**Primary Care Clinic Workflow (In-Person Visit)**

**Goal:** Integrate social needs screening into routine outpatient visits.

**Workflow Steps:**

1. **Patient Check-In:**
    - Front desk provides a paper or tablet-based HRSN questionnaire during check-in.
    - Languages are available based on patient preference.
2. **Screening Tool Used:**
    - Standardized tool (e.g., PRAPARE, AHC-HRSN).
3. **Medical Assistant (MA) Review:**
    - MA reviews completed form before vitals.
    - Flags any positive responses in the EHR.
4. **Provider Review:**
    - Clinician discusses flagged needs during the clinical encounter.
    - Prioritizes needs based on patient goals.
5. **Referral Process:**
    - Warm handoff to care coordinator or social worker if needed.
    - Referral to internal services or community-based organizations.
6. **Documentation:**
    - HRSN data and actions documented in structured EHR fields.
7. **Follow-Up:**
    - Social worker follows up within 1 week.
    - Needs reassessed at annual visits or as needed.

**Telehealth Behavioral Health Visit Workflow**

**Goal:** Screen for HRSNs during mental health sessions conducted remotely.

**Workflow Steps:**

1. **Pre-Visit Intake Form:**
    - Patients complete online HRSN screener through patient portal 24 hours prior to session.
2. **Therapist Review:**
    - Screens reviewed before the telehealth session begins.
    - Discussed as part of psychosocial evaluation.
3. **Integrated Care Plan:**
    - Therapist collaborates with care team to address needs (e.g., unemployment, transportation).
4. **Referral and Navigation:**
    - Digital referral made to community partners or internal care management team.
5. **Documentation:**
    - Responses and actions documented in behavioral health section of EHR.
6. **Follow-Up:**
    - Care manager contacts patient within 3 business days for support.