

Overcome behavioral health barriers by designing better workflow

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A comprehensive AMA how-to guide can help you overcome barriers and design a workflow that will allow your primary care practice—no matter whether it is a private practice or part of a large health system—to make behavioral health integration (BHI) a reality for your patients.

The AMA BHI Workflow Guide (PDF) provides actionable, evidence-based best practices on workflow design based on input from the experts with firsthand experience in effectively integrating behavioral health care into primary care practices.

Your practice's BHI workflow may look and feel a little different depending on your patient population, current staff capabilities, and available technology, among other resources. But there "are key considerations, examples and tools to help teams create a workflow that works best for their practices while maintaining high-quality, equitable care for patients," says the guide.

Learn more with the AMA about designing a workflow for behavioral health integration.

Where to start

There are key questions and criteria to consider as you start to craft an efficient and effective BHI workflow. Here are some of the considerations the guide advises practices to discuss.

Staffing. What kind of staff does the clinic need? Are any key roles unfilled? Who manages the transition between physical and behavioral health care services, if needed?

Training. Does the staff need to be trained to screen for behavioral health issues? Is escalation training provided to all staff members?

Handoffs. How, and how frequently, will the staff discuss behavioral health caseloads? How will patient updates be communicated to the integrated care team?

Protocols for crises. What is the plan to manage a patient who has been identified as being at a moderate or severe risk of suicide? What about a patient who is experiencing a crisis due to a substance-use disorder?

Technology. How will telehealth be used? Is there a patient portal? How does current software meet data and record-management needs?

Setting logistics. Where does the patient wait to see a behavioral health specialist if on site? How is privacy ensured in the waiting area? Where does the patient go when connecting with a behavioral health specialist virtually?

Billing and coding procedures. Are the appropriate codes available in the EMR? Who manages the coding, claim submissions, documentation and policies?

Patient and staff feedback. How is feedback collected and used to improve the BHI workflow?

The AMA BHI Workflow Guide also features a case study of how the team at Morris Hospital & Healthcare Centers in Morris, Illinois, designed their BHI protocols and clinical workflows to empower their staff to address the critical unmet behavioral health care needs of their patients. For more details, visit the Overcoming Obstacles series webinar entitled "BHI in practice: Establishing efficient workflows."

Create your own workflow

An editable workflow plan (PDF) from the AMA allows you to create your own workflow design for integrating behavioral health care in your practice. You can also explore sample workflows (PDF) and case studies to guide you through the process of creating a workflow that works best for you and your patients.

As you design your workflow, your practice will also need to decide how you will:

- Identify and engage patients.
- Identify and initiate treatment.
- Manage and track the treatment plan.
- Adjust treatment proactively.



The AMA established the BHI Collaborative with seven other leading physician organizations to help physicians sustain practices that are able to help treat the whole health of their patients. Learn more with the collaborative's "Overcoming Obstacles" webinar series.

And 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.