**Section 7: BHI Workflows**

* Objective: Create BHI workflows for the pilot site, by identifying role and responsibility for each team member while leveraging current clinic workflows
* Due by Friday, June 28 to your Improvement Advisor
* Resources: Many resources are on the CalHIVE BHI [[[website](https://www.pbgh.org/calhive-bhi/#learn:~:text=deck%3B%20Webinar%20recording-,Learn,-Access%20a%20rich)](https://www.pbgh.org/calhive-bhi/#lear)](https://www.pbgh.org/calhive-bhi/#learn) (Learn)

| **Area** | **Team Response** |
| --- | --- |
| *Key Questions* |  |
| **Understanding the Team** |  |
| 1. Who are the workflow owners (those that will oversee the workflow and make changes)? |  |
| 1. Who are the workflow implementers (those that will be doing the work)? |  |
| 1. What other teams will be involved with BHI workflows (i.e. front desk, training, finance, quality, data, EHR IT)? |  |
| **BHI Workflows** |  |
| Collect current clinic workflows exist that can be leveraged to incorporate BHI, including but not limited to:   * PHQ-9 * New Patient Initiation * Initial Assessment (BHI) * Follow-Up Care (Remission and response/closure of the loop) * Patient Re-Engagement / Outreach * BH Crisis | Link to Box folder with workflows collected for 2024 in-person convening |
| 1. Share your BHI workflows, including:  * Screening * Warm-Handoff and Initiation of Care * Initial Assessment * Follow-Up Care * Patient Re-Engagement * Systematic case Review (CoCM only) * Relapse Prevention and Discharge (CoCM only) | Workflows can be submitted in any format; teams can use this [PPT template](https://www.pbgh.org/wp-content/uploads/2024/05/Section-7_BHI-Workflows.pptx) if needed |
| **Transition to Community Resources** |  |
| 1. What community resource connections are currently available for patients when they need to be referred out? |  |
| 1. What community resource connections are needed? What are the next steps to establish these connections? |  |
| **Training & Education** |  |
| Look at your Section 6 Implementation Plan:   1. Are there any updates needed post workflow changes? |  |
| 1. What needs to be updated around training for BHI? |  |
| 1. How will you show appreciation for buy-in for BHI workflow changes? |  |
| 1. What are your opportunities around monitoring for BHI? |  |

**Section 7: Action Plan**

Considerations for developing the Action Plan:

* This is a space for your team to identify next action steps needed to move toward pilot implementation. Add additional rows as needed.
* Look at the questions raised during the implementation plan section above.
* Understanding these questions and your responses will provide insight into what needs to be addressed in your Action Plan.
* What issues or concerns do they bring up?
* Keep in mind that all tasks do not have to be completed by June 28th.

| *Due Date* | *Lead & Task* |
| --- | --- |
|  | * Lead: * Task: |