

Patient-Centered Social Needs Screening Observer Checklist

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.

Conversation Step	Completed (Yes/No)	Notes
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.		
Ask permission to have conversation, acknowledge sensitivity of questions, and give permission to decline at any point.		
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.

Conversation Step	Completed (Yes/No)	Notes
If the Empathic Inquiry conversation is <i>conducted as a follow up to a completed screen</i> , briefly summarize the results of the screen and ask the patient an open-ended question about their priorities.		
If the Empathic Inquiry conversation is <i>conducted so that the screening process is embedded within a dialogue with the patient</i> , use open-ended questions to find out about the patient's experiences and incorporate		

Conversation Step	Completed (Yes/No)	Notes
the formal screening questions as appropriate.		
Use open-ended questions to follow up and find out more about the patient's perspectives on their experience.		
Ask patients about their interests, hobbies or sources of meaning and enjoyment.		
Convey understanding through attentive non-verbal listening cues, including eye contact and body language as appropriate.		
Convey understanding through reflective listening.		

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.

Conversation Step	Completed (Yes/No)	Notes
Provide affirmations of patient's strength and resilience.		

Summarizing and Action Planning – End with empathy and collaboration

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

Conversation Step	Completed (Yes/No)	Notes
Summarize key points from the conversation to demonstrate understanding. Check to see if you've missed anything that the patient considers a priority.		

Conversation Step	Completed (Yes/No)	Notes
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.		

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.