

A Guide to Implementing Social Risk Screening and Referral-making

Introduction

Adverse social determinants of health – referred to in this guide as **social risks** – include contextual factors such as food, transportation, and housing instability, and social isolation. Collecting information on these risks can help ambulatory care teams understand and address how these factors impact their patients' health.

This pragmatic guide will help your clinic implement social risk screening and (if desired) referral-making, or improve your current practices. It is meant to be used by any primary / ambulatory care staff interested in implementing social risk screening and referral-making.

Overview

This guide uses a five-step roadmap for implementing or improving social risk screening and related activities at your clinic. It provides tools and materials to support each step, and a list of useful resources.



Step 1: Getting Ready

Materials include: Orientation to social risks; Clinic champion orientation; Draft email from leadership to staff



Step 2: Identify Clinic Goals

Materials include: Recommendations for setting goals; Goal-setting decision tool



Step 3: Create a Social Risk Plan

Materials include: Overview of social risk tools in the EHR; Workflow examples; Workflow development tool



Step 4: Orient Clinic Staff To Your Clinic's Social Risk Plan

Materials include: Overview; FAQs for staff; Orientation slide deck; Kick-off package (Poster, social risk champion certificate, tips for engaging staff, goals thermometer, etc.)



Step 5: Roll Out and Iterate

Materials include: Overview; Steps; Considerations and tips; Example; Roll-out template



Resources to Support Implementing Social Risk Data Collection and Referral-Making

This guide was developed as part of an NIH-funded study (1R18DK114701) by teams at the Kaiser Permanente Center for Health Research and OCHIN, Inc. The purpose of this study was to test the effectiveness of targeted implementation support at enhancing social risk screening adoption in primary care settings and community health centers.