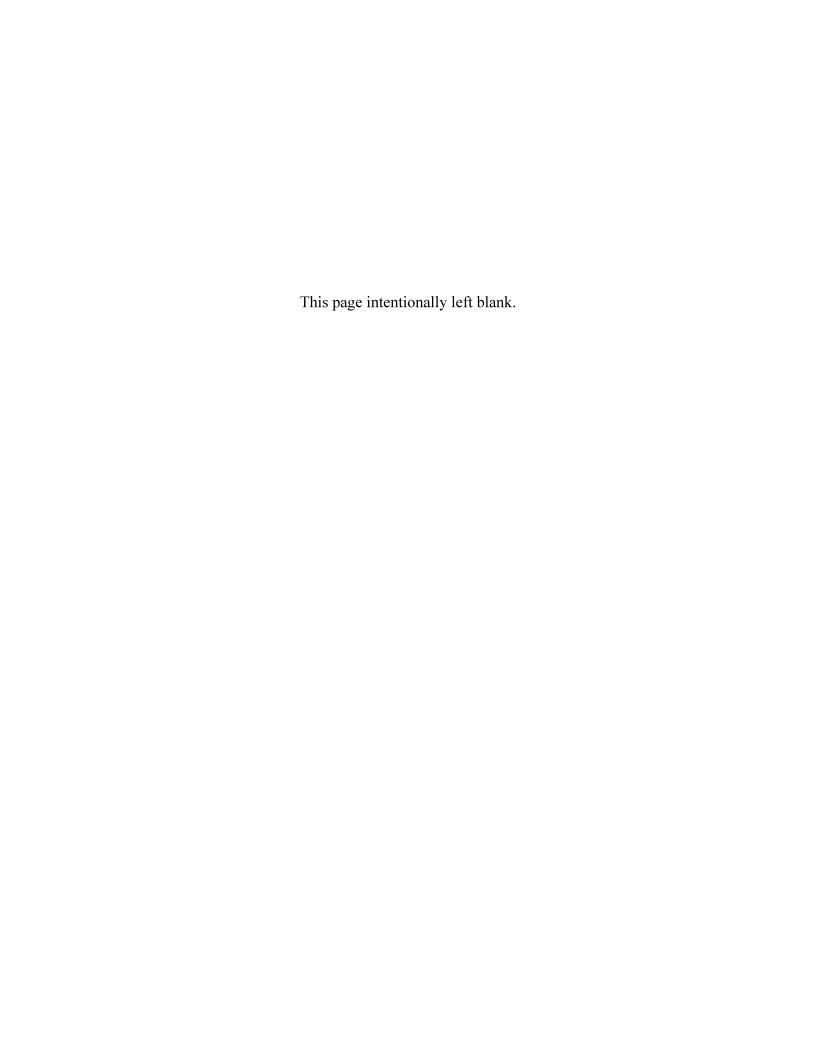
About the Academy for Integrating Behavioral Health in Primary Care

This Lexicon was developed under the auspices of AHRQ's Academy for Integrating Behavioral Health in Primary Care (the Academy; http://integrationacademy.ahrq.gov). AHRQ created the Academy to advance the field of integration by serving as a national resource and coordinating center for those interested in behavioral health and primary care integration. The Academy's vision is to support the collection, analysis, synthesis, and dissemination of actionable information that is useful to providers, policymakers, investigators, and consumers.

The National Integration Academy Council (http://integrationacademy.ahrq.gov/bios) advises the Academy operational team on strategic issues, helping to improve the sharing of knowledge, experience, and ideas as the field moves forward. The NIAC comprised most of the expert panel that created this Lexicon. By reflecting the diversity in the field and providing a forum for outstanding leaders to share perspectives and tools, the NIAC will also help to expand the common ground and enrich the discussion about what methods work in which contexts.

Contents

Creators of the Lexicon for Behavioral Health and Primary Care Integration	iii
Foreword	iv
Executive Summary	1
The Problem	1
Benefits of a Shared Lexicon	
Methods for Creating a Consensus Lexicon	1
Lexicon Overview	
Lexicon for Behavioral Health and Primary Care Integration At a Glance	2
"How" Defining Clauses (1-3)	3
The "Supported by" Defining Clauses (4-6)	
Parameters 1-7 Related to the "How" Defining Clauses	5
Parameters 8-12 Related to the "Supported by" Defining Clauses	7
Auxiliary Parameters	
Family Tree of Terms Used in Behavioral Health and Primary Care Integration	



Executive Summary

This lexicon is a set of concepts and definitions developed by expert consensus for what we mean by behavioral health and primary care integration—a functional definition—what things look like in practice. A consensus lexicon enables effective communication and concerted action among clinicians, care systems, health plans, payers, researchers, policymakers, business modelers and patients working for effective, widespread implementation on a meaningful scale.

The Problem

The field of behavioral health integration is only beginning to develop a standardized vocabulary, with different vocabularies emerging from different intellectual, geographical, organizational, or disciplinary traditions. Definitions in the field have emphasized values, principles, and goals rather than functional specifics required for a particular implementation to count as "the genuine article. Definitions have not supplied a vocabulary for acceptable alternatives—to prevent behavioral health integration from being seen as a field in which "anything goes."

Benefits of a Shared Lexicon

For patients and families. "What should I expect from integrated behavioral health?"

For purchasers. "What exactly am I buying if I add integrated behavioral health care to the benefits?"

For health plans. "What specifically do I require clinic systems to provide to health plan members?"

For clinicians and medical groups. "What exactly do I need to implement—to count as genuine behavioral health integrated in primary care?"

For policymakers and business modelers. "If I am being asked to change the rules or business models to support integrated behavioral health, exactly what functions need to be supported?

For researchers. "What functions need to be the subject of research questions on effectiveness? What functions need to be measured? What terms will I use to ask research questions?"

Methods for Creating a Consensus Lexicon

Methods exist for defining complex subject matters (Ossorio, 2006). These methods led to:

- 1. Six paradigm case *defining clauses* that map similarities and differences in genuine integrated behavioral health.
- 2. Twelve *parameters*, a vocabulary for how one instance of integrated behavioral health might differ from another one across town.

Requirements for a Method

- Be consensual but analytic (a disciplined transparent process).
- Involve actual implementers and users—"native speakers".
- Bring out functionalities in practice (not only principles, values, or 'anatomical' features).
- Specify acceptable variations on the required pattern—not a rigid prescription.
- Be amenable to gathering an expanding circle of contributors.

Lexicon Overview

The outline on the next five pages helps the reader quickly see the basic lexicon structure and content. However, the full lexicon contains denser clarifying detail that the creators found necessary to resolve ambiguities and get beyond, "What do you mean by that?" The full lexicon backs up the summary.

Lexicon for Behavioral Health and Primary Care Integration At a Glance

What

The care that results from a practice team of primary care and behavioral health clinicians, working together with patients and families, using a systematic and cost-effective approach to provide patient-centered care for a defined population. This care may address mental health and substance abuse conditions, health behaviors (including their contribution to chronic medical illnesses), life stressors and crises, stress-related physical symptoms, and ineffective patterns of health care utilization.

Defining Clauses	Corresponding Parameters
What integrated behavioral health needs to look like in action	Calibrated acceptable differences
	between practices

Parameter numbering at right does not correspond to clause numbering below.

How

- 1. A practice team tailored to the needs of each patient and situation
 - A. With a suitable range of behavioral health and primary care expertise and role functions available to draw from
 - B. With shared operations, workflows and practice culture
 - C. Having had formal or on-the-job training
- 2. With a shared population and mission
 - A panel of patients in common for total health outcomes
- 3. Using a systematic clinical approach (and a system that enables the clinical approach to function)
 - A. Employing methods to identify those members of the population who need or may benefit
 - B. Engaging patients and families in identifying their needs for care and the particular clinicians to provide it
 - C. Involving both patients and clinicians in decision-making
 - D. Using an explicit, unified, and shared care plan
 - E. With the unified care plan and manner of support to patient and family in a shared electronic health record
 - F. With systematic follow-up and adjustment of treatment plans if patients are not improving as expected

- 1. Range of care team function and expertise that can be mobilized
- 2. Type of spatial arrangement employed for behavioral health and primary care clinicians
- 3. Type of collaboration employed
- 4. Method for identifying individuals who need integrated behavioral health and primary care
- 5. Protocols
 - A. Whether protocols are in place or not for engaging patients in integrated care
 - B. Level that protocols are followed for initiating integrated care
- 6. Care plans
 - A. Proportion of patients in target groups with shared care plans
 - B. Degree to which care plans are implemented and followed
- 7. Level of systematic follow-up

Supported by

- 4. A community, population, or individuals expecting that behavioral health and primary care will be integrated as a standard of care.
- 5. Supported by office practice, leadership alignment, and business model
 - A. Clinic operational systems and processes
 - B. Alignment of purposes, incentives, leadership
 - C. A sustainable business model
- 6. And continuous quality improvement and measurement of effectiveness
 - A. Routinely collecting and using practice-based data
 - B. Periodically examining and reporting outcomes

- 8. Level of community expectation for integrated behavioral health as a standard of care
- 9. Level of office practice reliability and consistency
- 10. Level of leadership/administrative alignment and priorities
- 11. Level of business model support for integrated behavioral health
- 12. Extent that practice data is collected and used to improve the practice

Three auxiliary parameters appear on page 8 of this Executive Summary.

"How" Defining Clauses (1-3)

(Those functions that define what integrated behavioral health care looks like in action)

1. A practice team tailored to the needs of each patient and situation

Goal: To create a patient-centered care experience and a broad range of outcomes (clinical, functional, quality of life, and fiscal), patient-by-patient, that no one provider and patient are likely to achieve on their own.

- A. With a suitable range of behavioral health and primary care expertise and role functions available to draw from—so team can be defined at the level of each patient, and in general for targeted populations. Patients and families are considered part of the team with specific roles.
- B. With shared operations, workflows, and practice culture that support behavioral health and medical clinicians and staff in providing patient-centered care
 - Shared physical space—co-location

 Alternative (what could change): Change "shared physical space—co-location" to "a set of working relationships and workflows between clinicians in separate spaces that achieves communication, collaboration, patient-centered operations, and practice culture requirements."
 - Shared workflows, protocols, and office processes that enable and ensure collaboration—including one accessible shared treatment plan for each patient.
 - A shared practice culture rather than separate and conflicting behavioral health and medical practice cultures.
- C. *Having had formal or on-the-job training* for the clinical roles and relationships of integrated behavioral health care, including culture and team-building (for both medical and behavioral clinicians).

2. With a shared population and mission

With a panel of clinic patients in common, behavioral health and medical team members together take responsibility for the same shared mission and accountability for total health outcomes.

Alternative: Change "a panel of clinic patients in common" to "any identifiable subset of the panel of clinic patients for whom collaborative, integrated behavioral health is made available, e.g., age group, disease cluster, gender, culture, ethnicity, or other population."

3. Using a systematic clinical approach (and system that enables it to function)

- A. *Employing methods to identify those members of a population who need or may benefit* from integrated behavioral/medical care, at what level of severity or priority.
- B. *Engaging patients and families in identifying their needs for care*, the kinds of services or clinicians to provide it, and a specific group of health care professionals that will work together to deliver those services.
- C. *Involving both patients and clinicians in decision-making* to create an integrated care plan appropriate to patient needs, values, and preferences.
- D. Caring for patients using an explicit, unified, and shared care plan that contains assessments and plans for biological/physical, psychological, cultural, social, and organization of care aspects of the patient's health and health care. Scope includes prevention, acute, and chronic/complex care. (See full lexicon for elements of care plans and markers for their implementation.)

E. With the unified care plan, treatment, referral activity, and manner of support to patient and family contained in a shared electronic health record or registry, with regular ongoing communication among team members.

Alternatives: Change "unified care plan in shared medical record" to problem list and shared plans are contained in provider notes or other records in the same organization medical record which everyone reads and acts upon."

Delete "electronic" in "shared electronic medical record" (interim, not desired final state).

F. With systematic follow-up and adjustment of treatment plans if patients are not improving as expected. This is the "back-end" management of patients from "front-end" identification. (See full lexicon for specific markers of such follow-up and care plan adjustment.)

The "Supported by" Defining Clauses (4-6)

(Functions necessary for the "how" clauses to become sustainable on a meaningful scale)

- 4. A community, population, or individuals expecting that behavioral health and primary care will be integrated as a standard of care so that clinicians, staff, and their patients achieve patient-centered, effective care.
- 5. Supported by office practice, leadership alignment, and a business model
 - A. Clinic operational systems, office processes, and office management that consistently and reliably support communication, collaboration, tracking of an identified population, a shared care plan, making joint follow-up appointments or other collaborative care functions.

Alternative: Delete "consistently and reliably" (an interim state, not a desired final state).

- B. Alignment of purposes, incentives, leadership, and program supervision within the practice. Alternative: Substitute "Intention and process underway to align..." for "alignment of."
- C. A sustainable business model (financial model) that supports the consistent delivery of collaborative, coordinated behavioral and medical services in a single setting or practice relationship.

Alternative: Substitute "working toward sustainable business model" for "sustainable business model."

- 6. And continuous quality improvement and measurement of effectiveness
 - A. Routinely collecting and using measured practice-based data to improve patient outcomes—to change what the practice is doing and quickly learn from experience. Include clinical, operational, demographic and financial/cost data.
 - B. *Periodically examining and internally reporting outcomes*—at the provider and program level—for care, patient experience, and affordability (The "Triple Aim") and engaging the practice in making program design changes accordingly.

Parameters 1-7 Related to the "How" Defining Clauses

How one genuine integrated practice might differ from another

1. Range of care
team function
and expertise
that can be
mobilized to
address needs of
particular
patients and
target
populations

Foundational functions for target population

- Triage/identification
- Behavioral activation/self management
- Psychological support/crisis intervention
- Straightforward community resource connection
- Straightforward mental health/substance abuse psychological interventions
- Straightforward mental health pharmaceutical interventions
- Common chronic/complex illness care
- Follow-up, outcome monitoring for timely adjustment of care and coordination
- Cultural and linguistic competency

Foundational plus others for population

- Triage/identification with registry and tracking/coordinating functions
- Complex or specialized mental health therapies needed for population
- Complex or more specialized pharmacologic interventions

Extended functions, add

- Specialized disease experts
- Specialized population experts
- Experts from cultural, school, vocational, spiritual, corrections, other areas of intersection with health care or specialized care managers

2. Type of spatial arrangement employed

Mostly separate space

- Behavioral. health and medical clinicians spend little time with each other practicing in same clinic space.
- Patient has to see providers in at least two buildings

Co-located space

- Behavioral health and medical clinicians in different parts of the same building, spending some but not all their time in same medical clinic space.
- Patient typically has to move from primary care to behavioral health space

Fully shared space

- Behavioral health and medical clinicians share the same provider rooms, spending all or most of their time seeing patients in that shared space.
- Typically, the clinicians see the patient in same exam room.

3. Type of collaboration employed

Referral-triggered periodic exchange formation exchanged

Information exchanged periodically with minimally shared care plans or workflows

Regular communication/coordination

Regular communication and coordination, usually via separate systems and workflows, but with care plans coordinated to a significant extent

Full collaboration/integration

Fully shared treatment plans and documentation, regular communication facilitated and/or clinical workflows that ensure effective communication and coordination.

4. Method for identifying individuals (who need integrated behavioral health and medical care)

Patient or clinician Patient or clinician identification done in a non-systematic fashion

Health system indicators

(Other than patient screening) Demographic, registry, claims, or other system data, at risk for complex needs or special needs

Universal screening or identification processes

All or most patients or members of clinic panel are screened or otherwise identified for being part of a target population

5A. Protocols in place or not for engaging patients in integrated care

Protocols not in place

(Not acceptable—described here only for context)
Undefined or informal: Up to individual clinician and patient
whether or not and how to initiate/engage with integrated
behavioral health care, e.g., whose care should be integrated, goals,
appropriate team and roles, main contact person

Protocols in place

Protocols and workflows for initiation and engagement in collaborative care are built into clinical system as a standard part of care process

5B. Level that protocols are followed for initiating integrated care

Protocols followed less than 50%

(Not acceptable)

Protocols followed more than 50% but less than 100% (an interim state)

Protocols for initiating integrated behavioral health care are followed for 75% to 100% of patients identified in priority group.

Protocols followed nearly 100%

Protocols for initiating integrated behavioral health care are followed for nearly 100% of patients identified in priority group. Goal is 100%—as in "standard work".

6A. Proportion	Less than 40%	40% to nearly 100%	Nearly 100%
of patients in target groups with shared care plans	(Not acceptable) Most patients in targeted groups for integrated behavioral health without written care plans	A meaningful proportion but less than full-scale integrated behavioral health care plans for targeted groups—an interim state—not a desired final state	Nearly 100% of patients in targeted groups with care plans—as "standard work"

6B. Degree that	Less than 50%.	More than 50%, less than 100%	Care plans followed nearly 100%
care plans are implemented	(Not acceptable) Care plans implemented and	(An interim state, not final state) Significant but incomplete	Care plans implemented and followed for nearly 100% of
and followed	followed for less than 50% of patients.	implementation of care plans	patients in priority group. Goal is 100%as in "standard work".

7. Level of systematic follow up*	Less than 40 % (Not acceptable—shown here only for context)	40% to 75% Significant but incomplete follow- up being done	76% to 100% Goal is 100%"standard work"
(Percent of patients in the practice population or target subpopulation)		. 5	

^{*}Follow up elements that may be tracked in parameter 7 include: A) Patients with at least one follow-up (those engaged in care); B) Patients with at least one follow-up in initial 4 weeks of care; C) Patients who have their cases reviewed for progress on a regular basis (e.g., every 6-12 weeks); D) Patients who receive treatment adjustments if not improving.

Parameters 8-12 Related to the "Supported by" **Defining Clauses**

Calibrated conditions needed for success of clinical action in the real world on a meaningful scale

8. Level of community expectation for integrated behavioral health as a standard of care	(Not acceptable—shown here for Insufficient reach of understanding a expectation to enable integrated behavior	tation to enable integrated behavioral programming to start and function in understanding and				Widely expected as standard of care Almost universal community understanding and expectation for integrated behavioral health as a standard of care
9. Level of office practice reliability and consistency	Non-systematic (Not acceptable—shown here only for context) Referral, communication, and other processes are non-standard and vary with clinician and clinical situation	Standard unwarrar preference	Substantially routinized ndards set for most processes, but varranted variability and clinician ference still operate—not yet adard work			Standard work Whole team operates each part of the system in a standard expected way that improves reliability and prevents errors.
10. Level of leadership/ administrative alignment and priorities Inspired by Schein (2004), Collins (1996)	Misaligned (Not acceptable—shown here only context) Integrated behavioral health care is a among several strategic initiatives, be practical conflicts with other organizational priorities, resource allocations, incentives, and habits ar apparent. Such tensions may or may be articulated openly	y for Some al but with ongoing the surfa unresolv between re incentiv		with constructive bet star star surface and resolve solved tensions into eveen purposes, ntives, habits, and dards. bet star star star star star star star sta		Fully aligned nstructive balance achieved ween priorities, incentives, and ndards. Integrated behavioral alth functions are fully designed to priorities and incentives. Hereging conflicts are routinely alressed and respected as part of at the organization does to
11. Level of business model support for	Behavior health integration not for The business model has not yet foun support the integrated behavioral her selected and built for this practice. It	d ways to alth function	fully ons	The business mod integrated behavior	el has	n integration fully supported s found ways to fully support the ealth functions selected and built version of funds marked for other

11. Level of
business model
support for
integrated
behavioral
health

selected and built for this practice. If these functions are maintained, it is by diverting resources not designated for these purposes or through unsustainable sources of funding such as grants or

for this practice. No diversion of funds marked for other purposes nor unsustainable sources of funding are required.

12. Scale of practice data collected and used on at least the integrated medical/ behavioral health aspect of the practice

Minimum: (less than 40% of patients)

(A startup state only—not a desired final state)

A system for collecting and using practice data from a limited number of patients or situationsto improve quality and effectiveness (of integrated behavioral health), especially at the individual patient level

Partial: (40%-75% of patients)

(An interim state, not a desired final state)

Significant but less than full collection and use of practicebased data for decisionmaking—to improve quality and effectiveness and reporting at the system or unit level

Full/standard work: 76% -100% of patients

Routine data collection on most patients with integrated behavioral health—with internal reporting of "triple aim" outcomes and their use in decisionmaking to improve effectiveness at the system, unit, or community/population level

Auxiliary Parameters

These may be useful for specific purposes, though not considered central to the full lexicon.

A. Locus care					dical care			alty mental alth care		
B. Life st	age	Children		Adolescents	Adults/	young'	adults	Geria	ntrics	End of life
sympton targeted D. Type of situation	of ns	illness High risk and often high stress for clinics Patients with or more typic mental health substance ab conditions; fi partner, and relationship problems aff health No contact Patients with no Substance as conditions; fi partner, and relationship problems aff health		nce abuse ditions with one typical nealth or ce abuse ns; family, and ship s affecting	abuse ons th one ical th or buse family, id ffecting ses, Prevention,		Red Medical conditions Patients whome or more or modical diseases or conditions. e.g., diabete asthma, cardiovase disease, ludisease Acute life stress		Comples sympton condition or person social de health	plex cases x blend of ms, problems, ons, diseases onal situations, eterminants of High risk and/or high cost
Degree that orogram is argeted to specific contact with h system, even for prevention Integrated behavioral populations such as designed to specific contact with h system, even for prevention		contact with healti system, even for prevention rated behavioral hea ations such as disea thnic minorities, soc	Targeted ealth program designed fease, prevention, at-risk,		, age, racial	social risks, isolation, financial, other Integrated bel- generically fo		other special populations linked to disparities Non-targeted vioral health programy patient deeme		d to need
	B. Life st C. Type symptor targeted D. Type situation targeted	B. Life stage C. Type of symptoms targeted D. Type of situations targeted Integration population and e	C. Type of symptoms targeted D. Type of situations targeted	C. Type of symptoms targeted D. Type of situations targeted D. Type of substance targeted D. Type of substanc	B. Life stage C. Type of symptoms targeted D. Type of situations targeted D. Type of situations targeted C. Type of situations targeted D. Type of situations targeted Targeted Integrated behavioral health program designed populations such as disease, prevention, at-risk and ethnic minorities, social complexity, pregnance in the program of the program designed populations such as disease, prevention, at-risk and ethnic minorities, social complexity, pregnance in the program designed populations such as disease, prevention, at-risk and ethnic minorities, social complexity, pregnance in the program designed populations such as disease, prevention, at-risk and ethnic minorities, social complexity, pregnance in the program designed populations such as disease, prevention, at-risk and ethnic minorities, social complexity, pregnance in the program designed program de	B. Life stage Children Adolescents Adults/ C. Type of symptoms targeted Green High risk and often high stress for clinics Patients with one or more typical mental health or substance abuse conditions; family, partner, and relationship problems affecting health D. Type of situations targeted No contact Patients with no presenting problems or no contact with health system, even for prevention Targeted Integrated behavioral health program designed for specific populations such as disease, prevention, at-risk, age, racial and ethnic minorities, social complexity, pregnancy or other	C. Type of symptoms targeted D. Type of situations targeted	C. Type of symptoms targeted	C. Type of symptoms targeted	B. Life stage Children Adolescents Adults/young adults Geriatrics

Breadth of	Pilot scale	Project scale	Full-scale
outcomes	Limited expectations for a limited	Significant, but not full-scale	Full-scale and broad-based
expected	set of outcomes for a limited group	outcomes expected: Multiple	outcomes expected: Full scale way
depending on	of patients: A "pilot" is a demonstration of feasibility or	promising pilots gathered together with a larger, but still not full	of life in the organization for the entire population of patients—the
program scale	starter "test of change" with limited	scale population, but led visibly	way things are done, no longer a
or maturity	number of patients or clinical scope	as a project aiming toward the	project attached to the mainstream
(From Davis, 2001)		mainstream.	that hasn't changed

Illustration: A family tree of related terms used in behavioral health and primary care integration

See glossary for details and additional definitions

Integrated Care

organizational integration involving social & other services. "Altitudes" of integration: 1) Integrated treatments, 2) integrated program structure; integrated system of programs, and 4) integrated payments. (Based Tightly integrated, on-site teamwork with unified care plan as a standard approach to care for designated populations. Connotes

(typically psychiatrists) working together in shared system and record, maintaining 1 treatment plan addressing all patient Predominately Canadian usage PC & MH professionals health needs. (Kates et al, 1996; Kelly et al, 2011)

Patient-Centered Care

The organization of patient care activities between two or more participants (including the patient) involved in care, to facilitate appropriate delivery of healthcare services. Organizing care involves the marshalling of personnel and other resources needed to carry out required care activities, and often Coordinated Care circumstances, and relationships in health care"-or "nothing about me it) of transparency, individualization, recognition, respect, dignity, and "The experience (to the extent the informed, individual patient desires cheice in all matters, without exception, related to one's person, without me" (Berwick, 2011).

Collaborative Care

identify problems and treatments, continually revising as needed to hit A general term for ongoing working relationships between clin cisms, rather than a specific product or service (Doberty, McDaniel & Baird, 1996). Providers combine perspectives and skills to understand and goals, e.g. in collaborative care of depression (Unutzer et al, 2002) THE RESERVE OF THE PARTY OF THE

Co-located Care

managed by the exchange of information among participants responsible for different aspects of care." (AHRQ, 2007).

specific service or kind of collaboration. (adapted delivering care in same practice. This denotes shared space to one extent or another, not a BH and PC providers (i.e. physicians, NP's) from Blount, 2003)

Integrated Primary Care or Primary Care Behavioral Health

behaviors, MH or SA disorders. For any problem, they have come to the right place—"no wrong deor" (Blount). BH professional used Combines medical & BH services for problems patients bring to primary care, including stress-linked physical symptoms, health as a consultant to PC colleagues (Sabin & Borus, 2009; Haas & deGruy, 2004; Robinson & Reiter, 2007; Hunter et al, 2009).

Behavioral Health Care

including MH and SA conditions, stross-linked physical symptoms, patient activation and health behaviors. The job of all kinds of care settings, and done by clinicians and health An umbrella term for care that addresses any behavioral problems bearing on health, coaches of various disciplines or training.

Mental Health Care

healthier, longer, more productive lives. Done by a variety of caregivers in diverse public and private settings such as Care to help people with mental illnesses (or at risk)-to specialty MH, general medical, human services, and voluntary support networks. (Adapted from SAMHSA) suffer less emotional pain and disability—and live

Primary Care

THE PERSON NAMED IN COLUMN TWO IS NOT THE OWNER. THE

and substance abuse problems suffer less emotional pain, family and

Substance Abuse Care

vocational disturbance, physical risks-and live healthier, longer, Services, treatments, and supports to help people with addictions

human services, voluntary support networks, e.g. 12-step programs

and peer counselors. (Adapted from SAMHSA)

more productive lives. Done in specialty SA, general medical,

patients and their personal physicians, and when appropriate, the patient's family. Emphasizes care of populations, team earc, whole person care—including behavioral health, care coordination, information tools and business models needed to An approach to comprehensive primary care for children, youth and adults—a setting that facilitates partners ips between

Patient-Centered Medical Home

sustain the work. The goal is health, patient experience, and reduced cost. (Joint Principles of PCMH, 2007)

Primary care is the provision of integrated, accessible health care services by clinicians who are accountable for addressing a large partnership with patients, and practicing in the context of family majority of personal health care needs, developing a sustained and community. (Institute of Medicine, 1994) Thanks to Benjamin Miller and Jürgen Unützer for advice on organizing this illustration

From: Peek CJ and the National Integration Academy Council. Lexicon for Behavioral Health and Primary Care Integration: AHRQ Publication No.13-IP001-EF. Rockville, MD: Agency for Healthcare Research and Quality. 2013. Available at http://integrationacademy.ahrg.gov/sites/default/files/Lexicon.pdf