Screening Implementation: Process Flow-Chart

- Identify practice champions

- Introduce the idea to practice
  - Share compelling case for developmental screening
  - Elicit ideas, concerns, and suggestions from all staff members
  - Acknowledge that change is hard

- Choose a tool
  - Review available/feasible tools
  - Pick a tool for trial that matches practice needs for trial

- Train appropriate staff in administering, scoring and interpreting the tool

- Consider methods of implementation
  - At what visits will screening be included first?
    __________________________________________
  - How will tool be distributed – in the office, via mail, or posted electronically online?
    __________________________________________
  - At what point in patient flow will the tools be distributed?
    __________________________________________
  - Who will distribute the tools?
    __________________________________________
  - Is there a system at that place to readily flag the age of the child?
    __________________________________________
  - What script will accompany distribution of the tools?
    __________________________________________
What, if any, handouts will accompany distribution of the tools?

Who will ensure a stock of the tools?

Where will the tools be stored/located?

What additional materials will be needed to support completion of the tools? Clipboards? Pens/pencils?

What will you do with completed screens?

Who will be responsible for scoring?

When will they be trained?

Where will scoring instructions be available?

Where/how will results be recorded in the chart?

How will the screening process be documented in the chart?

How will data be collected?
Referral system

☐ What is your current system?
________________________________________

☐ Will you need a new system?
________________________________________

☐ Who will make referral?
________________________________________

☐ How will the referral be made? (Step by step)
________________________________________
________________________________________
________________________________________

☐ Where is the contact information?
________________________________________

☐ Do forms need to be filled out? If so:
☐ By whom?
________________________________________

☐ Where are forms available?
________________________________________

☐ Who keeps them stocked?
________________________________________

☐ What patient handouts are given for referral?
________________________________________
What staff/process are available to assist, or is it an individual patient process?

________________________________________

Documenting the screening results

☐ Who will ensure that the scored forms are part of the patient’s chart and available to clinicians?
________________________________________

☐ If you are using electronic records, who will be responsible for entering the patient’s results?
________________________________________

☐ What will happen to the screening materials once the results have been discussed with the families?
________________________________________

☐ Handouts and guidance about development/celebrating milestones. Materials and process identified
________________________________________

Patient discussion and follow-up

☐ Who will explain screening results to families?
________________________________________

☐ Who will ensure that families receive patient education materials before leaving the office?
________________________________________

☐ Who will identify referral resources when needed? (NOTE: This should include more than one individual)
________________________________________
Practice Run

☐ Date Set: ________________________________

☐ How will it be piloted? (i.e. 1 day, 1 provider with feedback, 1 provider per patient, 1 provider per 2 patients, etc.)

________________________________________

________________________________________

☐ How/when will feedback be shared?

________________________________________

Ongoing

☐ Communicate consistently

☐ Request regular feedback from all staff – particularly, but not only, after the practice run

☐ Give staff regular feedback on their successes and the changes you believe necessary

CELEBRATE SUCCESS!