



GETTING STARTED: IMPLEMENTING A SCREENING PROCESS

The following worksheet has been created as a guide to help you in developing a *screening process* workflow for your practice. For the purposes of this worksheet, a screening process is defined as the method of early identification and intervention for potential risks to a child's development through ongoing surveillance, routine screening per AAP guidelines, family-centered discussion of results, interpretation, and—when concerns are identified—referral and follow-up.

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

Developmental screenings:

General developmental screening: _____

Social-emotional screening: _____

Autism screening: _____

Perinatal depression screening: _____

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

STEP 2: Identify your practice champion. *Who will lead our team through implementing or improving the screening process?*

STEP 3: Identify the practice team members that will be part of the screening process. *Who is on our screening workforce team and what are their roles?*

STEP 4: Select the screening tool(s) and educational materials that will be used. *What fits best with our practice structure and patient population?*

Developmental screenings:

General developmental screening: _____

Social-emotional screening: _____

Autism screening: _____

Perinatal depression screening: _____

Social drivers of health
screening tool/questions: _____

Educational materials:

STEP 5: Plan key parts of the workflow/process for each of the screening categories. *How will we get this done?*

See Workflow Planning Worksheet on the following 2 pages.

**STEP 5: Workflow
planning worksheet**

**DEVELOPMENTAL
SCREENING**

**SOCIAL-EMOTIONAL
SCREENING**

AUTISM SCREENING

**PERINATAL
DEPRESSION
SCREENING**

**SOCIAL DRIVERS OF
HEALTH SCREENING**

1.)	At what ages of the child will the family receive the screenings? Recommendations:	9, 18, and 30 months	Regular intervals	18 and 24 months	1, 2, 4, and 6 months	Every visit
2.)	How will parents access the screening tool to complete it? (Ex: EMR portal, paper version in office, laminated wipe-away)					
3.)	If paper, who will ensure that copies of the screening tool are available for parents to complete each day?					
4.)	When in the visit will the parent receive the screening tool?					
5.)	Who will give the parent the screening tool?					
6.)	Who will score the screening tool?					
7.)	When will the provider review the screening results with the parent and work with them to make a plan for next steps?					
8.)	How will referrals be handled for children at risk?					

**STEP 5: Workflow
planning worksheet**

**DEVELOPMENTAL
SCREENING**

**SOCIAL-EMOTIONAL
SCREENING**

AUTISM SCREENING

**PERINATAL
DEPRESSION
SCREENING**

**SOCIAL DRIVERS OF
HEALTH SCREENING**

9.)	Who will be responsible for facilitating the referrals?					
10.)	Where will referrals be documented?					
11.)	What happens with the screening tool after it has been discussed with the parent? (Ex: results recorded in EMR, scanned into chart, shredded, wiped away)					
12.)	Who will give the parent educational materials? When will these be presented?					
13.)	Where will you keep your supply of educational materials?					
14.)	Who will make sure that materials (including screening tools and educational materials) are restocked and readily available?					
15.)	Who will 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 can we work with to support our patients? What materials do we need for our process?*

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](#): _____

[Parents 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: _____

Parental/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](#): _____

Parenting 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 will you work with staff to develop the process? How will new staff receive initial training on the concepts? How will staff be refreshed/reminded of this information?

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

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