Focus on the Experience of the Recipient of Services: Questions to consider in designing workflow

* **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?
  + What would I like to have happen at my very first contact with the organization?
  + How can we find out if clients like our current workflow around screening and admission?
* **Getting to know the 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?
  + Does the client meet every member of the team?
* **Service Planning:** 
  + 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)?
* **Service Delivery** For each service provided including primary care:
  + 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?