

## 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?).