

Title: Best Practices to Improve Primary Care Social Needs Screening

Background: At NYC Health + Hospitals, the largest safety net healthcare system in the country, primary care patients are screened for social needs. To promote high quality screening, we established three guidelines: 1) implement effective screening workflows 2) screen primary care patients annually, 3) establish workflows to address positive screens and connect patients to resources.

Objective: Between June 2023 and June 2024, we aimed to improve the quality of screening and referrals by promoting adherence to the guidelines.

Methods: We partnered with adult primary care clinics and used several strategies, including:

1. Establishing metrics for screening rate (percent of primary care patients screened) and screening yield (percent of screened primary care patients with at least one social need) over 12 months. Based on our pilot studies and estimated rates of social needs in our population, we established a screening yield of 25% as a metric for effective screening.
2. Utilizing data tools like visual dashboards to monitor key metrics.
3. Encouraging patient self-completion of screener, including using tablets.
4. Establishing referral workflows, including an automated resource list distributed with the After-Visit Summary.
5. Incentivizing screening and referrals by highlighting regulatory requirements and financial incentives through Z codes.

Results: Between 6/1/23 and 6/30/24, 295,838 patients were screened. System-wide screening rate increased from 59% to 75% and screening yield increased from 21% to 33%. During this time, one facility maintained a screening rate of 90% while increasing their yield from 9.1% to 50%. At another facility, the implementation of tablet screening increased screening rates from 58% to 79% and maintained a yield of 45%.

Conclusion: Setting systemwide guidelines and metrics, providing technical assistance, using data to monitor progress, and encouraging patient self-completion were effective strategies to improve the quality of social needs screening and referrals in a large safety net healthcare system.