

WORKSHEET: ASSESSING CURRENT SCREENING PROCESSES

One focus of this TICR QI collaborative is to screen for barriers to early relational health for children less than 5 years of age. Over the next 9 months your core team will either improve a current screening process for a potential barrier to early relational health or integrate a new screen.

For practices currently utilizing one or more screens:

The following worksheet is a guide to help assess a current a *screening process* workflow for your practice. Complete the worksheet for each screen you currently use. If there are fuzzy steps in the current process, consider improving the current screen before introducing a new screen.

For the purposes of this worksheet, a screening process is defined as the method of early identification and intervention for potential risks to early relational health through ongoing surveillance, routine screening per AAP guidelines, family-centered discussion of results, interpretation, and—when concerns are identified—referral and follow-up.

For practices not currently utilizing one or more screens:

No need to complete this worksheet. You will utilize a similar assessment in the coming months to help you select your new screen.

STEP 1: Identify current screening tools. *What formal assessments are we currently using to identify concerns?*

Perinatal depression screening: _____

Social drivers of health tool(s)/questions: _____

Social-emotional screening: _____

Complete the CURRENT workflow assessment worksheet for all formal assessments currently in use in the practice.

CURRENT Workflow assessment worksheet		PERINATAL DEPRESSION SCREENING	SOCIAL DRIVERS OF HEALTH SCREENING	SOCIAL-EMOTIONAL SCREENING
1.)	At what ages of the child do the family receive the screenings? Recommendations:	1,2,4,and 6 months	6, 15, 24 and 48 months	6, 15, 24 and 48 months
2.)	How do caregivers access the screening tool to complete it? (Ex: EMR portal, paper version in office, laminated wipe-away)			
3.)	If paper, who ensures that copies of the screening tool are available for caregivers to complete each day?			
4.)	When in the visit do the caregivers receive the screening tool?			
5.)	Who gives the caregiver the screening tool?			
6.)	Who scores the screening tool?			
7.)	When does the provider review the screening results?			
	Where are screening results documented?			

CURRENT Workflow assessment worksheet		PERINATAL DEPRESSION SCREENING	SOCIAL DRIVERS OF HEALTH SCREENING	SOCIAL-EMOTIONAL SCREENING
8.)	For positive screens, what are available interventions?			
	Where are recommended interventions documented in the EHR?			
9.)	For referrals, who facilitates them?			
	What tools are used to track referrals / interventions?			
11.)	What happens with the screening tool after it has been discussed with the caregiver? (Ex: results recorded in EMR, scanned into chart, shredded, wiped away)			
12.)	Who gives the caregiver educational materials? When will these be presented?			
13.)	Where are your supply of educational materials? (paper, website, EMR)			
	Who reviews the materials on a regular basis to ensure they are up-to-date?			

CURRENT Workflow assessment worksheet		PERINATAL DEPRESSION SCREENING	SOCIAL DRIVERS OF HEALTH SCREENING	SOCIAL-EMOTIONAL SCREENING
14.)	Who makes sure that materials (including screening tools and educational materials) are restocked and readily available?			
15.)	Who facilitate following up with families to determine the outcomes of the referral?			
16.)	Where will follow-up notes be recorded?			

STEP 6: Identify program supports. *What partners do you currently work with to support patients? What materials do you currently utilize?*

RESOURCES FOR DEVELOPMENTAL CONCERNS

Local care coordination service program for children: _____

State Early Intervention services: _____

Developmental behavioral pediatrician: _____

Speech therapist: _____

Occupational therapist: _____

Physical therapist: _____

[Child Care Resource and Referral Agency \(CCR&R\)](#): _____

[Child Care Health Consultants](#): _____

Infant Mental Health Consultants: _____

[Head Start](#): _____

[Caregivers as Teachers](#): _____

School system preschool coordinator: _____

Local early childhood collaboration: _____

Local family support group: _____

School nurse contact: _____

Exceptional child contact (school system): _____

State/Local education office: _____

Local [Easter Seals](#): _____

Local [The Arc](#): _____

School [United Way](#): _____

MENTAL HEALTH RESOURCES

Maternal depression: _____

Local services identified by
[Postpartum Support International](#): _____

Local new moms group: _____

Caregiver/Caregiver depression: _____

Child psychologist: _____

Child behavioral therapist: _____

Substance use support: _____

Domestic violence support: _____

Additional Resources:

[Postpartum Progress](#)

[National Alliance on Mental Illness](#)

800-950-NAMI (6264)

[National Institute of Mental Health](#)

[National Suicide Prevention Lifeline](#)

1-800-273-TALK (8255) or Live Online Chat

[Substance and Mental Health Services Administration](#)

SAMHSA Treatment Referral Helpline – 1-877-SAMHSA7 (1-877-726-4727)

FAMILY SUPPORT RESOURCES

State/Local health department: _____

Local home visiting program
identified by the [Maternal and Child Health Bureau](#): _____

Caregiving groups: _____

Local food pantries listed on
[Feeding America](#) website: _____

Local homeless shelter: _____

Local contact information for [Public Housing Authority](#) programs: _____

[Supplemental Nutrition Assistance Program](#) (food stamps): _____

[Women, Infants, and Children \(WIC\) services](#): _____

[National Diaper Network](#): _____


Local [homelessness prevention provider](#): _____

State/Local legal services agency: _____

STEP 7: Engaging staff in the concepts, principles and process.

How do your staff support the process? How do new staff receive initial training on the concepts? How are staff be refreshed/reminded of this information?

Does the team monitor progress and make changes as necessary? Are there be regular forums for feedback? Is there a structure to how feedback is presented?

After completing this worksheet, what is your assessment of the current processes for 
Postpartum Depression
Social Determinants of Health
Social-Emotional Screening

If a score is (less than xx) consider improving the process for that screen(or some such working....)

ACKNOWLEDGEMENTS:

This resource was adapted from a version developed by the
[North Carolina Assuring Better Child Health and Development program.](#)
And the AAP Selecting a Screening Tool