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?