

# Improvement Checklist



## STEPS TO USING SCREENING AND SURVEILLANCE IN YOUR OFFICE

Careful preparation will increase the likelihood you will successfully implement and sustain new systems for using screening and surveillance in your practice.

### **Elicit explicit support from practice leaders to use new structured screening tools**

- Practice leader support is important when introducing new tools and strategies. Discuss with practice leaders the evidence that supports the use of developmental screening tools. Obtaining staff support for implementing new procedures will help persuade them to participate. Encourage leaders to discuss at staff meetings how soliciting parental concerns will improve patient care.

### **Assign responsibility for coordinating the use of developmental screening tools**

- Identify a staff member to lead and coordinate efforts to incorporate screening into your practice. Consider creating a team of people to undertake this responsibility. It may be helpful to involve representatives of the physician, nursing, and administrative staff because they may all need to participate in implementation.

### **Communicate with staff about new procedures for screening**

- Seeking ideas and input from staff will help you develop the right system for incorporating screening into your practice.
  - Inform staff of the available tools and resources.
  - Share information about how using these tools will improve patient care.
  - Describe how materials will be organized so that staff can easily access materials and information as needed.
  - Train everyone in the practice to provide consistent information to parents about the purpose of the screening and assessment, and how the information benefits their child's care.

### **Select screening instruments**

- Several instruments are available for use in clinic settings. Consider:
  - Who will ensure that copies of the screening are available? Some tools are protected by copyright and must be ordered from the publisher. Other tools are in the public domain and can be reproduced. Assign someone to monitor the inventory and replenish supplies as needed.
  - Determine the interval for patients to receive the screening.
  - After you have determined the intervals for screening, be sure to think carefully about how you will identify the patients who are supposed to be screened (e.g., flagging charts, incorporating a reminder system into patient appointments).

### **Determine when the parent will receive the screening**

- There are several options for distributing screening tools to parents.
  - Mail or email the screening to families prior to the appointment. Doing so allows the parent more time to complete the information. This option also allows input from daycare providers or others close to the child. Be certain to establish a procedure to follow if parents forget to bring the completed screening to the visit.
  - Give the tool to the parent during the office visit. Some parents may not read well. In this situation, it can be helpful to use a simple form and to offer parents the opportunity to get assistance when completing the tool. Ask parents, "Would you like to complete this on your own or have someone go through it with you?"
  - Determine how you will introduce the screening to parents. Consider explaining to parents that the screening is very important because it helps the physician understand their child's needs

better. Let parents know who they can ask for help if they need assistance. Remind them that all the information is confidential.

### **Who will distribute and score the screening?**

- Office staff can play a key role in performing different screening tasks. Distribute the work across several staff. For instance, a receptionist can be in charge of making sure parents complete the screening while a nursing assistant, nurse, or developmental specialist can score the screening and highlight areas for the clinician to follow-up.

### **Test out ideas before implementing changes throughout the practice**

- Before attempting practice-wide implementation of a new structured screening tool, try it out with five families and review what you learned from those encounters. Ask yourself: "Did this tool uncover important parental concerns I might have missed in the past?; How did the parents react to providing this information?; Do I need more information or training to make this a better interaction?; and How could we improve the flow of getting the parent the tool?" You may find it helpful to repeat such tests several times before you decide which new materials or strategies should be implemented practice-wide. It is important that the team testing new strategies keep track of its efforts to help determine which approaches are successful.

### **Prepare for the human side of change**

- Changes—even those that a practice agrees to make—can be difficult. People react differently to changes. Some staff may resist changes because they are unfamiliar. Some changes may create additional work until everyone is more accustomed to the new routines (e.g., asking added questions during a visit, using a new tool). To already busy clinicians and staff, a change that is perceived as creating more work is likely to be avoided unless the benefit of the change is clear. Describing the benefits, acknowledging that such changes may require extra time, and recognizing everyone's efforts to improve care can increase the likelihood that providers and staff will use new tools and approaches.

### **Train clinicians and staff**

- As you introduce the structured screening tools into your practice you may find using such tools is new to some or all of your clinicians and staff.
  - Consider holding informal training sessions for all staff to present the rationale for using new tools. Include scientific evidence that supports their use. Provide opportunities for questions and review the new tools and how they will be used.
  - Include instructions on any new roles or responsibilities for staff or clinicians.
  - Staff might welcome a session on how to talk about sensitive topics or how to handle difficult situations that may come to light as a result of using the new tools (e.g., maternal depression, family violence).

### **Determine what to do with completed screenings**

- Determine if you need to store completed screenings and where to store them.
- Consider how to incorporate information from the screening into future care. If you are planning to compile data from a sample of screenings to inform quality improvement, determine who will tally and present the data.
- If screening your patients in a structured way uncovers areas where you want to increase your ability as a practice to handle concerns either individually or systematically, develop plans for enhancing those aspects of your practice.

### **Consider what new resources or referrals your practice may need**

- If using structured screening tools is new to your office, you may need to identify community resources for referrals for issues that are revealed by the structured screening approach. Gathering data about the most common concerns of your patients may help you decide which referrals and community resources are the most likely to be needed and used by your patients.

## **MONITORING PROGRESS**

### **Ask for patient feedback during encounters**

- An easy, low technology way to assess your practice's performance is simply to ask families for feedback while they are in the office. When you ask for your patient's input, be prepared to respond.
- Consider running a "feedback drive" once or twice each year in your practice. During your practice's "feedback drive," each clinician and staff person could be instructed to solicit feedback from a set number (e.g., 2 or 3) of patients per day during the course of the drive. A simple feedback tool could be attached to the chart to remind clinicians to collect and provide a place for the data to be recorded. All the completed feedback tools can be summarized and used by the practice to better understand how the patients in the practice perceive their care.
- Regardless of the method you use to collect data from patients on a regular basis, be sure to set aside time at regular practice meetings to share feedback from patients with others on your clinic staff.