

Social Determinants of Health (SDH) Screening Sample Workflow

Steps for Clinical Staff <u>During</u> the Clinical Visit

Clinical staff include nurses, medical assistants, and behavioral health specialists, among others.

Take-Aways:

- Clinical staff are trained to collect sensitive information and have experience collecting sensitive data.
- Clinical staff can potentially bill for screening time.
- Administering screening in the exam room ensures that the information is collected in a private setting, rather than the waiting room.
- + Can work very well for New Patient Exams which are longer than other clinical visits.
- Clinical staff typically have heavy workloads and staff burnout is prevalent.
- Timing is difficult. There is risk of not completing the screening if the provider comes into the exam room.

The Steps:



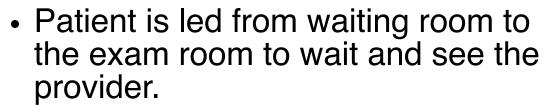
 The staff person will flag the next appointment (1 year) for an SDH screening.

#1 Patient enters the Exam Room

#2 Clinic Staff Enters Exam Room and Administers SDH Screening

#3 Refers Patient to Needed Services

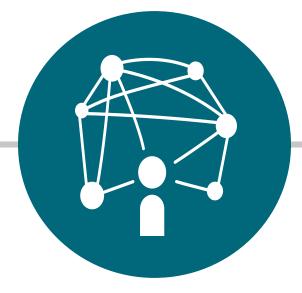






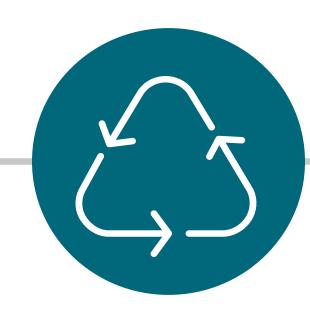
- Clinical staff uses "value-added" time when patient would otherwise be waiting to see the providers so doesn't lengthen clinic visit.
- Staff person asks the patient each question.
- Enters the responses in electronic health record under current date.

within 24 hours



 Immediately notifies case manager or social worker to assist patient given needs identified.

#6 Follow Up



 If room remains open, case manager or social worker will follow up immediately with needed resources.

• If there is no time, follow up by phone to determine if resources were utilized.

Document in electronic health record.

#4 Provider Enters the Room and Performs Clinic Visit



 Provider is notified via the electronic health record of any social determinants of health issues that might impact care, treatment plan, or prescriptions.



