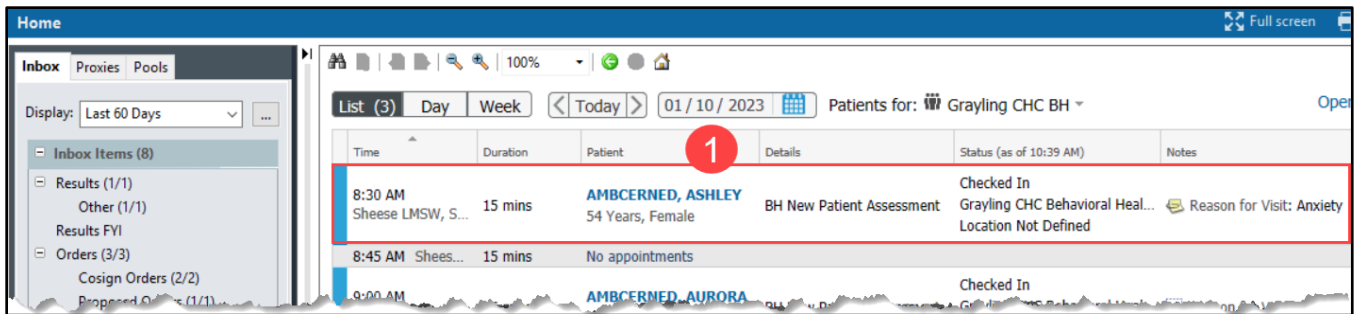# Behavioral Health Workflow for Providers

Patient Intake

1. Find the appropriate patient within the Ambulatory Organizer and review appointment type, reason for visit and any notes on the appointment. Click on the patient's name in blue to open the patient's chart on the correct visit encounter.


2. Navigate to the Ambulatory Behavioral Health Therapist Workflow in the Provider View.

3. Review any past documents within the Documents Component.
   a. Use the filter options to filter and display specific documents.

4. In the Chief Complaint Component, enter a Chief Complaint in the text box and click Sign. If the Chief Complaint is already filled out by the nurse, click into the textbox, and click Sign.

5. Click the drop-down arrow in the Form Component and select BH OP Therapy Visit.
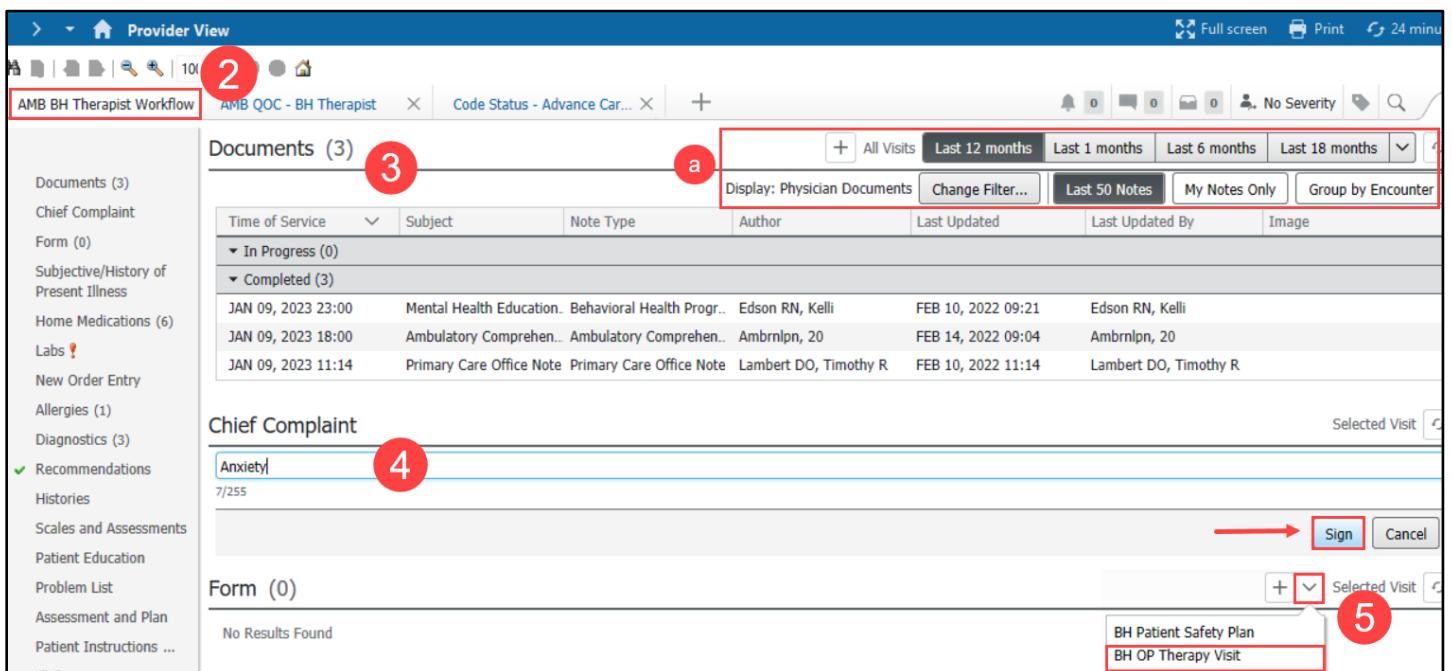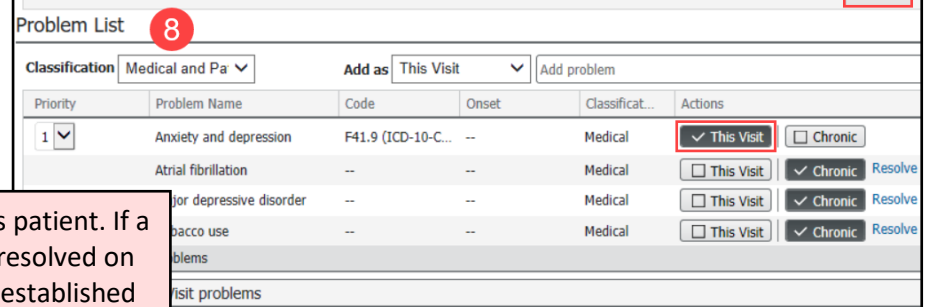
6. Complete the form, including all required areas (indicated with a red asterisk). Click the green check to sign the form.
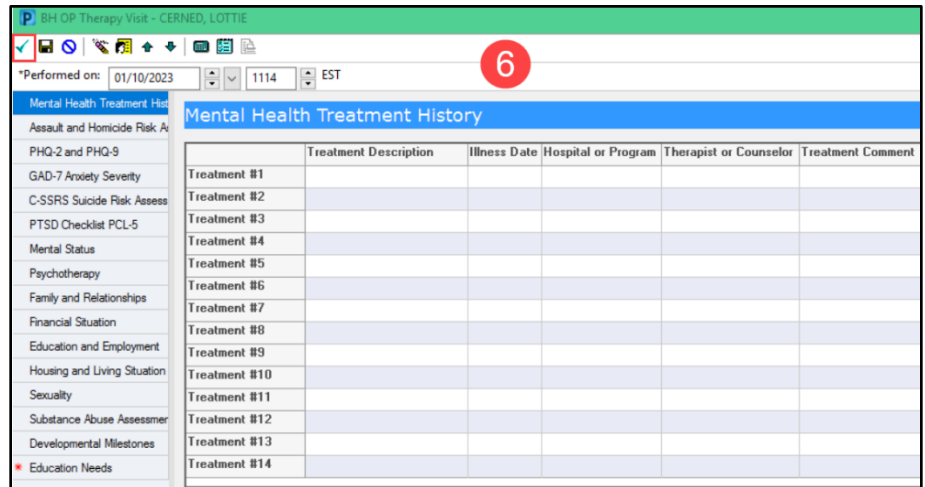
7. Complete the Subjective/History of Present Illness Component by using free text or Auto-Text or dictating via Dragon Medical One in the textbox. Click Save.
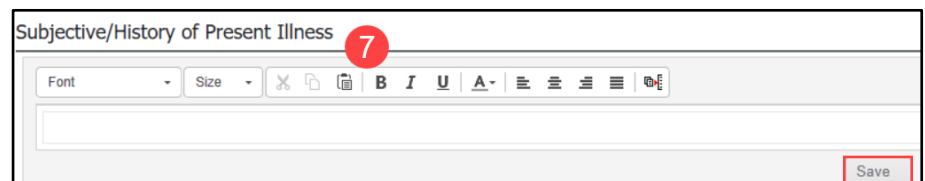
8. Update the Problem List and verify there is at least one problem listed as This Visit.


Note: This is a shared Problem List for this patient. If a provider resolves a chronic problem, it is resolved on every provider's Problem List who has an established relationship with the patient in PowerChart.

9. Navigate to the Quick Orders and Charges MPage.
    a. Place appropriate charges and orders by single clicking on the order/charge, which highlights it in green and puts the order/charge in the Orders for Signature area.
   b. Click Orders for Signature to sign the order/charge.
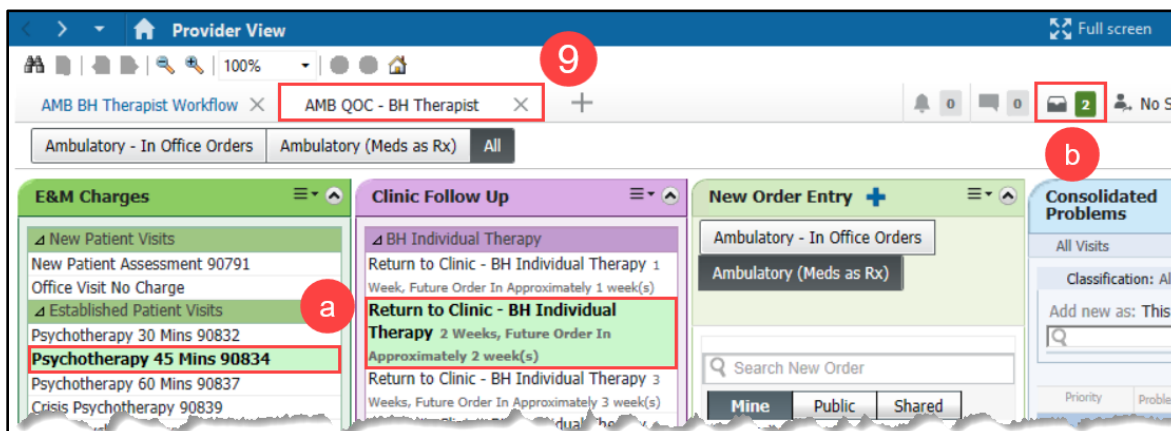
10. In the Orders for Signature window, click in a cell to associate a This Visit problem with each order. Then click Sign.
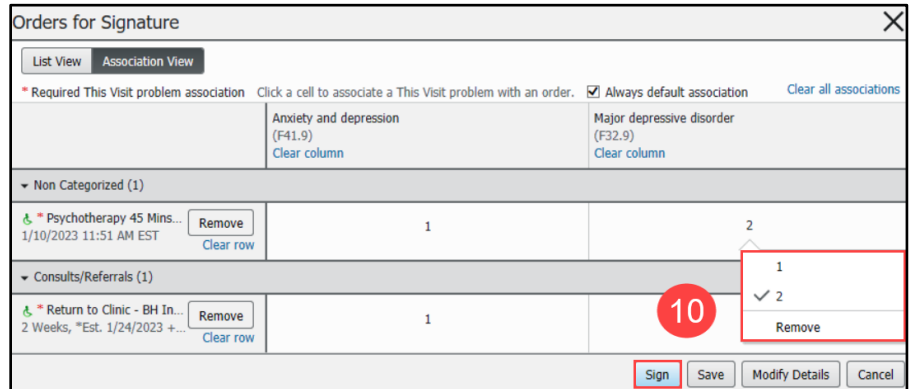
11. Return to the AMB BH Therapist Workflow.

12. If the BH OP Therapy Visit form needs modification, such as adding end time of the session, navigate back to the Form Component and select the form to bring up the details pane.
    a. Select Modify. Complete any additional or outstanding information and sign the form with the green check mark ✔️ when complete.
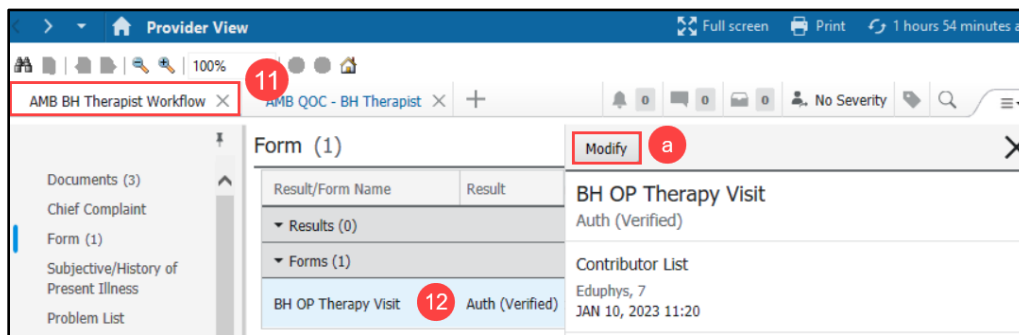
13. Complete the Assessment and Plan Component and click Save.

14. Select an appropriate dynamic documentation note type to create the note. Once the note has been created, it is best practice to work from the note and not to navigate back to the Workflow.
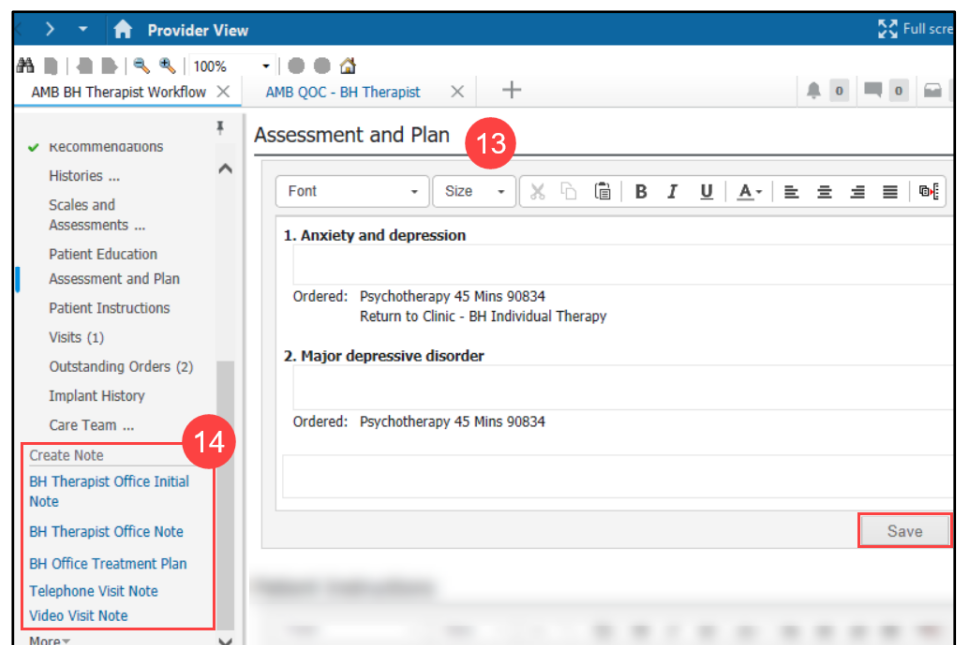
15. Add additional information using free text, Auto-Text or dictating via Dragon Medical One in the textboxes. Edit or delete any other information on this page, as needed.

16. Once complete, click Sign/Submit.

Note: Headers that do not contain information below will be removed upon signing the note.

17. The Sign/Submit window displays and allows the note to be forwarded to any recipient. Enter a recipient's name in the search box or select a recipient from favorite contacts.

18. Select if the recipient should Sign or Review/CC the note. Enter in a comment if needed.

19. Click Sign.