



## Values Exercise

*Scenario: You, the Coordinator, are the only one in the clinic today. A school staff member comes in looking for help with a potential patient who has complicated needs. Some of the services may be provided at the SBHC; others may require a referral to an external resource.*

What is the first thing that comes to my mind?
What is my biggest priority?
What do I want to accomplish?
What do each of my previous answers mean in practice in the context of my work?
What's an example of what this looks like to me?

## Worksheet: Key School Staff

<b>Role/Responsibility</b>	<b>Position/Job Title</b>	<b>Name/Contact Details</b>	<b>What to Ask Them About</b>
Head of school	<i>Principal</i>		
Contracts/Leases			
School health	<i>School Nurse</i>		
Instructional assistant supervisor			
School office lead			
Attendance			
New student enrollment			
Academic need(s)			
Student discipline			
Social/emotional and mental health			
Special education			
Janitorial			
Building and IT network access			
Family support/resources			
Student truancy			
Transportation			
Student careers			
Nutrition services			
Athletics			
Health education			
Special education			
English Language Learners (ELL)			
After school program			
Associated Student Body (ASB)			
McKinney-Vento			

## Worksheet: Your Clinic's Frequently Asked Questions (FAQs)

You'll come across some questions that you'll have to answer frequently, especially when working with the school and other community partners. It's important to talk to your team and program leaders to make sure everyone is saying the same thing when these common questions come up. Please provide your own answers to the questions below, as SBHCs in the state have different ways of doing things.

What's the difference between the School Nurse and the SBHC? ( <a href="#">See Additional Links and Resources, Link A</a> )
How is the SBHC funded?
What services are offered at the SBHC?
Who can be seen at the SBHC?
How do I make a referral to your SBHC?
Are services free at your SBHC?
Can you take same day walk-in appointments?
How do you register for the clinic? ( <i>Online, in person, etc.</i> )
<b>Fill in your own FAQs below</b>

## Worksheet: Community Partners

Organization Name	Name/Contact Details	Scope of their services
		<i>Sports, food assistance, financial assistance, arts education, fundraising</i>

## Tracking SBHC referrals

As you set up your referral processes and workflow, consider how you will keep track of referrals. Implement a system within your SBHC team (see examples in [Appendix 2, Section C](#)) and maintain a referral tracking tool (see [Appendix 2, Section B](#)).

Staff Person	Role in Managing Referrals	Key Questions
		<ul style="list-style-type: none"> <li>• Do referral management roles change depending on the referral method or type of referral (i.e.: mental health referral versus dental referral)?</li> <li>• What happens if a student declines services?</li> </ul>

### Worksheet: Referral System Overview

✓	Referral Method	How do they make a referral?
	Patient self-referral	
	Parent/guardian referral	
	School staff referral	
	Community partner referral	
	Other	

## Worksheet: Clinic Contacts/Accounts Management

	Role/Job Title/Organization	Name/Contact Details
Contact for billing/ coding issues		
Contact at nearest community clinic		
Call center contact		
Lab contact		
Interoffice delivery contact		
Technical support		
Waste management (Biohazard pick up)		
<b><i>Fill in other clinic/account management contacts</i></b>		

## Worksheet: Clarifying Roles and Responsibilities

Divide the clinic tasks between the Coordinator and your program leadership. You can use the following list as a starting point but add any additional tasks as necessary. Some tasks may involve multiple roles.

- Attend student support meetings
- Attendance communication
- Contract/Lease management
- Courier needs
- Custodial communication
- Daily vaccine fridge temperature checks
- Equipment maintenance
- Infection control/compliance
- Insurance enrollment/eligibility
- Interpersonal conflicts
- IT support
- Medical supply ordering
- New patient registration
- Office supply ordering
- Referrals from school staff
- Relationships with community-based organizations
- Reporting/data
- Schedule management
- School leadership check-ins
- Scope of services
- Vaccine ordering and receiving
- Vaccines for Children (VFC) renewal
- WA-IIS record reconciliation
- Workflows and procedures

<b>Clinic Coordinator</b>	<b>Program Manager</b>	<b>Other Staff (Specify)</b>



## Worksheet: Tasking Cheat Sheet

Task	Who to Task	How and What to Include
<i>Example: Provider scheduling blocks</i>	<i>Clinic Coordinator</i>	<i>Email with subject line: "Scheduling request time frame", including travel time. If within the week, instant message to notify of email.</i>
Provider scheduling blocks		
EHR vaccine inventory		
WA-IIS errors		
Ordering vaccines		
Vaccine incidents		
Ordering medical supplies		
Ordering office supplies		
Specific purchasing requests		
Insurance application		
Workflow questions		
Referrals to specialists		
Registration updates/errors		
Patient scheduling errors		
IT issues		
Request for program partnership		
Feedback from the school		
<b>Fill in other tasks</b>		



## Worksheet: Beginning of New School Year Checklist

If possible, prioritize these items in August before the school year starts. If necessary, do at the end of the previous school year. Review annually and update as needed.

### Intentional start with school staff

- Ask Principal for a short amount of time to do a brief training and introduction at the first available all-staff meeting
- Prepare a quick guide to clinic services to give out to staff (electronic and paper)
- Schedule periodic check-ins with school staff throughout the year to go over FAQs and address questions

### Forms and materials

Prepare and/or review the following:

- Referral forms
  - Paper copies (if relevant)
  - Electronic version (have previous irrelevant entries been archived and cleared?)
- Registration packets
  - Any documents that are year sensitive have been updated
  - Translations into key languages
  - Review any updates
- Outreach materials
  - Brochures/business cards
  - Incentives for new students

### Administrative

- Remove paperwork for patients who have transferred schools/graduated
- Arrange for deep clean of clinic

### Outreach

- Arrange to table or be present at:
  - Back-to-School nights (school-organized or community organized)
  - New student orientation
  - Resource nights
- Who is the point person for the events?













# Worksheet: Plan-Do-Study-Act Tool

**PLAN**

What questions do you want this test to answer?

Briefly describe the test:

What do you predict will happen?

**PLAN**

List the tasks necessary to complete this test (what)	Person responsible (who)	When	Where
1.			
2.			
3.			
4.			
5.			

How will you know that the change is an improvement? Plan for collection of data:

**DO:** Test the changes.

Was the cycle carried out as planned?  Yes  No

Record data and observations.

What did you observe that was not part of our plan?

**STUDY:**

Did the results match your predictions?  Yes  No

Compare the result of your test to your previous performance:

What did you learn?

**ACT:** Decide to Abandon, Adapt, Adopt

Abandon: Discard this change idea and try a different one.

Adapt: Improve the change and continue testing.

Describe what you will change in your next PDSA

Adopt: Select changes to implement on a larger scale and develop an implementation plan and plan for sustainability.

