Behavioral Health Link

Discovery Questionnaire

A Comprehensive Guide for Behavioral Health Leaders Evaluating Crisis System Technology Decisions

Use this checklist to conduct thorough discovery before making any crisis technology investment—whether you're considering system integration, purchasing new platforms, or evaluating your current infrastructure.

TECHNICAL DISCOVERY

Current System Landscape

- What systems are currently in use across your crisis continuum?
- Do different providers or departments use different systems?
- Are these systems cloud-based or on-premise?
- Who owns and maintains these systems?

Data Requirements

- What specific information needs to be shared across systems?
- Which information needs to be real-time vs. batch-updated?
- Are there regulatory requirements for how quickly information must be available?
- What information should absolutely never leave certain systems due to consent or privacy rules?

Technical Capabilities

- Do your existing systems have published APIs?
- Have these systems been successfully integrated with other platforms before?
- What level of API support does each vendor provide?

OPERATIONAL DISCOVERY

Current Workflow Analysis

- Where do handoffs currently break down in your crisis continuum?
- What information gets lost between crisis call, mobile response, facility admission, and follow-up?
- How much time do staff spend on duplicate data entry?

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- What workarounds have staff created to deal with system gaps?

Your Team Assessment

- What's your IT team's capacity for supporting integrations?
- Do you have staff with integration experience?
- How do staff feel about learning new systems?

STRATEGIC DISCOVERY

Program Goals and Vision

- Are you building a new crisis system or improving an existing one?
- Are you trying to unite multiple providers under one platform?
- What outcomes are you trying to improve?

Your Budget

- What's your total budget for technology over the next 3-5 years?
- Can you allocate resources for ongoing maintenance and support?
- Do you have a contingency budget for unexpected integration challenges?
- How will you measure ROI to justify continued investment?

Ready to take the next step?

Submit your questionnaire here or contact us.

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