Health-Related Social Needs (HRSN) Screening Workflow Template

1. Setting/Context

What is the care setting?

[ ] Primary Care

[ ] Emergency Department

[ ] Inpatient

[ ] Telehealth

[ ] Community Outreach

[ ] Other: _____

2. Screening Trigger

When does the screening occur?

[ ] At check-in

[ ] During triage

[ ] Pre-visit via patient portal

[ ] During clinical encounter

[ ] Other: _____

3. Screening Tool Used

Tool(s) used:

[ ] PRAPARE

[ ] AHC-HRSN

[ ] Custom internal form

[ ] Other: _____

4. Who Conducts the Screening?

[ ] Front Desk Staff

[ ] Medical Assistant/Nurse

[ ] Social Worker

[ ] Behavioral Health Provider

[ ] Patient Self-administered

[ ] Other: _____

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5. Workflow Steps

Outline each step below:

1.

2.

3.

4.

5.

6. Referral & Follow-Up

Who handles referrals?

[ ] Social Worker

[ ] Care Coordinator

[ ] Community Health Worker

[ ] Other: _____

How is follow-up managed?

[ ] Phone call

[ ] Portal message

[ ] In-person visit

[ ] Other: _____

7. Documentation

Where is screening data documented?

[ ] EHR structured fields

[ ] Free text note

[ ] External database

[ ] Paper form

[ ] Other: _____

8. Frequency of Screening

[ ] Once per year

[ ] Every visit

[ ] Based on clinical discretion

[ ] Other: _____

9. Evaluation & Quality Improvement

Metrics tracked:

[ ] Screening rate

[ ] Referral completion

[ ] Patient satisfaction

[ ] Outcome improvement

[ ] Other: _____