Sample Workplan for Schoolwide Screenings

Preparation
- Get buy-in of administration, teachers.
- Work with school administration to determine which class to pull students from for the schoolwide screening. This should be a class that all targeted students take. Usually PE, science, or advisory periods work well.
- Coordinate dates, times, location with school administration.
- Clear SBHC schedule so during screening dates/times so that providers have no regular patients.
- Don’t do it alone! Find volunteers, e.g. college students, interns, or your students/parents.
- Form and prepare your team: providers (i.e., physicians, nurse practitioners, dentists, NP students) SBHC staff, school staff, and volunteers. Secure additional clinic staff to help with screening.
- Prepare all templates and forms (i.e., opt out, screening assessment tool, letter home or “child report card”, promotional flyers, etc.)
- Order and prepare your supplies: clipboards, pens, clinical supplies, goody bags, masks, hand sanitizer.
- Obtain list of students from the school administration (principal, counselor, front office staff). Cross check against registered patients and remove students who have already accessed services at the SBHC.
- Meet with teachers (i.e., science, advisory, PE) to go over logistics.
- Classroom outreach: Visit classes and help students fill out registration paperwork in class.
- Distribute opt-out consents home 1-2 weeks in advance.
- Advertise event and conduct outreach (i.e., hang flyers throughout the school, notify parents, visit classrooms, etc.).
- Collect opt-out consents.
- Enter registration information collected in classroom visits; activate FPACT; screen for student need, etc.
- Identify students with charts at the SBHC to determine whether screening is billable. Review services/minor consent/confidentiality.
- Define and document set-up and roles and responsibilities for screening day.

Implementation
- Clarify workflow/setup and roles and responsibilities of all staff.
- Screening set-up, ensure privacy and clear workflow.
- Call students to screening in groups, if possible. If managing large groups, assign one staff member to manage crowd control and another to maintaining flow.
- Create a welcoming space.
- "Normalize" clinic.
- Provider meets with students for 15 min
- Get drinks and snacks to have for students when they arrive.
- Print out screening and billing forms.
- Send a “runner” to go up to class and bring students down to the screening in groups based on the number of providers you have.
- Ask students to complete intake forms in the waiting area, if not done in class ahead of time.
- Assign them to a provider.
- Call the student in to meet with the provider in a confidential space when the provider is available. Each visit takes approximately 10-15 minutes.
- Sign all students up with Family PACT and give them their card, unless they want it to be kept at the clinic.
- Document—take pictures, capture narrative, etc.
- Make it fun!

Case management/Follow-up
- Review billing, enter notes, communicate.
- Identify additional needs for patients.
- Notify caregivers.
- Identify insurance coverage.
- Assist with Medi-Cal enrollment, if necessary.
- Schedule follow-up at SBHC or other community provider.
- Thank teachers/administration. Share data (i.e., how many seen? how many needed follow-up care?).