Managing Screening and Referral Data for Improvement and Impact: *Strategies, Ideas, and Resources for Community Health Centers*

Overview

During a learning network session on managing screening and referral data for improvement and impact, community health centers discussed best practices for their workflows and data management practices. By enhancing their data management, health centers can improve the accuracy of screening data entered into patient charts, help complete more timely referrals, and support families who may face care coordination challenges.

Practical Strategies

- **Establish practice-wide standards for documenting screening and referral follow-up.** Standardize and monitor data entry processes across health center teams to ensure accurate early childhood development (ECD) outcome reporting and respond to emerging needs. This fosters trust among families by prioritizing their child's needs and rapidly coordinating appropriate developmental follow-up services.

- **Collaborate and align data metrics with community partners and health departments.** Coordinate with the local health department and other partners to use comparable datasets. This can help health centers establish shared goals, identify ways to improve care for more families, and maximize the impact of ECD outcomes.

Actionable Ideas

- **Review current data processes and train staff to standardize data entry.** Establish a shared, agreed-upon process to input and track data in real time to address family challenges and ensure the timely completion of referrals. Conduct regular trainings to address data entry errors and continuously improve data entry processes.

- **Maximize tools to ensure effective communication and tracking for screening and referral follow-up.** Leverage electronic health record (EHR) system dashboards, well-visit templates, portal messages, flowsheets, or collaborative spreadsheets to actively monitor and communicate critical information regarding a patient's well-child visit, screening results, and follow-up services.

- **Integrate data managers into workflows and encourage team engagement.** Data managers play a pivotal role within health centers and can provide key insights on the functionality of the EHR system and data entry and reporting. Include data managers in team collaboration efforts like huddles and quality improvement meetings to identify data solutions that support ECD outcomes.

Resources

- Getting Started Guide: Implementing a Screening Process – Early Childhood Developmental Health Systems: Evidence to Impact Center

- Ages & Stages Questionnaire (ASQ) Workflow

- Epic Well Child Visit Templates (available in the Epic EHR)

If you have questions, please email us at ECDHSCenter@zerotothree.org.

Early Childhood Developmental Health Systems

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