

# Improvement Checklist



## STEPS TO USING FAMILY PSYCHOSOCIAL SCREENING AND SURVEILLANCE

Careful preparation and planning will increase the likelihood that 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 psychosocial screening tools**

Practice leader support is important when introducing new tools and strategies. Discuss with practice leaders the evidence that supports the use of psychosocial screening tools. Obtaining explicit support for implementing new procedures will help persuade staff to participate. Encourage leaders to discuss at staff meetings how assessing for well-being and safety within the family will improve patient care.

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

Identify someone in your practice to lead and coordinate efforts to incorporate screening into your practice. Consider creating a team of people to undertake this responsibility. It might be helpful to involve physician, nursing, and administrative staff because they might 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 tools and resources that are now available so they can use them with patients and families.
- 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 the health and well-being of the child.

### **Select screening instruments**

Several instruments are available for use in clinic settings. Consider:

- Who will ensure that copies of the screening tool 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 at which patients and families should receive the screening.
- After you have determined the intervals for screening, be sure to think carefully about how you will identify the patients and families 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. Before choosing a screen, decide what issues your practice wishes to focus on and what screens would best fit your concerns. Will the screens be performed at one visit, or will they be spread throughout the practice's well-child care regimen? Will the questions be asked in person in a private setting or in a questionnaire? Will just one issue (e.g., maternal depression) be assessed or multiple psychosocial topics be discussed at once (e.g., at the two-week well-child visit)?

**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 ensuring that parents complete the screening while a nursing assistant can make sure that the screening tool is on the patient's chart in the exam room when the health care provider plans to conduct the screening.

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

Before attempting practice-wide implementation of a new psychosocial screening tool, try it out with five families and review what you learn based on those encounters. Ask yourself, "Did this tool uncover important safety and well-being issues in the child's home that 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? How could we improve the flow of getting the parent the tool?" You might 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 keeps track of its efforts to inform decisions about which approaches are successful in your practice.

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

If using psychosocial screening tools is new to your office you might need to identify new community resources or referrals for issues that are revealed by the psychosocial screening. You should outline which referrals and community resources are the most likely to be needed and used by families when cases of domestic violence, substance abuse, and maternal depression are identified from the screening.

**IMPLEMENTING IMPROVEMENTS: USING PSYCHOSOCIAL SCREENING TO ASSESS PARENTAL WELL-BEING AND SAFETY IN THE HOME**

You now have identified some strategies that you believe will enable you to implement psychosocial screening in your practice. You are ready to spread these strategies throughout your practice. Listed below are several tips on how to ensure that your strategies will be implemented.

**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 might react by resisting changes because they are unfamiliar. Some changes might 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 health care providers 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 to patients of the change, acknowledging that such changes might require extra time, and recognizing everyone's efforts at improving care can increase the likelihood that providers and staff will use new tools and approaches.

#### **Train clinicians and staff**

As you introduce the psychosocial screening tools into your practice you might find that using such tools is new to some or all of your health care providers 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 health care providers.
- Staff might welcome a session on how to talk about sensitive topics or how to handle difficult situations that may arise 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.

### **MONITORING YOUR NEW SYSTEM FOR USING PSYCHOSOCIAL SCREENING**

One means of monitoring your screening efforts is by periodically (e.g., annually) reviewing patient medical charts.

Providers who choose to add a series of questions to their discussions with parents rather than use a formal screening tool should consider using a parent-based survey to measure whether they are routinely screening parents for psychosocial issues.

The Promoting Healthy Development Survey (PHDS), developed by the Child and Adolescent Health Measurement Initiative (CAHMI), is a standardized, validated parent-based survey that can be used to monitor your progress. The survey has one relevant section to monitor improvement efforts focused on screening parents for parental well-being and safety within the home. To view the PHDS go to <http://www.cahmi.org>.

The survey results can be used to identify the following:

- The proportion of parents who were asked about three or more psychosocial issues.
- The proportion of parents who were asked about each of the six psychosocial and safety risks asked about in the survey.

Regardless of the method you use to collect data from families on a regular basis, be sure to set aside time at regular practice meetings to share feedback from families with others in your practice.

### ***Administering the Promoting Healthy Development Survey***

The Promoting Healthy Development Survey can be administered to a sample of patients at regular intervals (e.g., five consecutive patients per age group in a month OR all patients in the first two weeks of a month). There are three age-specific versions of the survey: 3–9 months, 10–18 months, and 19–46 months. Ongoing use of this tool can provide data to help you track improvements your practice is making over time and identify areas that can be the focus of new improvements. The objective assessments should be completed annually. Consider timing the collection and summarization of these data so that they are available to inform annual priority setting for your practice. Further details about administering the PHDS in your practice can be found at <http://www.cahmi.org>.