

Collaborative Care Team Building and Workflow Guide

The AIMS Center has helped hundreds of organizations implement and sustain Collaborative Care for common mental disorders. For Collaborative Care to succeed, we've learned that clinics must clearly define the roles of all team members and create a workflow that meets the needs of their patients. This step-by-step guide is a road map to get you there. PLEASE NOTE: This process should be guided by someone who is familiar with the clinic and who can organize information.

PRELUDE: Understand the Basics of Collaborative Care

Make sure each member of the team understands the five principles of Collaborative Care and the basic elements for providing Collaborative Care. Define your team broadly: include all clinical staff who are involved at any point in the patient's care, including primary care physicians and administrative staff (e.g., clinic manager, front desk staff)

STEP 1: Complete Team Member Self-Assessments

Have each member of the team complete the **Team Member Self-Assessment** individually

STEP 2: Identify Gaps and Duplication of Services

Complete the **Task Summary** by marking which tasks are performed by staff members and which are completed via a partner agency or referral.

STEP 3: Create a Clinical Flow Chart

Using the **Task Summary** and **Team Member Self-Assessments**, facilitate a small team discussion about gaps, duplications, re-assignments, training needs, critical communication, handoff steps, and the “practical ideal” your team is striving for. Identify opportunities to make your process more efficient.

As a small team, fill out the **Clinical Workflow Plan** indicating how you want your work flow to look. Indicate what organization-level changes are needed for your work flow to become a reality.

Using the **Clinical Workflow Plan**, create a clinical flow chart showing the exact process of what happens when a patient comes to the clinic. Include a protocol for psychiatric emergencies (e.g., suicidal), and pay particular attention to communication among team members (e.g., ensuring recommendations from psychiatric consultant are communicated to primary care provider). The AIMS Center can provide example flow charts.

STEP 4: Create an Action Plan

Create an action plan using the **Action Plan** worksheet. Use the organization-level changes identified in Step 3 along with the **Administrative Readiness Checklist** to list every action that needs to occur. Building your action plan in an Excel spreadsheet will allow you to sort by Responsible Party, Due Date, etc to better organize the information.