### Table 2: Scope of integrated behavioral health—what kinds of cases to identify
(Thanks to C.J. Peek and N. Calonge)

<table>
<thead>
<tr>
<th>Identification of individuals (cases) whose care plans require blended behavioral health and medical expertise</th>
<th>Identification of clinical situations (that are not diseases or conditions) in which behavioral health expertise is needed in care plan</th>
<th>Identification of need for health behavior change as part of plan for any condition</th>
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</table>
| **Identification of mental health and substance abuse conditions** (Identifying individuals for whom further diagnostic assessment is warranted) | **Identification of physical symptoms or common complaints not fully explained via disease processes; BH expertise needed** | **Detection of care delivery patterns associated with:**  
- Overutilization  
- Unfocused utilization  
- Unplanned visits, ER, hospital, urgent care  
- Many failed services  
- Distrustful patient-clinician relationship  
- Patient unhappiness with care—feeling stuck  
- Provider feeling stuck  
**Evidence basis:** Stress and somatization literature |
| **Screening or other identification for MH/SA conditions that can be understood and treated more or less independently of other health concerns** (Examples: ADHD or depression in an otherwise healthy adolescent; bipolar disorder in an adult with ordinary medical picture) | **Evidence basis,** e.g., from USPSTF. | **Evidence basis:** Self-management, chronic care, SA care literature |
| **Screening or other identification for MH/SA conditions that are deeply intertwined with medical conditions or chronic illnesses** (Example: Major depression in a person with poorly regulated diabetes who considers diabetes their main health issue) | **Evidence basis:** Health services research literature | **Evidence basis:** Self-management, chronic care, SA care literature |

**Methods:**  
- MH/SA screening tools  
- Health risk assessment  
- Med record history/hx  
- MH/SA screening tools  
- HRA  
- Medical facts, history  
- General sx checklists, HRA  
- MH screen/careful interviewing  
- History and medical facts  
- General sx checklists  
- Claims data  
- Claims data  
- Behavior and wellness behavior checklists, HRA  
- SA screens  
- Behavioral factor information in medical records

MH = mental health; SA = substance abuse; ADHD = Attention Deficit Hyperactivity Disorder; USPSTF = U.S. Preventive Services Task Force; BH = behavioral health; HRA = health risk assessment.