

A PRIMER

Screening for Social Needs and Collecting Detailed Demographics at MDPCP Practices

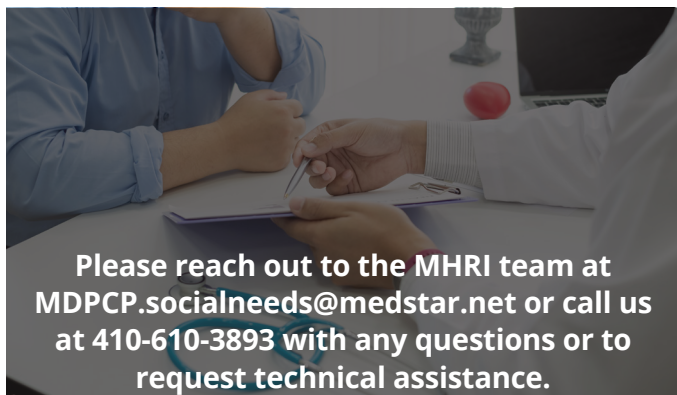


The Maryland Primary Care Program has released a [toolkit](#) to help practices find out about their patients' unmet social needs such as food, housing, and transportation insecurity, and connect patients to resources to meet unmet needs, as well as to collect detailed demographic data.

Our Technical Assistance Team at the MedStar Health Research Institute (MHRI) can help your practice with:

- Developing handouts to address most common patient needs
- Co-development of protocols or workflow for data collection depending on individual clinic priorities
- Identifying appropriate trainings for staff on how to ask or use sensitive questions
- Informatics or technical support to engage with EHR vendors
- On-site consultation to observe workflow and help problem-solve questionnaire administration

Even if your practice already conducts social needs screening, the Technical Assistance team can help in brainstorming solutions to problems in fully implementing screening and using these data to improve care delivery.



Please reach out to the MHRI team at MDPCP.socialneeds@medstar.net or call us at 410-610-3893 with any questions or to request technical assistance.

This Primer can help your practice find resources to support social needs screening and demographic data collection.

I want to...

Make my clinic feel welcoming of patients who have diverse identities or needs

- Display posters or print outs like [these](#) in waiting rooms or exam rooms
- Print a [Folding Card on Sexual Orientation and Gender Identity](#) to guide you through these conversations or to leave in exam rooms

Learn what types of questions to ask patients to learn about their social risk factors

- Use the [Health Leads screening toolkit](#) or the [Accountable Health Communities Screening Tool](#)

Learn what types of demographic data about my patients may influence their health outcomes

- Fields to consider include those in the [ADDRESSING Framework](#)

Learn how to ask patients these questions in a respectful manner

- Use resources to learn [empathic inquiry, conversation guides](#) to elicit SDOH, and how to ask about [sensitive demographic information](#)

Obtain CME credit for completing training on social risk factor or demographic data collection

- [Collecting Patient Data: Improving Health Equity in Your Practice](#); Interactive course, 0.75 CME credits, includes additional resources
- [How to collect Accurate and Complete Race / Ethnicity Data – A Step Toward Improving Health Equity](#); Webinar/ video, 60 minutes, 1.00 CME credits
- [Narratives and Language](#); Audio, 48 minutes, 0.75 CME credits (can be downloaded)
- [Implicit bias](#), a 45-60 minute training for 1.0 CME credits

Learn where I can refer patients to for their social needs

- Use findhelp.org, [211 Maryland](#)

Collecting and using detailed demographic data about patients and their social needs can help you deliver more effective care that is personalized to patients' problem. **The toolkit outlines a simple, 4-step process of collecting both demographic data and social needs information:**

Step 1: Decide which screening tools and questions about social needs and demographics will contribute towards advancing health equity within your practice.



Step 2: Consider how you will fit social needs screening and demographic data collection within your workflow.

	Patient-Administered	Healthcare team-Administered
Who documents information?	Patient or caregiver/family member	Front desk, Medical Assistant, Clinician, Care Manager, Social Worker, Community Health Worker
When is screening completed?	<ul style="list-style-type: none"> If before the visit: Patient portal or chatbot If during the visit: At check in or exam room 	<ul style="list-style-type: none"> If before visit: Over the phone If during the visit: Clinic check in or exam room
What technologies are used to document screening?	Paper, EHR-integrated technology (e.g., patient portal, chatbot, tablet)	Paper, telephone, EHR or EHR-integrated technology
How does screening data enter the EHR?	Manual entry by member of care team (if not EHR-integrated)	Manual entry by member of care team (if not EHR-integrated)
Advantages	May be able to cover more domains of needs or demographics	May build additional trust with patient if delivered in a culturally competent way

Step 3: Determine how you will use social needs and demographic data.

Example technical assistance opportunities	
<p>In-depth, ongoing consultation strategy</p> <ul style="list-style-type: none"> Plan: Work with MDPCP technical assistance team to consider whether additional data collection fields are needed Plan: Practice develops workflow with planning input from MDPCP technical assistance team as desired Plan: MDPCP technical assistance provides relevant training resources on collecting and analyzing data Do: New data collection and feedback loop processes launch and results studied with MDPCP team 	<p>Single consultation</p> <ul style="list-style-type: none"> MDPCP technical assistance team helps identify relevant data collection fields and provides customized checklists to meet practice-specific needs and capabilities for pilot testing and launch MDPCP provides ongoing resources as desired/requested by the practice

Step 4: Train your team in asking social needs and demographic questions in a sensitive and culturally competent manner.

Principle	Example language for a provider-administered screener	Example language for a self-administered screener
Support autonomy and respect privacy	"Is it ok if we spend a few minutes talking about your experiences and priorities in your life outside the clinic that might be affecting your health? I want to acknowledge that some of the questions might feel kind of sensitive, so please feel free to let me know if, at any time, you don't want to answer any of these questions."	"We would appreciate it if you would answer the following questions. If you would prefer not to answer these questions, that is fine."

For questions or assistance on developing, implementing, and evaluating any of these processes, contact the TA team at: MDPCP.socialneeds@medstar.net.