

1. Open the office door for the BHC in the morning and start computers.
2. Get charts for the day's scheduled patients and locate any missing charts (if the clinic still has paper charts).
3. Call scheduled patients to remind them of appointment times. (May be done the morning of the appointment or the day before depending on time availability.)
4. Coordinate scheduling of patients who call for same-day or next-day BHC visits.
5. Coordinate scheduling of patients referred by a PCP for same-day visits.
6. Maintain copies of all assessment tools used by the BHC.
7. Administer pre-appointment assessment tools and enter results in the chart.
8. Organize the BHC's patient visits. This includes obtaining the billing slip and chart, and taking these, the patient, and the results of the pre-appointment assessment to the BHC (if paper is used for billing and charting).
9. Ensure an interpreter is available, when needed, at the start of the BHC visit.
10. Inform PCPs and staff when same-day appointments are available with the BHC (e.g., if there is a no-show, cancellation or open appointment time).
11. Huddle with PCPs and/or their assistants at the beginning of the day to review the PCP's schedule and plan patients that might benefit from a same-day consult with the BHC.
12. Manage PCBH registries (for classes and pathways).
13. Call patients to follow-up on simple care plans (such as self-management goals).
14. Assist with completion of forms for medical records, such as the permission form for release or exchange of information.
15. Fax paperwork and make copies of documents for the patient or chart, as needed.
16. Return calls to patients if instructed by the BHC (e.g., if a simple administrative issue is involved).
17. Assist with completing referrals for services outside of the clinic.
18. Maintain supplies for the BHC.
19. Document patient no-shows and cancellations in patient charts.
20. If asked by the BHC, contact patients who no-show or cancel to arrange a follow-up.
21. Send letters to patients who no-show for appointments.
22. Assist with scheduling patients for return appointments after a visit (if patients want to schedule rather than calling for a same-day follow-up appointment in the future).

23. Assist with organizing BHC classes and group care clinics.
24. Initiate calls to schools and other community organizations as requested.
25. Update community resource lists on a quarterly basis.
26. Organize and maintain patient education materials and community resource brochures.
27. At the end of the day, clean the room used for triage/pre-appointment activities.

*Figure 3.2.* Common tasks for a Behavioral Health Assistant (BHA).