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!