



BHI WORKFLOW PLAN

The *BHI Workflow Plan Resource* is designed to help practices develop a successful BHI Workflow by identifying the people, processes, and tools required to ensure it runs effectively and efficiently. This resource can be used to identify structures already in place, as well as modifications to be made that will help the system run smoothly.

HOW TO USE THIS DOCUMENT

- Download the *Workflow Plan Resource* to fill in the appropriate fields.
- With the leadership team, fill in the “who,” “how,” “what,” “when,” and “where” associated with each BHI-related task.

TASK

What is being accomplished?

WHO IS INVOLVED?

What is their name and title?
 What skills/certification/credentials do they require?
 Who is the secondary point person and what is their title, if needed?

HOW IS THE TASK COMPLETED?

What subsequent steps are taken?
 How is this being documented and in what type of documentation template?
 How is this being communicated to the integrated team?

WHAT IS REQUIRED?

What tools, resources, and/or forms are required to complete this task?

WHEN DOES THIS TAKE PLACE?

At what point does this task take place?
 How long should this task take? (Provide a range if variable)

WHERE DOES THIS TAKE PLACE?

Where does this task take place (e.g., clinic, partner agency, patient room, via telehealth, etc.)?

	TASK	WHO IS INVOLVED?	HOW IS THE TASK COMPLETED?	WHAT IS REQUIRED?	WHEN DOES THIS TAKE PLACE?	WHERE DOES THIS TAKE PLACE?
IDENTIFY AND ENGAGE PATIENTS	Receive referral or schedule consult prompting initial BH screening					
	Obtain patient consent to engage with BHI services, as needed					
	Review with the patient past medical history (PMH), drug history (DH), family history (FH) and social history (SH)					
	Perform BH screening, save data and scores, and recommend further assessment as indicated					
	Introduce BH specialist (if available) and schedule assessment					
	Engage patient via shared decision-making					
INITIATE TREATMENT	Perform BH assessment					
	Review assessment with patient to validate conclusions and avoid overestimation or underestimation of symptoms					
	Identify BH issue/disorder					
	Diagnose BH disorder, if present					
	Develop BH treatment plan and discharge plan via shared decision-making with the patient					
	Conduct patient education (explain symptoms and diagnosis, treatment plans, medication and side effects, etc.)					

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	TASK	WHO IS INVOLVED?	HOW IS THE TASK COMPLETED?	WHAT IS REQUIRED?	WHEN DOES THIS TAKE PLACE?	WHERE DOES THIS TAKE PLACE?
PROVIDE TREATMENT AND TRACK OUTCOMES	Identify and treat coexisting medical conditions					
	Prescribe psychotropic medication(s), peer support specialist, psychotherapy, DBT (Dialectical Behavior Therapy) groups, etc., as needed					
	Implement BH treatment plan; track patient strengths, needs, abilities, symptoms, and side effects, as well as any barriers to treatment engagement					
	Conduct targeted outreach to non-adherent or disengaged patients to explore needs, preferences, and barriers to treatment/ care					
PROACTIVELY ADJUST TREATMENT IF PATIENTS ARE NOT RESPONDING	Review, recommend and implement changes in treatment plan, as clinically indicated with patient					
ONGOING	Conduct team meetings or huddles with integrated care team (including physical health and BH members)					
	Collect patient and staff feedback and iterate workflow, as needed					
	Monitor clinical outcomes					
	Utilize measurement-based care tools for discharge planning					
	Stay updated on practice's BHI policies					
	Submit BH coding and billing claims					
	Record BHI metrics for practice (e.g., number of BHI patients, completions of treatment plan, follow-ups, etc.)					