

## Patient-Centered Social Needs Screening Conversation Guide

### Engaging - Start with relationship

Consider how to create a welcoming and safe environment in your health center. If possible, conduct the social needs screening conversation at the end of the visit, so that the patient has more time to get comfortable while at the primary care clinic.

- Introduce yourself and your role at the clinic.
- Explain the what, why and how long of the screening process and/or Empathic Inquiry follow up conversation.
  - *“We are having these conversations with patients so that we can understand better what might be affecting your health and well-being. We may be able to help you get connected to resources, though we can’t guarantee that will be the case. Even where we can’t connect you to assistance, this information will help us partner with you to create a care plan that fits your life. Understanding what the patients we serve are experiencing also helps us to be a better advocate for our community.”*
- Ask permission to have conversation, acknowledge the potential sensitivity of some questions and give permission to decline at any point.
  - *“Is it ok if we spend a few minutes talking about your experiences and priorities in your life outside the clinic that might be affecting your health? I want to acknowledge that some of the questions might feel kind of sensitive, so please feel free to let me know if, at any time, you don’t want to answer any of these questions.”*
- Ask if the patient has any questions.

### Empathizing – Create and convey understanding

The goal of the Empathic Inquiry conversation is for the patient to feel understood and respected as you gather information about their life experiences, and for you to find out what their priorities are.

- If the Empathic Inquiry conversation is conducted as a follow up to a completed screen, briefly summarize the results of the screen and ask the patient an open-ended question about their priorities:
  - *“I looked over the questionnaire you filled out and I see that you are experiencing some difficulties with X,Y and Z. What are your top priorities here? What makes these feel important to you?”*
- If the screening process is embedded within the Empathic Inquiry conversation, use open-ended questions to find out about the patient’s experiences:
  - *“How are things going with making ends meet?”*
  - *“What, if any, bills are you worried about this month?”*
  - *“Tell me about your typical experience. Do you have any concerns about getting access to all the resources you need?”*
- Use open-ended questions to find out more about the patient’s perspectives on their experience:
  - *“Tell me a little more about what’s going on for you.”*
  - *“How do you see all this affecting your health?”*
  - *“Help me understand how this impacts you?”*
- Use open-ended questions to ask patients about their interests, hobbies, and sources of enjoyment and meaning.

- *“We’ve talked about some of the things that might be challenging to your health. I’d love to hear more about what you enjoy. What are your hobbies? What do you find most meaningful in your life?”*
- Convey understanding through attentive non-verbal listening cues, including eye contact and body language as appropriate.
- Convey understanding through reflective listening.
  - *“You’ve really just been patching it together and it’s getting pretty stressful.”*
  - *“Getting help with your phone bill sounds like your highest priority.”*
  - *“You are tired of bouncing around between housing situations.”*

### **Supporting - Focus on strengths**

Affirmations help to shift focus from the challenges patients face to the strengths they possess. Positive feedback builds patient empowerment and promotes self-efficacy and self-confidence.

- Provide affirmations of patient’s strength and resilience.
- Empathy-based affirmations that respond to a specific characteristic or behavior are the most powerful.
  - *“It sounds like you have been working hard to make ends meet. You are clearly very resourceful and creative.”*
  - *“It takes a lot of strength to get through such a tough situation. You really have a lot of grit.”*

### **Summarizing and Action Planning – End with empathy and collaboration**

A good summary ensures that everyone is in agreement about the priorities and next steps following the conversation. Summaries convey empathy and support collaboration.

- Summarize key points from the conversation to demonstrate understanding. Check to see if you’ve missed anything that the patient considers a priority.
  - *“We’ve talked about a few different challenges you’ve been experiencing today: trouble paying your rent and having enough for food by the end of the month, as well as feeling kind of lonely or isolated. It sounds like getting access to food resources is the most important to you. Is that right?”*
- Use open-ended questions to find out whether the patient wants referrals to other team members or community resources, if available and appropriate.
- Acknowledge that for areas where resources are not available, the primary care team will use this information to support care planning and health promotion in partnership with the patient.
- Ask patient permission to follow up, if appropriate.
  - *“What do you already know about food resources available in our community? We can help you get connected, if that interests you.”*

### **Collaborating with the Team – Follow up with primary care team and referral partners about patient priorities**

- Communicate with teammates regarding patient priorities to conduct effective warm handoffs, care coordination and seamless team approach to care.
- Initiate referral process, as needed.