



# Utilizing Behavioral Health Technicians

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# Disclaimer

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The views expressed are those of the presenter and do not necessarily reflect the opinions of the Uniformed Services University of the Health Sciences, the Department of Defense, or the U.S. Government.

# Clinic Optimization Toolkit

## Modules

Clinic Gap Analysis
Patient Management
EBP Utilization
Group Therapy Expansion
<b>Technician Support</b>
Metrics
Evaluation

## Types of Resources

-  Training Decks
-  Fact Sheets & Handouts
-  Forms & Templates
-  Spreadsheets & Supporting Documents
-  Standard Operating Procedures



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# Learning Objectives

- Analyze models for Behavioral Health Technicians (BHTs) utilization
- Distinguish best practices for using BHTs as provider extenders to support use of EBPs



# Overview of a BHT

# Definition of a BHT



Allied health professionals

Assess/evaluate for mental health care

Trained in communication and behavioral health skills

Provider extenders

Photo by Staff Sgt Ryan. Permissions Granted

(PHCoE, 2019)

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# METC Training

## Medical Education and Training Campus

14-17 weeks

Didactic classroom  
instruction

Supervised practical  
exercises



U.S. Army Garrison Yongssan image <https://creativecommons.org/licenses/by-nc-sa/2.0/>

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# BHT Program Topics

Communication Techniques	Human Development	Psychological Disorders
Psychological Testing	Consultation	Interviewing
Psychiatric Behavioral Interventions	Counseling	Combat Operation Stress Control
Administrative Management	Ethics, Culture, & Law	Basic Life Support

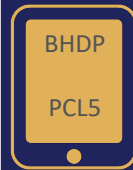
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# BHT as “Provider Extender”



Administer & track  
outcome measures



Documentation



Screening  
appointments



Assist with therapy



# BHT Roles

# Administrative Roles

Patient scheduling

Management of clinic forms

Front desk operations

Program management



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# Additional Duties

Briefings

Bullet fodder

Honor guard

Security manager



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# Clinical Roles



Triage and screen patients

Provide treatment with supervision

Teach psychoeducational groups

Draft clinical notes for providers

U.S. Army photo by SGT Christopher Calvert.  
<http://www.dvidshub.net/image/1006077/ai-r-cavalry-mental-health-specialist-helps-troops-combats-stigma>

# Current State of Affairs



Administrative tasks

Additional duties



Less clinical work

(Holliday et al., 2019)



# Models of BHT Utilization

# Model One: Purely Admin



No direct patient care

Aims to reduce admin pressure on providers to see more patients

Reactive vs proactive strategy



# Purely Admin Model Challenges



BHTs lose vital skills

BHTs not allowed to be  
provider extenders

Not effective solution for  
high caseloads

# Model 2: Floating/Rotational

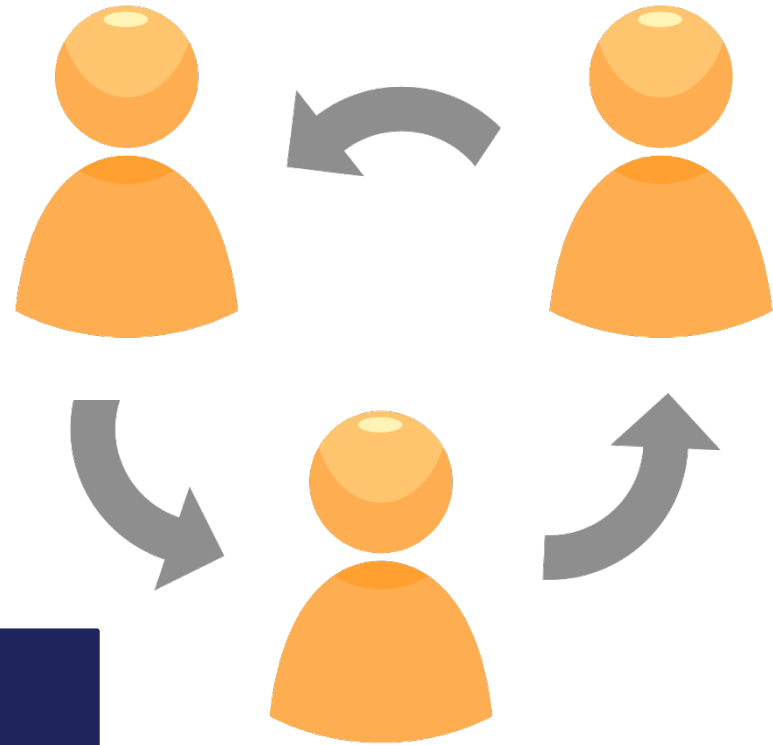
BHTs rotate clinical duties

Triage

Intakes

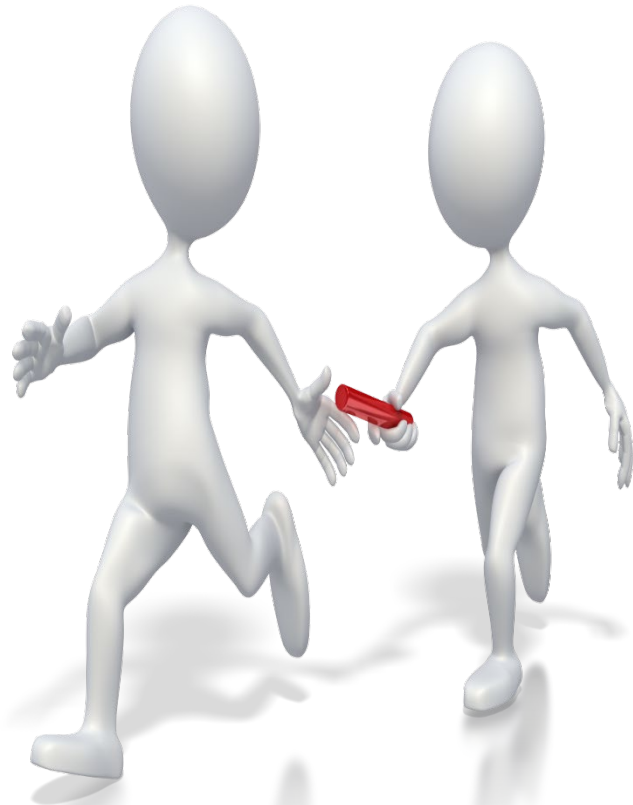
Assessments

Not assigned to specific provider or group



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# Floating/Rotating Model Challenges



Adjusting to different supervisors

Exposure vs skill development

Easier for BHTs to avoid clinical duties

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# Model 4: Paired Model

Endorsed by DHA working group

Assigned to provider or group

Acts as a provider extender



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# Paired Model Challenges

BHTs assigned to provider or group

Pairing BHTs with providers

Switching from observing to provider extender activities



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# Implementation Strategies



# Implementation Strategies:

## Administrative

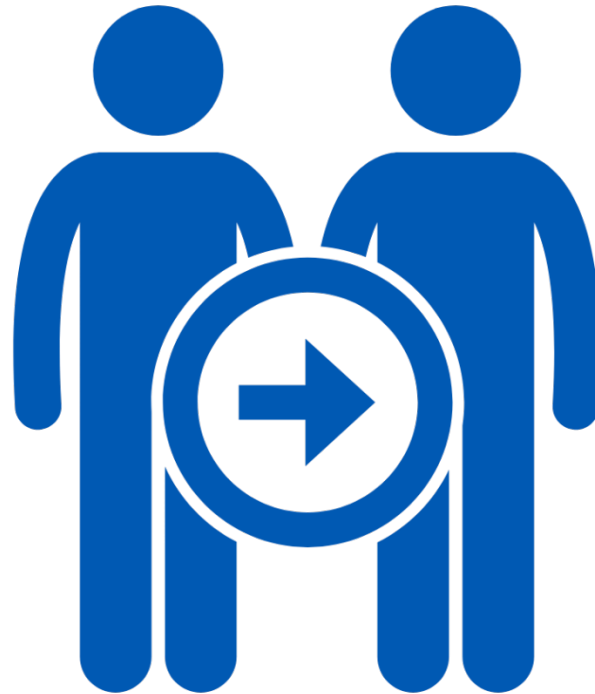
- Screen referrals
- Maintenance of EBP materials
- Pre & post session follow-up

## Patient Care

- Assess BHT skills
- Pair BHT with an EBP group
- NCO supervision

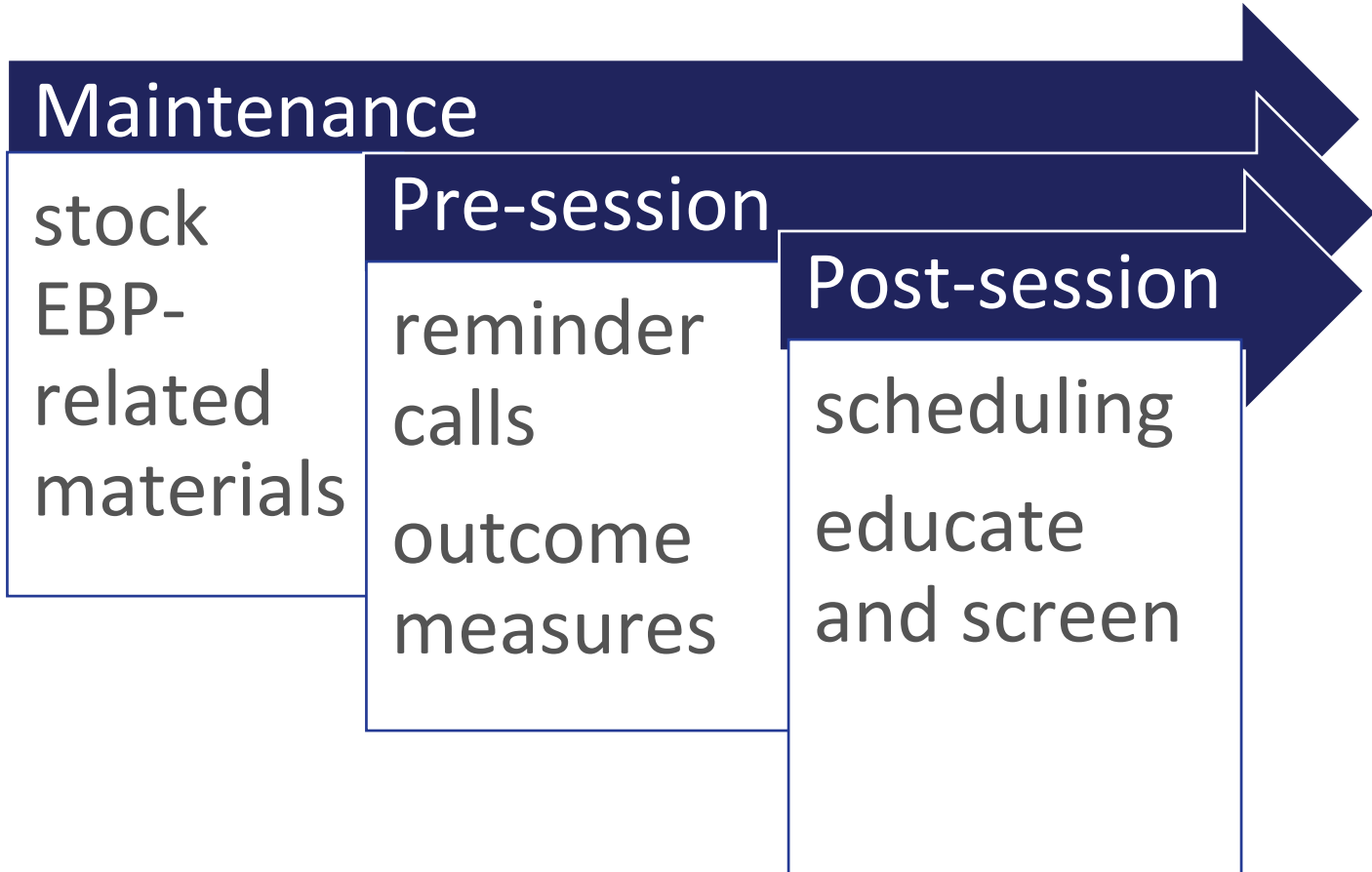
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# Administrative BHT Tasks: Referrals





# Administrative BHT Tasks



# Assessing BHT Clinical Skills

Core EBP competencies

BHT competency assessment

Strengths and areas of improvement

## EBP Competency Checklist for BHTs

Technician Name: \_\_\_\_\_ Date: \_\_\_\_\_

The technician must be able to demonstrate the necessary knowledge, skills, and professionalism to provide care based on the physical, emotional, cognitive, and safety needs of patients served in their assigned area.

Please use this Competency Checklist to assess the competency level of behavioral health technicians. To complete the form, please enter the validation method using the designated letters from the legend below. Please initial and date each entry.

### Methods of Validation:

Demonstration (D)    Observation (O)    Medical Records Review (MRR)    Verbal Response (V)

Domain	Specific Competencies	Validation Method	Validated By	Date
Administer and score outcome measures	<ul style="list-style-type: none"> <li>Identify appropriate outcome measures for patient conditions</li> <li>Appropriately administer and score*:                             <ul style="list-style-type: none"> <li>PHQ-2/8/9</li> <li>PCL-5</li> <li>GAD-7</li> <li>AUDIT-C</li> <li>Others (e.g., ISI, C-SSRS): _____</li> </ul> </li> </ul> <p>*When BHDP is not available</p>			
Provide logistical support to individual EBP therapists	<ul style="list-style-type: none"> <li>Complete patient check-ins through EMR (electronic medical record)</li> <li>Schedule follow-up appointments for patients when appropriate</li> <li>Complete phone consults and transfers notes to providers for co-signature</li> <li>Knows locations of EBP forms and manuals</li> <li>Ensures EBP forms and manuals are stocked</li> <li>Follows procedures for administering and scoring outcome measures</li> </ul>			
Conduct group screenings	<ul style="list-style-type: none"> <li>Explains rationale for group therapy</li> <li>Apply inclusion/exclusion screening criteria for various groups</li> <li>Describes expectations for EBP groups</li> <li>Can screen records to determine appropriateness of referral</li> </ul>			

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# Groups and BHTs

Limited BHT  
availability

Efficiency  
and  
effectiveness  
of group  
therapy

Maximize  
provider  
extender  
role

# Group Therapy BHTs Tasks

Prepare materials

Outcome measures

Tracking sheet

Initiate notes



Photo by Dr. Eric Kloeppe. Permissions granted.

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# Additional Group Toolkit Items

Tracking forms

Attendance

Participation

Homework

Mood/affect

Scores on measures

(INSERT NAME OF YOUR CLINIC)  
PRE-GROUP SCREENING FORM

Name of Group: \_\_\_\_\_ Facilitator(s): \_\_\_\_\_ Date: \_\_\_\_\_

Name of Patient	Rank	DOB	Gender	Contact Information

Referral Source: \_\_\_\_\_  
Primary Provider: \_\_\_\_\_

**Patient's Reason for Wanting to Join Group:**  
What are you hoping to learn from participating in the group?  
  
How motivated are you to get help for this condition on a scale of 1-10, with 10 being the most?  
  
How motivated are you to attend group therapy on a scale of 1-10, with 10 being the most?  
  
Do you have any worries or fears about starting the group?  
\_\_\_\_\_

**Past History of Therapy:**  
Have you ever tried this therapy before? Y / N  
If yes, in group or individual therapy? Group / Individual  
  
Do you have a history of early termination from treatment? Y / N  
If yes, what led to you dropping out?  
\_\_\_\_\_

**Informed Consent:**  
Are you able to attend at the set date and time? Y / N  
If no, preferred day and time? M / T / W / R / F AM / PM  
  
Review group format (content/focus on diagnosis, treatment goals, structure, time, attendance requirement, number of sessions, ground rules, not a process group, homework, etc.). Do you agree? Y / N

**Outcome Measures (Baseline)**

Measure	Date	Score	Interpretation

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# Additional Group Toolkit Items

Group screening form

Note templates

EBP-related

Customizable

{{Insert Clinic Name}} Behavioral Health Clinic  
 Group Therapy Session Note Tracking

Group Name: \_\_\_\_\_  
 Day & Time: \_\_\_\_\_  
 Facilitator(s): \_\_\_\_\_  
 This group cycle: Begins on \_\_\_\_\_ Ends on \_\_\_\_\_

Patient Name	Last 4	Outcome Measure(s)	Basic Info	MSE	Plans for Upcoming Session:	Comments (bx obs, homework assignments, etc)
<i>Joe Example</i>	<i>6789</i>	PCL: <i>EE</i> OQ-30: <i>EE</i>	Attend: <input checked="" type="checkbox"/> Y / <input type="checkbox"/> N Participate: <input checked="" type="checkbox"/> Y / <input type="checkbox"/> N Homework: <input checked="" type="checkbox"/> Y / <input type="checkbox"/> N	Mood: <i>Anxiety</i> Affect: <input checked="" type="checkbox"/> Cong / <input type="checkbox"/> Incon SI/Hi: <input checked="" type="checkbox"/> Y / <input type="checkbox"/> N		<i>Patient was 15 minutes late, stated they are running out of meds. Advised to book a follow-up with psychiatrist.</i>
			Attend: Y/N Participate: Y/N Homework: Y/N	Mood: _____ Affect: Cong/Incon SI/Hi: Y/N		
			Attend: Y/N Participate: Y/N Homework: Y/N	Mood: _____ Affect: Cong/Incon SI/Hi: Y/N		
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# Developing Collaboration

Co-facilitator roles

Treatment responsibilities & expectations

Managing disagreements



U.S. Navy photo by Jacob Sippel, Nava Hospital Jacksonville/Released. Permissions Granted

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# Provider Role



Complete risk assessment

Clinical oversight of intakes and triage

Conduct and supervise group sessions

Review and sign clinical note drafts

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# Supervision Recommendations

Regular observation of clinical work

Evaluation & feedback

Promoting self-assessment of work

Know policy on BHTs\*

(PHCoE, 2019; Headquarters, Department of the Army (2017); Holliday et al., 2019; U.S. Department of the Air Force, 2018a, 2018b, 2020; U.S. Department of the Navy (2017, 2018a, 2018b))



# Barriers and Resources for Implementation

# Barriers to Implementation:

Leader and provider concerns:

Few BHTs or administrative staff

Concerns about BHT skill

Turnover and deployments



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# Barriers to Implementation:

## BHT Concerns:

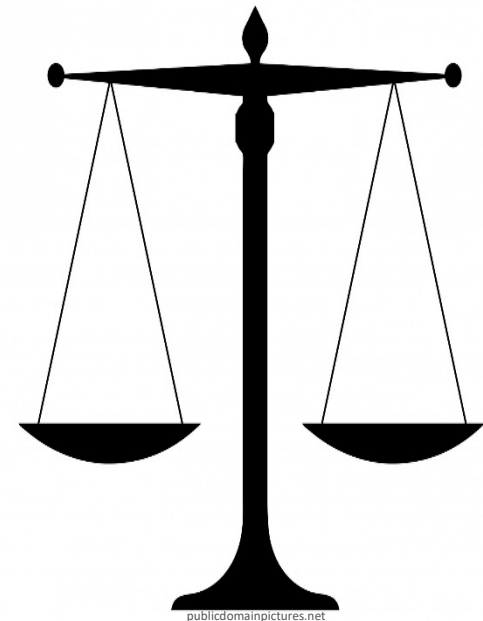
Administrative duties

Getting promoted

Lack of practice

Clinical

Admin



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# Toolkit Resources

- ***Training Decks***
- *Factsheets & Handouts*
- *Forms & Templates*
- *Spreadsheets & Supporting Documents*
- *Standard Operating Procedures*

## Utilizing Behavioral Health Technicians



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**NOTE TO USER-** This template is intended to give your clinic a head start on developing its own Standard Operating Procedure for this topic. The template can quickly be adapted to fit your clinic's needs. Drop content you do not need, and add anything you feel is relevant. There are several highlighted areas that allow you to customize this template for your clinic.

**Subject:** Standard Operating Procedures (SOP)/Operating Instructions (OI) outlining the role of Behavioral Health Technicians (BHTs) at the [Mental Health Clinic] at [Medical Center]

**Purpose:** To establish detailed expectations for BHTs to support our mission to provide the best care possible to our patients using evidence-based practices.

**References:**

Defense Health Agency, Medical Education and Training Campus (no date). "Behavioral Health Program: Behavioral Health Technician." <http://www.metc.mil/academics/Bht/>

Holliday, S. B., Hepner, K. A., Tanielian, T., Meyer, A., & Pincus, H. A. (2019). *Understanding behavioral health technicians within the military: A review of training, practice, and professional development*. Rand Corporation. [https://www.rand.org/pubs/research\\_reports/RR2649.html](https://www.rand.org/pubs/research_reports/RR2649.html)

Psychological Health Center of Excellence Behavioral Health Technician Working Group (2019). *Healthcare provider's practice guide for the utilization of behavioral health technicians (BHTs): Information and recommendations to optimize use of BHTs to support psychological healthcare in the Department of Defense*. <https://www.health.mil/Reference-Center/Publications?query=Technicians&isDateRange=0&broadVector=000&newsVector=00000000&refVector=00000000001000&refSrc=1>

**1. Objectives.**

- 1.1. Provide appropriate treatment to as many patients as possible through efficient use of EBPs, especially in a group format.
- 1.2. Fully utilize existing personnel resources.
- 1.3. Delegate appropriate tasks currently completed by licensed providers to BHTs.
  - 1.3.1. Offer fulfilling, challenging work to BHTs that assists in career advancement.
- 1.4. Decrease burden on licensed providers.
- 1.5. Increase availability of services to patients.
  - 1.5.1. Decrease wait times.
  - 1.5.2. Broaden range of services available.

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# Learning Objectives

- Analyze models for Behavioral Health Technicians (BHTs) utilization
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# Clinic Optimization Toolkit

## Modules

- Clinic Gap Analysis
- Patient Management
- EBP Utilization
- Group Therapy Expansion
- Technician Support
- Metrics
- Evaluation

## Types of Resources

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