Map the Workflow Worksheet

Description

This worksheet guides you through the planning process for developing procedures and implementing behavioral screenings in your office. You can get the best results by going through it systematically with your staff.

Identify “Key” Practice Staff Who Will Help Map the Workflow

- Physician Champion
- Practice Manager
- Nursing Manager
- Other

Outline Your Workflow Process

Using the following guide, develop your practice workflow/process and identify staff roles throughout this process.

Screening Tools

- Determine what screening tools your office will implement (*indicates tool is available for free on the TNAAP website):
  - Edinburgh Postnatal Depression Scale (EPDS)*
  - Pediatric Symptom Checklist (PSC – 17)*
  - Strengths and Difficulties Questionnaire (SDQ)*
  - Ages & Stages Questionnaire: Social Emotional (ASQ-SE)
  - CRAFFT*
  - Patient Health Questionnaire: Modified for Teens (PHQ-9)*

- Who will be responsible for downloading and/or purchasing the tools?
  - Front Office
  - Nurse
  - Other
- If using electronic records or age-specific encounter forms, who will indicate that the screening has been completed and where will that indication appear?
  
  ____ Nurse
  ____ Doctor

- Who will ensure that copies of the screening tool(s) are available each day?
  
  ____ Front Office
  ____ Nurse
  ____ Other ________________________________

- If completed during the visit, when in the visit will the parent or child receive the screening tool and who will give it to the parent? (May be different for each individual screening tool)
  
  ____ Front Office at check in
  ____ Nurse in exam room
  ____ Other ________________________________

- Who will help parents who need assistance completing the questionnaire (e.g. literacy problem)?
  
  ____ Front Office
  ____ Nurse
  ____ Other ________________________________

- Who will collect the screening tool from the parents?
  
  ____ Front Office
  ____ Nurse
  ____ Doctor
  ____ Other ________________________________

- Who will score the screening tool?
  
  ____ Front Office
  ____ Nurse
  ____ Doctor
  ____ Other ________________________________
• Who will attach the screening tool to the chart or otherwise make sure it is available to the clinician?
  ______  Front Office
  ______  Nurse
  ______  Other ________________________________

• Who will review the screening tool with the parent and/or child? *When does this happen?*
  ______  Nurse  When _______________________________
  ______  Doctor  When _______________________________
  ______  Other ___________________________  When _______________________________

**Educational Materials and Handouts**

• Who will locate patient information materials and handouts?
  ______  Front Office
  ______  Nurse
  ______  Other ________________________________

• Where will you keep your supply of educational materials?
  ______  Front office
  ______  Clinical area
  ______  Other ________________________________

• Who is going to give the parent educational material? *When is the best time to give this to the parent?*
  ______  Front Office  Best Time ______________
  ______  Nurse  Best Time ______________
  ______  Doctor  Best Time ______________
  ______  Other ________________________________  Best Time ______________
Behavioral Health Referrals

- Who will identify behavioral health (for all ages) resources in your community?
  
  _____ Front Office  
  _____ Nurse  
  _____ Other ______________________________

- Who will contact the local Community Mental Health Center or other behavioral health providers to discuss populations served, program, referral process, etc.?
  
  _____ Front Office  
  _____ Nurse  
  _____ Other ______________________________

- Who will keep referral resources organized (i.e., binder, post in office area, etc.)?
  
  _____ Front Office  
  _____ Nurse  
  _____ Other ______________________________

- Who will keep referral resources up to date?
  
  _____ Front Office  
  _____ Nurse  
  _____ Other ______________________________

- Who will handle making referrals for children/teens identified as needing behavioral health services?
  
  _____ Front Office  
  _____ Nurse  
  _____ Other ______________________________

- Who will contact referral resources when needed?
  
  _____ Front Office  
  _____ Nurse  
  _____ Other ______________________________
• Who will follow up on the referral?
  _____ Nurse
  _____ Doctor
  _____ Other ________________________________

_ How will this person follow up? ___________________________________________________

• What method will you use to initiate the screening process?
  _____ Start with one visit/one tool and expand to others later
  _____ Pick key visits for screening and implement tool(s) at those visits
  _____ Use tool(s) at all preventive care visits
  _____ Office currently incorporates _________________ screenings at ______________ visits

• Who will be responsible for conducting staff orientations and ensure that the process is understood and implemented by all staff?
  _____ Office manager
  _____ Nurse
  _____ Doctor

**Conduct Staff Orientations**

Introduce the new workflow and procedures to your staff. Walk through the process and determine if it works the same in practice as it did on paper. Adjust as necessary. Republish the map and formally incorporate into the office protocols. Remember to periodically monitor progress, offer feedback, and make adjustments if necessary.

Introduce the concept, principles, and processes of behavioral health screenings to your staff. A copy of the outlined workflow can become a part of your office policy and protocols.

Adapted from North Carolina *ABCD Project* and the Illinois Chapter of the AAP’s *STEPP’s Program*.  

Rev. 3/20/13