Primary Clinician Transitions—Staff Journey Mapping

Clinical Staff Perspective

STEPS	Discover a change is needed	Discuss change with client	Determine a transition plan	Conduct as warm a handoff as possible	Update paperwork	Process transition with client
VALUE	• Understand the rationale for the change • Prepare for impact on managing caseload	• Know who the next clinician will be (or even involved in the selection) • Feel comfortable on how to initiate and facilitate a conversation about the change with the client/family	• Receive timely response from receiving clinician • Know coordination steps, roles, and time frames for the transition plan • Schedule time for a warm hand-off	• Have both (old and new) staff present when possible • Conduct a healthy goodbye (for both staff and client/family)	• Obtain clear understanding of the client/family's needs and high risk issues • Coordination with other involved providers (Medical staff; Personal Finance Services)	• Build rapport and orient client/family to new space and staff • Keep the client/family engaged through the transition process

QUESTIONS

How are cases assigned to a new clinician?

What if the client isn't happy with the transition? Will they be okay?

The old clinician left without updating the paperwork. How do I get the current information I need?

They had a really good/long relationship with the old clinician. How will they respond to me?

How much is my anxiety, and how much is theirs?

When is the best time to start talking about a transition?