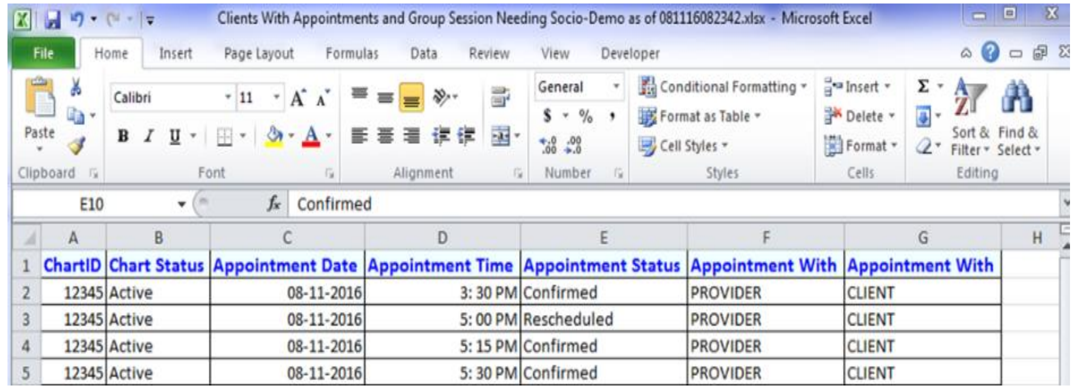
East End CHC Workflow:

STEP 1: Admin assistant runs a daily report in PSS to identify all upcoming appointments and which of those clients has SDD missing/incomplete.



	A	B	C	D	E	F	G
1	ChartID	Chart Status	Appointment Date	Appointment Time	Appointment Status	Appointment With	Appointment With
2	12345	Active	08-11-2016	3: 30 PM	Confirmed	PROVIDER	CLIENT
3	12345	Active	08-11-2016	5: 00 PM	Rescheduled	PROVIDER	CLIENT
4	12345	Active	08-11-2016	5: 15 PM	Confirmed	PROVIDER	CLIENT
5	12345	Active	08-11-2016	5: 30 PM	Confirmed	PROVIDER	CLIENT

STEP 2a: If client is new, the client will meet 1-on-1 with CHW for initial intake, and will explain the purpose and importance of collection.

STEP 2b: For all other clients, admin assistant will flag the upcoming appointment by manually adding "NEEDS DEMO" in the EMR.*

STEP 3: Reception staff see the flag and provide the intake form. If the client needs extra support, they meet with CHW 1-on-1.

STEP 4: Admin staff write the client ID on each collected form. Data will be inputted into the EMR at a later time.

STEP 5: In an excel file, track all flagged appointments and if sociodemographic data was collected. If flagged client did not have SDD completed, note if appointment was cancelled/rescheduled.

*in Step 2b, use this tracking sheet to cross reference if SDD form was recently collected in order to avoid asking client to fill form again.

Collected vs Flagged Tracking Sheet

Date	PS Chart #	SDD collected?	Notes
January 15th 2020	12345	Yes	
January 15th 2020	12347	No	Appt rescheduled
January 15th 2020	12348	No	Missing back page – will need to flag again