### Overview

This document will walk staff through the process of completing an e-check in, completing the Pre-Screener PRAPARE data reconciliation, and placing the PRAPARE referral to the Community Health Worker (CHW) to address patient's Social Drivers of Health(SDOH) needs.

<u>Note:</u> *Staff will only reconcile completed Pre-PRAPARE questions.* **The screening does not need to be completed manually if it is not populating for the patient.**

<u>Note:</u> *If the PRAPARE pre-screener indicates a positive response for SDOH needs,* **a referral will be placed within the same business day as the patient's visit.** *See* [PRAPARE Follow-Up Policy](#) *for additional information.*

Check-In Workflow (*Front Office*)

1. Click the **Arrived – Send Link** button in the CareManager to start Athena check-in.
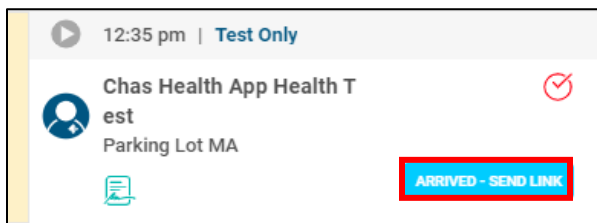
2. Confirm patient has completed assigned tasks using the CareManager chrome extension.
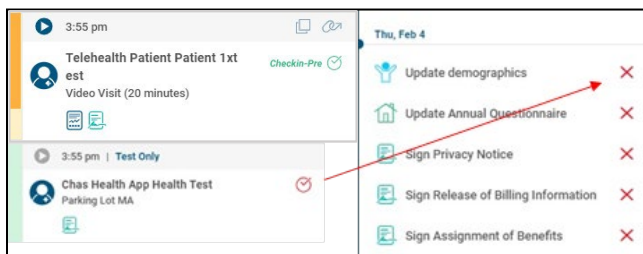
3. Determine if the patient has a smartphone to complete tasks on their phone.

   a. If the patient will use their phone, instruct the patient to check their device for the link to complete their tasks.

   b. If the patient needs an iPad to check in, use a clinic iPad and launch the **Qure4u CheckIn App**.

    c.   Ensure the device is in **kiosk mode** and search for the patient by their **last name** and **date of birth**.

         Note: *If needed, follow steps in* *Setting up Qure4u Check-In App in Kiosk Mode*

    d.   Confirm that the patient is correct and click **continue.**

    e.   Click the **CHECK IN** button for today's appointment.

    f.   Hand the iPad to the patient with instruction to complete forms and return the iPad when finished. Forms will vary by appointment type.


4. Athena check-in will be completed automatically unless there are outstanding items such as copay collection.

5. If necessary, complete outstanding items and manually complete Athena check in.

**PRAPARE Pre-Screening and PRAPARE Referral Ordering Process (Medical Assistant)**

1. **Reconcile** data in the patient's chart during **intake**.

   Note: *If the patient did not make changes to their PRAPARE form, data will not need to be reconciled during intake.* **The screening does not need to be completed manually if it is not populating for the patient.**

   a. **Go to Data Reconciliation**– if the patient fills out history forms, data will appear in this section of the intake stage of the encounter.
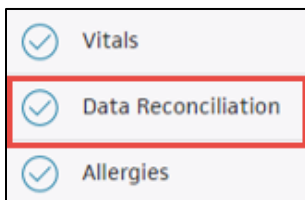
   History Tab – If reconciling data from the exam stage of an encounter, select the history tab and scroll to the Social History section. If history forms were completed electronically, a "Social History to reconcile" link will appear. Click link to reconcile data.
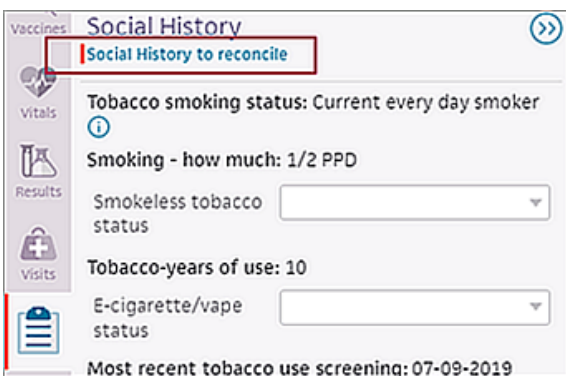
   b. Select all updated data items under Social History of Data Reconciliation section, select update chart.
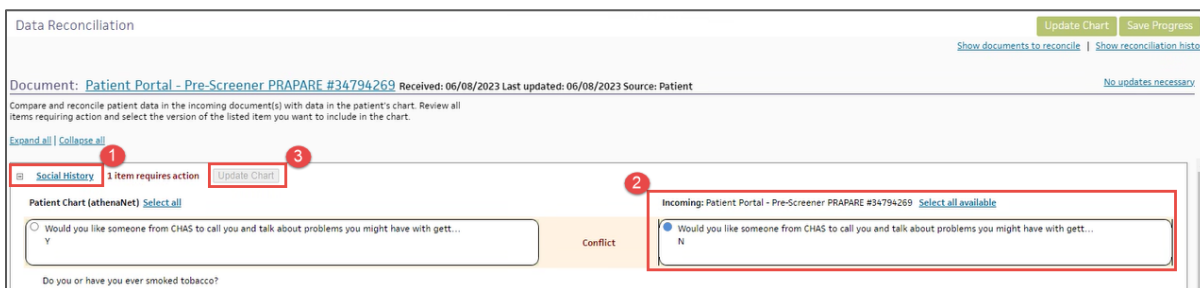
   Note: *If Pre-Screener PRAPARE items do not populate but were completed, staff may need to select "show documents to reconcile."*

2. Review Pre-Screener PRAPARE for a **positive response and verify the answer with the patient**. Take next steps to generate a referral if the patient has a 'yes' response to the question.

    <u>Note:</u> If the patient **responds 'no'** to the question upon verification and no longer wishes to talk with someone, **do not change the initial response**. Add referral and document as declined (see steps 3-7 below).

    <u>Note</u>: If the Pre-Screener PRAPARE template does not populate, the template will need to be added. Select the + symbol then select Pre-Screener PRAPARE from the dropdown list.
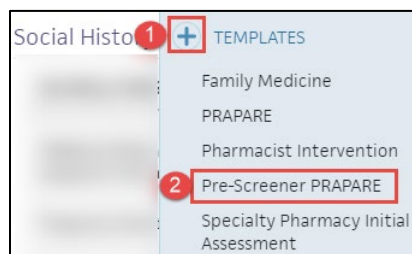
3. Launch a **CS COMMUNITY HEALTH WORKER referral order set** if a patient answers "yes" to the PRE-Screener PRAPARE.

    <u>Note:</u> Referral will be placed within the same business day of the patient's visit.
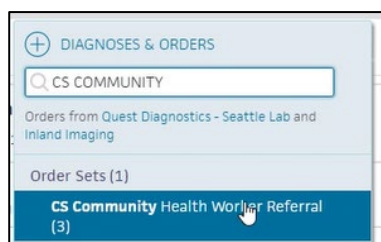
4. Select PRAPARE in the _Specific service requested_ dropdown.
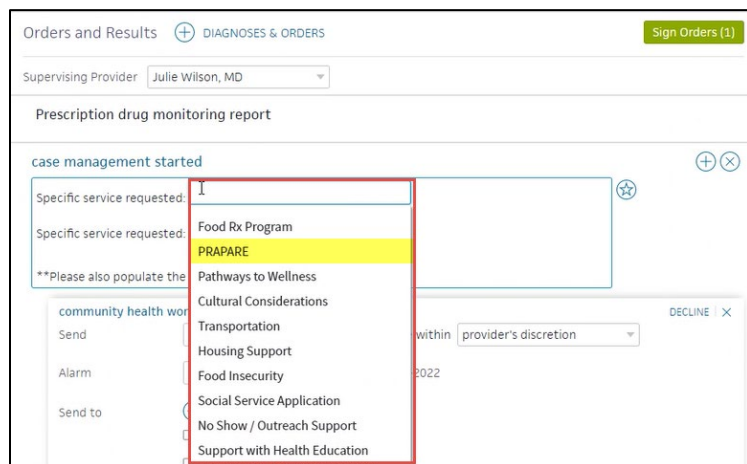
5. Add "PRAPARE" into the internal note field of the Community Health Worker Referral.

6. If a patient declines the referral for additional assistance, indicate the patient declined and the reason for declining in the referral order.

7. Sign order. Referral will send to CHW inbox for review and follow-up.

   Note: *If patient requires immediate assistance, reach out to a Patient Resource Coordinator or Community Health Worker directly for warm handoff before patient leaves the clinic.*

PRAPARE Screener Reconcile Report Process

To support clinical teams in ensuring PRAPARE pre-screeners and CHW referrals are completed appropriately, a report is sent out daily by CHAS BI. The following process maps outline the process of reviewing the daily report and what steps to take next.

Open PRAPARE & review report sent daily by CHAS BI

Select to reconcile tab

Filter location to specific clinic

Filter the username to the provider you worked with the previous day

Select the pt id, find pt in Athena, & reconcile Pre-PRAPARE screener in social history

Verify reconciliation is complete by reviewing answers in social history template

Enter the date Pre-PRAPARE screener was created

Is the response positive?

Yes → Enter CS Community Health Worker Referral in order group for CHW follow up to be completed

Select PRAPARE in Specific Service Requested

Enter PRAPARE in Internal Note for referral and sign

MA process is complete

No → MA process is complete

PRAPARE Screener Referral Report Process

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┌─────────────────────────────┐
│ Open PRAPARE & review report│
│   sent daily by CHAS BI     │
└─────────────┬───────────────┘
              │
              ▼
┌──────────────┐   ┌──────────────┐   ┌──────────────────┐   ┌──────────────────┐
│ Select Needs │──▶│ Filter       │──▶│ Select the pt id,│──▶│ Enter date Pre-  │
│ Referral Tab │   │ Reconciled by│   │ find pt in Athena│   │ PRAPARE screener │
│              │   │ your unsername│  │ & review Pre-    │   │ was reconciled   │
│              │   │              │   │ PRAPARE screening│   │                  │
│              │   │              │   │ in social history│   │                  │
└──────────────┘   └──────────────┘   └──────────────────┘   └────────┬─────────┘
                                                                       │
                                                                       ▼
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                            ┌────────────────┐        ┌──────────────────┐      ┌──────────────┐
                            │ Did the note   │  Yes   │ Enter CS Community│──▶  │ MA process is│
                            │ indicate pt    │───────▶│ Heath Worder     │      │ complete     │
                            │ declined       │        │ referral in the  │      └──────────────┘
                            │ referral/      │        │ order group &    │
                            │ follow up?     │        │ select decline   │
                            └───────┬────────┘        └──────────────────┘
                                    │ No
                                    ▼
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┌──────────────┐   ┌──────────────┐   ┌──────────────────┐
│ MA process is│◀──│ Enter PRAPARE│◀──│ Select PRAPARE in│◀── ┌──────────────────┐
│ complete     │   │ in Internal  │   │ Specific Service │    │ Enter CS Community│
└──────────────┘   │ Note for     │   │ Requested        │    │ Health Worker    │
                   │ referral and │   └──────────────────┘    │ Referral in order│
                   │ sign         │                           │ group for CHW    │
                   └──────────────┘                           │ follow up to be  │
                                                              │ completed        │
                                                              └──────────────────┘
```