



## Summary of Social Needs Screening Tools

*Adapted from CARDI-OH.org as produced by the  
Social Determinants of Health Working Group*

Contributing author on behalf of the Heart Healthy Ohio Initiative:  
Adam Perzynski, PhD, The MetroHealth System, Case Western Reserve University

November 2021

Researchers, clinical practitioners and health policy experts have increasingly recognized that social determinants of health are fundamental to the health and wellbeing of individuals (1,2). Social resources and supports have a foundational influence on health, disease prevention and illness recovery across the life course. The affordability of our homes, safety of our neighborhoods and workplaces, the quality of our schooling; the cleanliness of our water, food, and air; and the textures of our social interactions and relationships have direct and indirect linkages to health care costs and individual health outcomes(1). Recent work has highlighted the importance of understanding the specific social hurdles patients face in the context of primary care (3).

Accordingly, organizations across the United States are rushing to implement social needs screening tools in primary care settings. In particular, health care payment and policy shifts towards value-based and risk-based contracts are engendering novel efforts to address social needs. The National Academies of Sciences recently published proceedings from a workshop on investing in health-related social needs (4). National experts at the workshop identified a number of critical research gaps and noted that in general there is a lack of evidence supporting effective, efficient models of screening for and addressing social needs in clinical care.

### PRIMARY RESOURCES

The primary resources below were produced by the American Association of Family Practice's "Everyone Project". This project has a broad scope and below we highlight a few basic essential resources. Note that many EHR vendors now include specific social needs screening tools as part of their default software build or in the patient history/demographics data views.

1. **Guide to Screening.** This document provides practices with a straightforward step-by-step guide to initiating screening for social needs.

[https://www.aafp.org/dam/AAFP/documents/patient\\_care/everyone\\_project/hops19-physician-guide-sdoh.pdf](https://www.aafp.org/dam/AAFP/documents/patient_care/everyone_project/hops19-physician-guide-sdoh.pdf)

2. **Screening Tool.** The everyone project provides a form with questions and response choices for conducting social needs screening. This form is in English, other versions are available at the general link below.  
[https://www.aafp.org/dam/AAFP/documents/patient\\_care/everyone\\_project/hops19-physician-form-sdoh.pdf](https://www.aafp.org/dam/AAFP/documents/patient_care/everyone_project/hops19-physician-form-sdoh.pdf)
3. **Services Search Tool.** Using the Neighborhood Navigator, you your team our your patient can enter a zip code and view nearby social care resources:  
<https://www.aafp.org/family-physician/patient-care/the-everyone-project/neighborhood-navigator.html>
4. **Action Plan.** This is a printable template designed for use in encounters for completion and sharing with patients.  
[https://www.aafp.org/dam/AAFP/documents/patient\\_care/everyone\\_project/action-plan.pdf](https://www.aafp.org/dam/AAFP/documents/patient_care/everyone_project/action-plan.pdf)
5. General link to the AAFP Everyone Project: All of the tools and information above are part of the AAFP Everyone Project. <https://www.aafp.org/family-physician/patient-care/the-everyone-project/toolkit.html>

#### SECONDARY RESOURCES

1. AAFP has also created an especially useful summary of lessons learned from attempts to screen for and address social needs: <https://www.aafp.org/fpm/2019/0900/p13.html>
2. SIREN, The Social Interventions Research and Evaluation Network has created curated summaries of a special issue on social needs screening published in the American Journal of Preventive Medicine. The summaries also link to the full text of the articles. The SIREN Evidence Library is available at: <https://sirennetwork.ucsf.edu/tools/evidence-library>
3. Gold et al, in their article on social needs screening for community health centers provide important results of screening, lessons learned and an especially useful supplemental appendix with a screening tool and **recommendations for integrating into clinical workflows:**  
Article: <http://www.annfammed.org/content/16/5/399.short>  
Appendix:  
[http://www.annfammed.org/content/suppl/2018/09/06/16.5.399.DC1/Gold\\_Supp\\_App\\_s.pdf](http://www.annfammed.org/content/suppl/2018/09/06/16.5.399.DC1/Gold_Supp_App_s.pdf)
4. The Center for Medicare and Medicaid Innovation have published several useful resources in connection with The Accountable Health Communities Health-Related Social Needs Screening Tool. <https://innovation.cms.gov/Files/worksheets/ahcm-screeningtool.pdf>
5. The National Alliance to Impact the Social Determinants of Health has produced an informative issue brief, "Identifying Social Risk and Needs in Health Care: Promising Approaches to Screening for Social Determinants of Health & Recommendations for Continued Exploration" <https://www.nasdoh.org/wp-content/uploads/2019/01/NASDOH-Social-Risks-Issue-Brief.pdf>

6. The Center for Health Care Strategies produced an issue brief on “Screening for Social Determinants of Health in Populations with Complex Needs: Implementation Considerations” <https://www.chcs.org/resource/screening-social-determinants-health-populations-complex-needs-implementation-considerations/>

#### ADDITIONAL REFERENCES

1. Adler NE, Stead WW. Patients in context—EHR capture of social and behavioral determinants of health. *Obstetrical & Gynecological Survey*. 2015 Jun 1;70(6):388-90.
2. Gottlieb LM, Tirozzi KJ, Manchanda R, Burns AR, Sandel MT. Moving electronic medical records upstream: incorporating social determinants of health. *American journal of preventive medicine*. 2015 Feb 1;48(2):215-8.
3. Bibbins-Domingo K. Integrating social care into the delivery of health care. *Jama*. 2019 Nov 12;322(18):1763-4.
4. National Academies of Sciences, Engineering, and Medicine. Integrating social care into the delivery of health care: moving upstream to improve the nation's health. National Academies Press; 2019 Dec 30.  
<http://nationalacademies.org/hmd/Reports/2019/integrating-social-care-into-the-delivery-of-health-care>