NATIONAL ASSOCIATION OF Community Health Centers®

Workflows for

athenaOne PRAPARE® Social Drivers of Health (SDOH)

PRAPARE®d by:

Healthefficient
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PRAPARE® Screening Tool Overview

athenaOne provides a PRAPARE® screening questionnaire to screen patients for Social Drivers of Health (SDOH) using the PRAPARE® screening questionnaire. The PRAPARE® tool can be accessed during an encounter in the **Screening** tab during the intake phase and outside of an encounter in the **Care Plan** tab.

PRAPARE® can be added to an encounter plan to link encounter reasons, chief complaint or follow-up diagnosis to one or more screening questions. All the plan's diagnosis, orders, and templates including the screening questionnaire are added to the encounter automatically.

The demographic-related information is captured by the front-end staff and the data will continue to reside in this section to avoid duplication of effort and data integrity issues. This data is currently captured by most FQHCs for UDS reporting to HRSA. The other information on the screening tool is mapped to structured data fields in the progress note and is best captured by clinical staff, patient navigators, community health workers, care managers, and social workers. This information identifies the patient's social needs that the organization may be able to provide information about resources, referrals, or additional services.

High-Level eCW SDOH Screening and Response Workflows

The integration of SDOH data into patient care involves a structured workflow to ensure accurate capture, documentation, and follow-up of social risk factors.

- Determine how often the SDOH screening will be delivered, i.e. annually or by visit type.
- Determine when the screening will be delivered to patients. For example, prior to an appointment, during check-in, during the intake/rooming process, during the clinical exam, or after the appointment.
- Create and use an SDOH Questionnaire to have the patients complete the SDOH screening electronically. Questionnaires are available in various patient engagement tools, such as **Patient Portal, athenaPatient app, and Patient Self Check-in**.
- Document the PRAPARE® screening responses during the **Intake** phase of an encounter or part of a **Care Plan**.
- Automate the capture of the SDOH assessment Z codes by mapping the screening questionnaire to procedure codes. Map each SDOH need with the appropriate ICD Z codes to ensure the SDOH assessments are captured.
- Document the intervention/response using **Referrals** to effectively track and manage the follow-up to internal or community resources.
- Create and use an **Order Set** to upload a list of **SDOH Resources** developed by the practice, and have staff utilize the developed resource list to connect patients to needed resources and social support. The order set has the option to include linked assessment ICD Z codes.

Helpful Resources

- NACHC Social Drivers of Health Action-Guide_SDOH.pdf (nachc.org)
- Details on EHR PRAPARE® implementation on page 32 of the PRAPARE® Toolkit
- PRAPARE® Data Documentation Quick Sheet
- PRAPARE® Data Documentation and Codification File
- New: PRAPARE® Screener Available (athenahealth.com)

athenaOne PRAPARE® Configuration

The PRAPARE® questionnaire is free for athenaOne end users. Contact your athenaOne Customer Support Manager (CSM) and sign the End User License Agreement to access PRAPARE® in athenaOne.

User Access and Permission

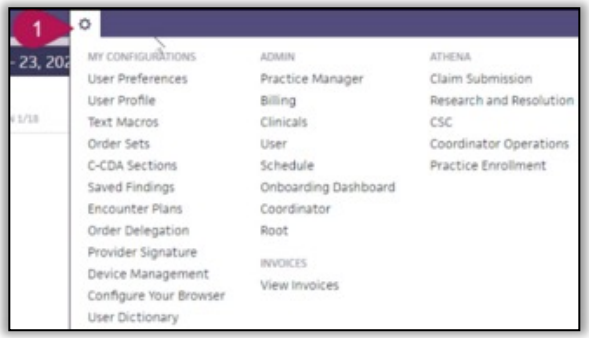
- To configure the PRAPARE® screening questionnaire, users must have Clinicals Admin permission.
- To document the PRAPARE® screening questionnaire in an encounter, users must have "Clinicals" permission.

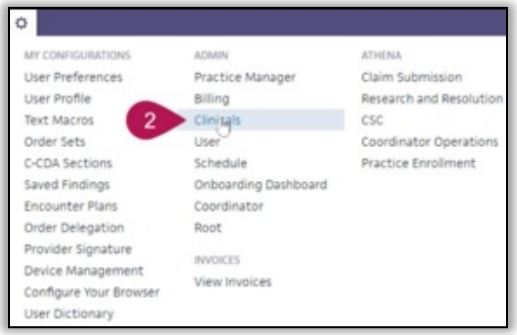
Add PRAPARE® Screening Questionnaire

athenaOne added PRAPARE® to their screeners in 2021. Health centers can add this tool and collect data needed to understand better and act on their patient's social drivers of health. Patient responses can be easily documented, tracked, and assessed using the PRAPARE® screening questionnaire.

To Add the PRAPARE® screening questionnaire:

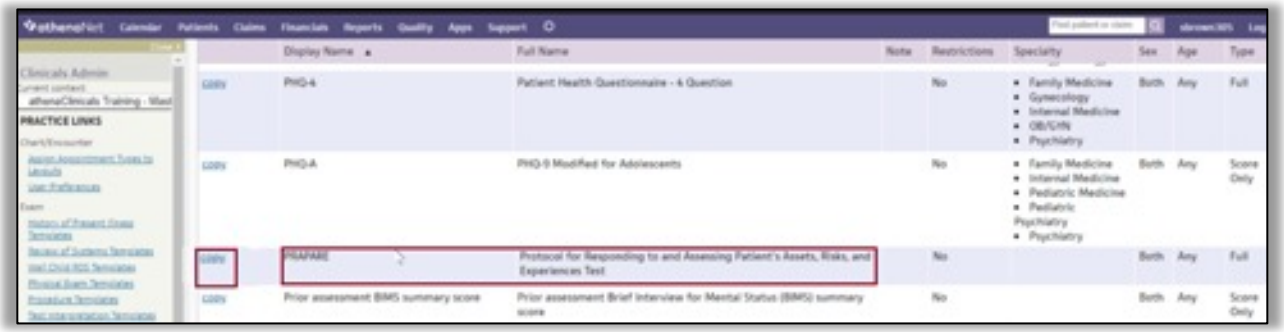
- Click on the "Settings  icon", under ***ADMIN*** click on "Clinicals"



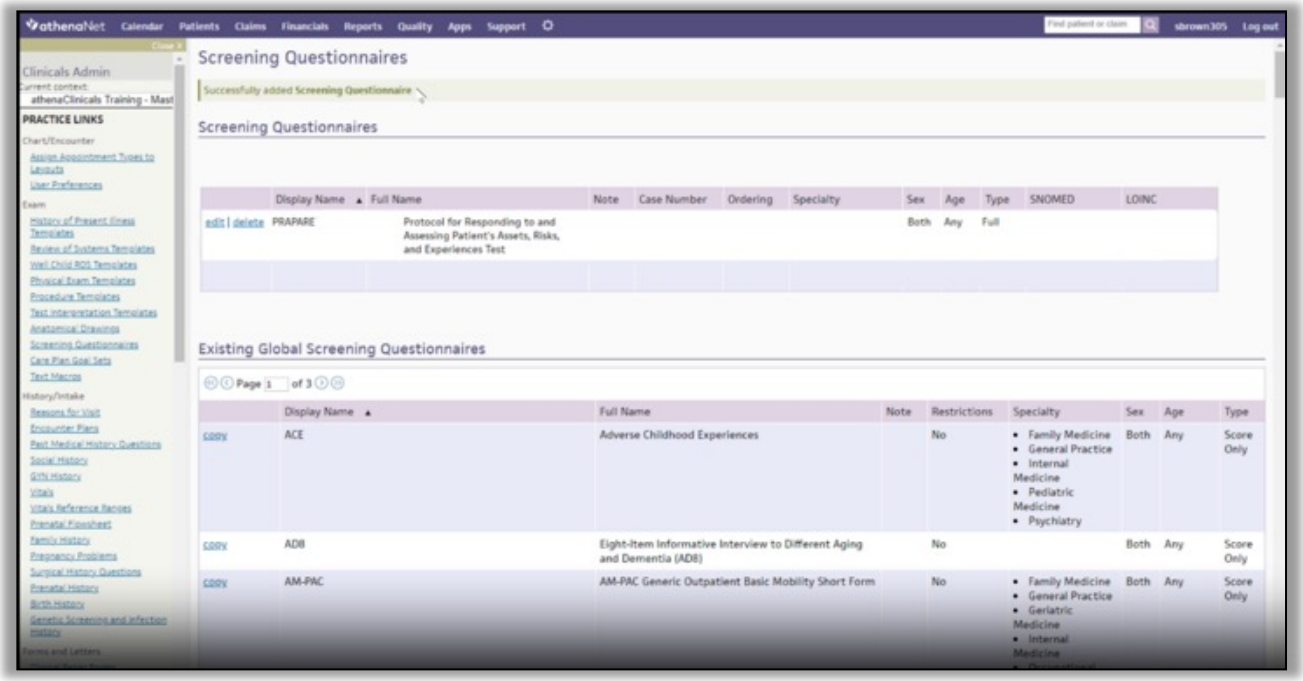


- In **Clinicals Admin**, under ***Practice Links***, scroll down to **Exam section** and select "Screening Questionnaires"

- This will display all **Global Screening Questionnaires** on the right panel. Scroll down to ***PRAPARE®***. Click "Copy" next to the screening questionnaire.



- The Page shows the PRAPARE® screening questionnaire has been successfully added.



- Click "EDIT" and additional fields appear:
  - o Display Name — The questionnaire name displayed on the encounter Screening section. This is not editable.
  - o Sex — Select the "patient gender" from the menu or select "Both" if the questionnaire is used for both males and females.
  - o Age range — Enter a "minimum and a maximum age" for the patients who can complete the questionnaire.
  - o Specialty — Accept the default value, "All", to allow all specialties to use this questionnaire, or click "Selected" and then select the "specialties" from the list.
  - o Note — Enter "any notes about this questionnaire".
  - o Ordering — Enter a "digit" to specify the order of the questionnaire in the list that appears at the top of the Screening section.
- Click "Save"

Add PRAPARE® Screening Questionnaire to Encounter Plans

Encounter Plans allow health centers to preload *Encounter Plan Actions*:

1. Documentation structured templates,
2. Diagnosis, and
3. Orders and Order Sets.

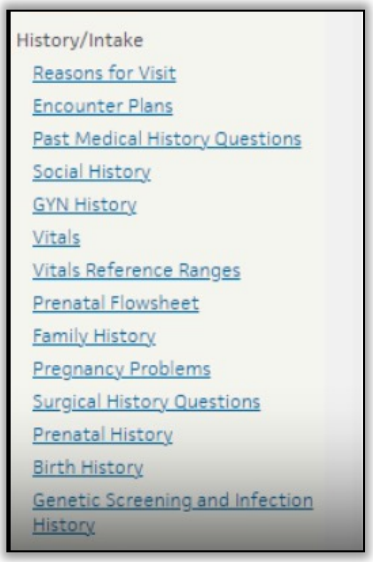
An Encounter Plan is triggered based on the *Reasons for Visit* or *Follow-up Diagnosis* during an encounter's **Intake** and **Exam** stages.

Benefits of using Encounter Plans:

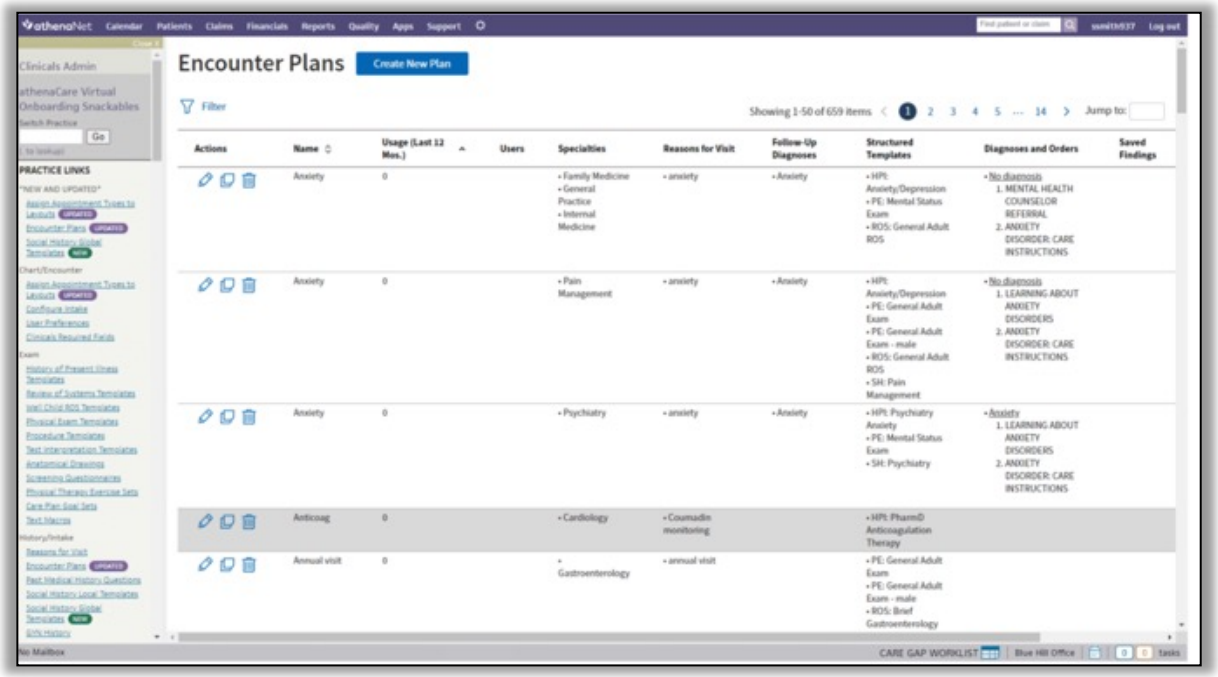
1. Add standardized orders and order sets to an encounter
2. Help providers tailor documentation to their own practice needs
3. Items in an Encounter Plan are automatically loaded in athenaOne during the Intake and Exam stage
4. Providers save time, as documentation is easy and the actions are preloaded to select either referrals or orders and add diagnosis without navigating outside of the encounter plan.

Update the Encounter Plan:

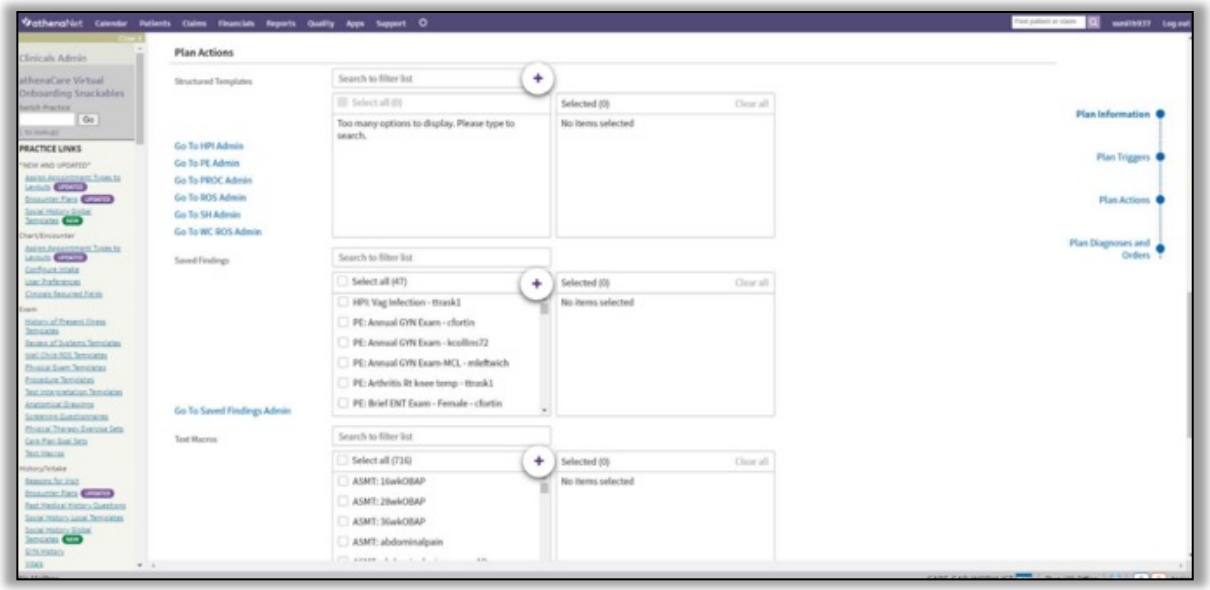
- Click on the "Settings icon", and under ***ADMIN*** click on "Clinicals".
- In **Clinicals Admin**, under ***Practice Links***, scroll down to the **History/Intake** section and select "Encounter Plans"



- Click the "Edit icon" to update an existing **Encounter Plan**. (see athenahealth O Help for details on how to create a new Encounter Plan)

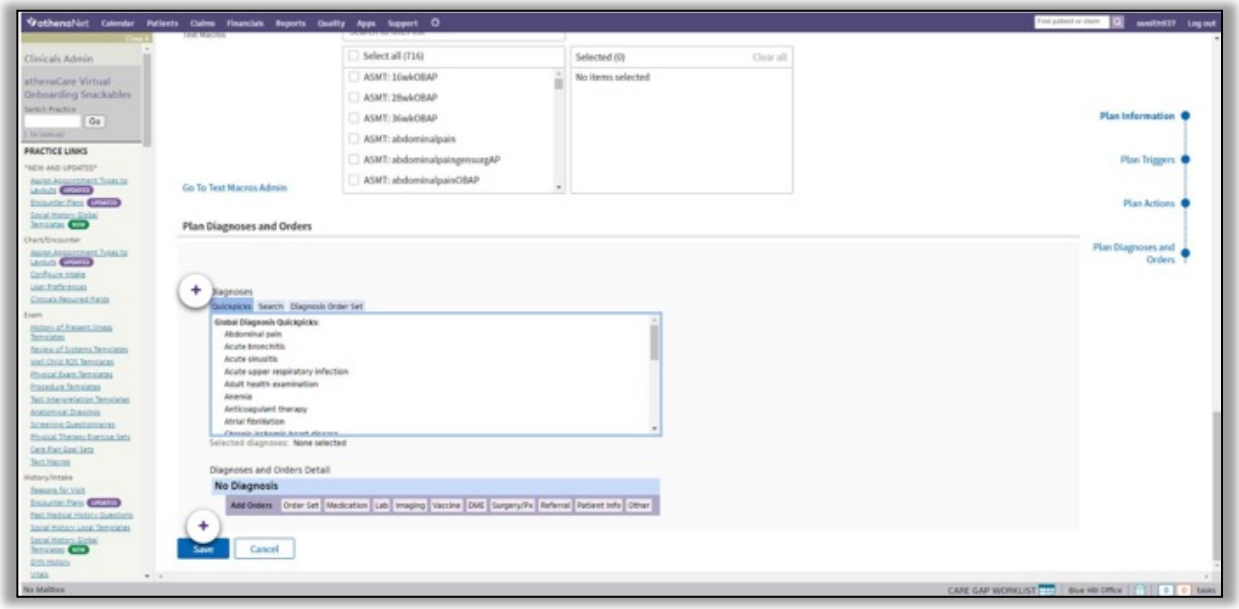


- In the **Plan Actions** section - filter the templates list on the left by entering ***"SQ"*** in the filter list text box. Screening questionnaires appear. Select "PRAPARE®" to add to the **Encounter Plan**.



- In **Saved Findings** – select the "list that will be included in the HPI, PE, and ROS" during the encounter. Select any "Text Macros", if needed

- In the **Plan Diagnosis and Orders** – add "Referrals, Diagnosis, and Orders" to associate with the PRAPARE® questionnaire.



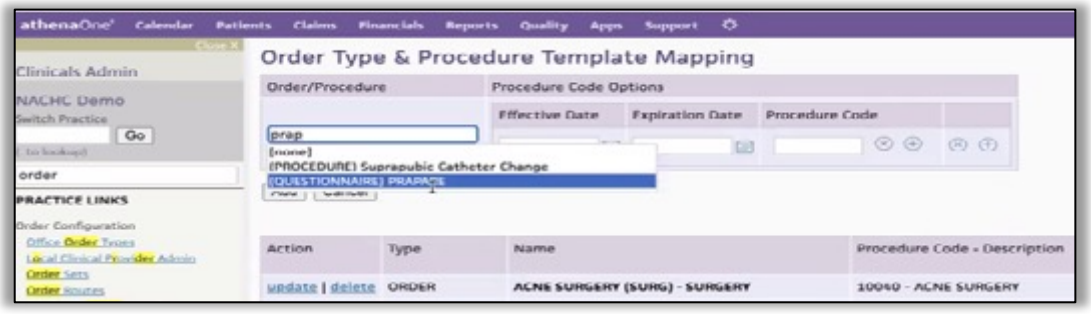
- Click "Save" to save the Encounter Plan.

Note: *The encounter plans page adds questionnaires to Encounter Plan. During an encounter, if staff select an encounter reason, chief complaint, or follow-up diagnosis with an associated encounter plan, all the plan's diagnosis, orders, and templates (including screening questionnaires) are automatically added to the encounter.*

Map PRAPARE® Screening Questionnaire to Procedure Codes

PRAPARE® Screening Questionnaire can be mapped to a procedure code. The codes appear automatically next to the questionnaire in the ***Services*** section of the ***Billing*** tab.

- Click the "Settings icon", under ***ADMIN***, click "Clinicals". In the task bar, under ***PRACTICE LINKS***, select "Charge Integration" and click on "Order Type & Procedure Template Mapping".
- Order/Procedure – Click inside the text box to display the list of available order types, procedures, and screening questionnaires, and select the "PRAPARE® questionnaire" that must be mapped.

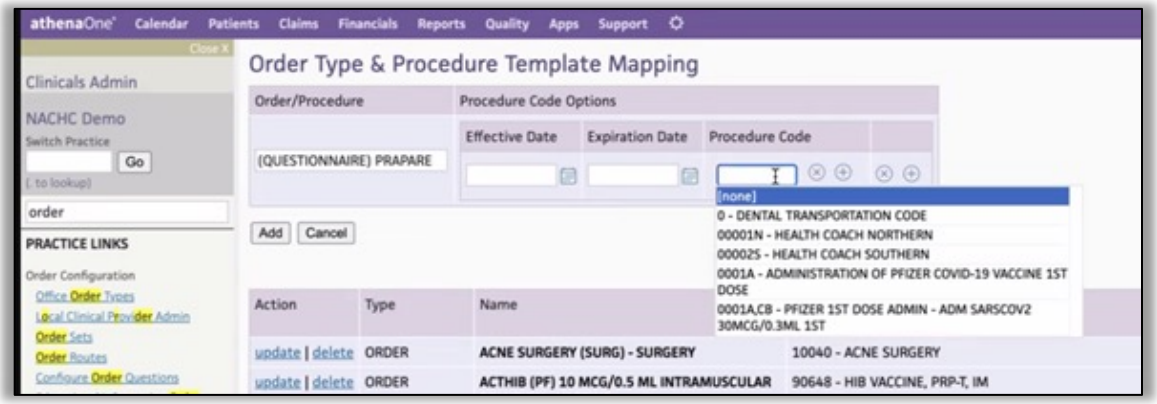


- Effective Date — Enter an effective date for the mapping or leave the field blank if you do not want to restrict the mapping to a date range.

- Expiration Date — Enter an expiration date for the mapping or leave the field blank if you do not want to restrict the mapping to a date range.
- Procedure Code — Click inside the text box and enter the first few characters of the procedure code to map. You can search by procedure name or by CPT code.

Note: *Your fee schedule does not limit the list of procedure codes. You can map orders, procedures, and questionnaires to any valid CPT codes. These codes can be mapped to the PRAPARE® questionnaire for standardized data capture.*

- Click "Add" to save the new mapping. Use the "Plus sign ⊕ " to add more codes.



The new mapping appears in the list of mappings at the bottom of the page. Users can use the links to update or delete mappings.

Examples of naming conventions for PRAPARE® screening results:

Name	Diagnoses/Orders
PRAPARE--Stress	• Stress (Z73.3: Stress, not elsewhere classified) • PRAPARE--Counselling Resources NowPow
PRAPARE--Education	• Less than a high school diploma (Z55.5: Less than a high school diploma) • PRAPARE--Education Resources NowPow
PRAPARE--Unemployed	• Unemployed (Z56.0: Unemployment, unspecified) • PRAPARE--Employment Resources NowPow
PRAPARE-Housing Instability	• Housing instability (Z59.819: Housing instability, housed unspecified; Z59.812: Housing instability, housed, homelessness in past 12 months; Z59.811: Housing instability, housed, with risk of homelessness) • PRAPARE--Housing Instability Resources NowPow
PRAPARE--Financial Insecurity	• Financial insecurity (Z59.6: Low income) • PRAPARE--Financial Instability Resources NowPow

PRAPARE-Homelessness	• Homeless (Z59.00: Homelessness unspecified; Z59.01: Sheltered homelessness; Z59.02: Unsheltered homelessness)
	  • SOCIAL WORKER REFERRAL
	  • PRAPARE--Homelessness Resources NowPow

PRAPARE--Food Insecurity	• Food insecurity (Z59.41: Food insecurity) • PRAPARE--Food Insecurity Resources NowPow
PRAPARE--Social Support	• Social problem (Z60.8: Other problems related to social environment) • PRAPARE--Counselling Resources NowPow
PRAPARE--Refuee	• Legal problem (Z65.3: Problems related to other legal circumstances) • PRAPARE-Immigration Information NowPow
PRAPARE--Safety	• Partner relationship problem (Z63.0: Problems in relationship with spouse or partner) • PRAPARE--Counselling Resources NowPow
PRAPARE--Incarceration	• Problem related to release from prison (Z65.2: Problems related to release from prison) • PRAPARE--Legal Resources NowPow
PRAPARE--Transportation	• Inability to access health care due to transportation insecurity (Z75.3: Unavailability and inaccessibility of health-care facilities) • Unavailable community resources (Z75.4: Unavailability and inaccessibility of other helping agencies)

Examples of naming conventions for SDOH screening results:

Name	Diagnoses/Orders
SDOH - Housing	• Housing lack (Z59.00: Homelessness unspecified) • HOUSING SUPPORT PROGRAM REFERRAL*
SDOH- Transportation	• Inability to access health care due to transportation insecurity (Z75.3: Unavailability and inaccessibility of health-care facilities) • PATIENT TRANSPORTATION*
SDOH - Food	• Food insecurity (Z59.41: Food insecurity) • FOOD ASSISTANCE PROGRAM REFERRAL*
SDOH- Insurance	• Finding related to health insurance issues (Z59.9: Problem related to housing and economic circumstances, unspecified) • COMMUNITY HEALTH WORKER REFERRAL
SDOH - Employment	• Employment problem (Z56.0: Unemployment, unspecified) • EMPLOYMENT AND JOB TRAINING REFERRAL*
SDOH - Utilities / Finances	• Income insufficient to meet needs (Z59.6: Low income) • COMMUNITY HEALTH WORKER REFERRAL
SDOH - Dependent Care	• Cares for dependent relative at home (Z63.6: Dependent relative needing care at home) • COMMUNITY HEALTH WORKER REFERRAL
SDOH - Education	• Literacy problems (Z55.0: Illiteracy and low-level literacy) • EDUCATION ASSISTANCE REFERRAL
SDOH - Personal Safety (IPV,DV)	• Reports of violence in the environment (Z60.8: Other problems related to social environment)

Connect

Create a Task Assignment Override (TAO)

A Task Assignment Override is created to override task assignments in the Clinical Inbox for document classification, orders, referrals, and patient cases. Creating TAO will assist in the referrals getting to the right assignee.

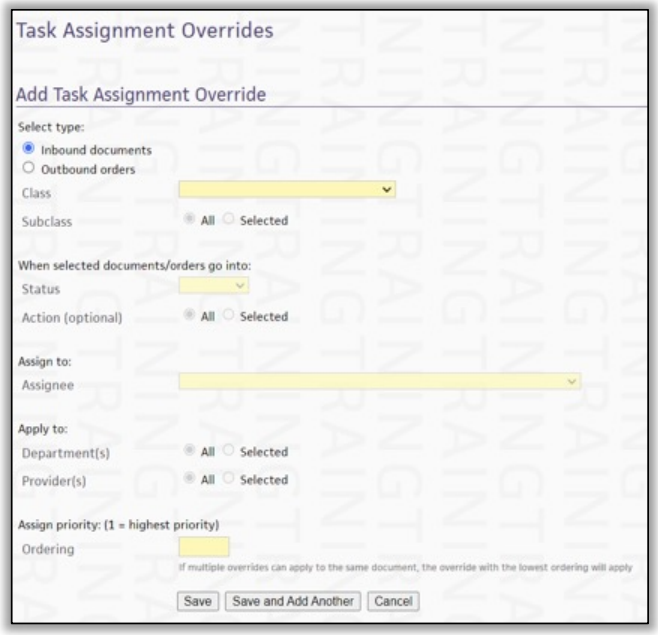
To create a TAO Note:

Navigate to **Task Assignment Override** page:

1. Click "Settings".
2. Click "Clinicals".
3. Click "Task Assignment Overrides".
4. Click "Add new".
5. Select "Type".
6. In drop-down, Select "Class".
7. Select "Subclass".
8. In drop-down, Select "Status".
9. In the drop-down, Select "Assignee" (orders and referrals are assigned to the assigned role).
10. Select "Department".

    Note: *if the department was just recently created (within the hour, approximately) it may take a bit more time to appear for selection on the TAO admin page. If a user attempts to create a TAO for a newly created department and the department does not appear, attempt again after at least an hour and it should then be available for selection.*

11. Select "Provider".
12. Enter <**ordering number**>.
13. Click "Save".



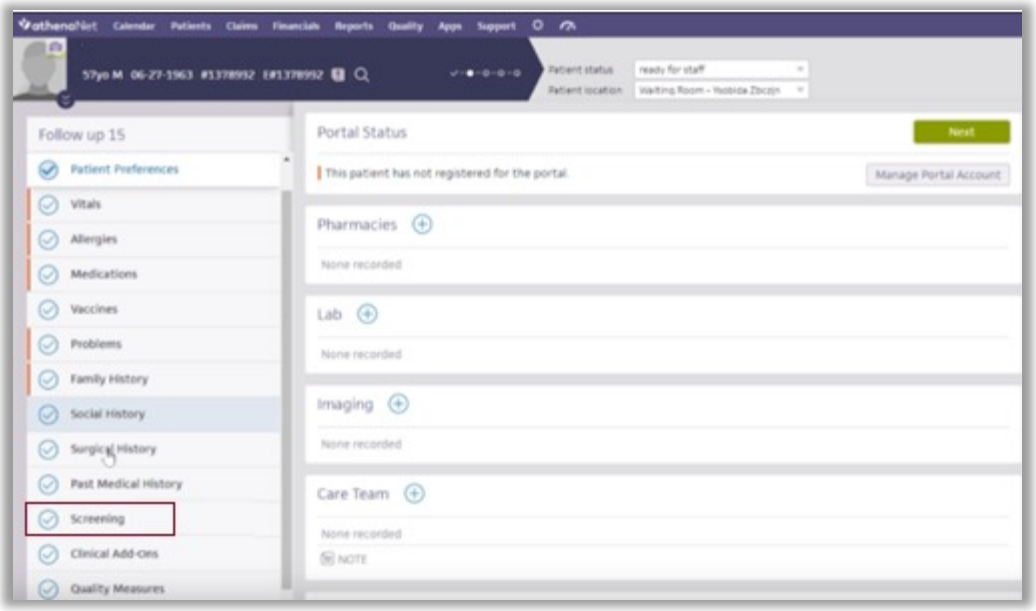
PRAPARE® Workflow in athenaOne

PRAPARE® screening can be completed during the Intake stage of the visit from the **Screening** tab. This allows staff to select and complete the PRAPARE® form that automatically populates all the questions and the tally score. athenaOne **Screening Questionnaire Report** pulls data from the PRAPARE® form.

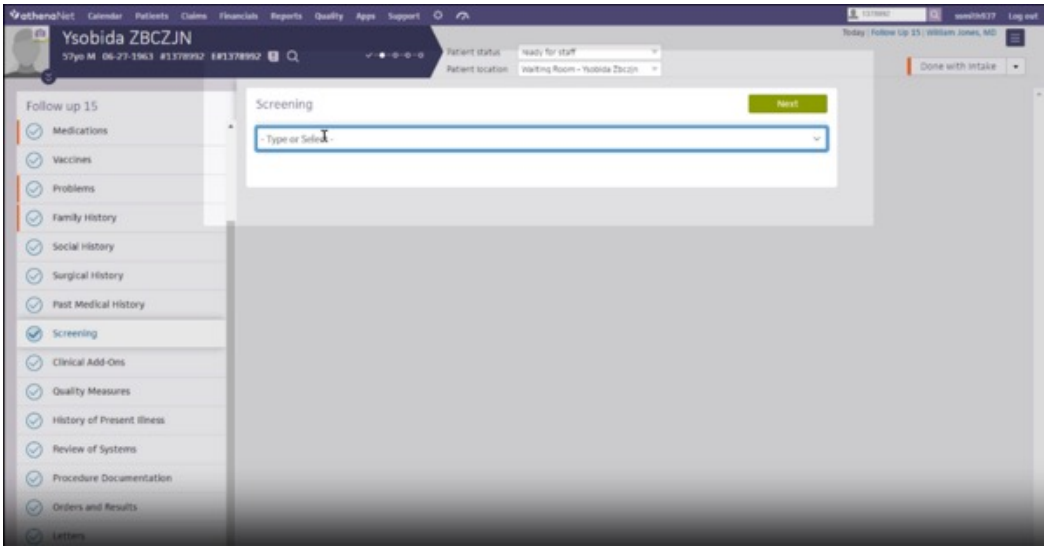
Additionally, health centers can create a template for the PRAPARE® screener in the **Social History Global Templates**. The PRAPARE® questions can be added to this template and can be accessed during the intake stage of the visit via the **Social History** tab.

PRAPARE® Intake Workflow During an Encounter

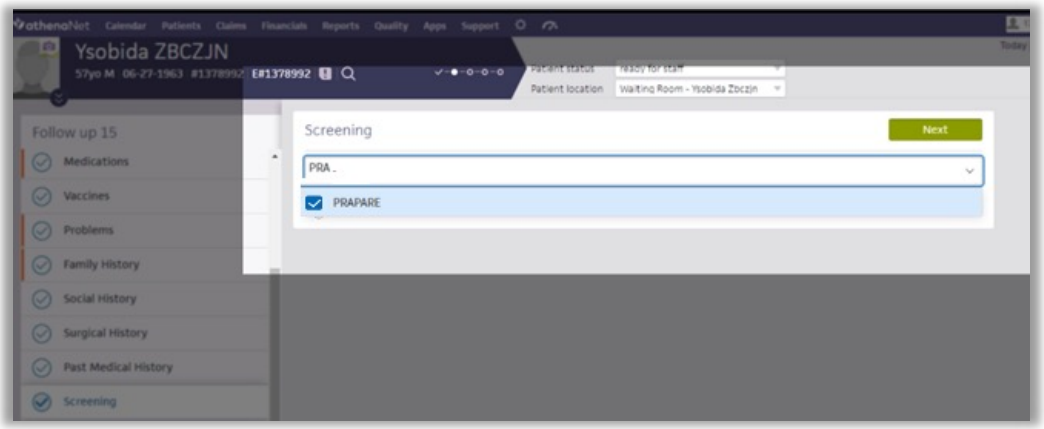
- From the Intake stage of an encounter, click the Screening section in the checklist.



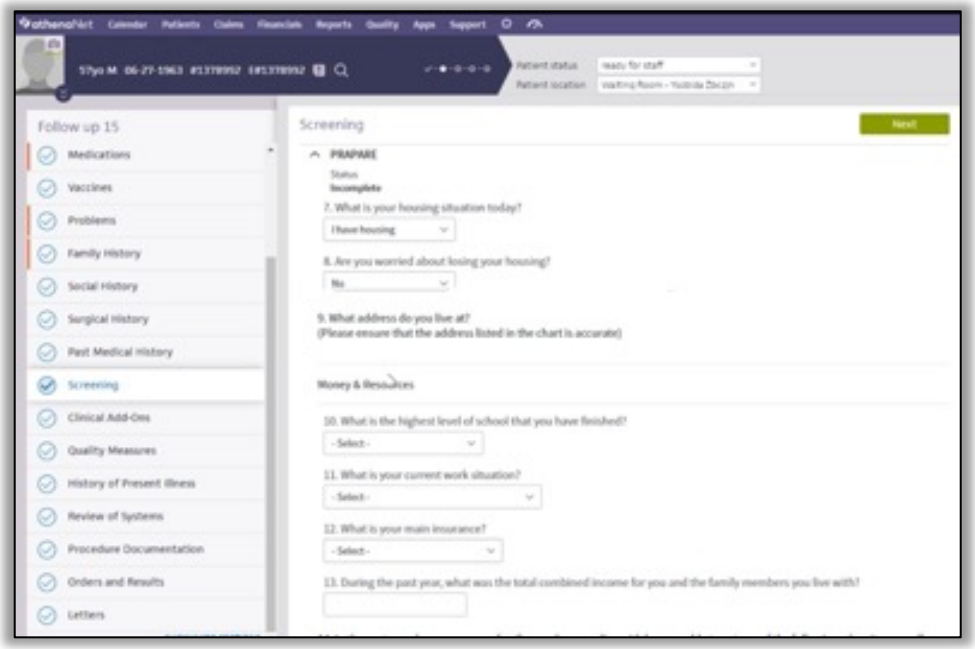
- Click the "plus sign ⊕ " to open the section. The **screening** window appears.



- The PRAPARE® questionnaire will appear if an Encounter Plan is triggered.
- If the questionnaire is not automatically triggered by an Encounter Plan or your practice does not use Encounter Plans, search for and select the PRAPARE® questionnaire.

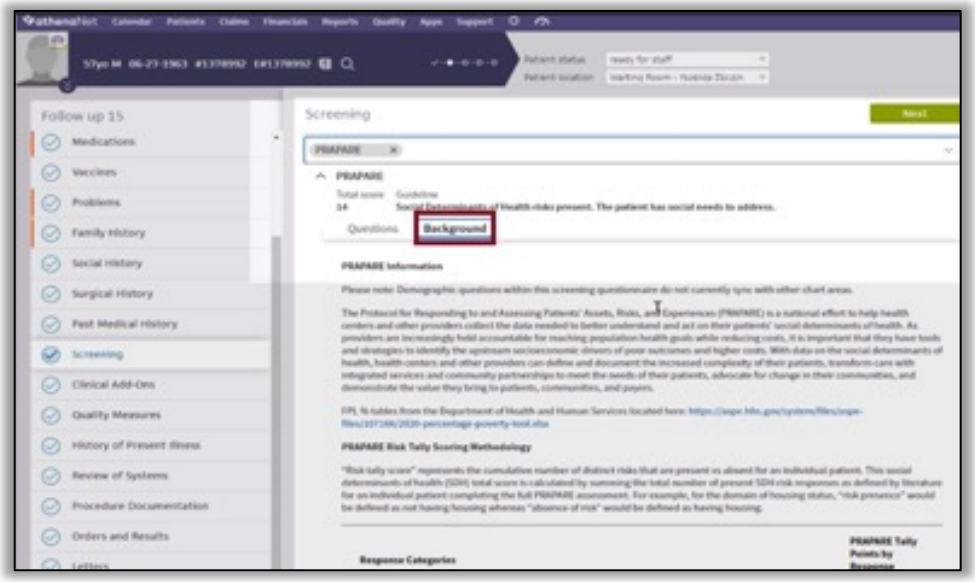


- Click the "expand icon " to view the questionnaire and enter responses.

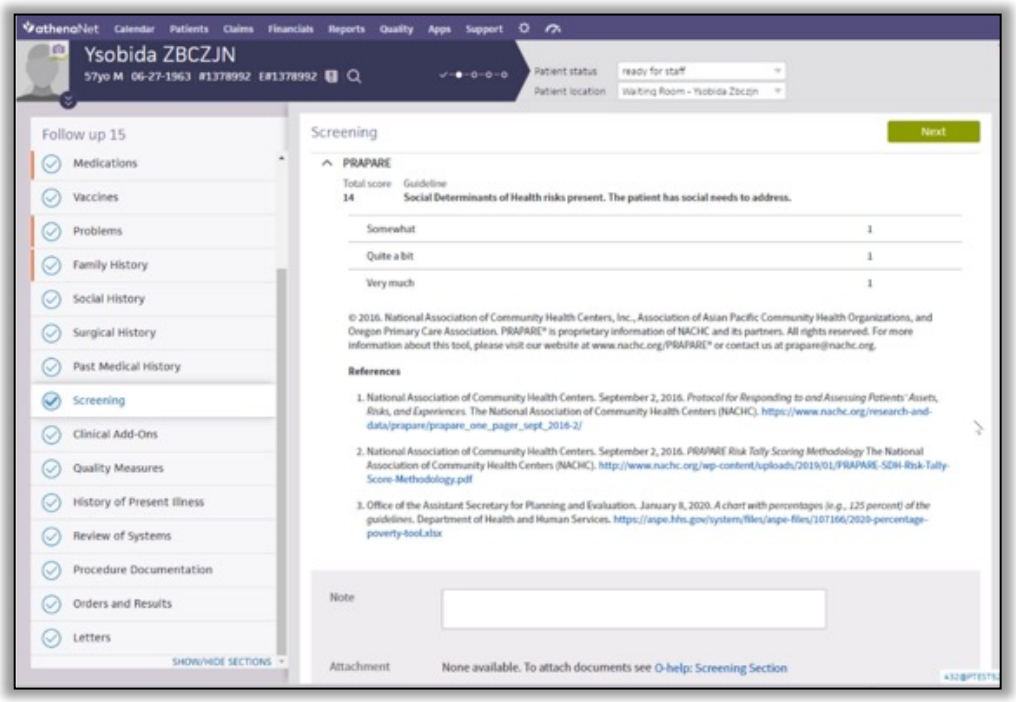


Note: The PRAPARE® screening questionnaire will not update any related information captured elsewhere in the patient chart, such as the Patient Registration page or in the patient's Social History.

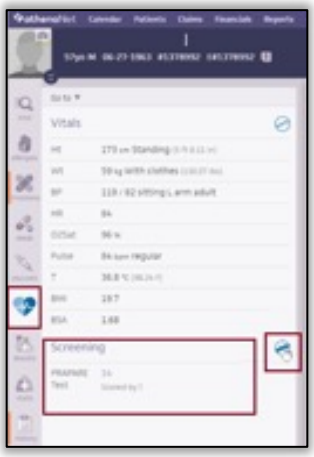
- To see more information about the questionnaire, click the “Background tab”.

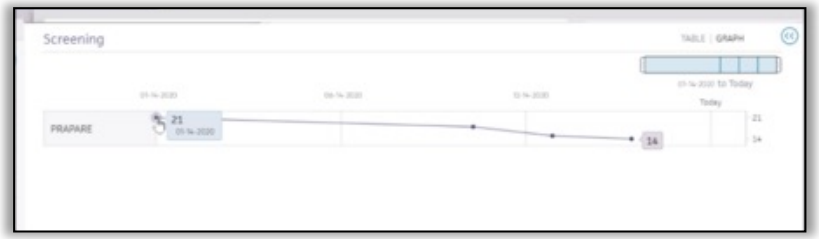


- After all questions are answered, click “Score”. The score and the guidelines appear at the top of the questionnaire.



- Click "Save".
- PRAPARE® responses over time with the scores can be viewed in the **Vitals** section of the patient's chart.





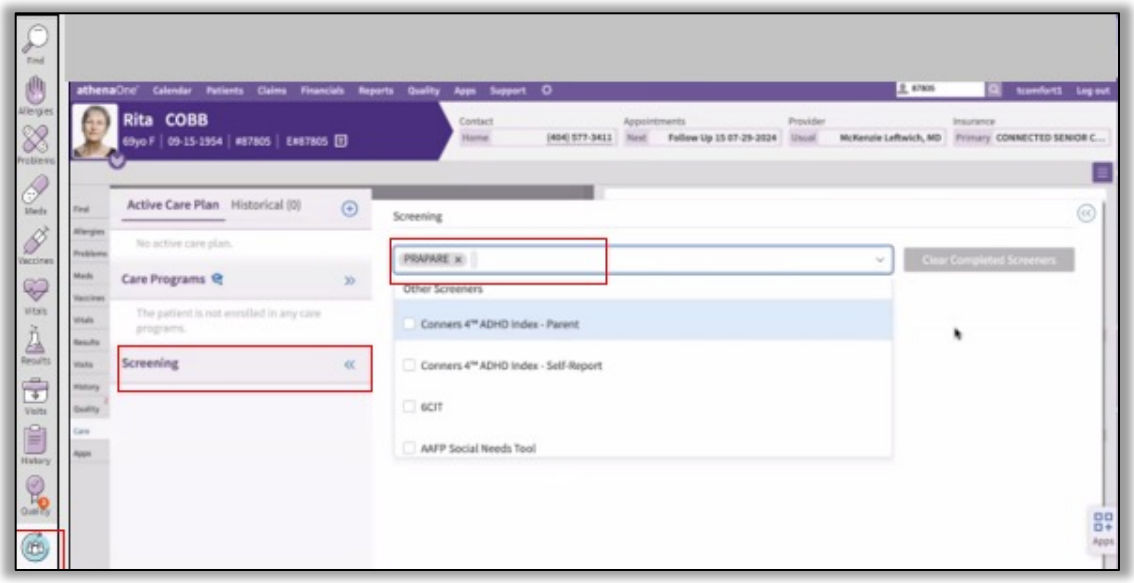
PRAPARE® Workflow outside of an Encounter

PRAPARE® screening can be completed outside of an encounter from the **Care** tab. The Care tab consists of any active care plan, care programs, and screening options for patients enrolled in Care Management.

Health concerns referred to as "**Reasons of care plan**" can be documented in the care plan. These concerns are the problems, barriers to care, or social drivers of health (SDoH) that the provider or care team can document outside of an encounter.

To document PRAPARE® outside of an encounter

- Click on the "Care Tab"
- Click on "Screening" to expand the screeners
- Type "PRAPARE®"
- Enter responses
- After all questions are answered, click "Score"
- Click "Save"



Documenting PRAPARE® using a Paper Form

For health centers using paper questionnaires, upload the document to the patient chart and tie it to the encounter. Use the **Add Document** page to upload the questionnaire; select "Encounter Document>Health History Questionnaire". Enter the "Score" in the screening section. Click "Save".

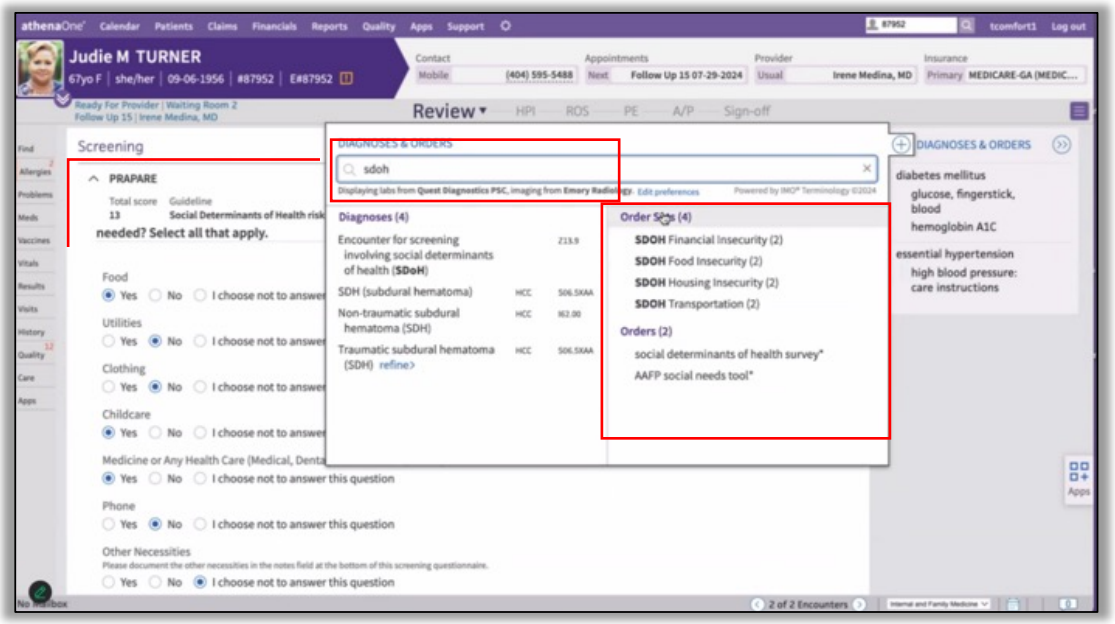
Note: *health centers that previously created their local social history template to document PRAPARE®, should complete the PRAPARE® screening questionnaire and then delete information related to PRAPARE® from the Social Drivers section to avoid duplicate data in the encounter summary.*

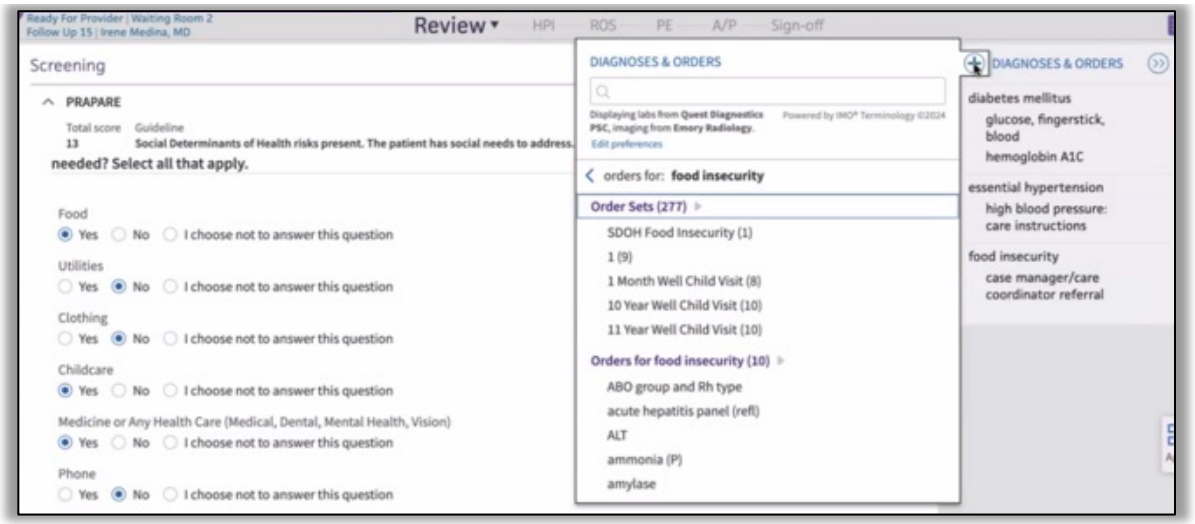
Coding - Add the SDOH Assessment/Diagnosis

Health centers can include supplemental ICD-10 Z-codes (Z55-Z56) in the patient's diagnosis section and problem list.

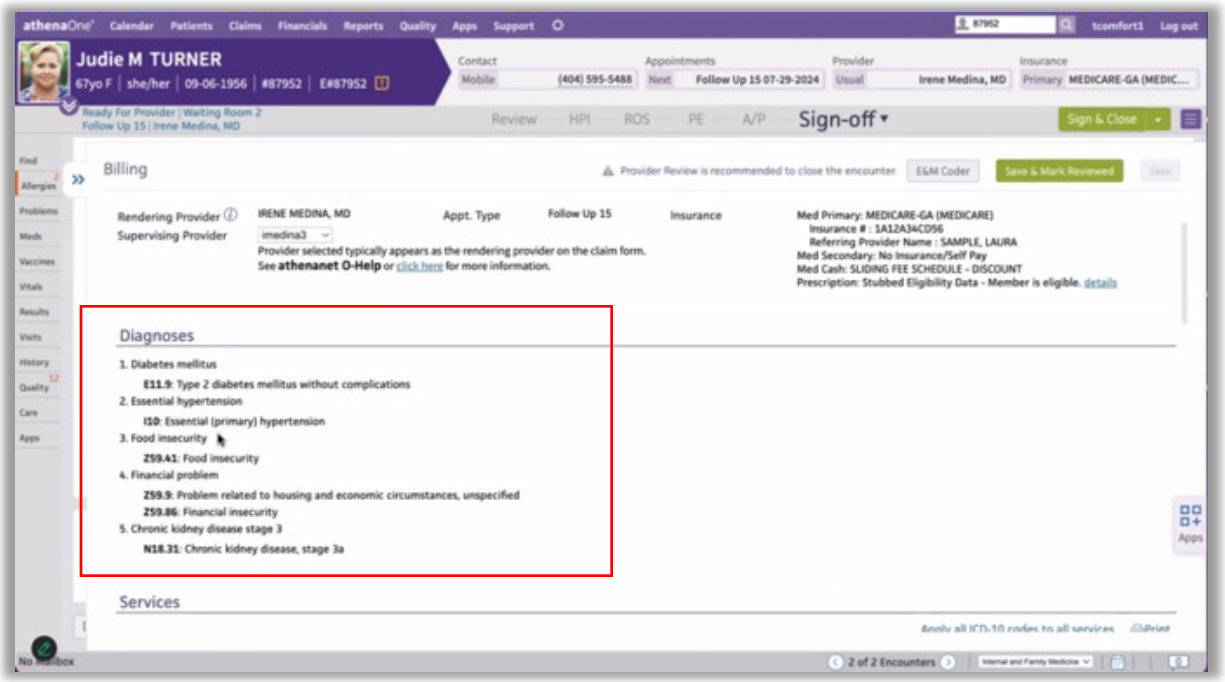
The clinical staff/provider can add the SDOH assessment ICD-10 code for each positive response captured from the PRAPARE® screening. These assessments are mapped to an order set with relevant Z codes.

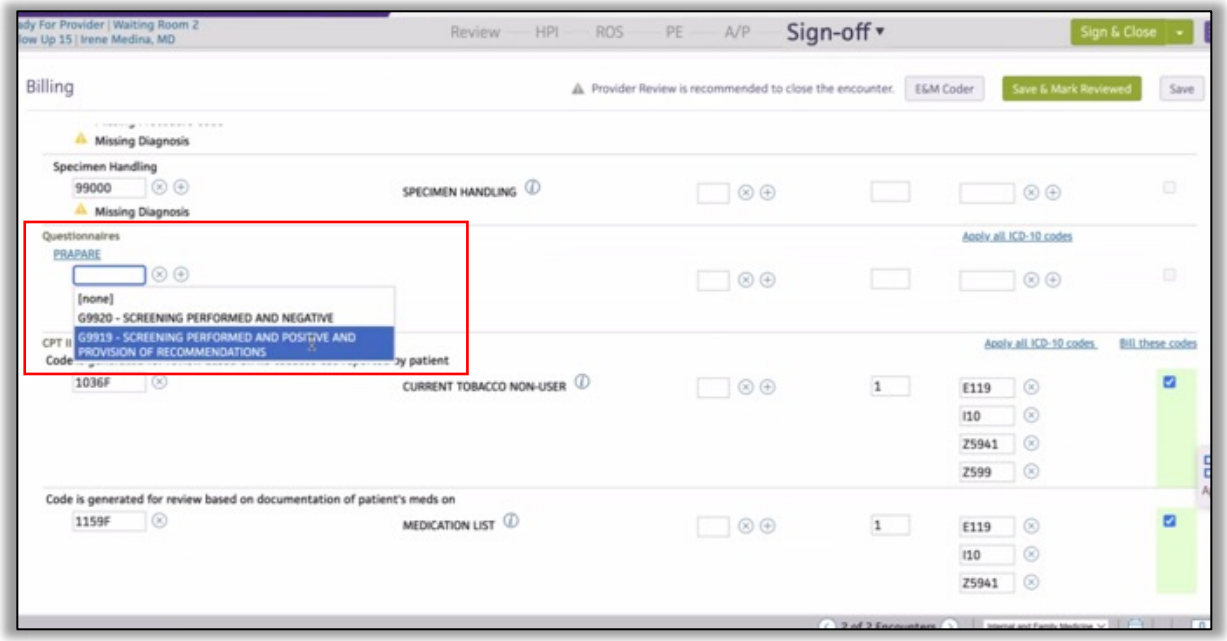
- Complete **PRAPARE® screening**
- For any positive response, the patient has social needs that should be addressed
- Click on "Diagnosis & Orders"
- Type "SDOH"
- Select the appropriate SDOH assessment
- Z-codes are automatically dropped in the **Assessment & Plan** section

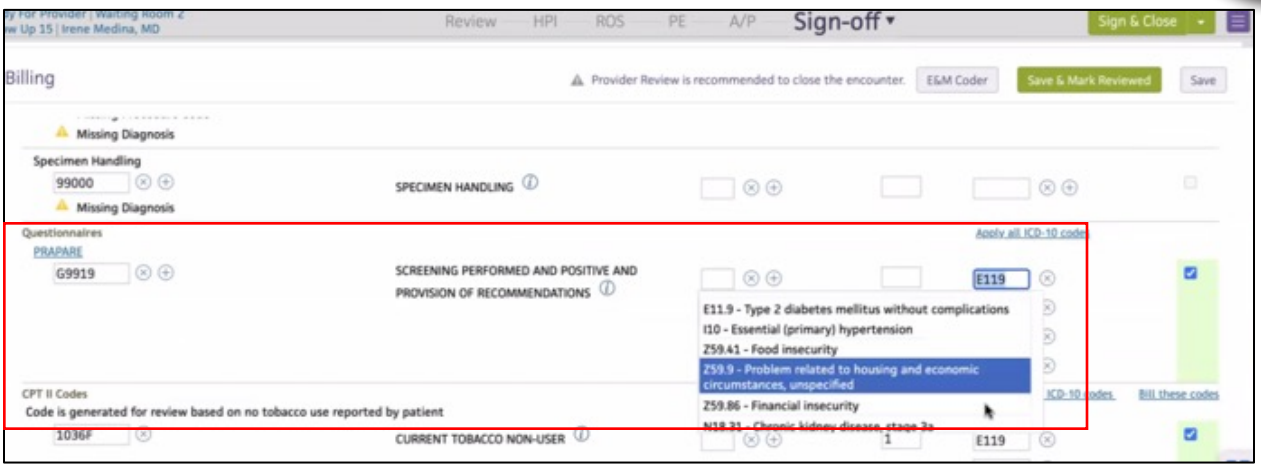




Social drivers of health are dropped with the Z-codes in the diagnosis section of the **Billing** tab. A provider can review the social needs identified and then click Save & Mark Reviewed and then click "Sign & Close".

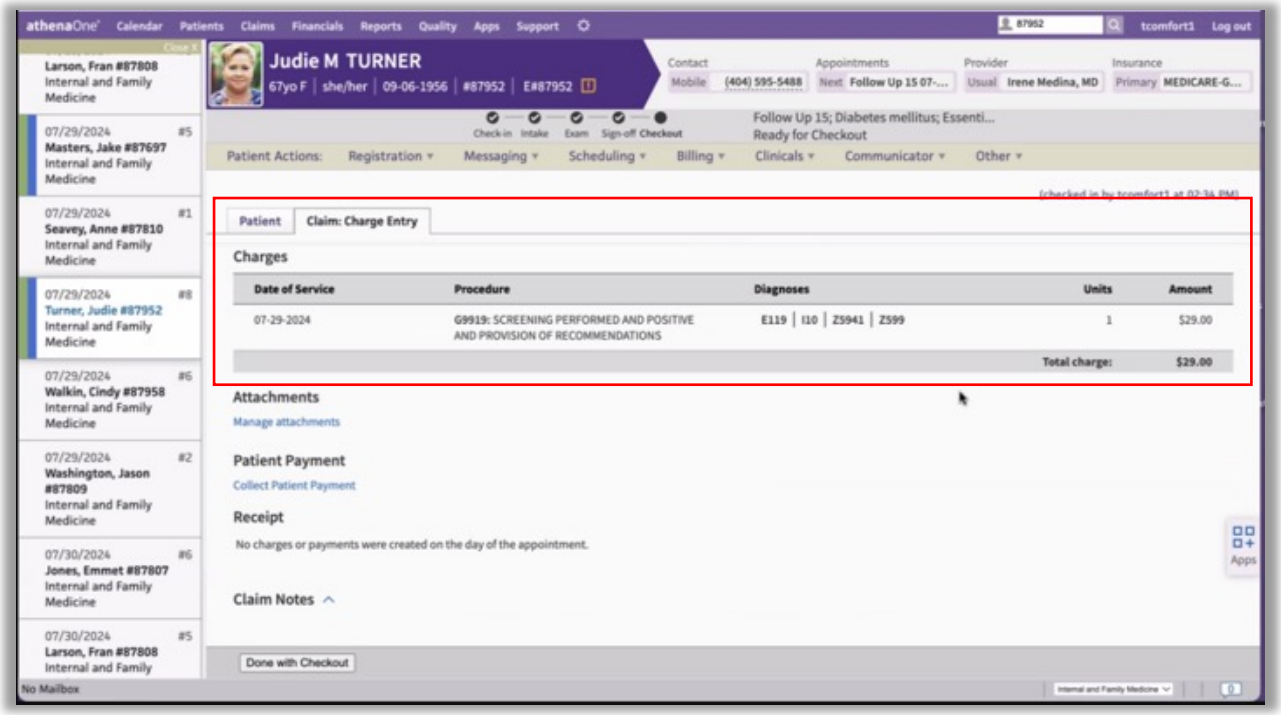


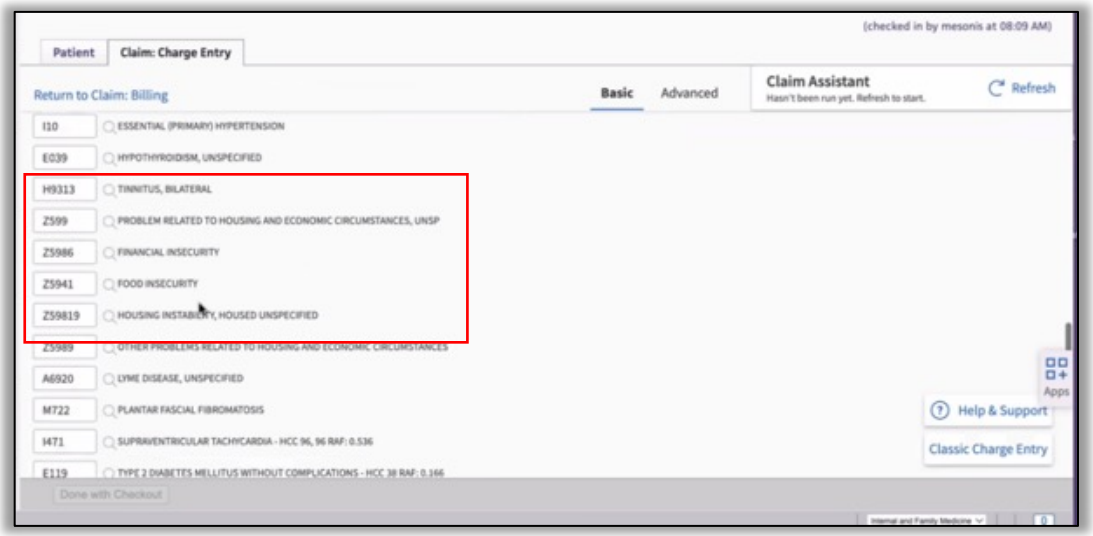




Health centers can create a mapping strategy to map standardized ICD-10 Z-Codes based on the PRAPARE® questionnaire responses. The PRAPARE®-Data-Documentation-Quick-Sheet provides the importance of each domain and how to map each question and response category to the aligned source.

The billing staff can work on the **Claim Charge Entry** to submit the charges for the patient after reviewing the codes added to the claim.





Helpful Resources:

- Details on EHR PRAPARE® implementation on page 32 of the PRAPARE® Toolkit
- PRAPARE® Data Documentation Quick Sheet
- PRAPARE® Data Documentation and Codification File

Closing the Loop – Provide Intervention and Follow-Up

PRAPARE® SDOH data is collected during an encounter by clinical staff or the patient (self-assessment). Interventions or follow-up for SDOH-related needs may include counseling, referrals to internal or external resources, enabling services, and other interventions.

Referral workflows can be used to connect patients with resources to address their social needs and form partnerships with external organizations.

In addition to SDOH Z-Codes, health centers may consider using custom procedure "dummy" codes to track interventions/enabling services. Standardized procedure codes are not yet available for use. Access the AAPCHO Enabling Services Implementation Guide for more details.

Tracking the enabling services or support provided is important for UDS Reporting for UDS Table 5.

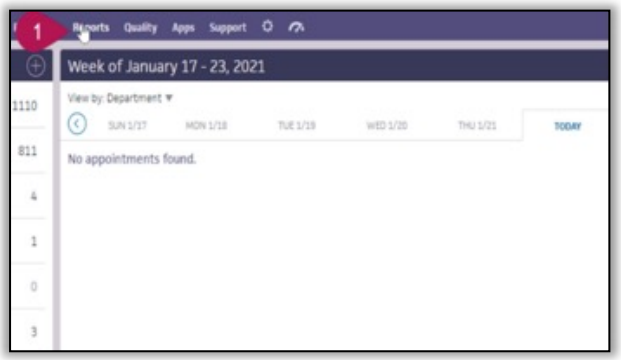
PRAPARE® Reports

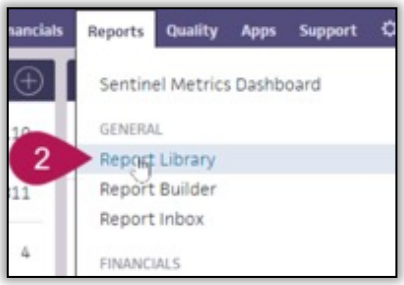
The athenaOne **Screening Questionnaires Report** provides clinical information documented in the screening questionnaires during patient encounters.

Run the PRAPARE® report for patients with high tally scores to ensure providers follow up with the patient and refer them to either internal team members (Behavioral Health Specialists, Social Workers, Community Health Workers) or provide a referral to enabling services.

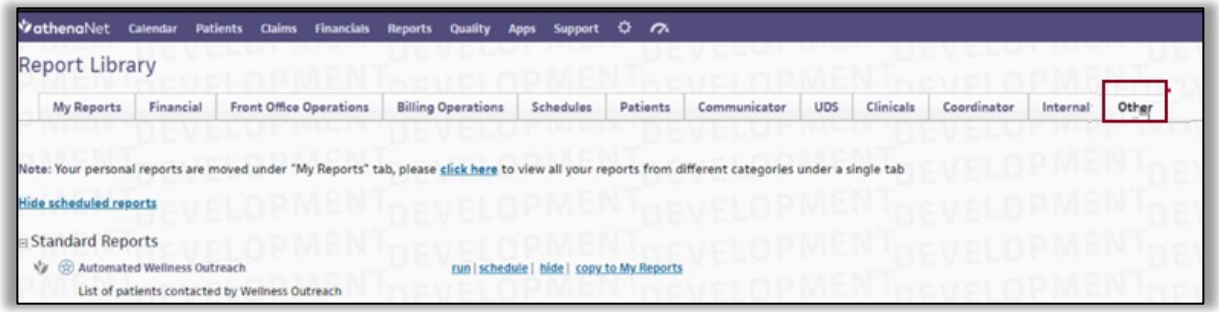
Run the PRAPARE® Screening Questionnaire report:

- On the main menu, click on "Report" tab and then click "Report Library"





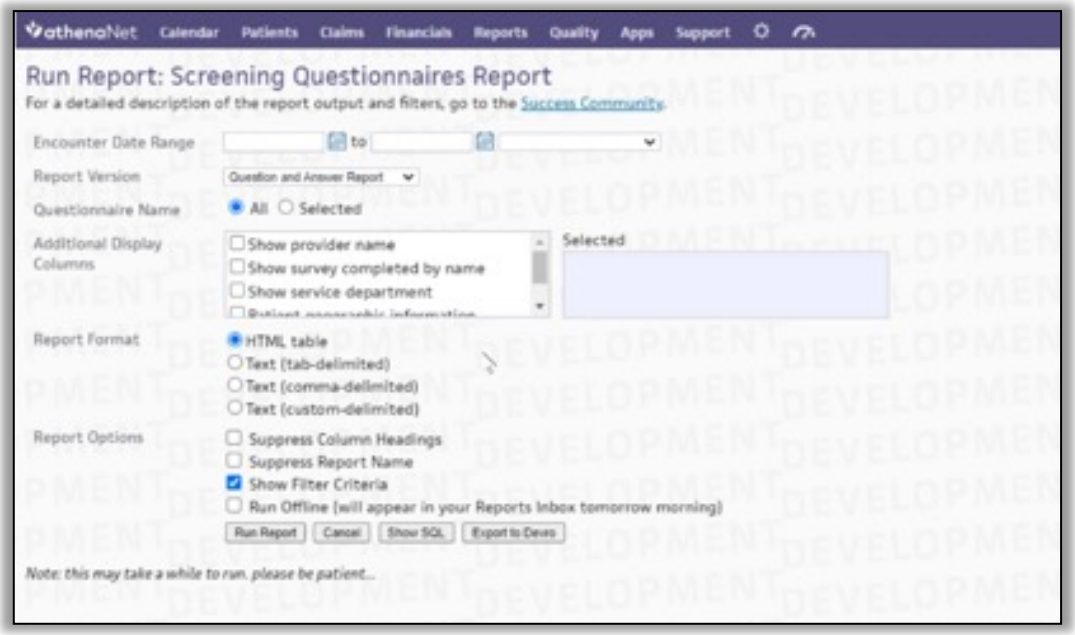
- In the Report Library click the "Other" tab.



- Scroll down the list and search for **Screening Questionnaires Report** and click 'Run'

- Click on **"Selected"** and type **"PRAPARE®"**

- Enter the fields (refer to Table 1 for field selection) and click "Run Report"



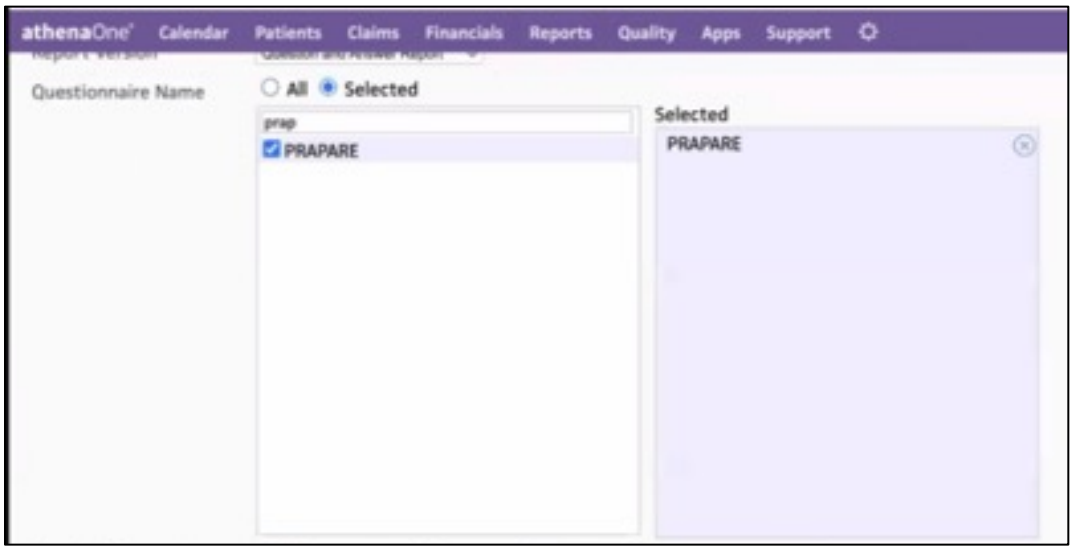


Table 1: Field Reference

Run Report: PRAPARE® Screening Questionnaires Report	
Encounter Date Range	Enter or select the date range for the report.
Report Version	Select one of these options: • Question and Answer Report — This report returns the full question-and-answer text information from each patient's questionnaire, along with other relevant questionnaire data. • Questionnaire Summary Report — This report returns a summary of the questionnaire information, including Questionnaire Name, Total Score, and Encounter Date.
Questionnaire Name	Click All to report on all the questionnaires that you administered during the date range or click "Selected" and select the PRAPARE® questionnaire to include in the report.
Additional Display Columns	Select one or more of these display columns to include in the report: • Show provider name — Includes columns for the provider who supervised the encounter (Provider ID, Provider First Name, and Provider Last Name). • Show survey completed by name — Includes columns for the user who administered the questionnaire (Completed by First Name and Completed by Last Name). • Show service department — Includes columns for the service department where the questionnaire was administered (Service Department ID and Service Department Name). • Patient geographic information — Includes columns for the patient's address (Patient City, Patient State, and Patient Zip). • Encounter procedure codes — Includes a column that displays the procedure codes and modifiers associated with the appointment during which the questionnaire was administered.
Report Format	Select the format for your report results. • HTML table — Display the report results on your screen. • Text (tab-delimited) — Export the report results to a .csv file in tab-delimited format. • Text (comma-delimited) — Export the report results to a .csv file in comma-delimited format. • Text (custom-delimited) — Export the report results to a .csv file in a custom-delimited format. Note: If you select this option, the Delimiter field appears. Enter the delimiter character to use for the report.
Report Options	Select other options for your report results. • Suppress Column Headings — Select this option to remove column headings from the report results. • Suppress Report Name — Select this option to remove the report name from the report results. • Show Filter Criteria — Select this option to include your selected filter criteria in the report results. • Run Offline (will appear in your Report Inbox next morning) — Select this option for very long reports. Reports that are run offline appear in your Report Inbox the morning after the request.

- The report will run with the options selected with patient information along with scores and codes.