

# OBAT Eligibility, Intake, and Assessment

## Module 4



### Today's Presenters

#### **Claire Nolan, PharmD**

Program Manager for MI-CCSI's involvement in the Michigan Overdose Data to Action (MODA) program, content expert, faculty member, and participant in practice transformation initiatives. Dr. Nolan has experience in community, specialty, and ambulatory pharmacy.



#### **Robin Schreur, BS, RN, CCM**

Trainer for MI-CCSI with care management experience in the primary care, behavioral health, and payer settings. She has trained hundreds of clinicians on the care management process and motivational interviewing. Her love of and partnership with patients, families and clinicians is rooted in early work as a psychiatric nurse and the deep conviction that care management is a privilege and calling.

# Disclosure

**MI-CCSI, or the presenter, does not have any financial interest, relationships, or other potential conflicts, with respect to the material which will be covered in this presentation.**

# Patient-Centered Treatment for Substance Use Disorder in Primary Care

## Clinical

**Module Title**

- |           |  |
|-----------|--|
| <b>1</b>  | <b>Navigating Buprenorphine Prescribing for the Primary Care Physician</b>                 |
| <b>3</b>  | <b>Buprenorphine Medical Management: Monitoring the Patient</b>                            |
| <b>5</b>  | <b>Challenging Clinical Scenarios in MOUD: Early Refills and Lost or Stolen Medication</b> |
| <b>7</b>  | <b>Complex Cases in Buprenorphine Treatment, Part 1</b>                                    |
| <b>9</b>  | <b>Complex Cases in Buprenorphine Treatment, Part 2</b>                                    |
| <b>11</b> | <b>Pain and Addiction</b>  |

## Operational

**Module Title**

- |           |  |
|-----------|--|
| <b>2</b>  | <b>Substance Use Disorder and Patient Identification</b>                           |
| <b>4</b>  | <b>OBAT Eligibility, Intake and Assessment</b>                                     |
| <b>6</b>  | <b>Patient Support for Induction and Maintenance</b>                               |
| <b>8</b>  | <b>Operationalizing Team Meetings, Systematic Case Review, &amp; Documentation</b> |
| <b>10</b> | <b>Team Roles and Responsibilities</b>   |
| <b>12</b> | <b>Supporting the Patient Beyond Buprenorphine</b>                                 |

# Action Period Assignment




## From Module 2

- Identify the tool your team will use to identify patients across the continuum of SUD



# OBJECTIVES

At the conclusion of this presentation, the participant will be able to:

-  **Define the process to screen for participation in the office-based addiction treatment (OBAT) program**
-  **Describe the OBAT intake process**
-  **List components of the initial provider assessment**

# AGENDA

1	Review
2	Screen for OBAT Participation
3	OBAT Intake
4	Initial Provider Assessment
5	Practice Interviews

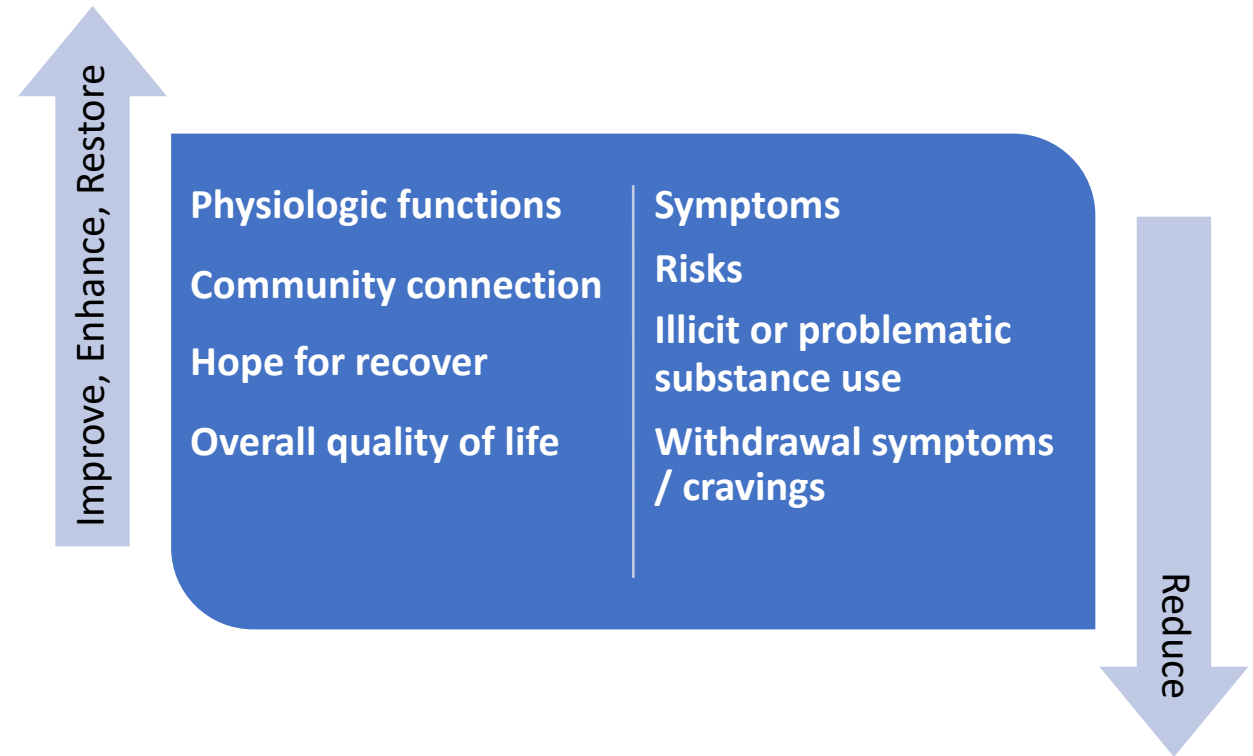
# Review

## Previous Modules

# Office-Based Addiction Treatment (OBAT)

## Overview

- Patient-focused
- Evidence-based
- Primary care / community model
- Offer of medication and psychosocial therapies as a component of a comprehensive care plan
- Select patients identified via screening may be candidates for OBAT

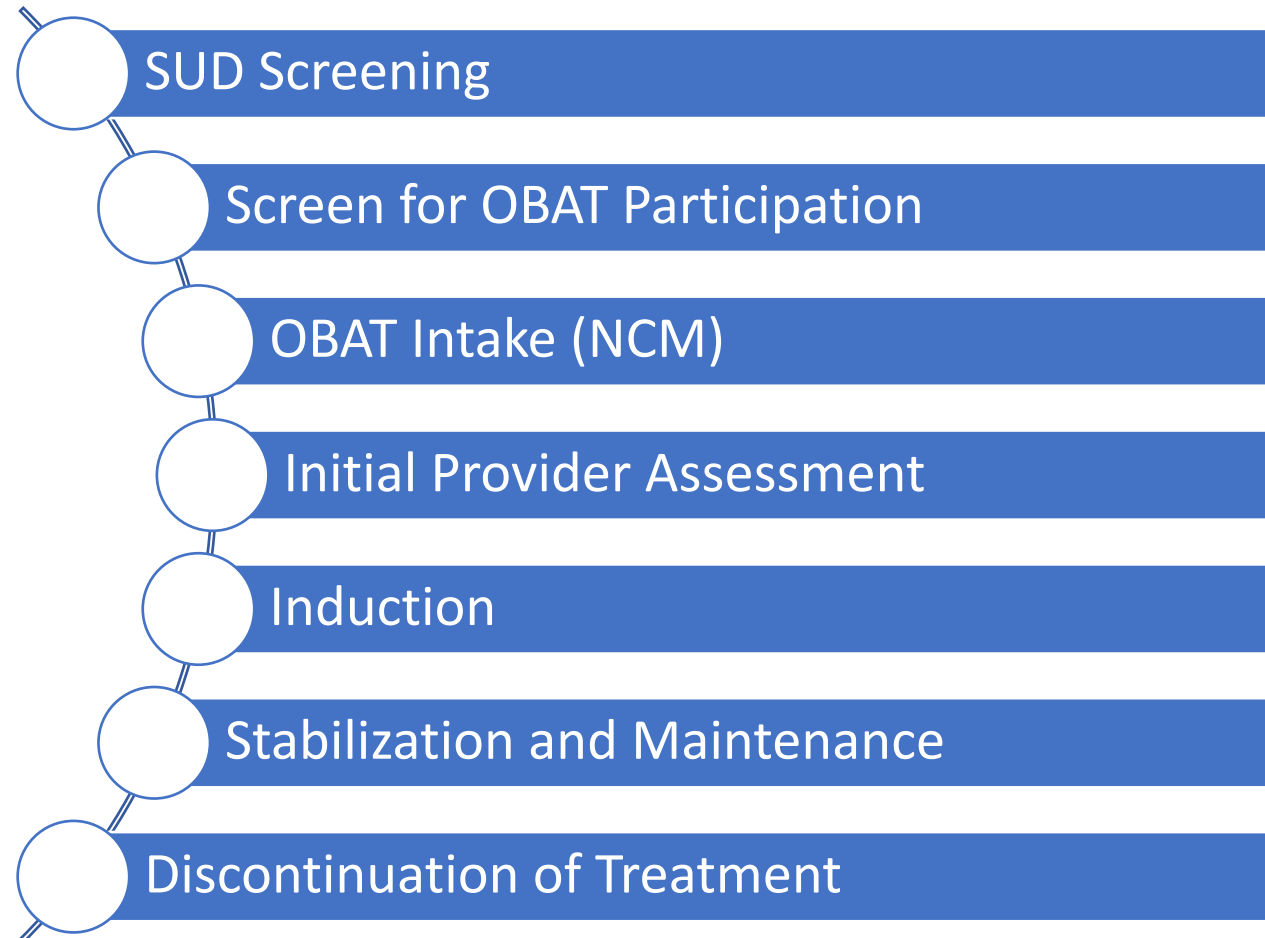


Reference Massachusetts Nurse Care Model of Office Based Addiction Treatment: Clinical Guidelines. (2021). Office Based Addiction Treatment Training and Technical Assistance. Boston Medical Center.  
[https://www.bmcobat.org/resources/index.php?filename=22\\_2021\\_Clinical\\_Guidelines\\_06.22.21.FINAL.pdf](https://www.bmcobat.org/resources/index.php?filename=22_2021_Clinical_Guidelines_06.22.21.FINAL.pdf)



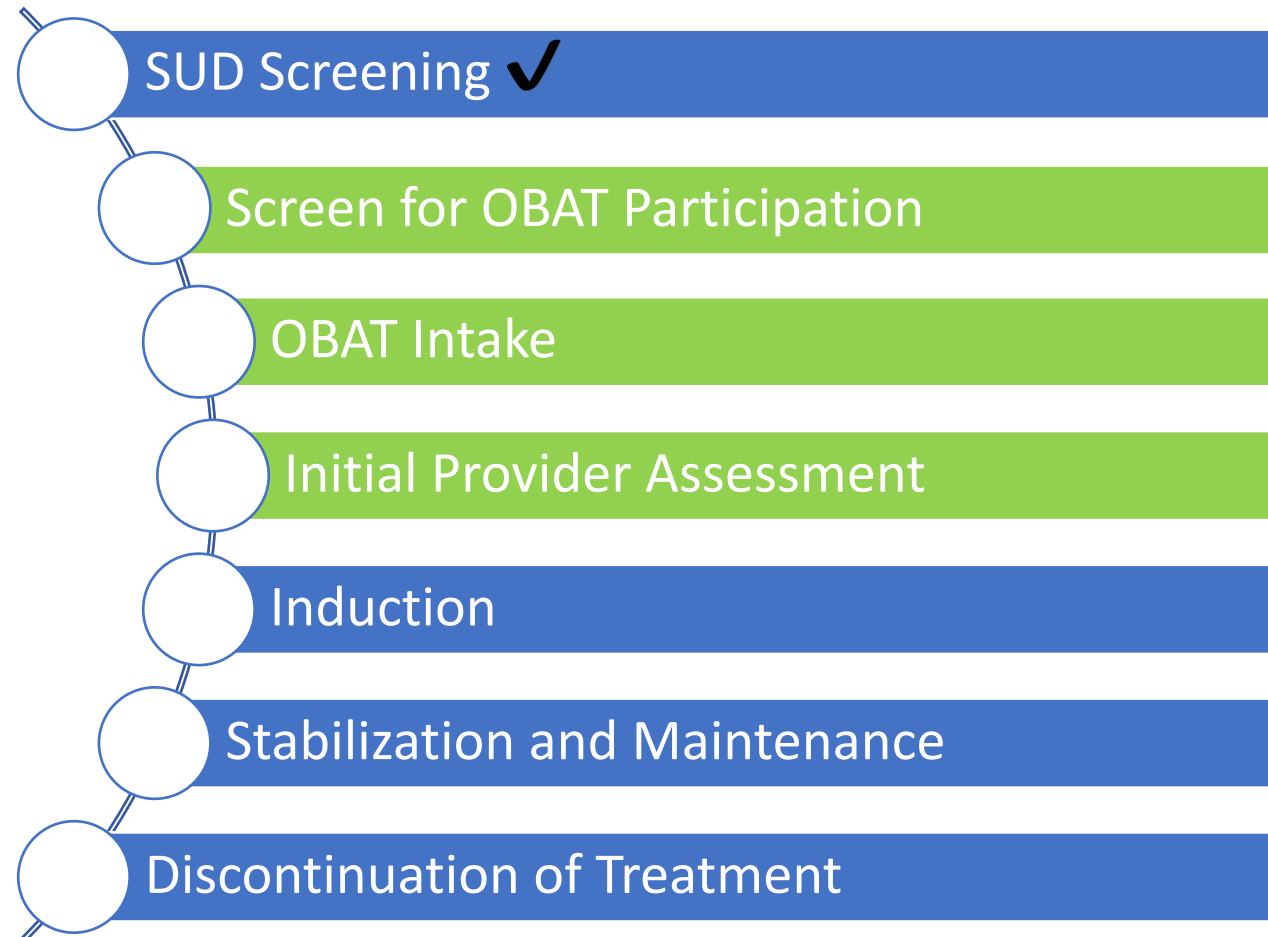
# OBAT

## Program Components



# OBAT

## Program Components



# OBAT Eligibility

## Criteria and Initial Screening



## OBAT Eligibility Criteria

- DSM-V diagnosis of substance use disorder
- Able to attend visits during program hours of operation
- If seeking treatment with buprenorphine, no chronic pain requiring full  $\mu$ -agonist opioid therapy (e.g., morphine)
- If seeking treatment with naltrexone, not have chronic pain requiring ongoing opioid therapy
- Able to be treated in an office-based setting safely without risk of harm to themselves or others

Reference - Massachusetts Nurse Care Model of OBAT: Clinical Guidelines. (2021). OBAT TTA. Boston Medical Center.  
[https://www.bmcobat.org/resources/index.php?filename=22\\_2021\\_Clinical\\_Guidelines\\_06.22.21.FINAL.pdf](https://www.bmcobat.org/resources/index.php?filename=22_2021_Clinical_Guidelines_06.22.21.FINAL.pdf)

# OBAT Eligibility

## Initial Screening

- Patient-centered approach
- Enables team-based decision-making regarding eligibility
- Timely review is essential
  - Goal = low-barrier, same day treatment access
- OBAT Training and Technical Assistance Manual
  - Initial Screening Note (pages 96-104)

### Topics Covered in Detail

- Demographics
- Social History and Support
- Housing
- Substance use history, including recovery and treatment
- Mental health history
- Health status
- Health care provider information
- Treatment goals

Reference - Massachusetts Nurse Care Model of OBAT: Clinical Guidelines. (2021). OBAT TTA. Boston Medical Center.  
[https://www.bmcobat.org/resources/index.php?filename=22\\_2021\\_Clinical\\_Guidelines\\_06.22.21.FINAL.pdf](https://www.bmcobat.org/resources/index.php?filename=22_2021_Clinical_Guidelines_06.22.21.FINAL.pdf)

# OBAT Eligibility

## Engaging the Patient

- Express interest
- Open-ended questions
- Empathetic demeanor
- Examples:
  - “How are things going at home?”
  - “Where are you currently staying?”



Reference - SAMHSA. (2021, June). SAMHSA-HRSA Center for Integrated Health Solutions (CIHS). SAMHSA. <https://www.samhsa.gov/integrated-health-solutions>

# OBAT Eligibility

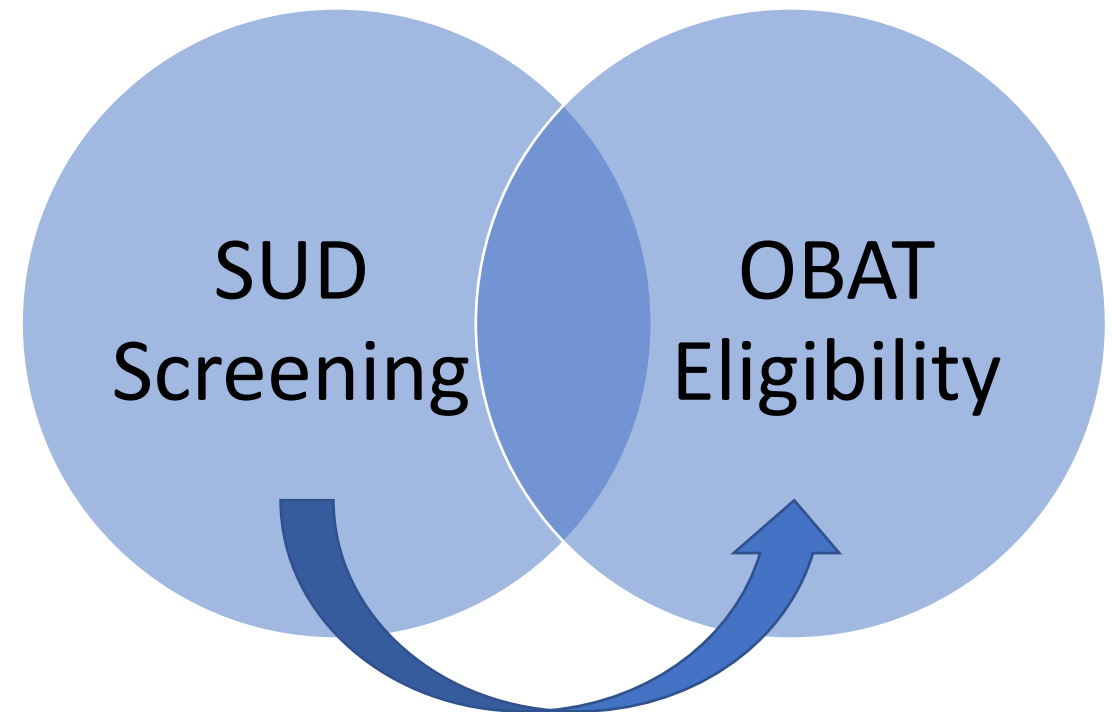
## Practical Considerations for Initial Screening

- Who?
- When?
- What information will be collected?
- Telephone or in-person?
- Documentation process?

# OBAT Eligibility

## Putting it all Together

- Separate activities
- Some overlap in the information collected
  - E.g., substance use history
- Patient identification occurs first
  - E.g., SUD screening



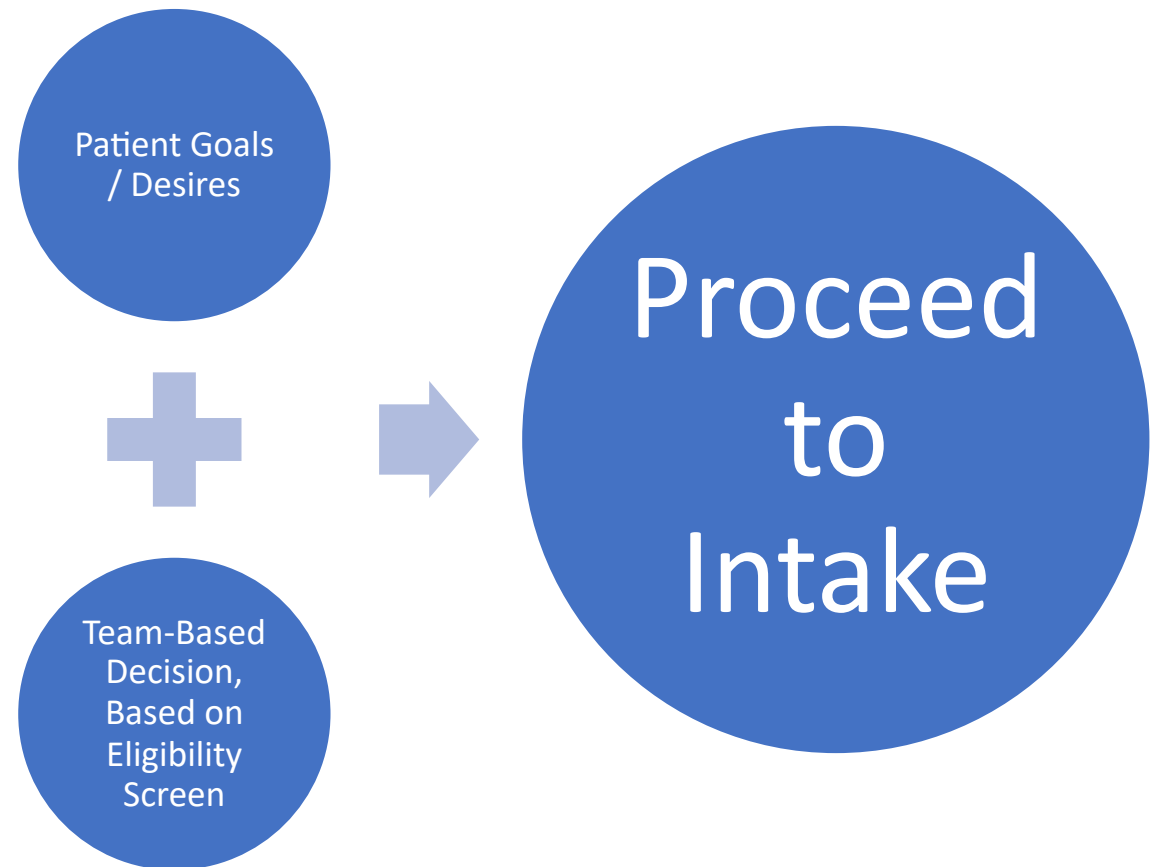
Reference - Massachusetts Nurse Care Model of OBAT: Clinical Guidelines. (2021). OBAT TTA. Boston Medical Center.  
[https://www.bmcobat.org/resources/index.php?filename=22\\_2021\\_Clinical\\_Guidelines\\_06.22.21.FINAL.pdf](https://www.bmcobat.org/resources/index.php?filename=22_2021_Clinical_Guidelines_06.22.21.FINAL.pdf)



# OBAT Eligibility

## Team-Based Decision Making

- Role of the team:
  - Review initial screening information
  - Patient goals / desires
  - Determine program eligibility
- Decisions should be timely
  - Ensure timely access to care maintained
- Future modules:
  - Team roles/responsibilities
  - Team meetings



Reference - Massachusetts Nurse Care Model of OBAT: Clinical Guidelines. (2021). OBAT TTA. Boston Medical Center.  
[https://www.bmcobat.org/resources/index.php?filename=22\\_2021\\_Clinical\\_Guidelines\\_06.22.21.FINAL.pdf](https://www.bmcobat.org/resources/index.php?filename=22_2021_Clinical_Guidelines_06.22.21.FINAL.pdf)

# OBAT Intake

## Setting the Stage

# OBAT Intake

## Building the Groundwork for a Therapeutic Relationship

- Complete intake
  - Confirm info already collected
  - Fill in gaps / augment
- Opportunity to obtain:
  - Signed consent forms
  - Laboratory testing
- Patient education
- OBAT Training and Technical Assistance Manual
  - Nurse Intake (pages 105-111)



Reference - Massachusetts Nurse Care Model of OBAT: Clinical Guidelines. (2021). OBAT TTA. Boston Medical Center.  
[https://www.bmcobat.org/resources/index.php?filename=22\\_2021\\_Clinical\\_Guidelines\\_06.22.21.FINAL.pdf](https://www.bmcobat.org/resources/index.php?filename=22_2021_Clinical_Guidelines_06.22.21.FINAL.pdf)

# OBAT Intake

## Labs and Consent

- Laboratory testing
- Consent forms for collaboration of care

### Typical Laboratory Testing

- Toxicology
- Pregnancy testing
- HIV/HBV/HCV/syphilis
- Tuberculosis (per institutional protocol)

### Additional Laboratory Testing (*as clinically indicated*)

- Complete blood count
- Comprehensive metabolic panel
- Hepatic function
- Hepatitis A serology
- Chlamydia and gonorrhea

Reference - Massachusetts Nurse Care Model of OBAT: Clinical Guidelines. (2021). OBAT TTA. Boston Medical Center.  
[https://www.bmcobat.org/resources/index.php?filename=22\\_2021\\_Clinical\\_Guidelines\\_06.22.21.FINAL.pdf](https://www.bmcobat.org/resources/index.php?filename=22_2021_Clinical_Guidelines_06.22.21.FINAL.pdf)

# OBAT Intake

## Treatment Agreement and Clinic Policies

- Goals of agreement
  - Provide clarity and set expectations
  - Patient engagement
  - Reinforcement, education, and reassurance
  - Connection to resources
- OBAT Training and Technical Assistance Manual
  - OBAT Treatment Agreement and Clinic Policies (pages 143-151)

### Components to Consider

- Clinical appointments
- Random call-backs
- Counseling
- Medication refills
- Toxicology screening
- Behavior agreement

Reference - Massachusetts Nurse Care Model of OBAT: Clinical Guidelines. (2021). OBAT TTA. Boston Medical Center.  
[https://www.bmcobat.org/resources/index.php?filename=22\\_2021\\_Clinical\\_Guidelines\\_06.22.21.FINAL.pdf](https://www.bmcobat.org/resources/index.php?filename=22_2021_Clinical_Guidelines_06.22.21.FINAL.pdf)

# Treatment Agreement

## Example - Clarity and Expectations

### The patient can expect:

- Dignity and respect
- Notification if the office is closed + information on how to seek assistance, if needed
- Confidentiality in compliance with CFR 42
- Up to date information on means to contact a member of the OBAT team or a colleague

### The OBAT team can expect

- Dignity and respect
- Notification if the patient is unable to attend an appointment
- Up to date information on means to contact the patient to assist with treatment needs

Reference - Massachusetts Nurse Care Model of OBAT: Clinical Guidelines. (2021). OBAT TTA. Boston Medical Center.  
[https://www.bmcobat.org/resources/index.php?filename=22\\_2021\\_Clinical\\_Guidelines\\_06.22.21.FINAL.pdf](https://www.bmcobat.org/resources/index.php?filename=22_2021_Clinical_Guidelines_06.22.21.FINAL.pdf)

# OBAT Intake

## Patient Education

- Clinic information
  - Hours
  - Emergency contact information and on-call coverage process
  - Warm hand-off process to another treatment setting, when necessary/appropriate
- Medication for addiction treatment
  - What it is, how it works, administration, interactions, side-effects, potential adverse reactions, and initiation and maintenance processes
  - Responsibilities for safe storage
- Harm reduction
  - Overdose prevention, identification, and reversal
  - Safer injection techniques, when appropriate
  - Safer consumption techniques as appropriate
  - Access to safer consumption supplies

# OBAT Intake

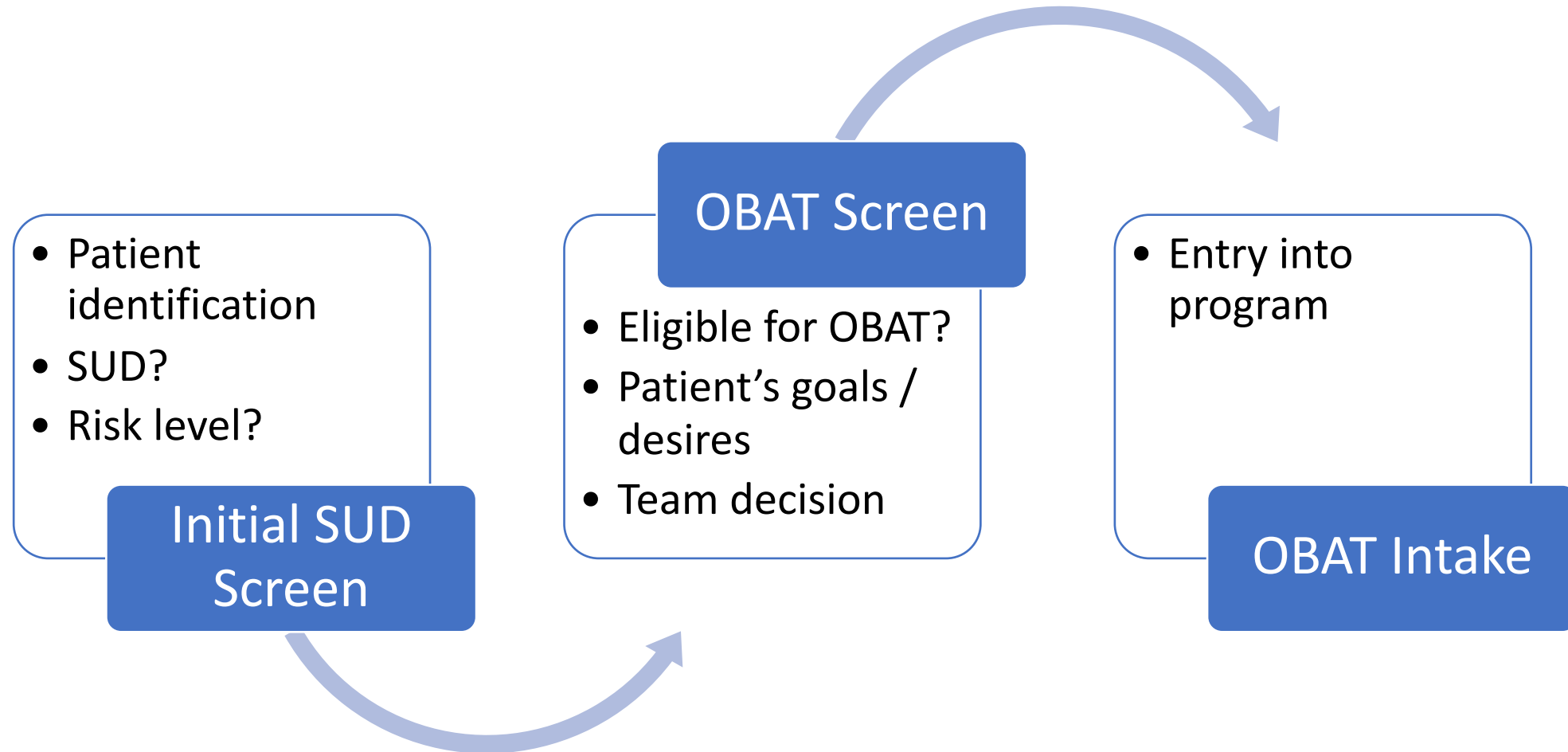
## Practical Considerations

- Who?
- Treatment agreement specifics?
- Patient education materials?
- Initial labs?
- Next steps for patients who decide not to participate?
- Documentation process?



# Screening and Intake

## Putting it all Together

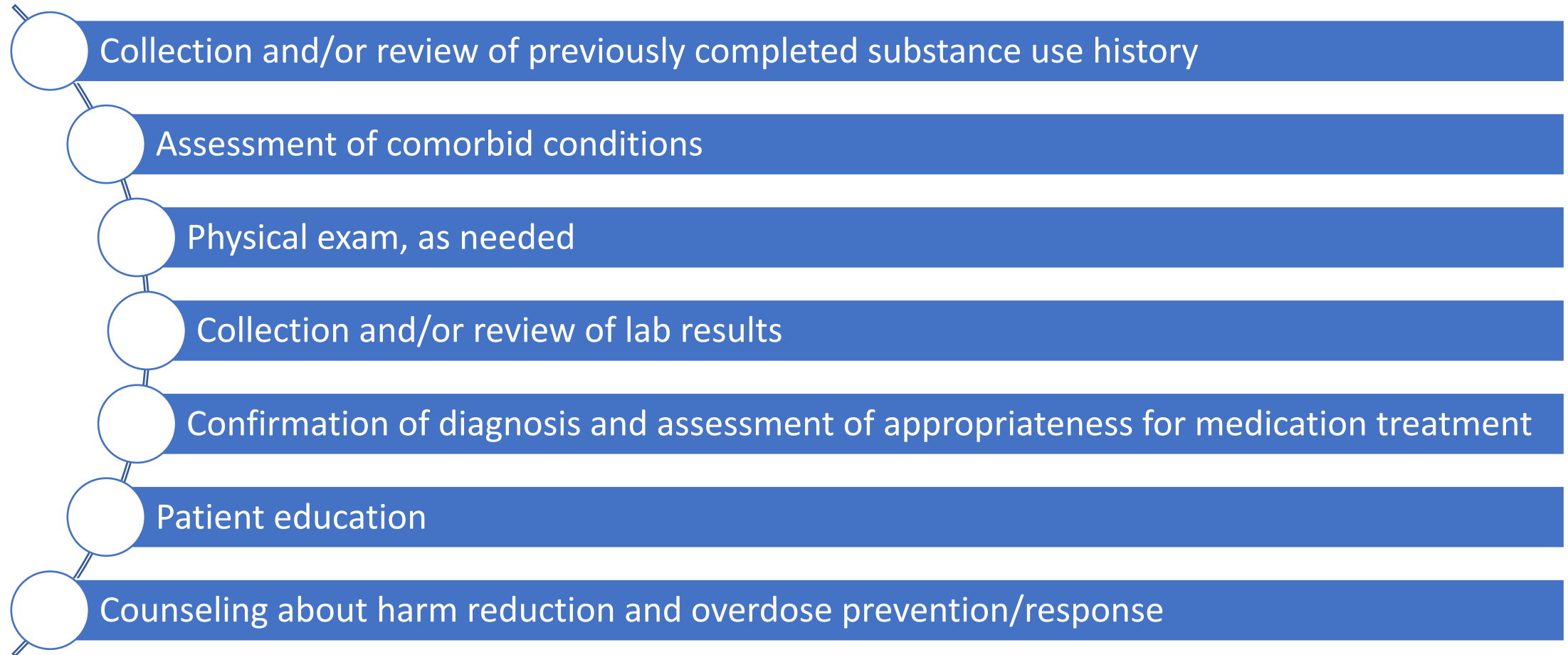


Reference - Massachusetts Nurse Care Model of OBAT: Clinical Guidelines. (2021). OBAT TTA. Boston Medical Center.  
[https://www.bmcobat.org/resources/index.php?filename=22\\_2021\\_Clinical\\_Guidelines\\_06.22.21.FINAL.pdf](https://www.bmcobat.org/resources/index.php?filename=22_2021_Clinical_Guidelines_06.22.21.FINAL.pdf)

# Initial Provider Assessment

## Assessing for Appropriate Medication Treatment

# Initial Provider Assessment Components



Reference - Massachusetts Nurse Care Model of OBAT: Clinical Guidelines. (2021). OBAT TTA. Boston Medical Center.  
[https://www.bmcobat.org/resources/index.php?filename=22\\_2021\\_Clinical\\_Guidelines\\_06.22.21.FINAL.pdf](https://www.bmcobat.org/resources/index.php?filename=22_2021_Clinical_Guidelines_06.22.21.FINAL.pdf)

# A Guide for Patients Beginning Buprenorphine Treatment

Provide patient education:

- Timing of administration
- Withdrawal symptoms and assessment

**Before you begin you want to feel sick from your withdrawal symptoms**

<p>It should be at least ...</p> <ul style="list-style-type: none"> <li>- <b>12 hours</b> since you used heroin/or pain pills</li> <li>- <b>16 hours</b> since you last used fentanyl</li> <li>- 48-72 hours since you used methadone</li> <li>- If you used more than one drug, use the longest wait time before starting buprenorphine.</li> </ul>	<p>You should feel at least four of these symptoms ...</p> <ul style="list-style-type: none"> <li>- Restlessness</li> <li>- Frequent yawning</li> <li>- Enlarged pupils</li> <li>- Runny nose/eyes</li> <li>- Body aches</li> <li>- Tremors/twitching</li> <li>- Chills or sweating</li> <li>- Anxious or irritable</li> <li>- Goose bumps</li> <li>- Stomach cramps, nausea, vomiting or diarrhea</li> </ul>
--	---

**Once you are ready, follow these instructions to start the medication**

<b>DAY 1:</b> 8-24 mg of buprenorphine						<b>DAY 2:</b> 8 to 16 mg of buprenorphine	
Step 1.		Step 2.		Step 3.		Take 8 to 16 mg dose	
Take the first dose  <div style="border: 1px solid black; padding: 5px; display: inline-block;">4 to 8 mg</div>	Wait 45 minutes  <div style="border: 1px solid black; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;"> <div style="text-align: center;">45 minutes</div> </div>	Still feel sick? Take next dose  <div style="border: 1px solid black; padding: 5px; display: inline-block;">4 to 8 mg</div>	Wait 6 hours  <div style="border: 1px solid black; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;"> <div style="text-align: center;">6 hours</div> </div>	Still uncomfortable? Take last dose  <div style="border: 1px solid black; padding: 5px; display: inline-block;">4 to 8 mg</div>	Stop  <div style="border: 1px solid black; border-radius: 50%; width: 60px; height: 60px; margin: 0 auto; display: flex; align-items: center; justify-content: center;"> <div style="text-align: center;">Stop</div> </div>	<div style="border: 1px solid black; padding: 10px; display: inline-block; margin: 10px auto; width: 100px;">                         8 to 16 mg                     </div>	
<ul style="list-style-type: none"> <li>- Put the tablet or strip under your tongue</li> <li>- Keep it there until fully dissolved (about 15 min.)</li> <li>- Do NOT eat, drink or smoke 15 min before</li> <li>- Do NOT swallow the medicine</li> </ul>		<ul style="list-style-type: none"> <li>- You may need up to 24mg to manage withdrawal on day 1.</li> <li>- Most will do well with 16mg</li> </ul>		<ul style="list-style-type: none"> <li>- Stop after this dose</li> <li>- Do not exceed 24mg on Day 1</li> </ul>		<ul style="list-style-type: none"> <li>- If you took 16mg or more on day 1 take a total of 16mg</li> <li>- If you took less than 16mg and felt well take that dose.</li> <li>- If you have questions or troubles follow up with the clinical team.</li> </ul>	

**Contact the clinic or emergency number given to you if your symptoms get worse.**

Boston Medical Center Office Based Addiction Treatment Training and Technical Assistance + 12/2020

Reference - Massachusetts Nurse Care Model of OBT: Clinical Guidelines. (2021). OBT TTA. Boston Medical Center.  
[https://www.bmcobat.org/resources/index.php?filename=22\\_2021\\_Clinical\\_Guidelines\\_06.22.21.FINAL.pdf](https://www.bmcobat.org/resources/index.php?filename=22_2021_Clinical_Guidelines_06.22.21.FINAL.pdf)

# Intake and Assessment

## The Team Sets the Tone for the Therapeutic Relationship

- Acknowledge the uniqueness of each individual patient
- Establish patient-driven goals for treatment
- Build rapport
- Reinforce the view of SUD as a chronic medical condition
- Emphasize:
  - View of SUD as a chronic medical condition
  - Support will be continuous and that the patient will not be abandoned
  - Treatment plan and medication therapy may change over time

# HOMework

## Action Period

- Identify the tool your team will use to determine patient eligibility for office-based treatment of addiction.
- Define the process your team will follow for intake into the program.



# Thank You

Please email [Claire.Nolan@miccsi.org](mailto:Claire.Nolan@miccsi.org) with any questions.

# Examples From Practice

## Eligibility, Intake, and Assessment

**Once a patient has screened positive for substance use disorder, what is the process your team takes for identifying them as appropriate for and engaging them in office-based addiction treatment?**