

BMJ Open Social work's scope of practice in the provision of primary mental health care: protocol for a scoping review

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ABSTRACT

Introduction Social work is a key member of interprofessional primary healthcare teams and foundational to primary healthcare reforms that aim to improve the provision of mental healthcare. Little is known, however, about social work's scope of practice within primary healthcare settings, particularly in the provision of mental healthcare. The objective of this study is to identify and describe social work's scope of practice as it relates to mental healthcare in primary healthcare settings.

Methods and analysis A scoping review will be conducted using the methodology established by Arksey and O'Malley. We will search electronic databases (MEDLINE, Embase, PsycINFO, CINAHL, Social Services Abstracts and Social Work Abstracts) to identify studies appropriate for inclusion. One reviewer will independently screen all abstracts and full-text studies for inclusion, with supervision by lead investigator. We will include any study that focuses on social work and mental healthcare within primary healthcare settings. All bibliographic data, study characteristics and range of social work practice activities will be collected and analysed using a tool developed by the research team.

Ethics and dissemination The scoping review will synthesise social work's scope of practice in the provision of mental healthcare within primary healthcare settings. This review will be the first step to formally develop guidelines for social work practice in primary healthcare. The results will be disseminated through a peer-reviewed publication and conference presentations.

INTRODUCTION

There is strong international evidence that supports that the optimal location for responding to the growing population needs for prevention and management of mental health disorders resides in primary healthcare.¹⁻³ The development and implementation of interprofessional primary healthcare teams has helped support Canadian and US healthcare reform goals of improving access, quality of care and availability of services to meet the needs of an increasingly complex patient population.⁴⁻⁷ One approach to achieving healthcare reforms has been by strengthening interprofessional primary healthcare teams with the inclusion of mental

Strengths and limitations of this study

- ▶ This will be the first scoping review study to identify social work's scope of practice in the provision of primary mental healthcare.
- ▶ Scoping reviews cover vast volume of literature and will provide a broad understanding of social work's contribution to mental healthcare in primary care settings.
- ▶ Inclusion criteria are limited to English and inclusive of all peer-reviewed publications.
- ▶ No formal assessment of quality will be applied to articles included in this study.

health providers such as social work in order to enhance the availability, capacity and quality of mental health care.⁴⁻¹⁰

As one of the few non-medical providers in primary healthcare, social work brings an expertise and philosophy that complements aims of primary healthcare practice and skills for the provision of mental healthcare.^{4 7 11} Collaborative care interventions that include social work and other mental health providers can be highly effective in improving outcomes for primary healthcare patients with mental health disorders such as depression and anxiety.^{2 12-16} Although there has been a recent increase of social workers working in interprofessional primary healthcare team settings, greater clarity is needed to help social workers determine how to develop their role in order to effectively contribute to collaborative care interventions.^{4 8} Currently, no practice guidelines exist that can provide clarity to social work in the provision of mental healthcare within primary healthcare settings. Scope of practice refers to the range of roles, functions, responsibilities and activities that professionals are educated and authorised to perform.¹⁷ Social workers in primary healthcare settings often provide care to diverse patient populations and engage in a broad range of practice areas that is inclusive, but not limited to mental health



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care.⁴ Within primary healthcare settings, social workers provide care related to chronic disease, geriatrics, palliative care, grief, trauma, parenting and a multitude of psychosocial issues.⁴ According to a recent study investigating social work's emerging role in primary healthcare, mental healthcare is a core practice area with 96% of study participants indicating that they provided mental healthcare on a daily basis.⁴ Although social workers in primary healthcare settings provide care to a diverse range of practice areas, our scoping review will focus on mental healthcare because it is a core practice area for social workers in primary healthcare settings.⁴ Doing so will also help guide current healthcare reforms that are striving to enhance the capacity of primary mental health care.⁴⁻⁷ By focusing solely on mental healthcare, our scoping review is not intended to minimise the importance of other areas of care in which social work is engaged. Identifying the current state of knowledge regarding social work's scope of practice related to primary mental healthcare will help provide a foundation for the development of future practice guidelines.

Study objectives

The objectives of this scoping review are to (1) systematically scope the literature on social work, mental health and primary healthcare; and (2) identify the range of roles, functions, responsibilities and activities that social work is performing in order to describe social work's scope of practice. This work will constitute the first step in the development of guidelines to support social work practice in primary healthcare. This information will help provide guidance to social workers and other leaders in primary healthcare in determining how social work's scope of practice can best compliment the interprofessional team in helping to address demands for mental healthcare.

METHODS AND ANALYSIS

Our study is employing scoping review methods to help provide a broader understanding of social work's scope of practice in the provision of mental healthcare in primary healthcare settings.¹⁸ A scoping review is a method of knowledge synthesis that 'addresses an exploratory research question aimed at mapping key concepts, types of evidence and gaps in research related to a defined area or field by systematically searching, selecting and synthesising existing knowledge'. (Colquhoun *et al*, p5)¹⁹ Systematically mapping a subject field is particularly useful when literature on a topic is being compiled for the first time, when minimal literature exists for a particular topic and/or when the investigation is examining a complex or non-homogeneous topic.¹⁸⁻²⁰ Scoping reviews also provide an opportunity to identify key concepts, gaps in research and evidence that can help guide practice and policy-making.²⁰ Knowledge synthesis like scoping reviews is essential for advancing healthcare practices and can help knowledge users—in this case social

workers—increase inclusion of efficient evidence-based decisions in practice.¹⁹

Following recommendations from Colquhoun *et al*,¹⁹ our methods for this study are based on a five-stage scoping review framework proposed by Arksey and O'Malley¹⁸ and enhanced by Levac *et al*.²¹ Five stages informing our review are (1) identifying the research question, (2) identifying relevant studies, (3) study selection, (4) charting the data and (5) data summary and synthesis of results.¹⁸ We consider this an optimal framework for our current study due to the infancy of the subject matter and scarcity of evidence-based studies.

Stage 1: identifying the research question

Levac *et al*²¹ recommend clarifying stage 1¹⁸ by combining a broad research question with a clear scope of inquiry that defines the concept, target population and relevant health outcomes in order to clarify the focus of the scoping review. Levac *et al*²¹ also recommend developing the research question with the intended outcome of the scoping review in mind to help determine the purpose of the study. In this case, the purpose of our scoping review is to provide clarity about social work's scope of practice in the provision of primary mental healthcare that may help contribute to practice guidelines that are currently absent. Through consultation, the research team has defined the research question as: 'What is social work's scope of practice in mental healthcare when working within primary healthcare settings?'

Stage 2: identifying relevant studies

At stage 2,¹⁸ we seek to identify available literature on social work providing mental healthcare within primary healthcare settings. Levac *et al*²¹ recommend strengthening stage 2¹⁸ by assembling a suitable research team with combined content and methodological expertise to ensure successful completion of the scoping review. We have followed Levac *et al*'s²¹ suggestion and have assembled a team that combines expertise in primary care (JBB/RA), social work practice in health (JBB/RA/TK), mental healthcare (JBB/RA/TK) and scoping review methodology (RA/TK). We have also identified a graduate-level research assistant who will participate in all phases of the scoping review.

We have met with a health sciences librarian at the University of Toronto in Toronto, Canada to determine databases and keywords. Identification of studies relevant to this review will be achieved by searching the following databases: MEDLINE, Embase, PsycINFO, CINAHL, Social Services Abstracts and Social Work Abstracts. Search terms have been developed with input from the research team and consultation with an experienced research librarian. Database searches will combine terms from three themes: social work, primary healthcare and mental health. Search terms being used to identify relevant studies are displayed in table 1.

Terms will be searched as keywords in the title, abstract and subject headings as appropriate. Inclusion criteria

Table 1 Search terms being used to identify relevant studies

Concepts	Search terms
Social work	social work*
Primary healthcare	primary care, primary healthcare, medical home*, family physician*, family practice, family medicine, general practice, nurse practitioner*, physician*, doctor*
Mental health	mental health, mental disorder*, mental illness*, common mental disorder*, anxiety, depression

guiding publication types acceptable for review are broad and inclusive of all peer-reviewed publications such as original research, case reports, literature reviews, technical guidelines and commentary papers. Furthermore, inclusion criteria are limited to English language. No date limits will be applied. Search results will be downloaded and imported into RefWorks.

Stage 3: study selection

At stage 3,¹⁸ the review process will be composed of two levels of screening: (1) a title and abstract review; and (2) full-text review. For the first level of screening, the graduate-level research assistant—working under supervision of lead authors—will independently conduct title scans and abstract reviews to assess eligibility against inclusion criteria. Articles that are considered relevant will then be included in the full-text review. Any discordant full-text articles will be reviewed by both the research assistant and the lead investigator to determine whether they meet inclusion/exclusion criteria. As well, any discordant full-text articles will be discussed with the second investigator until consensus decision is obtained.

Relevant studies will be assessed against the following inclusion criteria: (1) the words social work, primary healthcare (inclusive of search terms) and mental health care (inclusive of search terms) are used in the title or abstract; (2) social work is a key focus of the article; (3) the article focuses mainly on mental healthcare (inclusive of all types of mental healthcare except substance use) and (4) primary healthcare (inclusive of search terms) is a main focus of the article. Any type of study design will be included as well; commentary articles will also be included. We will follow Levac *et al*'s²¹ recommendation to consider stage 3 as an iterative process that includes regular team meetings to discuss study inclusion and exclusion at various stages of the study process.

Stage 4: charting the data

To guide stage 4,¹⁸ a data collection instrument will be generated by the research team to extract characteristics from the sample. We will extract data from all studies included in the scoping review. Sample characteristics will include but will not be limited to: authorship, publication year, type of article (eg, original study, commentary paper), study design, geographical origin of study or article, description of practice setting, type of social work practice activities, patient population characteristics and treatment modalities. This form will be reviewed by the research team. Data extraction will be conducted

by a graduate-level research assistant working under the supervision of lead investigator. Data will be extracted into a single Excel spreadsheet in Microsoft Excel software. Again, we will adopt Levac *et al*'s²¹ recommendation that the research team collectively develop the data-charting form and together determine variables to extract from the data in order to best answer the research question.

Stage 5: data summary and synthesis of results

The focus of stage 5¹⁸ will be to provide a summary and synthesis of the results. This aligns with the purpose of scoping reviews to provide a map of concepts underpinning the research, key sources and types of research.²² Levac *et al*'s²¹ suggest breaking stage 5¹⁸ into the following three smaller distinct steps: (1) analysis; (2) reporting the results and deliver the outcome guiding the overall study purpose and research question; and (3) consider the meaning of the findings in relation to the study purpose and discuss potential implications that findings may have on future research, practice and policy.

Ethics and dissemination

This study will be the first step to developing practice guidelines for social workers providing mental health services in primary healthcare settings. Research ethics approval is not required given that we are collecting data from publicly available sources. Results of this scoping review study will be disseminated through a conference presentation that engages an audience of social work practitioners in primary healthcare and a peer-reviewed publication. All members of the research team have established relationships with social work and primary healthcare networks, which will also be used to disseminate findings. Our aim is to use findings from this scoping review to help guide future research with social worker practitioners in primary healthcare to better understand how best to support them in the provision of quality mental healthcare.

Contributors RA, TK and JBB conceptualised and designed the study. RA wrote the initial study protocol, which was then revised by TK and JBB. RA took the lead and compiled revisions. RA, TK and JBB approved the final protocol manuscript and agreed to be accountable to all aspects of the work.

Competing interests None declared.

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