Social Determinants of Health Screening and Referral Project Monthly Meeting

November 21, 2024

3-4 pm

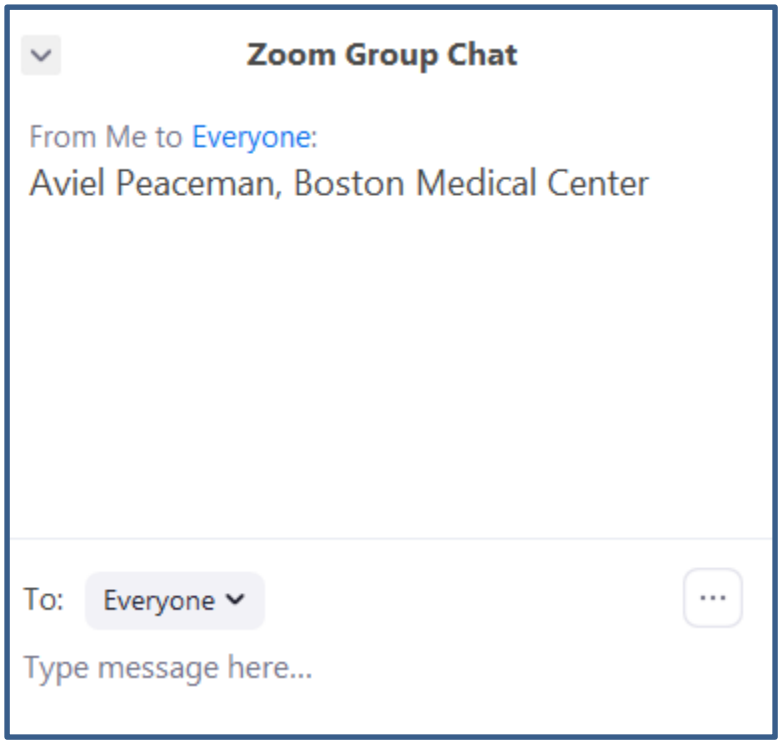
Welcome, Introductions, and Roll Call

Meg Parker, MD, MPH
Academic Chief of Neonatology
UMass Memorial Medical Center

Gaby Cordova Ramos, MD
Assistant Professor of Pediatrics
Boston Medical Center

Welcome!

Please chat your name and hospital into the chat box



Agenda

Time	Topic
2:00	Welcome and Introductions
2:10	Team Check in
2:20	Tool Selection and Adaptation Didactic
2:55	Wrap Up and Next Steps

Team Check Ins

Meg Parker, MD, MPH
Gaby Cordova Ramos, MD

How is it going?

- DUA/SOW status
- Forming your multi-disciplinary team
- Have you invited a family member to join your team?
- Other thoughts or questions?

Social Screening Tool Selection

Meg Parker, MD, MPH
Gaby Cordova Ramos, MD

What social screening tools are out there?

Name of Tool	Population	# of Questions (Total, Social Needs, Non-Social Needs)	Domains Assessed
AHC Tool	All ages	19*	Disabilities, Education, Employment, Financial strain, Food insecurity, Housing insecurity, Housing quality, Interpersonal violence, Social support, Stress, Transportation, Utilities
HealthBegins	All ages	24*	Civic engagement, Education, Employment, Financial strain, Food insecurity, Housing insecurity, Housing quality, Immigration, Interpersonal violence, Neighborhood safety, Social support, Stress, Transportation
Health Leads	All ages	10	Childcare access, Food insecurity, Health care/medicine access Housing insecurity, Literacy, Social support, Transportation, Utilities
iHELP	Pediatrics	14	Education, Financial strain, Food insecurity, Health care/medicine access, Housing insecurity, Housing quality, Immigration, Interpersonal violence, Power of attorney
Medicare Total Health Assessment Questionnaire	All ages	9*	Food insecurity, Housing insecurity, Housing quality, Power of attorney, Social support, Stress

Garg et al. Clinical approaches to reducing material hardships due to poverty: social risks/needs identification and interventions. *Acad Peds* 2021

What social screening tools are out there?

Name of Tool	Population	# of Questions (Total, Social Needs, Non-Social Needs)	Domains Assessed
MLP IHELLP	All ages	10	Benefits, Education, Employment, Housing insecurity, Housing quality, Immigration, Income, Interpersonal violence, Power of attorney
NAM	All ages	12*	Education, Financial strain, Income, Interpersonal violence, Social support, Stress
PRAPARE	All ages	17*	Childcare access, Clothing, Education, Employment, Food insecurity, Health care/medicine access, Housing insecurity, Immigration, Incarceration, Income, Interpersonal violence, Neighborhood safety, Social support, Stress, Transportation, Utilities, Veteran status
SEEK	Pediatrics	9*	Food insecurity, Interpersonal violence, Social support, Stress
SWYC	Pediatrics	9*	Food insecurity, Interpersonal violence
THRIVE	All ages	11	Caregiver responsibilities, Childcare access, Education, Employment, Food insecurity, Health care/medicine access, Housing insecurity, Transportation, Utilities
WE CARE	Pediatrics	12	Childcare access, Education, Employment, Food insecurity, Housing insecurity, Utilities
WellRX	All ages	10*	Childcare access, Education, Employment, Food insecurity, Housing insecurity, Interpersonal violence, Neighborhood safety, Transportation, Utilities

Garg et al. Clinical approaches to reducing material hardships due to poverty: social risks/needs identification and interventions. *Acad Peds* 2021

Standardized social screening in U.S. NICUs

2021 national survey of level 2-4 NICUs across 5 U.S. regions (n=170 respondents)
23% reported standardized processes for social risk screening and referral

Processes in NICUs with Standardized Screening & Referral
TOOL TYPE: All SDOH screening tools were multi-domain. **Most often tools developed by personnel in the unit** (35%)
SCEENING PROVIDER: Type of screening provider (check all that apply): Social worker (92%), Nurses (26%), Physician or AAP (15%).
TIMING OF SCREENING: Within the 1-2 weeks of admission (84%)
REFERRAL PROCEDURES: Social work consultation (94%), referral to community resources (80%)

Cordova-Ramos et al. National Prevalence of Social Determinants of Health Screening Among US NICUs. *Hosp Peds* 2022

What would the ideal screening tool look like?

Psychometric properties	Pragmatic properties
• Developed using gold standard processes • Accurately and precisely measures social risk domains (validity) • Measures changes in social risk over time and repeated measure (reliability)	• Easy to use in practice • Free or low cost • Brief • Low-literacy (8th grade or less) • Relevant to the NICU population • Appropriate for culturally and linguistically diverse populations (e.g. available in multiple languages)

Henrikson et al. Psychometric and Pragmatic Properties of Social Risk Screening Tools: A Systematic Review. *AJPM* 2019

Psychometric and pragmatic properties of existing social screening tools

- Systematic review of 21 social screening tools published in the peer reviewed literature between 2000 and 2018
- 8/21 underwent some reliability/validity testing
- 20/21 favorable pragmatic evidence
- No data on how validity varies by race/ethnicity or language

Conclusion: Various multi-domain, low-cost, low literacy tools are available for social screening in clinical settings, but psychometric data are very limited.

Henrikson et al. Psychometric and Pragmatic Properties of Social Risk Screening Tools: A Systematic Review. *AJPM* 2019

How do I select a screening tool? Consider…

Is there a tool already in use in your larger health system? Aligning with institutional efforts may facilitate implementation

	Tool Already in Use in Your Health System	Tool Not Already in Use in Your Health System
EHR integration		
Familiarity to other providers in health system		
Aligned with needs of families in the NICU		
Length and ease		

If a screening tool already exists in your health system…

Our recommendation: Choose the tool already in your health system and adapt it for use in the NICU

	Tool Already in Use in Your Health System	Tool Not Already in Use in Your Health System
EHR integration	Often already in the EHR	More time needed to get integrated into EHR
Familiarity to other providers in health system	Often more familiar	Less familiar
Aligned with needs of families in the NICU	Often less aligned, as it is meant for adults or out-patient setting	Can choose a tool that is more aligned with NICU
Length and ease	Can have more elements than needed	Can choose appropriate length

When choosing a tool or adapting a tool, consider…

- What domains should you screen for in your NICU?
  - CMS mandated items
  - Items particularly relevant to your NICU population
  - Items for which community resources are available

Possible Domains	CMS Mandate	NICU Relevance	Our Recommendation

Assessment of social risks vs. needs vs. both

- Screening tools may include assessments of risk only, needs only, or both. Currently, practice varies.

- Notably, CMS measures focused on social risk screening only.

Our recommendation is to include assessment of social needs (i.e. asking about family member's interest in support/assistance)

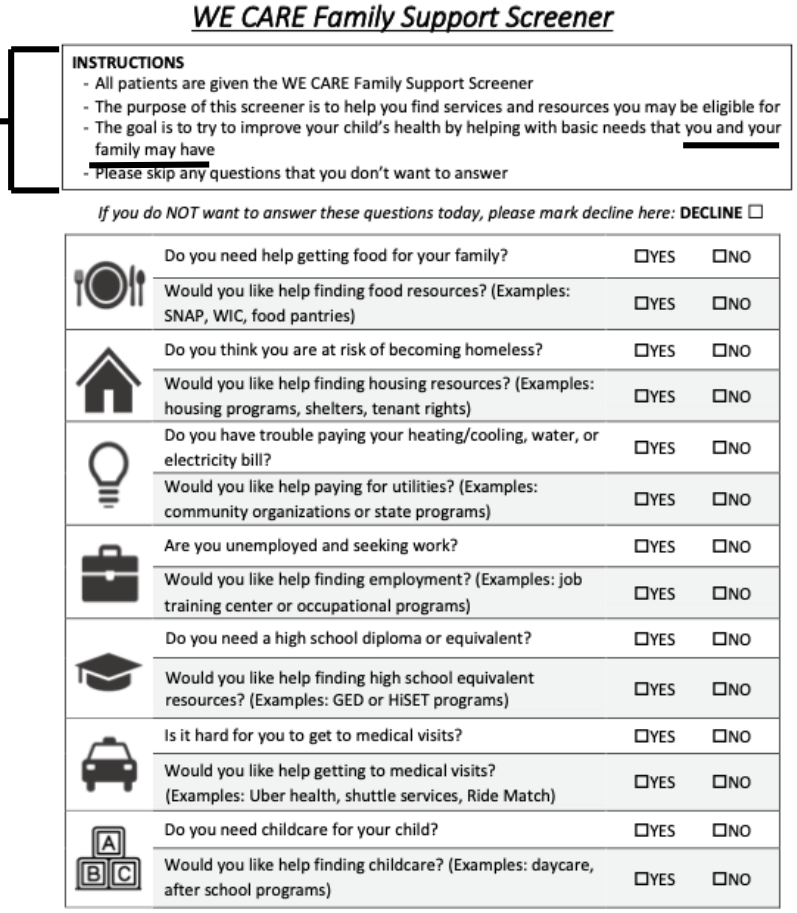
This is a family-centered method to intervene based on family priorities.

WE CARE 1.0 Tool

Disclosure statement

- Universal
- Purpose
- Voluntary

Targets the family unit



WE CARE Family Support Screener

INSTRUCTIONS
- All patients are given the WE CARE Family Support Screener
- The purpose of this screener is to help you find services and resources you may be eligible for
- The goal is to try to improve your child's health by helping with basic needs that you and your family may have
- Please skip any questions that you don't want to answer

If you do NOT want to answer these questions today, please mark decline here: **DECLINE** ☐

	Do you need help getting food for your family?	☐YES	☐NO
	Would you like help finding food resources? (Examples: SNAP, WIC, food pantries)	☐YES	☐NO
	Do you think you are at risk of becoming homeless?	☐YES	☐NO
	Would you like help finding housing resources? (Examples: housing programs, shelters, tenant rights)	☐YES	☐NO
	Do you have trouble paying your heating/cooling, water, or electricity bill?	☐YES	☐NO
	Would you like help paying for utilities? (Examples: community organizations or state programs)	☐YES	☐NO
	Are you unemployed and seeking work?	☐YES	☐NO
	Would you like help finding employment? (Examples: job training center or occupational programs)	☐YES	☐NO
	Do you need a high school diploma or equivalent?	☐YES	☐NO
	Would you like help finding high school equivalent resources? (Examples: GED or HiSET programs)	☐YES	☐NO
	Is it hard for you to get to medical visits?	☐YES	☐NO
	Would you like help getting to medical visits? (Examples: Uber health, shuttle services, Ride Match)	☐YES	☐NO
	Do you need childcare for your child?	☐YES	☐NO
	Would you like help finding childcare? (Examples: daycare, after school programs)	☐YES	☐NO

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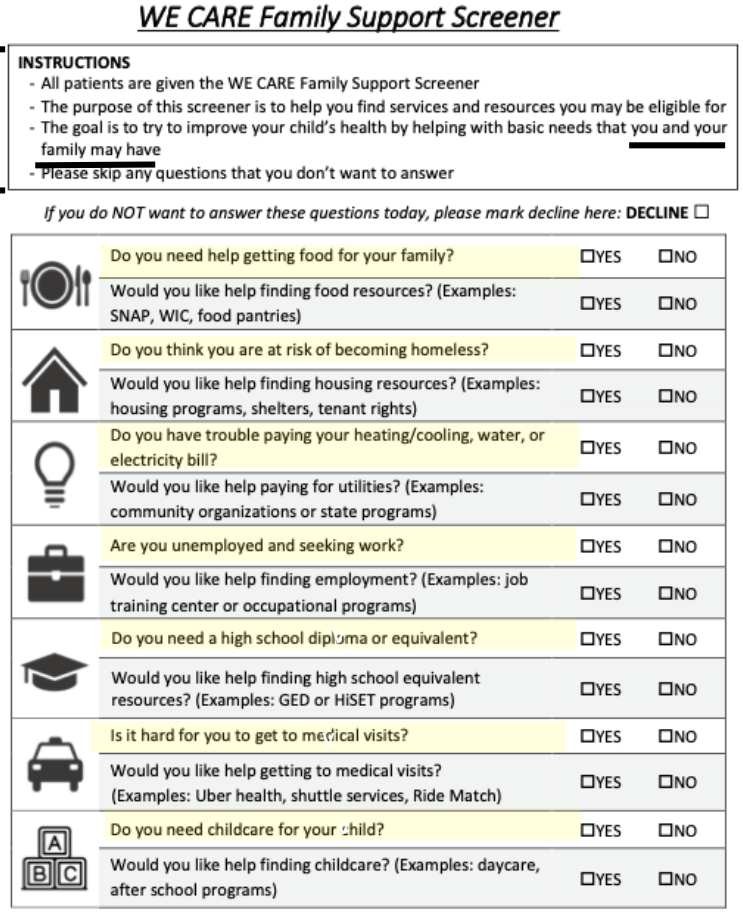
Targets the family unit

Asks for social risks and social needs



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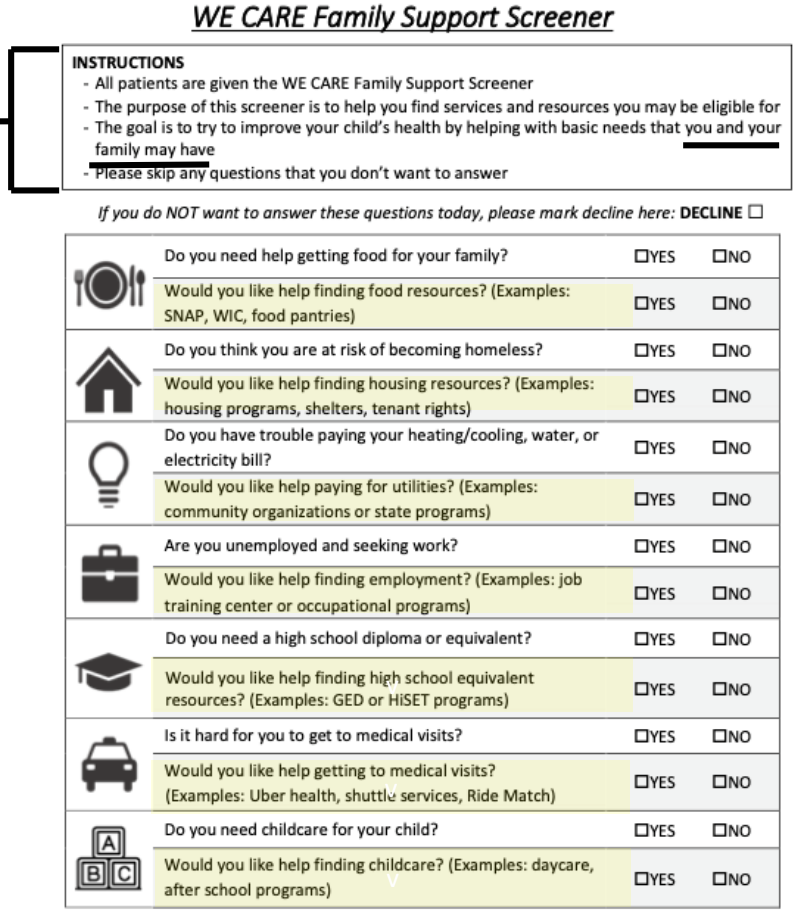

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	Is it hard for you to get to medical visits?	☐YES	☐NO
	Would you like help getting to medical visits? (Examples: Uber health, shuttle services, Ride Match)	☐YES	☐NO
	Do you need childcare for your child?	☐YES	☐NO
	Would you like help finding childcare? (Examples: daycare, after school programs)	☐YES	☐NO

WE CARE

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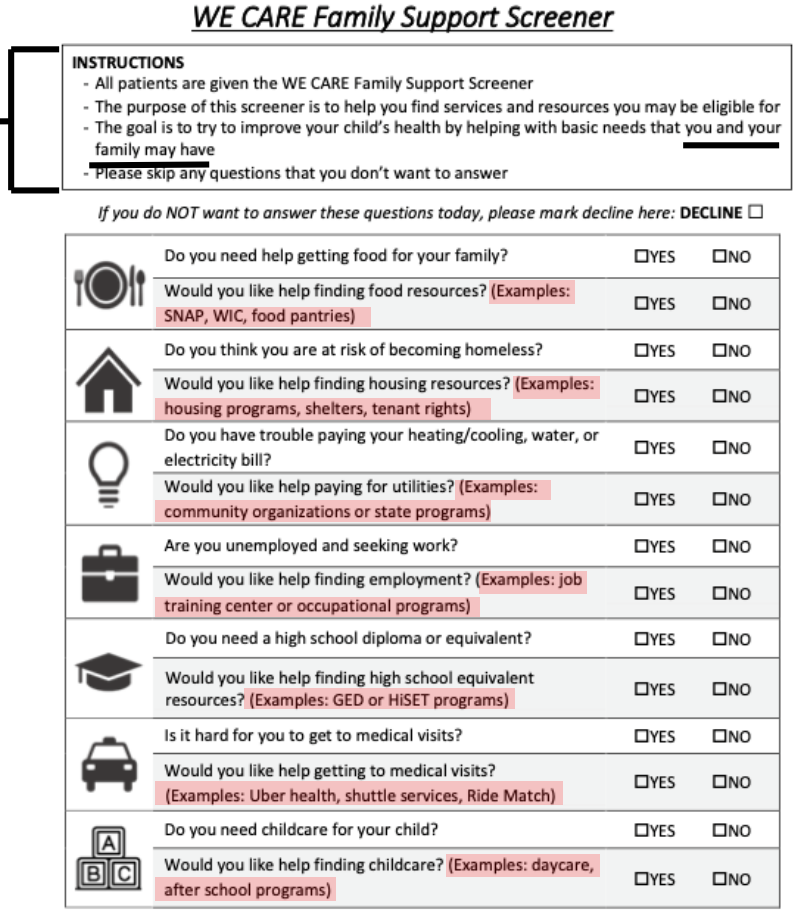
Targets the family unit

Asks for social risks and social needs

Gives examples of what assistance may look like



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	Would you like help finding housing resources? (Examples: housing programs, shelters, tenant rights)	☐YES	☐NO
	Do you have trouble paying your heating/cooling, water, or electricity bill?	☐YES	☐NO
	Would you like help paying for utilities? (Examples: community organizations or state programs)	☐YES	☐NO
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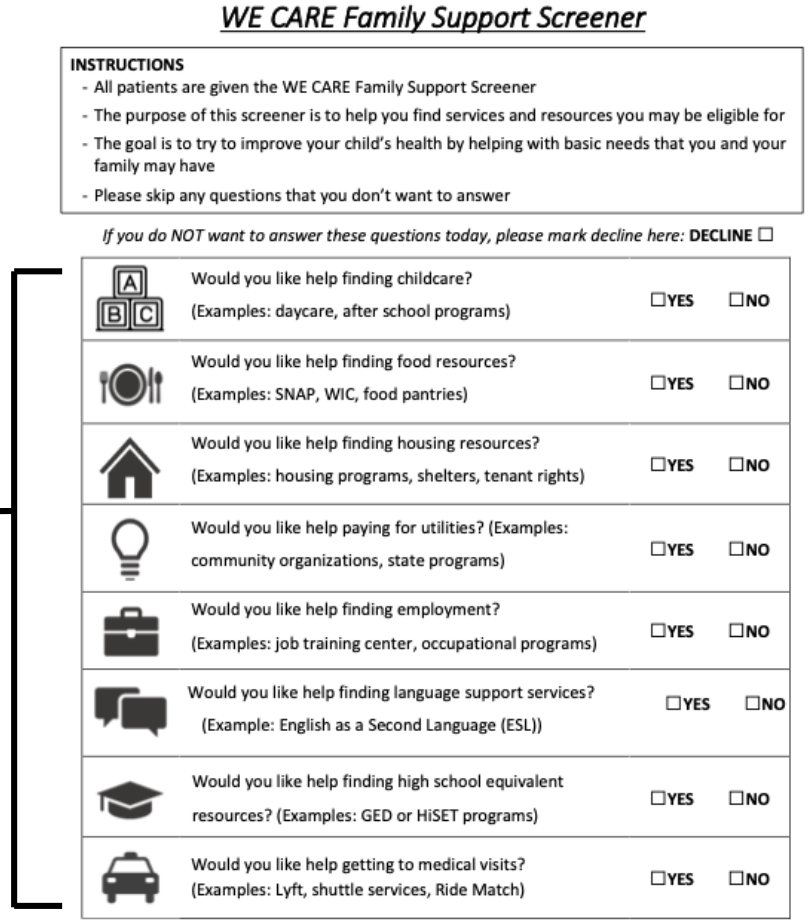
	Would you like help getting to medical visits? (Examples: Uber health, shuttle services, Ride Match)	☐YES	☐NO
	Do you need childcare for your child?	☐YES	☐NO
	Would you like help finding childcare? (Examples: daycare, after school programs)	☐YES	☐NO

WE CARE 2.0 Tool

Asks for social needs only



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Would you like help finding childcare? (Examples: daycare, after school programs)	☐YES	☐NO
Would you like help finding food resources? (Examples: SNAP, WIC, food pantries)	☐YES	☐NO
Would you like help finding housing resources? (Examples: housing programs, shelters, tenant rights)	☐YES	☐NO
Would you like help paying for utilities? (Examples: community organizations, state programs)	☐YES	☐NO
Would you like help finding employment? (Examples: job training center, occupational programs)	☐YES	☐NO
Would you like help finding language support services? (Example: English as a Second Language (ESL))	☐YES	☐NO
Would you like help finding high school equivalent resources? (Examples: GED or HiSET programs)	☐YES	☐NO
Would you like help getting to medical visits? (Examples: Lyft, shuttle services, Ride Match)	☐YES	☐NO

Take home points

There is no evidence that any social screening tools are better than others. Just use the one that your team likes, or that you are required to use.

Adapt tool as needed based on staff and family input, regulatory requirements and available resources.

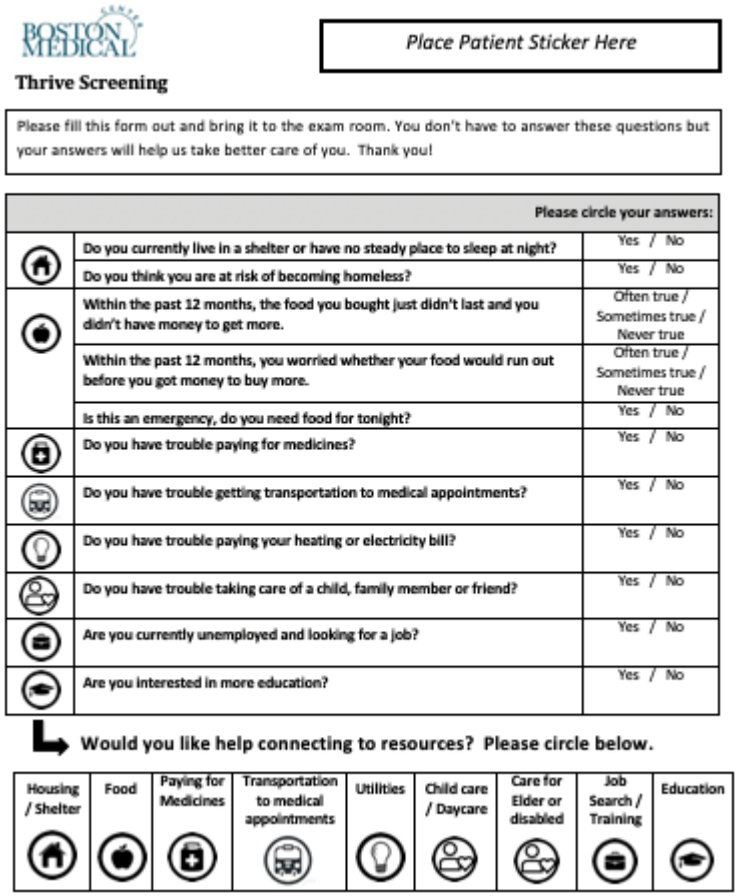
Examples of social screening tools chosen and adapted for the NICU context

THRIVE (original tool)

- Developed for adults
- Already integrated in EHR
- Widely used in out-patient settings

Assessment of social risks

Assessment of social needs



BOSTON MEDICAL

Thrive Screening

Place Patient Sticker Here

Please fill this form out and bring it to the exam room. You don't have to answer these questions but your answers will help us take better care of you. Thank you!

		Please circle your answers:
	Do you currently live in a shelter or have no steady place to sleep at night?	Yes / No
	Do you think you are at risk of becoming homeless?	Yes / No
	Within the past 12 months, the food you bought just didn't last and you didn't have money to get more.	Often true / Sometimes true / Never true
	Within the past 12 months, you worried whether your food would run out before you got money to buy more.	Often true / Sometimes true / Never true
	Is this an emergency, do you need food for tonight?	Yes / No
	Do you have trouble paying for medicines?	Yes / No
	Do you have trouble getting transportation to medical appointments?	Yes / No
	Do you have trouble paying your heating or electricity bill?	Yes / No
	Do you have trouble taking care of a child, family member or friend?	Yes / No
	Are you currently unemployed and looking for a job?	Yes / No
	Are you interested in more education?	Yes / No

Would you like help connecting to resources? Please circle below.

Housing / Shelter	Food	Paying for Medicines	Transportation to medical appointments	Utilities	Child care / Daycare	Care for Elder or disabled	Job Search / Training	Education

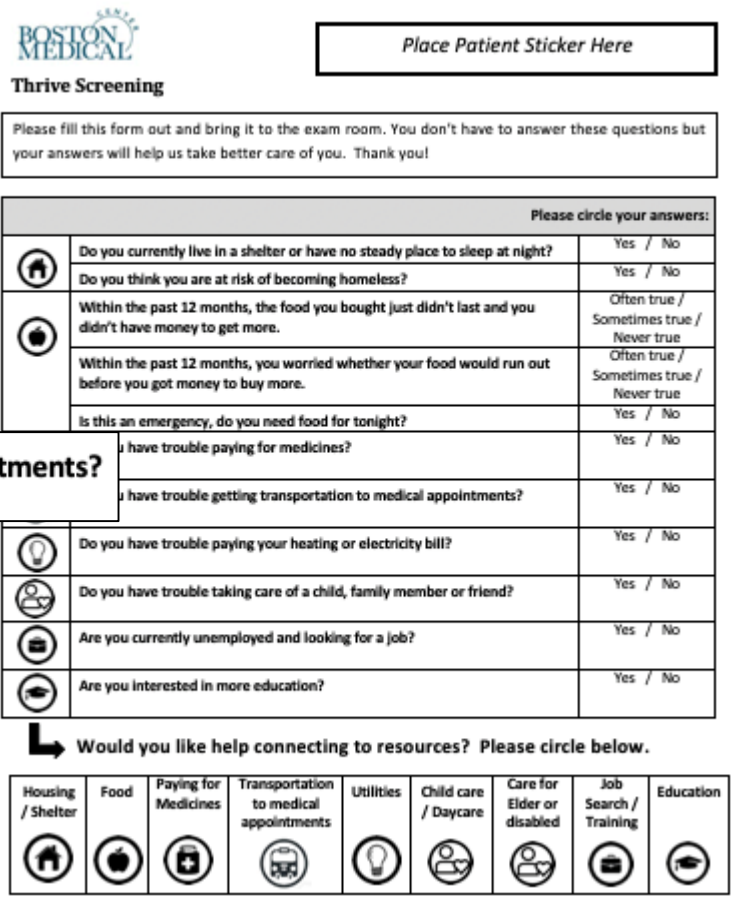
THRIVE (original tool)

Things that did not fit the NICU context…

	Do you have trouble paying for medicines?

	Do you have trouble getting transportation to medical appointments?

	Are you currently unemployed and looking for a job?
	Are you interested in more education?



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Housing / Shelter	Food	Paying for Medicines	Transportation to medical appointments	Utilities	Child care / Daycare	Care for Elder or disabled	Job Search / Training	Education

Example of adaptation: Case 1

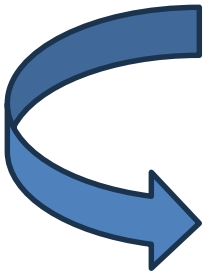
Adaptation Procedures:

- BMC team convened 2 focus groups with diverse families (one in English, one in Spanish) to ask them about questions

- BMC team convened 4 bi-monthly meetings with NICU multidisciplinary team (social worker, case manager, nursing director, bedside nurse champion, physician champion) to iteratively adapt questions for NICU context

- BMC team tested the revised tool with families at bedside

Examples of adaptation: Case 1



Do you have trouble getting transportation for medical appointments?	❑ Yes ❑ No
Do you need support getting transportation to or from the NICU? (Examples: paying for parking, getting a taxi ride, shuttle services)	❑ Yes ❑ No

"Offer support vs asking about trouble"

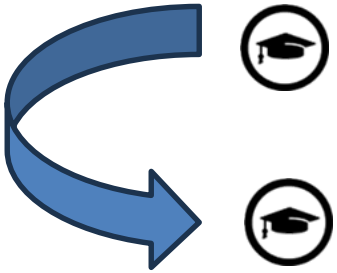
"Match to the resources you can offer"

Examples of adaptation

Are you currently unemployed and looking for a job?	❑ Yes ❑ No
Do you need support looking for a job or job training for you or anyone in your house?	❑ Yes ❑ No

"I would keep. But this question may be more pertinent for the non-birthing parent at this time"

Examples of adaptation



Are you interested in more education?	❑ Yes ❑ No
Do you need support getting more education for you or anyone in your house? (Examples: obtaining GED, English as second language classes)	❑ Yes ❑ No

"Need examples of resources. Many families are interested in ESL classes."

"Offer support and target the household."

THRIVE (adapted for NICU)

Disclosure statement

- Purpose
- Universal
- Voluntary
- Expectations

BOSTON MEDICAL CENTER

Verbal prompt: *The goal of our team is to provide the best possible care to both babies and families. For that, I would like to tell you about our THRIVE program. It is a few questions that cover areas such as housing, food, and other needs that many parents in the NICU have. Some questions may not apply to you but we ask them to all families. You may answer all questions, some, or none at all if you prefer. Our team will do its best to help you find resources and services you may be eligible for.*

	Do you need support with housing? (Examples: emergency shelter, eviction prevention, rent help, housing application)	☐ Yes ☐ No
	Within the past 12 months, you worried whether your food would run out before you got money to buy more.	☐ Often true ☐ Sometimes true ☐ Never true
	Within the past 12 months, the food you bought just didn't last and you didn't have money to get more.	☐ Often true ☐ Sometimes true ☐ Never true
	Do you need support with food? (Examples: apply for SNAP, WIC, referral to food pantry)	☐ Yes ☐ No
	Do you need food for tonight?	☐ Yes ☐ No
	Do you need support with: **Getting transportation to or from the NICU** (Examples: paying for parking, or getting a taxi ride, shuttle services).	☐ Yes ☐ No
	Paying your heating or electricity bills (Examples: community organizations, state programs)	☐ Yes ☐ No
	Finding childcare for other children at home (Examples: daycare, afterschool programs)	☐ Yes ☐ No
	Looking for a job or job training for you or anyone in your house	☐ Yes ☐ No
	Getting more education for you or anyone in your house (Examples: obtaining GED, English as second language classes)	☐ Yes ☐ No

For any "yes" can we refer you to free or low-cost programs? ☐ Yes ☐ No

THRIVE (adapted for NICU)

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Targets the household

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	Do you need support with: **Getting transportation to or from the NICU** (Examples: paying for parking, or getting a taxi ride, shuttle services).	☐ Yes ☐ No
	Paying your heating or electricity bills (Examples: community organizations, state programs)	☐ Yes ☐ No
	Finding childcare for other children at home (Examples: daycare, afterschool programs)	☐ Yes ☐ No
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Asks for social risks and social needs

	Do you need support with housing? (Examples: emergency shelter, eviction prevention, rent help, housing application)	☐ Yes ☐ No
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THRIVE (adapted for NICU)

Disclosure statement

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Targets the household

- Purpose
- Universal
- Voluntary
- Expectations

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THRIVE (adapted for NICU)

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- Expectations

Targets the household

Asks for social risks and social needs

Gives examples of what assistance may look like

BOSTON MEDICAL CENTER

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Baystate screening tool: Case 2

- Developed for pediatric out-patient settings
- Conducted on paper
- Not integrated into EHR

Baystate Health

Health Related Social Needs Screening Tool

We understand that the questions below are private and personal and may be hard to answer. We ask that you take time to answer them so that we may help those in need. Thank you for your cooperation.

1. In the past year, have you (your child) been **unable** to get any of the following when it was **really needed**? Select all that apply o Utilities (heat or gas) o Medicine/Health Care (Medical, Dental, Mental Health, Vision) o Transportation o Employment and/or education o Phone o Internet o Clothing o Child Care o No, I/my child has been able to get all the above when needed o Choose not to answer this question o Other:_____	2. Within the past 12 months, you worried that your (your child's) food would run out before you got money to buy more. o Often True o Sometimes True o Never True o Choose not to answer this question o Other:_____
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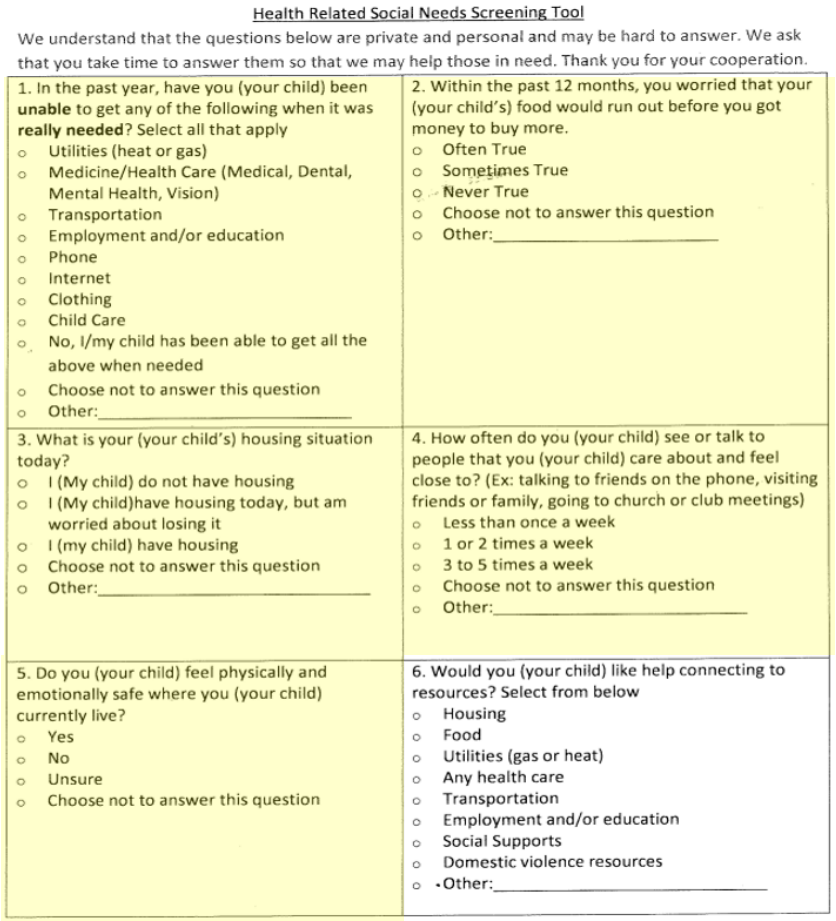
Baystate screening tool

Question 1-5 Asses

Social Risks:

Utilities
Housing
Childcare
Food
Employment
Education
Transportation
Material goods
Medical/healthcare
Phone/internet
Social support
IPV and safety at home

Baystate Health



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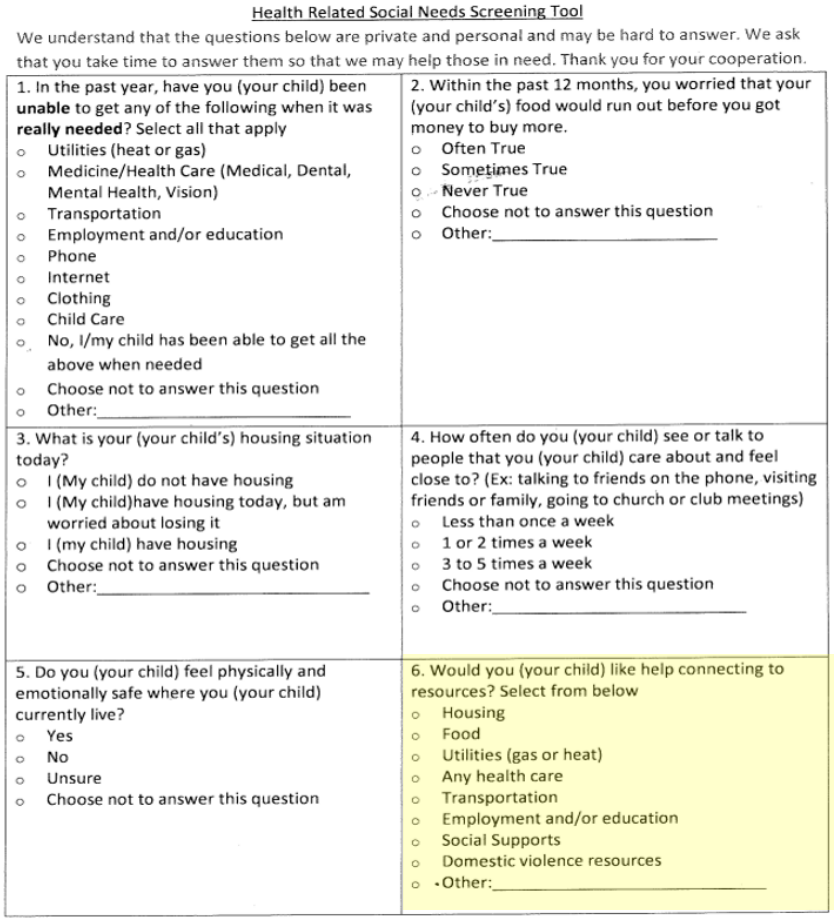
   - o Domestic violence resources
   - o Other:_____

Baystate screening tool

Question 6 Assesses
Social Needs:
Utilities
Housing
Food
Employment
Education
Transportation
Medical/healthcare
Social support
Domestic violence resources
"Other"



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   - o Other:_____

Baystate Health

Example of adaptation: Case 2

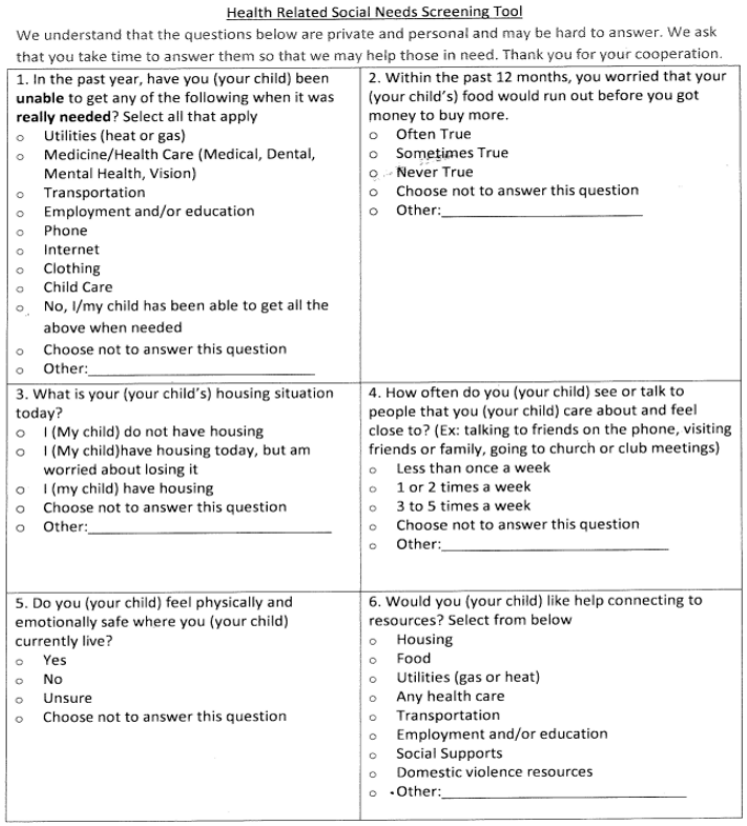
Adaptation Procedures:

- Baystate team held regular meetings with social worker and family partner for feedback on appropriateness and fit of screening tool to the NICU context

- Baystate team tested tool with NICU families at bedside

Examples of adaptation: Case 2

Baystate Health



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Verbal introduction to screening by social worker

Verbal screening by social worker

Rephrase questions to focus on caregivers in household

What we've learned…

Tools can be adapted to fit your NICU. Prioritize pragmatic characteristics (e.g. brief, relevant to NICU families, available in multiple languages).

At minimum, consider screening for food insecurity, housing instability, utilities and transportation difficulties. If screening for education needs, include ESL classes.

What we've learned…

Target the household/family, not just the responding caregiver. Prioritize needs over risks. Disclosure statements matter!

To the extent possible, align screening domains with available resources. Referrals must not be a dead end for families.

- Questions about Tools?

- Do you know if there is already something in use at your hospital system?

Integration of Social Screening and Referrals in the Electronic Health Record

Gaby Cordova Ramos, MD

Why is it important to have social screening in the EHR?

- Collect and track data on social risks/needs of your NICU population
- Streamline social work documentation
- Download resources
- Communicate screening and referral information with interdisciplinary team and with outpatient providers

Practical considerations

- There is currently **no consensus on best practices** for documenting social risks/needs in the EHR.
  - Some screeners are scanned in, some are manually entered into components of the EHR (e.g. flowsheets), and some are administered electronically (e.g. tablets, patient portals).

- Ask your IT team: How are social risks/needs and referrals documented in other departments? **Is it feasible to tailor** the documentation/display to your unit's needs?

- Modifications/additions to the EHR may take a long time. **Start soon!**

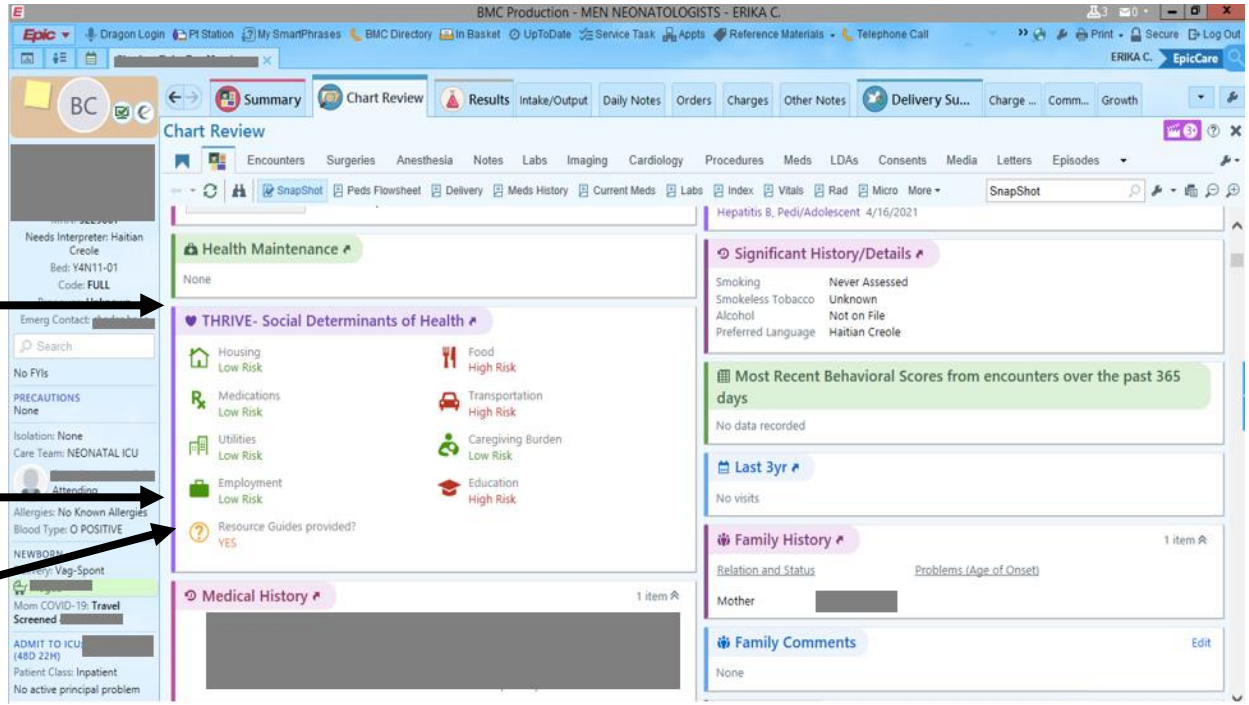
Important considerations when you are planning to integrate your screening tool into the EHR

Location of screening results in EHR

- Need location that can be viewed by all staff (not only the social worker)

Screening documentation

Referral documentation



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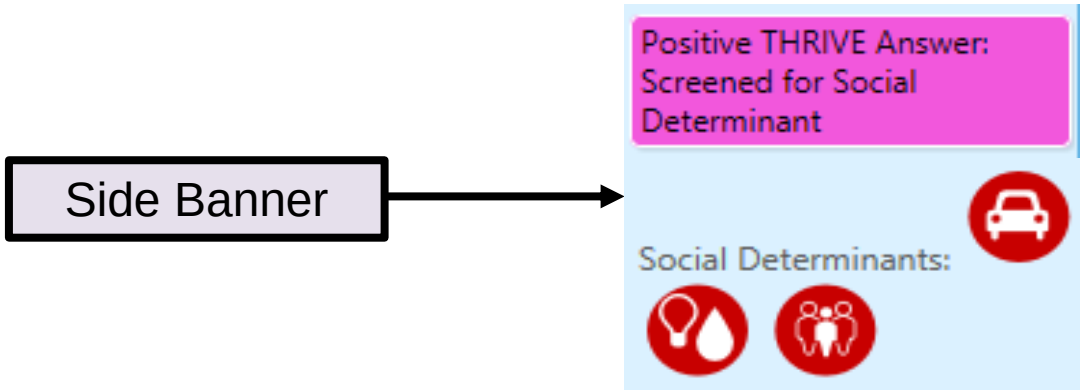


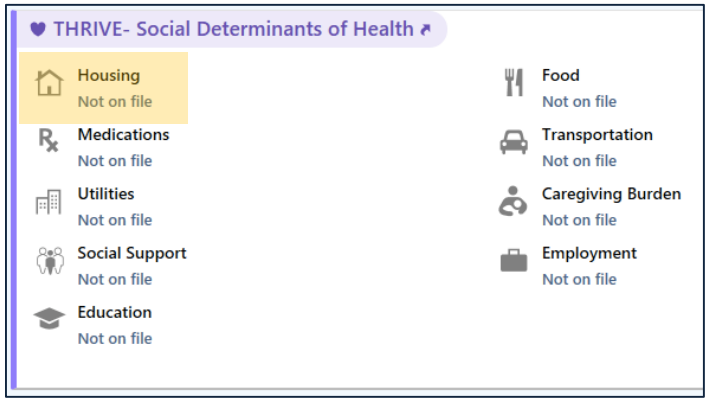
Identification of screening results in EHR

Not Screened

Screened

Identification of screening results in EHR

Not Screened



Screened

Need to differentiate between between “low risk” and “not assessed”
This is important if your team chooses not to use all domains of a previously existing tool

Identification of screening results in EHR

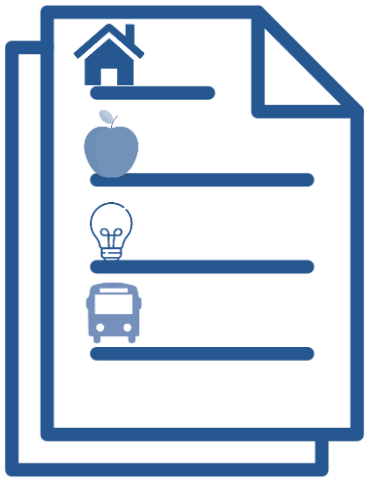
Not Screened

Screened

Need date of most recent screening
This is important if your team chooses to screen families more than one time

Entering screening results into the EHR

- Scenario 1. Screening conducted in paper form and results transferred to EHR
  - A. Forms may be scanned and entered
  - B. Form may be completed on paper by family or by provider during an interview and then transcribed
    - Does the display in the EHR mirror the paper version for ease of input?

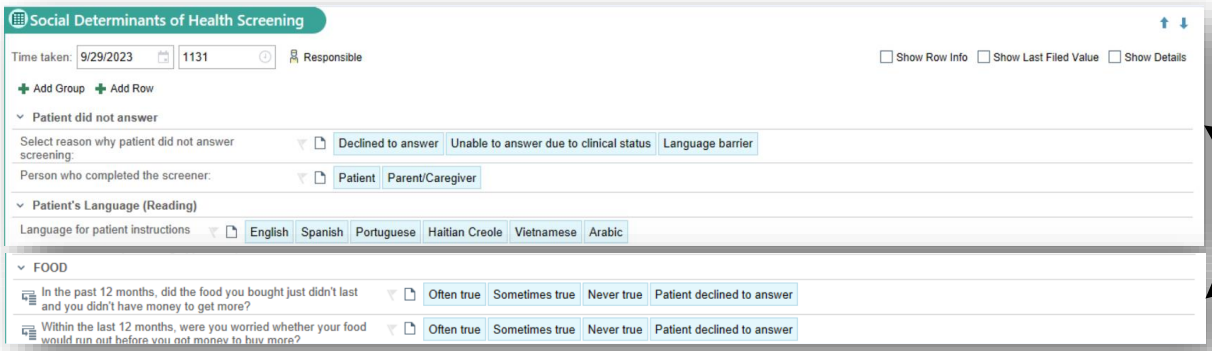


Entering screening results into the EHR

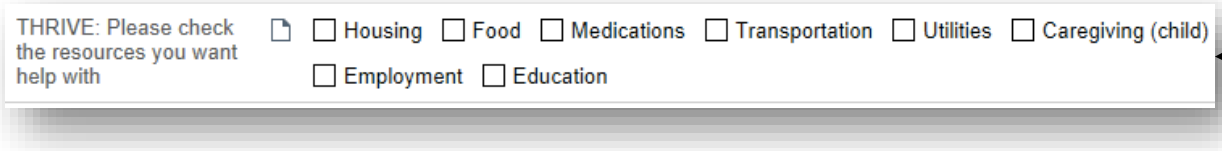
- Scenario 2. Screening results entered directly into EHR
  - A. Provider conducts screening verbally as they document it in tablet/computer
  - B. Patient completes screening independently on tablet/phone/patient portal

Entering screening results in EHR

- Document in EHR social risks AND social needs in separate fields



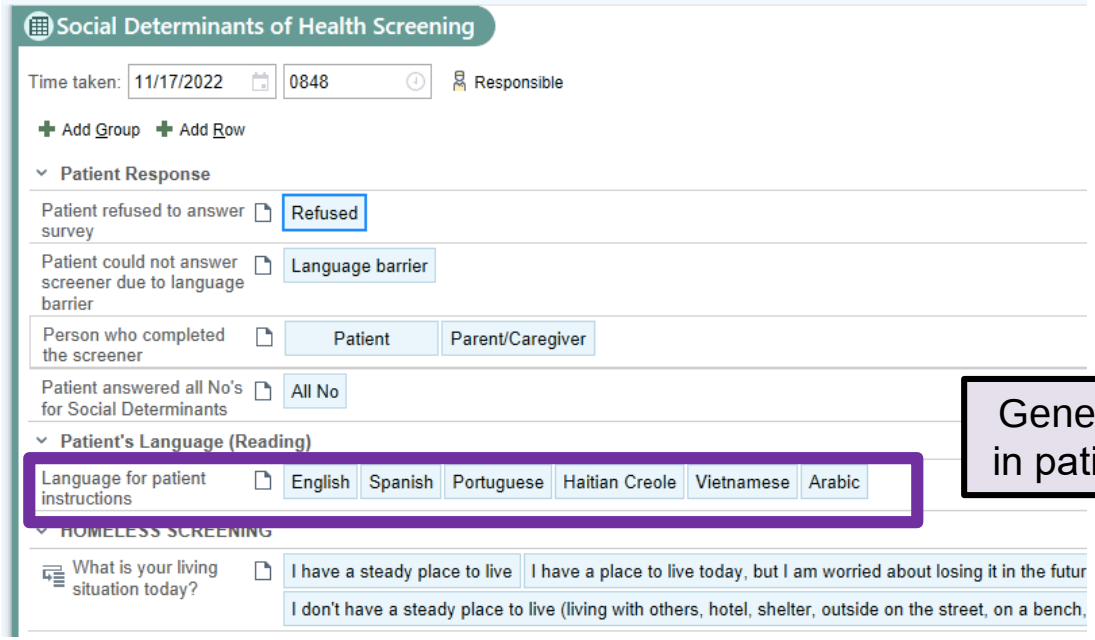
Social risks



Social needs

Use of EHR to provide community resource referrals

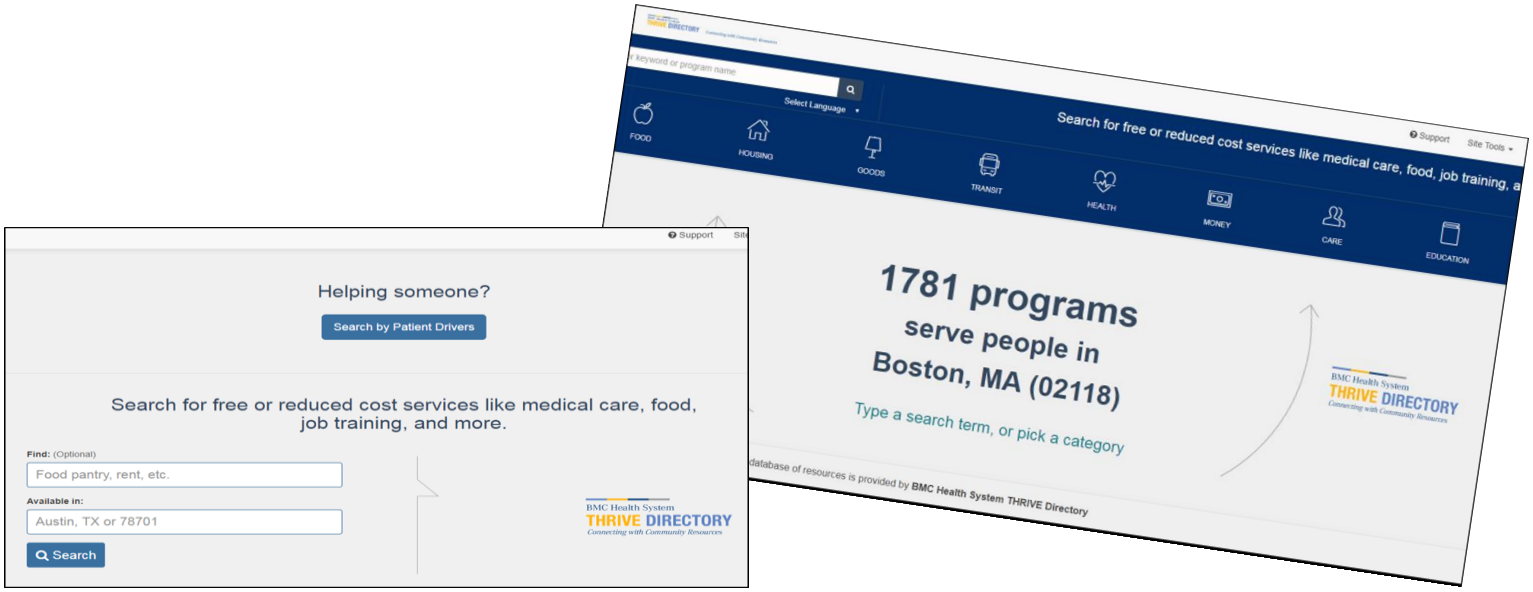
- Many EHRs in health systems enable printing of materials directly through EHR



Generates the resource guide in patient's preferred language

Use of EHR to provide community resource referrals

- Use of community resource search engines embedded in the EHR



Need for linkage in EHR between birthing parent and infant

- Screening results completed during mother's admission made visible on infants' chart and vice versa

Need for communication of screening results to out-patient settings

- *Optimal:* Screening display visible across encounters if out-patient providers use same EHR as NICU
- *Optimal:* Discharge summary templates pull results automatically of social risk/need screening that occur during NICU hospitalization
  - For EPIC Users: Results in flowsheets can be pulled into discharge summaries with dot phrases

THRIVE Survey
Language for patient instructions: English
What is your living situation today?: I have a steady place to live
In the past 12 months, did the food you bought just didn't last and you didn't have money to get more?: Never true
Within the last 12 months, were you worried whether your food would run out before you got money to buy more?: Never true
Do you have trouble paying for medications?: No
Do you have trouble getting transportation to medical appointments?: **(!) Yes**
Do you have trouble paying your heating bill and/or electricity bill?: No
Do you have trouble taking care of a child, family member or friend who depends on you?: No
Are you currently unemployed and looking for a job?: No
Are you interested in more education?: **(!) Yes**
THRIVE: Please check the resources you want help with: Transportation, Caregiving (child), Education

Take home points

EHRs can be leveraged to facilitate tracking of screening and referrals and communication of results among staff.

Modifications and build-ups in the EHR can take a long time. Plan ahead and start working with your IT team soon. Teams may choose to start on paper while EHR is set up.

Take home points

Design screening/referral displays that are easily accessible and visible to the full NICU team.

Special considerations for the NICU that the EHR can support: (a) linkage of birthing parent and infant charts; and (b) communication with outpatient providers after discharge.

Wrap Up and Next Steps

Aviel Peaceman, MPH

Next Steps for Hospital Teams

- DUAs:
  - Keep working on your DUA/SOW process for those still working on it.
  - Reach out with questions- we're here to help!
- Team roster- send us a spreadsheet with the names and email addresses of the people on your local hospital team
- Select your tool!

Any Comments, Reflections, or Questions?

Thank you!
We look forward to seeing you again on the next webinar!