

CHECKLIST FOR CLINIC READINESS TO IMPLEMENT SDOH SCREENING

NEEDS ASSESSMENT – Identify the needs of your patient population	SCREENING TOOL DEVELOPMENT
<input type="checkbox"/> Review existing local community health assessments <input type="checkbox"/> Conduct brief card study <input type="checkbox"/> Ask your social workers & patient navigators	<input type="checkbox"/> Review existing SDOH screening questions <input type="checkbox"/> Determine which screening questions to use <input type="checkbox"/> Pretest tool with your population
TEAM IDENTIFICATION – Develop a steering committee of clinic representatives	WORKFLOW DEVELOPMENT
<input type="checkbox"/> Clinician champion <input type="checkbox"/> Practice manager <input type="checkbox"/> Social worker/care manager <input type="checkbox"/> Support staff champions (MA, RN, front desk) <input type="checkbox"/> Key stakeholders (system level) <input type="checkbox"/> Patients (patient advisory councils)	<input type="checkbox"/> When during the clinic visit will patients complete the screening questionnaire? <input type="checkbox"/> Which patients will be screened? <input type="checkbox"/> How will the questionnaire be administered (on paper, electronically, verbally, etc.)? <input type="checkbox"/> How will patient responses be documented (by the MA, clinician, front desk, etc.)? <input type="checkbox"/> What is the process for verifying that patients with positive screenings desire assistance/follow up? <input type="checkbox"/> What is the process for address positive screening results? <input type="checkbox"/> How often will patients be screened (every visit, every six months, annually, etc.)? <input type="checkbox"/> How will the process be evaluated, and how will data collection occur?
PARTNERSHIPS – Develop partnerships to support the screening process	COMMUNICATION STRATEGY – Develop communication work plans for:
<input type="checkbox"/> Community partners (food banks, shelters, WIC, etc.) <input type="checkbox"/> Clinic partners (RN, staff, administration) <input type="checkbox"/> Project support (data collection, evaluation, etc.)	<input type="checkbox"/> Clinicians <input type="checkbox"/> Staff (front desk, MA, RN, social worker, etc.) <input type="checkbox"/> Patients (handouts, flyers, signs etc.)
BEST PRACTICES	SUSTAINABILITY
<input type="checkbox"/> Assure buy-in with key team members and clinic leadership <input type="checkbox"/> Research other clinics in your area doing the same work <input type="checkbox"/> Review models of community partnership	<input type="checkbox"/> Develop plan for ongoing evaluation and data collection <input type="checkbox"/> Put systems in place to recognize and overcome barriers and make changes as needed