



## Addressing Social Health and Early Childhood Wellness Individual Chart Review Form

### Directions:

- Include medical records for well-child visits for patients from birth through 48 months
- Records should only be from pediatricians participating in the ASHEW collaborative
- Convenience sample of most recent charts for eligible well-child visits
- Submit data by the 7<sup>th</sup> of each month
- Do not share ANY identifying information. Do not include patient information, record locator numbers, DOB, etc. Do not submit any physician or provider identifying information either
- Total patient charts entered should equal 40
  - 10 for 6-month visit
  - 10 for 15-month visit
  - 10 for 24-month visit
  - 10 for 48-month visit

Questions refer to documentation in the medical record for this particular visit.

### Section 1. Age/Visit

1. Which well child visit are you reviewing?
  - **6-month**
  - **15-month** (skip section 2. perinatal depression questions)
  - **24-month** (skip section 2. perinatal depression questions)
  - **48-month** (skip section 2. perinatal depression questions)
2. Is there documentation in the health record specifying assessment of family strengths/protective factors during the visit?
  - **Yes**
  - **No**

### Section 2. Perinatal Depression Screening

#### Screening

3. Is there documentation in the health record that a validated perinatal depression screening has been completed at least once (1 time) at the 1-, 2-, 4-, or 6-month visits?
  - **Yes**
  - **No** (Skip to Social Determinants of Health questions)
  - **Not applicable: mother was not present at any visits for 1-, 2-, 4-, and 6-months** (Skip to Social Determinants of Health questions)



4. Enter the number of perinatal depression screens documented in the 1-, 2-, 4-, and 6-month well-child visit charts. (Enter number, will not plot month-to-month)

### **Discussion**

5. Is there documentation in the health record that the perinatal depression screening results were discussed with the mother at the time of the screening at least once (1 time) at the 1-, 2-, 4-, or 6-month visits?
  - Yes**
  - No**

### **Referral**

6. Is there documentation in the health record that a referral was made at least once at the time of the visit for a positive perinatal depression screening at the 1-, 2-, 4-, or 6-month visit?
  - Yes**
  - No**
  - N/A – Screen was negative**

## **Section 3. Social Determinants of Health Assessment**

### **Assessment**

7. Is there documentation in the health record that a practice-standardized social determinants of health assessment was completed during the visit?
  - Yes**
  - No** (skip to Social-Emotional Development questions)

### **Discussion**

8. Is there documentation in the health record that the practice-standardized social determinants of health assessment results were discussed with the family at the visit?
  - Yes**
  - No**

### **Referral**

9. Is there documentation in the health record that documents an action (eg, food bank, Head Start, etc.) or referral was made at the time of the visit for a positive social determinants of health assessment at the visit?
  - Yes**
  - No**
  - N/A – Screen was negative**



## Section 4. Social-Emotional Development Screening

### Screening

10. Is there documentation in the health record that a social-emotional screening was completed at least once (1 time) at the visit?

- Yes**
- No** (no additional data will be collected from this patient)

### Discussion

11. Is there documentation in the health record that the social emotional screening results were discussed with the family during the visit?

- Yes**
- No**

### Referral

12. Is there documentation in the health record that a referral was made for a positive social-emotional screening during the visit at which the screening was completed?

- Yes**
- No**
- N/A – Screen was negative**

### Individual Chart Review Calculations

Yes = a, No = b

$3a/(3a+3b+3c)$

No calculation

$5a/3a$

$6a/3a$

$7a/(7a+7b)$

$8a/7a$

$9a/(7a-9c)$

$10a/(10a+10b)$

$11a/10a$

$12a/(10a-12c)$



## Addressing Social Health and Early Childhood Wellness Aggregate Chart Review Form

### Sample:

- Include medical records for well-child visits for patients from birth through 48 months (see last bullet)
- Records should only be from pediatricians participating in the ASHEW collaborative
- Convenience sample of most recent charts for eligible well-child visits
- Submit data by the 7<sup>th</sup> of each month
- Do not share ANY identifying information. Do not include patient information, record locator numbers, DOB, etc. Do not submit any physician or provider identifying information either
- Total patient charts entered should equal 40
  - 10 for 6-month visit
  - 10 for 15-month visit
  - 10 for 24-month visit
  - 10 for 48-month visit

Questions refer to documentation in the medical record for this particular visit.

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### 6-month visit:

1. How many charts are you entering for the 6-month visit?
2. How many charts have documentation of specifying an assessment of family strengths/protective factors? (note, number must be less than or equal to the number entered in Question 1)

### Perinatal Depression

3. How many records have documentation of a valid perinatal depression screening completed at least once at the 1-, 2-, 4-, OR 6-month visit? (note, this must be less than or equal to the number entered in Question 1)
4. How many records have documentation of a valid perinatal depression screening completed at only two visits?
5. How many records have documentation of a valid perinatal depression screening completed at only three visits?
6. How many records have documentation of a valid perinatal depression screening completed at all four visits?
7. How many records have documentation that a perinatal depression screening was **not** completed at all four of the 1-, 2-, 4-, and 6-month?
8. How many records have documentation in the health record that perinatal depression screening results were discussed at least once during the 1-, 2-, 4-, OR 6-month visit? (note, this number must be less than or equal to the number entered in Question 3)



9. How many records have documentation that a positive screen was identified? (note, this number must be less than or equal to the number entered in Question 3)
10. Of those records where a positive screen was identified, how many records have documentation that a referral was made during the visit at which the screening was conducted? (Note, number must be equal or less than the number entered in Question 9)

### **Social Determinants of Health**

11. How many records have documentation in the health record that a practice-standardized social determinants of health assessment was completed during the visit? (note, number must be equal or less than the number entered in Question 1)
12. How many records have documentation in the health record that the practice-standardized social determinants of health assessment results were discussed with the family at the visit? (note, number must be equal or less than the number entered in Question 11)
13. Of those that received a practice-standardized social determinants of health assessment, how many records indicated a need was identified? (note, number must be equal or less than the number entered in Question 11)
14. Of those records where a need was identified from the practice-standardized social determinants of health assessment tool, how many records have documentation that a referral was made during the visit at which the assessment was completed? (Note, number must be equal or less than the number entered in question 13)

### **Social-Emotional Development**

15. How many records have documentation in the health record that a validated social-emotional screening was completed during the visit? (note, number must be equal or less than the number entered in Question 1)
16. How many records have documentation in the health record that the results of the social-emotional screening were discussed with the family at the visit? (note, number must be equal or less than the number entered in Question 15)
17. Of those that received a social-emotional screening, how many records indicated a positive screen was identified? (note, number must be equal or less than the number entered in Question 15)
18. Of those records where a positive screen was identified, how many records have documentation that a referral was made during the visit at which the screening was conducted? (Note, number must be equal or less than the number entered in Question 17)

### **15-month visit:**

19. How many charts are you entering for the 15-month visit?
20. How many charts have documentation of specifying an assessment of family strengths/protective factors? (note, number must be less than or equal to the number entered in Question 19)

### **Social Determinants of Health**



21. How many records have documentation in the health record that a practice-standardized social determinants of health assessment was completed during the visit? (note, number must be less than or equal to the number entered in Question 19)
22. How many records have documentation in the health record that the practice-standardized social determinants of health assessment results were discussed with the family at the visit? (note, number must be less than or equal to the number entered in Question 21)
23. Of those that received a practice-standardized social determinants of health assessment, how many records indicated a need was identified? (note, number must be less than or equal to the number entered in Question 21)
24. Of those records where a need was identified from the practice-standardized social determinants of health assessment tool, how many records have documentation that a referral was made during the visit at which the assessment was completed? (note, number must be less than or equal to the number entered in Question 23)

### **Social Emotional Development**

25. How many records have documentation in the health record that a validated social-emotional screening was completed during the visit? (note, number must be less than or equal to the number entered in Question 19)
26. How many records have documentation in the health record that the results of the social-emotional screening were discussed with the family at the visit? (note, number must be less than or equal to the number entered in Question 25)
27. Of those that received a social-emotional screening, how many records indicated a positive screen was identified? (note, number must be less than or equal to the number entered in Question 25)
28. Of those records where a positive screen was identified, how many records have documentation that a referral was made during the visit at which the screening was conducted? (note, number must be less than or equal to the number entered in Question 27)

### **24-month visit:**

29. How many charts are you entering for the 24-month visit?
30. How many charts have documentation of specifying an assessment of family strengths/protective factors? (note, number must be less than or equal to the number entered in Question 29)

### **Social Determinants of Health**

31. How many records have documentation in the health record that a practice-standardized social determinants of health assessment was completed during the visit? (note, number must be less than or equal to the number entered in Question 29)
32. How many records have documentation in the health record that the practice-standardized social determinants of health assessment results were discussed with the family at the visit? (note, number must be less than or equal to the number entered in Question 31)



33. Of those that received a practice standardized social determinants of health assessment, how many records indicated a need was identified? (note, number must be less than or equal to the number entered in Question 31)
34. Of those records where a need was identified from the practice standardized social determinants of health assessment tool, how many records have documentation that a referral was made during the visit at which the assessment was completed? (note, number must be less than or equal to the number entered in Question 323)

### **Social Emotional Development**

35. How many records have documentation in the health record that a validated social-emotional screening was completed during the visit? (note, number must be less than or equal to the number entered in Question 29)
36. How many records have documentation in the health record that the results of the social-emotional screening were discussed with the family at the visit? (note, number must be less than or equal to the number entered in Question 35)
37. Of those that received a social-emotional screening, how many records indicated a positive screen was identified? (note, number must be less than or equal to the number entered in Question 35)
38. Of those records where a positive screen was identified, how many records have documentation that a referral was made during the visit at which the screening was conducted? (note, number must be less than or equal to the number entered in Question 37)

### **48-month visit:**

39. How many charts are you entering for the 24-month visit?
40. How many charts have documentation of specifying an assessment of family strengths/protective factors? (note, number must be less than or equal to the number entered in Question 39)

### **Social Determinants of Health**

41. How many records have documentation in the health record that a practice-standardized social determinants of health assessment was completed during the visit? (note, number must be less than or equal to the number entered in Question 39)
42. How many records have documentation in the health record that the practice-standardized social determinants of health assessment results were discussed with the family at the visit? (note, number must be less than or equal to the number entered in Question 41)
43. Of those that received a practice-standardized social determinants of health assessment, how many records indicated a need was identified? (note, number must be less than or equal to the number entered in Question 41)
44. Of those records where a need was identified from the practice-standardized social determinants of health assessment tool, how many records have documentation that a referral was made during the visit at which the assessment was completed? (note, number must be less than or equal to the number entered in Question 43)



### **Social Emotional Development**

- 45.** From the total number of eligible patients, how many records have documentation in the health record that a validated social-emotional screening was completed during the visit? (note, number must be less than or equal to the number entered in Question 39)
- 46.** How many records have documentation in the health record that the results of the social-emotional screening were discussed with the family at the visit? (note, number must be less than or equal to the number entered in Question 45)
- 47.** Of those that received a social-emotional screening, how many records indicated a positive screen was identified? (note, number must be less than or equal to the number entered in Question 45)
- 48.** Of those records where a positive screen was identified, how many records have documentation that a referral was made during the visit at which the screening was conducted? (note, number must be less than or equal to the number entered in Question 47)

### **Aggregate Chart Review Calculations**

#### **6-month visit:**

Family Strengths: 2/1  
Perinatal Depression Screen: 3/1  
Perinatal Depression Counseling: 8/3  
Perinatal Depression Referral: 10/9  
SDOH Screen: 11/1  
SDOH Counseling: 12/11  
SDOH Referral: 13/#12  
SED Screen: 15/1  
SED Counseling: 16/15  
SED Referral: 18/17

#### **15-month visit:**

Strengths: 20/19  
SDOH Screen: 21/19  
SDOH Counseling: 22/21  
SDOH Referral: 24/23  
SED Screen: 25/19  
SED Counseling: 26/25  
SED Referral: 28/27

#### **24-month visit:**

Strengths: 30/29  
SDOH Screen: 31/29  
SDOH Counseling: 32/31  
SDOH Referral: 34/33





SED Screen: 35/29

SED Counseling: 36/35

SED Referral: 38/37

**48-month visit:**

Strengths: 40/39

SDOH Screen: 41/39

SDOH Counseling: 42/41

SDOH Referral: 44/43

SED Screen: 45/39

SED Counseling: 46/45

SED Referral: 48/47