

# Workflow Design:

## A Focus on the Experience of the Recipient of Services

**Questions to consider in designing workflow related to the engagement, enrollment, retention, service planning, and service delivery processes. Created by Anthony Salerno, PhD**

In an integrated system of care, understanding the initial and ongoing experience of the client as s/he moves throughout the organization's policies, procedures, and activities is key to designing workflow systems that engage and respond to the felt needs of recipients. The best way to understand the effect of a particular policy and procedure on a client is to go through the process yourself. Some organizations have done just that and found the process invaluable. An organization's workflow that aligns with the aims of the PBHCI initiative involves closely examining the following questions related to key processes and procedures.

1. The initial screening and admission process: Who makes the initial contact with the client? Where and when does it take place? How are clients informed about the organization's services including access to primary care services? What are we trying to accomplish at our first meeting with a client? Do we include peers in this process? What information is gathered? How are clients oriented to the environment and the people in the setting? Are clients introduced to others?
  - o Ask yourself: What would I like to have happen at my very first contact with the organization? How do we initially engage and inform clients? How can we find out if clients like our current workflow around screening and admission?
2. Getting to know my treatment team: How do clients meet the members of their treatment team? Who informs the client about the members of the treatment team? Who is the main go to person for the client? How do clients get to know their primary care team members if they choose to enroll? Does the client meet every member of the team?
3. Deciding to enroll in the PBHCI initiative: How do clients make a decision to enroll? What information is provided? What information would you want in order to make an informed decision? Are clients provided any written information that they can share with others if they so choose? Are peers involved in supporting the client to make an informed decision?
4. Service Planning: How does the organization provide information about all the services available to the client? Who works with the client to make informed decisions about which services are needed and most importantly, wanted? In what way does the client participate in the identification of needs and services? What contribution does the client make directly to the documentation of the service plan? How is information communicated (e.g., just verbally or with written information?)
5. Service Delivery: For each service provided including primary care, describe the who, what, when, where and how of each service. How does a client access the service? Who is involved? What is the role of each team member in the provision of services? What happens if the client decides to stop a service? Dislikes a service? Changes their mind about the need for the service?

How does the client access primary care services? What steps are involved in assisting a client to get their initial physical exam? How are the results communicated to the client and the members of the treatment team? What are the steps involved if the person's exam reveals the need for follow up care? Who arranges it? Who provides support to the client? How are the results shared with the client and the treatment team?

How are clients informed about wellness related services and activities? Are peers involved? Who assists the client to make informed decisions about wellness activities? If a client avoids all the wellness activities, what steps might the program take? Are these the steps you would want taken?

