



Screening Implementation

Process Checklist

- Introduce the idea to practice** ***Go to "Step 1: Decide to Screen" for templates
 - Identify appropriate group to convene for introduction
 - Identify appropriate time and timeframe to have meeting
 - Organize meeting agenda, presentation, and handouts (food also helps!)
 - Share compelling case for developmental screening
 - Elicit ideas, concerns, and suggestions from *all* staff members

- Identify practice champions** ***See Step 2: Form Your Team for descriptions

- Choose a tool** ***see Step 3: Choose a Quality Screen for comparison chart
 - Review available/feasible tools
 - Pick a tool for trial that matches practice needs for trial

- Consider methods of implementation** ***See Step 4: Map Screening Flow for templates and materials
 - 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 ***See "Step 5: Prepare Referral Process" for samples and materials

What is your current system for referring children to developmental support services? _____

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/processes 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?

Does the electronic medical record allow for streamlined documentation? If so, can it be modified in a way that can be used for screening data collection?

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?

Referral coordination ***See Step 6: Prepare Parent Education and Community Connections for materials

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

Who will be in charge of referrals?



- How will this individual be alerted to make a referral?

- How will the referral be made? (list steps)

- How will referral outcomes be tracked?

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

- Administering the screen

- Collecting the screen

- Scoring the screen

- Discussing results with parents

- Making Referrals

- Ongoing** ***See Step 7: Implement and Evaluate for QI samples and templates

- 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

- Integrate screening evaluation into existing practice quality improvement activities (add to agenda of monthly meetings, etc.)

CELEBRATE SUCCESS!