

Behavioral Health Navigation Process Flow

Phase 1 - Physician Referral

- a. Receive Physician Referral from PCP
- b. Input into Quickbase within 1 business day
- c. Make initial contact with family within 2 business days of physician referral receipt to schedule consultation (Family Consent Forms: consent, telehealth, potential limits of confidentiality, PSC)
 - If contact is made & appointment kept → Move to Phase 2
 - If contact is made but appointment not kept → Document no-show; repeat contact
 - If no-show occurs after a second scheduled consultation → Send final notice; update PCP; keep referral case open for at least 30 days from final notice
 - If contact is not made → Attempt at least 3 contacts before final notice; update PCP; keep referral case open for at least 30 days from final notice

Phase 2 - Care Coordination Assessment/ Navigation

- a. Complete family interview and Baseline PSC (if not completed with initial consent forms)
 - Get a copy of the insurance card
 - Report if child is receiving medication
 - Opt-in ACES Questionnaire
 - Release of Information for each community provider
- b. Develop referral plan and share resources with family; update PCP
 - If navigation services are needed → Make provider referrals with release of information for each provider; send consultation summary and PSC to provider;
 - If evaluation services are needed → Make provider referrals with release of information for each provider; send intake summary and PSC to provider;
 - If navigation services are not needed → Close referral case; Final PSC not completed- input follow up status

Phase 3 - Provider Care

- a. Communicate regularly with provider to confirm contact, first appointment time & result
 - If appointment kept → Follow up with family to determine quality of the match
 - If positive match → Complete Family Satisfaction Survey and move to Phase 4

- If negative match → Amend referral plan, refer to new provider, and update PCP; repeat Phase 3
- If appointment missed → Follow up with family to identify barriers & offer resources/support to overcome them; update referral plan, re-refer as needed; update PCP; repeat Phase 3

Phase 4 - Closure

- a. Communicate regularly with behavioral health provider to confirm continued service provision and/or case closure
- b. Check-in with family at 30 days post 1st appointment date with successful provider match to determine sustained quality of match
 - If family still engaged with services → follow up again in 60 days; repeat phase 4 one time only
 - If family still engaged with services after 90 days post 1st appointment date with successful provider match, document Post PSC reminder (after 6 successful sessions with BH Provider) and close navigation case; update PCP
 - If family discontinued services → document reason
 - If discontinuation reason is case closure → request Final PSC from provider
 - If provider did not complete Final PSC, contact family to complete Final PSC within 14 days of closure notification; close navigation file; update PCP
 - If discontinuation reason is any other cause → evaluate referral plan and barriers, re-refer as needed; update PCP; return to phase 3