

Designing a workflow for behavioral health integration

Integrated behavioral health care strategies

The AMA's "Workflow Design How-To Guide" offers best practices and tools on crafting an efficient and effective integrated workflow, enabling primary care providers and their care teams to overcome key barriers to operationalizing integrated behavioral health (BH) care in their practice.

This is part of AMA's broader efforts to empower health care organizations to overcoming obstacles to accessible and equitable treatment for their patients' behavioral, mental and physical health needs.

Featured topics and resources in the guide

Strategies to design workflow

Workflows may look different depending on the practice setting, current staffing, and overall financial considerations; however, general sequences of actions are often consistent. Adjust to fit identified practice needs and available resources.

Approaching workflow design requires practices and systems to consider key questions, such as:

- **Staffing.** What kind of administrative and clinical staff does the practice need?
 - Key factors include patient demographics, financial considerations and practice setting as well as daily operations, clinical care and data/record management needs.
- **Handoffs.** How, and at what frequency, will the staff discuss BH caseloads?
- **Protocols for crisis.** Who develops and maintains a referral list with contact information for higher-level care?
- **Technology.** How and under what circumstances will telehealth be used, if at all, to deliver BH care?
- **Billing and coding.** Are appropriate codes available in the electronic medical record system?

- **Patient and staff feedback.** How is patient and staff feedback collected and used to iterate on and improve the behavioral health integration (BHI) workflow?

The guide provides sample workflows (PDF) and an editable plan (PDF) to help practices and systems create their own workflow that works best for them and their patients.

Working from the general to the specific

High-level design includes:

- Identifying and engage patients
- Identifying and initiating treatment
- Managing treatment plan and track
- Proactively adjusting treatment

Specifics are also detailed, with sample checklists provided for use. Physicians and practices are asked to consider staffing and training, any available technology, their billing and coding procedures, active crisis protocols and both patient and staff feedback.

Download the AMA's "BHI Workflow Guide" (PDF) for primary care providers and health systems to learn more about creating an effective workflow for addressing the behavioral health needs of their patients.

Check out the BHI Collaborative's Behavioral Health Integration Compendium, which serves as a tool to help provide health care organizations with a proven pathway for delivering integrated behavioral care and ensuring they have the most recent, actionable information at their disposal.

Additional resources

- 7 keys to an efficient integrated behavioral health care workflow
- Establishing efficient workflows
- BHI overcoming obstacles webinar series
- StepsForward BHI Module
- Compendium of BHI resources for physician practices
- BHI in physician practices