

A group of four professionals (three men and one woman) are gathered around a table in a meeting. They are looking at a laptop screen. The background is a blurred office setting with plants and windows. The image has a dark teal overlay.

# INTEGRATED BEHAVIORAL HEALTH OPTIMIZATION:

Aligning Access, Operations, and Patient Outcomes

---

*Courtney Lawson, BSN, RN*

*Assistant Clinic Director, Kirby Medical Group*

*April 22, 2026*

*ICAHN Rural Health Fellowship*

## Previous Intake Protocol

- Referral is received
- CM initiates contact with patient within two business days
- Upon completion of mental health tracking form it will be sent to the most appropriate provider
- Acceptance or denial will be within two business days (If no response from tracking form it will be assumed that you have no concerns with referral and patient will be contacted to schedule initial appointment).
- After two business days if CM has not received a response patient will be contacted for scheduling of assessment with provider.
- If patient does not answer CM will reach out every three business days. If after three attempts to contact patient there is no response they will be taken off of the wait list.
- Once the referral has been made and initial intake completed the patient will remain on the wait list for ??? (amount of time)
- *If the patient reaches back out to schedule in this time frame CM or PSR can schedule patient with identified therapist which can be found in-????*

## Updated Department Guidelines and Protocol Specifications

**POLICY**

Social Workers within the Integrated Behavioral Health (IBH) Department will follow standardized scheduling practices to ensure consistent patient access, appropriate appointment durations, and availability for crisis intervention. This department guideline also establishes a structured process for patient follow-up scheduling to support continuity of care.

**PURPOSE**

To define scheduling expectations for Social Workers, including appointment lengths, crisis intervention availability, and patient checkout procedures, in order to optimize access, improve efficiency, enhance quality of behavioral health services, and decrease patient wait list times.

**PROCEDURE**

- I. Appointment Types and Duration
  - A. New/Establish Care Appointments
    1. Duration: at or around 75 minutes
    2. Purpose: Comprehensive intake, assessment, and care planning.
  - B. Routine MHS Appointments
    1. Duration: at or around 45 minutes, biweekly, unless otherwise specified by provider
    2. Includes: Follow-ups, ongoing therapy, care coordination, and brief interventions.
  - C. Referral and Intake Process
    1. After receiving a referral, Case Management (CM) will contact the patient within two business days to complete the Intake Assessment via EHR system.
    2. Once the Intake Assessment is completed, the patient's information will be sent to Centralized Scheduling.
    3. Centralized Scheduling will schedule the patient with the earliest available provider based on the patient's intake preferences.
- II. Crisis Intervention Appointment Holds
  - A. Each Social Worker Will Have:
    1. One (1) designated crisis intervention appointment **hold** per week
    2. Duration: approximately 60 minutes
  - B. Purpose:
    1. To provide timely access for patients experiencing acute behavioral health needs.
    2. To reduce delays in urgent care delivery.
- III. Crisis Hold Utilization and Adjustments
  - A. Crisis Intervention Holds Are:
    1. Reserved for same-day or urgent behavioral health needs.
    2. Not to be pre-booked for routine care unless approved by Department Director
  - B. Capacity Monitoring:

1. Department leadership will regularly review:
  - a. Access metrics
  - b. Crisis demand
  - c. Provider utilization
- C. Adjustments:
  1. If staffing levels or access metrics indicate insufficient capacity:
    - a. Additional crisis holds may be added to individual provider schedules.
    - b. Adjustments may be temporary or ongoing based on departmental need.
- IV. Patient Checkout and Scheduling Process
  - A. At the Conclusion of Each Visit, Providers Will:
    1. Complete a checkout form indicating the recommended follow-up timeframe for the patient.
  - B. Patients Will Then:
    1. Present the completed checkout form to Patient Service Representatives (PSRs) for scheduling or
    2. Contact Centralized Scheduling at 217-762-1651 to arrange their follow-up appointment.
  - C. This Process Is Intended to:
    1. Ensure timely and appropriate follow-up care
    2. Improve scheduling accuracy and continuity of care
- V. Wait List and Cancellation Management
  - A. All Cancelled Appointment Slots Must Be Reviewed for Backfill Opportunities
  - B. Case Management Will Complete New Patient Intake Prior to Scheduling
  - C. Scheduling Staff Will:
    1. Utilize the existing wait list to fill open appointments.
    2. Prioritize patients based on clinical need and original referral/order date when applicable.
  - D. This Applies to:
    1. Same-day cancellations
    2. Cancellations within 24 hours
    3. Advance cancellations
  - E. If the Appointment Cannot Be Filled:
    1. Documentation of outreach attempts must be recorded in the patient's electronic medical record (EMR) for tracking purposes.
- VI. Documentation Requirements
  - A. Providers Will:
    1. Have access to Commure Ambient AI to document all patient encounters.
    2. Ensure documentation accurately reflects the clinical narrative.
    3. Complete documentation within 48 hours in accordance with departmental and organizational timeliness standards.
- VII. Scheduling Flexibility
  - A. All Scheduling Adjustments Require Approval from the Departmental Director
  - B. Schedules May Be Adjusted Based on:
    1. Patient demand
    2. Staffing levels
    3. Operational priorities
  - C. Providers Are Responsible for Monitoring Their Schedule, Noting Any Adjustments

Kirby Medical Center



## THE BIG IDEA

---

- **Inconsistent scheduling patterns** driven by cancellations and variable patient needs created frequent gaps in schedules
- **Lack of real-time visibility and coordination** led to missed opportunities to fill open appointment slots
- **Growing waitlist** resulted in delayed access to care for patients
- **Underutilized provider capacity** limited the department's ability to operate at full efficiency

## Core Statement

Kirby Medical Group, a subsidiary of Kirby Medical Center, will enhance patient access and continuity of care within the Integrated Behavioral Health department by implementing standardized social work scheduling practices, including defined appointment types and durations, protected crisis intervention availability, and a structured intake and follow-up process, supported by centralized scheduling and interdisciplinary coordination to improve utilization, reduce wait times, proactively manage waitlists, and fill appointment gaps. This approach ensures patients are connected to the right care at the right time, when they need it most.



# Project Objectives



1

*Streamline  
Scheduling  
Workflows*



2

*Increase Efficiency*



3

*Reduce Patient  
Wait Times*



4

*Minimize Unfilled  
Provider  
Appointments*



5

*Strengthen  
Continuity of Care*

**SUCCESS**

# DELIVERABLES

---



## Standardized Scheduling Guidelines

- *Define appointment types and durations*
- *Structured weekly templates for providers*



## Crisis Intervention Model

- *Weekly protected crisis appointment holds*
- *Defined usage and escalation protocols*



## Waitlist & Backfill Process

- *Active management of cancellations*
- *Prioritization based on clinical need and referral date*



## Centralized Intake & Scheduling Workflow

- *2-day intake completion expectation*
- *Seamless handoff to centralized scheduling*



## Checkout & Follow-Up Process

- *Provider-driven follow-up recommendations*
- *Standardized patient scheduling workflow*



## Documentation Standards

- *48-hour completion requirement*
- *Use of Ambient AI technology for efficiency*

# PROJECT TIMELINE

---

## Planning & Design

Define Goals  
Engage Stakeholders  
Identify Provider Needs  
Map Workflow  
Identify Resources

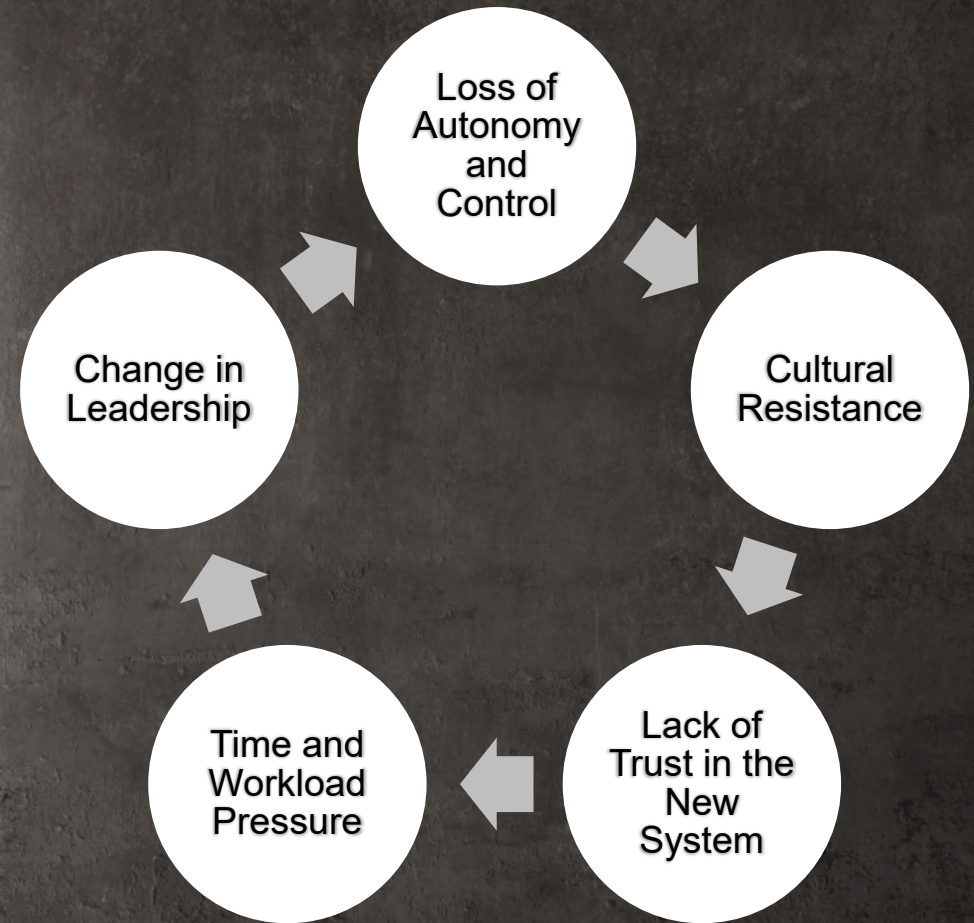
## Implementation & Integration

Create Department Guideline  
Policy & Procedure Committee Approval  
Interdepartmental Processes  
EHR Alignment  
Internal Communication

## Evaluation & Refinement

Access Metrics/Utilization Rates  
Patient Feedback  
Provider Feedback  
Stakeholder Feedback

# BARRIERS



# Successes

---



- Improved Efficiency
- Increased Access
- Provider Consistency
- Reduced Administrative Confusion
- Compliance and Accountability
- Cost Control and Productivity
- Communication and Transparency

# ONGOING DEVELOPMENT/ DEPARTMENT EXPANSION

---



## **Crisis Intervention**

*Reduce or eliminate the use of contracted services in the acute hospital setting by having Integrated Behavioral Health complete urgent patient evaluations internally.*



## **Placement Support**

*Support ER staff and patients by promptly coordinating inpatient hospitalizations to minimize delays.*



## **Expand Interdisciplinary Support Roles**

*To enhance operational efficiency, streamline workflows, and improve both provider and patient satisfaction.*

# THANK YOU FOR YOUR SUPPORT!



Nancy Newby  
ICAHN  
Executive  
Coach



Sara Wells  
Chief Clinical Officer  
Kirby Medical Group



Ryan Hastings  
Multi-site Rural Health  
Clinic Director  
Kirby Medical Group



Scott Rascher  
and Team  
Director of  
Information  
Management  
Services  
Kirby Medical  
Group



Shannon Williams  
and Team  
Director of Patient  
Financial Services  
Kirby Medical Group

# SPECIAL THANK YOU

## KMG – INTEGRATED BEHAVIORAL HEALTH



**Jessie Clapp,  
LCSW**



**Paul Saban,  
LCSW**



**Taylor Ferguson,  
MSN, RN  
Director of  
Integrated  
Behavioral  
Health**



**Liz McGarry,  
LCSW –  
Mental Health  
Program  
Coordinator**



**Grace Trybom,  
MSW, LSW –  
Case  
Management**

# THANK YOU!

---



*Courtney Lawson, BSN, RN*

ASSISTANT CLINIC DIRECTOR – ADDITIONAL LOCATIONS



*[clawson@kirbyhealth.org](mailto:clawson@kirbyhealth.org)*



*217-763-6010*

