Social Determinants of Health (SDH) Screening Sample Workflow

Steps for Clinical Staff During 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:

1. Patient enters the Exam Room
   - Patient is led from waiting room to the exam room to wait and see the provider.

2. Clinic Staff Enters Exam Room and Administers SDH Screening
   - 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.

3. Refers Patient to Needed Services
   - Immediately notifies case manager or social worker to assist patient given needs identified.

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.

5. 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.

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

If no needs are identified immediately notifies case manager or social worker to assist patient given needs identified.

within 24 hours

Adapted from National Association of Community Health Centers’ PRAPARE Toolkit: