

Team UP CHWs		Key Tasks for Behavioral Health and CBHI Referrals	
	KEY TASKS	DATE COMPLETED/ TEAM MEMBER	TIMEFRAME
INFORMATION GATHERING	Family permission to refer to BH/CBHI services		
	Provide family information on referral		
	Obtain signed releases for school and medical providers to communicate		
	Obtain reason for referral from BH provider and/or primary care provider		
	Obtain type of service requested (In-home therapy, outpatient therapy, intensive care coordination etc.)		
	Obtain health insurance information and confirm eligibility for CBHI		
	Document in EMR		
REFERRAL STAGE	Go to health insurance website and/or https://www.mass.gov/service-details/find-a-cbhi-provider to find provider based on region		Within 5 business days
	Complete referral paperwork		
	Call family to let them know referral was completed and who they should expect to hear back from		
	Document in EMR		
FOLLOW UP STAGE	Call family to ask about scheduling initial appointment for BH/CBHI services		Within 30 days of referral
	If family has not scheduled appointment, problem-solve barriers for scheduling appointment <ul style="list-style-type: none"> • How important are the services? • How confident does that family feel about accessing services? • Stigma about help-seeking? • Logistical barriers: transportation, work demands, privacy and in-home assessment 		
	If family has scheduled appointment, get date, document in EMR, ask if you can support them in any other way, including reminder call, logistics etc.		
	If family completed initial appointment, ask how it went, if they have any questions or concerns		
	If family has started services, think ahead with family about continuing with services		

	<ul style="list-style-type: none"> • What will help you stay engaged with services? • How do you know things are getting better? • What can you do if it becomes difficult to continue? 	
	Obtain medical releases for services	
	Document updates and progress in EMR	Within 30 days of engagement with services
	Obtain new signed releases for school and medical providers to communicate	
RESOURCES	MA Children’s Behavioral Health Initiative (CBHI) https://www.mass.gov/mashealth-childrens-behavioral-health-initiative	
	Association of Behavioral Health CBHI Guide https://www.abhmass.org/images/publications/download_publications/cbhi-guide.pdf	
	National Alliance for Mental Illness MA https://namimass.org/resources/mental-and-medical-health-services	