

Map the Workflow Worksheet

Description

This worksheet guides you through the planning process for developing procedures and implementing behavioral screenings in your office. You can get the best results by going through it systematically with your staff.

Identify “Key” Practice Staff Who Will Help Map the Workflow

- Physician Champion _____
- Practice Manager _____
- Nursing Manager _____
- Other _____

Outline Your Workflow Process

Using the following guide, develop your practice workflow/process and identify staff roles throughout this process.

Screening Tools

- Determine what screening tools your office will implement (*indicates tool is available for free on the TNAAP website):

- _____ Edinburgh Postnatal Depression Scale (EPDS)*
- _____ Pediatric Symptom Checklist (PSC – 17)*
- _____ Strengths and Difficulties Questionnaire (SDQ)*
- _____ Ages & Stages Questionnaire: Social Emotional (ASQ-SE)
- _____ CRAFFT*
- _____ Patient Health Questionnaire: Modified for Teens (PHQ-9)*

- Who will be responsible for downloading and/or purchasing the tools?

- _____ Front Office
- _____ Nurse
- _____ Other _____

- If using electronic records or age-specific encounter forms, who will indicate that the screening has been completed and where will that indication appear?

_____ Nurse

_____ Doctor

- Who will ensure that copies of the screening tool(s) are available each day?

_____ Front Office

_____ Nurse

_____ Other _____

- If completed during the visit, when in the visit will the parent or child receive the screening tool and who will give it to the parent? (May be different for each individual screening tool)

_____ Front Office at check in

_____ Nurse in exam room

_____ Other _____

- Who will help parents who need assistance completing the questionnaire (e.g. literacy problem)?

_____ Front Office

_____ Nurse

_____ Other _____

- Who will collect the screening tool from the parents?

_____ Front Office

_____ Nurse

_____ Doctor

_____ Other _____

- Who will score the screening tool?

_____ Front Office

_____ Nurse

_____ Doctor

_____ Other _____

- Who will attach the screening tool to the chart or otherwise make sure it is available to the clinician?

_____ Front Office
_____ Nurse
_____ Other _____

- Who will review the screening tool with the parent and/or child? *When does this happen?*

_____ Nurse When _____
_____ Doctor When _____
_____ Other _____ When _____

Educational Materials and Handouts

- Who will locate patient information materials and handouts?

_____ Front Office
_____ Nurse
_____ Other _____

- Where will you keep your supply of educational materials?

_____ Front office
_____ Clinical area
_____ Other _____

- Who is going to give the parent educational material? *When is the best time to give this to the parent?*

_____ Front Office Best Time _____
_____ Nurse Best Time _____
_____ Doctor Best Time _____
_____ Other _____ Best Time _____

Behavioral Health Referrals

- Who will identify behavioral health (for all ages) resources in your community?

_____ Front Office
_____ Nurse
_____ Other _____

- Who will contact the local Community Mental Health Center or other behavioral health providers to discuss populations served, program, referral process, etc.?

_____ Front Office
_____ Nurse
_____ Other _____

- Who will keep referral resources organized (i.e., binder, post in office area, etc.)?

_____ Front Office
_____ Nurse
_____ Other _____

- Who will keep referral resources up to date?

_____ Front Office
_____ Nurse
_____ Other _____

- Who will handle making referrals for children/teens identified as needing behavioral health services?

_____ Front Office
_____ Nurse
_____ Other _____

- Who will contact referral resources when needed?

_____ Front Office
_____ Nurse
_____ Other _____

- Who will follow up on the referral?

_____ Nurse
_____ Doctor
_____ Other _____

How will this person follow up? _____

- What method will you use to initiate the screening process?

_____ Start with one visit/one tool and expand to others later
_____ Pick key visits for screening and implement tool(s) at those visits
_____ Use tool(s) at all preventive care visits
_____ Office currently incorporates _____ screenings at _____ visits

- Who will be responsible for conducting staff orientations and ensure that the process is understood and implemented by all staff?

_____ Office manager
_____ Nurse
_____ Doctor

Conduct Staff Orientations

Introduce the new workflow and procedures to your staff. Walk through the process and determine if it works the same in practice as it did on paper. Adjust as necessary. Republish the map and formally incorporate into the office protocols. Remember to periodically monitor progress, offer feedback, and make adjustments if necessary.

Introduce the concept, principles, and processes of behavioral health screenings to your staff. A copy of the outlined workflow can become a part of your office policy and protocols.