



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!