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# Learning Collaborative (LC) 3: Providing Training for Social Needs Screening & Referral

February 29, 2024

Social Determinants of Health (SDOH): Social Needs Screening &  
Referral Measure Technical Assistance (TA)



# Welcome & Introductions

In the Zoom chat, please introduce yourself with the following:


- Your name & pronouns
- CCO affiliation
- In a few words, how are you feeling about the current state of access to training for SDOH screening and referral for staff in your region?



**Please include your CCO in your Zoom name**

# Learning Collaborative Goals

- Surface strategies to advance equity in metric implementation
- Provide venue for shared learning
- Identify & share promising approaches to metric implementation
- Discuss barriers & strategies for overcoming barriers
- Identify individual TA needs

 **We encourage you to have your cameras on, if possible, especially in the breakout groups**

# Today's Topics & Goals

## Today's Topics:

- Measure requirements
- Social needs training resources
- Discussion kick off: Kellee Rosales, ORPRN
- Breakout discussion

## Today's Goals:

- CCOs understand metric requirements and the importance of various training approaches for social needs screening and referral practices.
- CCOs share approaches to ensure training resources for patient centered screening are accessible to all screeners, and that practices are consistently applied.

**Poll**



# Measure Requirements – Element 4

## 4. Assess training of staff who conduct screening (MY 2024 & Review in MY 2025)

**Intent:** CCOs ensure that partners – including contractors, in-network providers, and CBO partners – provide training to staff who conduct screenings.

**The element is met if** the CCO reviews the training policies of its partners and, if needed, provides training resources to partners.

**Examples of meeting this element:** The CCO surveys its partners about training policies and practices. If a partner has a gap in policies or practices, the CCO suggests resources, such as the CCO's training policy as a model or training opportunities such as webinars on trauma-informed screening practices.

# Social Needs Screening Training Topics

- When considering resources to share with partners, **remember that written training topics and policies must include:**
  - Patient engagement
  - Empathic inquiry
  - Motivational interviewing
  - Trauma-informed practices
  - Cultural responsiveness
  - Equitable practices
- The training policy should be clear that members may decline to be screened or to accept referrals.
- **Refer to CCO written guidance on training**, such as a policy manual shared with staff and partners or an online website or application that includes a dedicated section on assessing members' unmet social needs ([see Element 2](#)).

# Motivational Interviewing & Empathic Inquiry

## Use Motivational Interviewing and Empathic Inquiry principles to...

- Relate to patients from a place of nonjudgment and curiosity
- Create an atmosphere where patients feel heard and valued
- Actively listen to understand the individual's perspective
- Evoke affirm, and center patient goals and priorities
- Express genuine empathy for their challenges
- Explore the gaps between their current situation and desired outcomes
- Foster collaborative decision-making by involving patient in determining next steps
- Use patient priorities to determine subsequent care planning and delivery



# Trauma Informed Care

Trauma informed care is an approach that recognizes the widespread impact of trauma on individuals and communities and aims to create an environment that promotes **safety, trust, and empowerment**

Integration of appropriate training can enhance the effectiveness and sensitivity of the screening process

## Trauma informed practices:

- 1) **Realize** how trauma affects the experiences and behaviors of the family, group, organizations, communities, and individuals.
- 2) **Recognize** the signs of trauma. These signs may be specific to gender, age, or setting.
- 3) **Respond** using language, behaviors, and policies that respect children, adults, and staff members who have experienced traumatic events.
- 4) **Resist** re-traumatization.

# Social Needs Screening Training Resources

- Oregon Health Authority (OHA) & Oregon-Rural Practice-Based Research Network (ORPRN) developed a compilation of free training resources & considerations to support successful metric implementation
- All trainings are virtual & asynchronous

## ★ SDOH Screening & Referral Metric: Social Needs Training Resources

### SDOH Screening & Referral Metric: Social Needs Training Resources

Developed by the Oregon Rural Practice-based Research Network (ORPRN) and the Oregon Health Authority Transformation Center to support implementation of the SDOH Screening and Referral Incentive Metric.

To meet must-pass element 2, CCOs must establish written policies on training. The element is met if the CCO establishes and maintains a written policy on the training for CCO staff members and shares the policy with partners conducting social needs screening. Training topics addressed must include patient engagement, empathic inquiry and motivational interviewing, trauma-informed practices, and cultural responsiveness and equitable practices. Below is a compilation of free training resources and topic-specific social needs screening resources, along with considerations to support successful implementation.

Foundational SDOH Metric Training Resources			
Training Topic	Organization / Training Resource	Training Name & Description	Time
Trauma-Informed Care	Trauma-Informed Oregon	<ol style="list-style-type: none"> <li>1. <a href="#">Trauma Informed Oregon's Introduction to Trauma Informed Care (TIC) Online Training Modules</a></li> <li>2. <a href="#">Foundations of Trauma Informed Care Videos</a></li> </ol>	<ol style="list-style-type: none"> <li>1. Modules range from 15-30 min</li> <li>2. Modules range from 8-13 min</li> </ol>

**Considerations:** Trauma-Informed Care (TIC) is an approach that recognizes the widespread impact of trauma on individuals and communities and aims to create an environment that promotes safety, trust, and empowerment. Integrating Trauma-informed Care principles into social needs screening can enhance the effectiveness and sensitivity of the screening process and resist re-traumatization.

**Trauma-Informed Practices:** (1) Realize how trauma affects the experiences and behaviors of the family, groups, organizations, communities, and individuals. (2) Recognize the signs of trauma. These signs may be specific to gender, age, or setting. (3) Respond using language, behaviors, and policies that respect children, adults, and staff members who have experienced traumatic events. (4) Resist re-traumatization. Stressful environments or specific practices can trigger painful memories, interfering with recovery and well-being. Organizations must review and change practices as needed to avoid re-traumatization. As you review these materials, think about how you might apply the principles of TIC as you address individuals in the social needs screening and referral process.

# Discussion Kick-Off

Kellee Rosales CHW (she/her), EOCCO

# Breakout Discussion

You will be randomly assigned to a breakout room. In your breakout rooms, you will have 20 minutes to discuss:

- How do you plan to systematically review the training policies of your partners?
- What are your approaches to ensure training resources are accessible to all screeners?
- How will you evaluate the consistency of training for social needs screening?

 **Please designate one colleague from your breakout group to take notes & share at least 1 take away with the large group.**

# Share-Out & Group Discussion

# Next Steps

- ★ Check out the [SDOH Screening & Referral Metric: Social Needs Training Resources](#) document!

## Upcoming Metric TA Opportunities

- **Café Connect** – Data Coordination Between Social Services & CCOs
  - March 18, 2024, 1 p.m. PST – [Registration Link](#)
- **Office Hour** – Aligning SDOH Metric with the 1115 Waiver & Other Initiatives
  - April 12, 2024, 10 a.m. PST – [Registration Link](#)
- **Learning Collaborative** – Addressing Referral Resources & Gaps through use of REALD
  - April 25, 2024, 3 p.m. PST – [Registration Link](#)

# Measure Contacts

## Technical Assistance Team

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## Oregon Health Authority Team

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# 2023 – 2024 SDOH Metric TA Structure

## Café Connect Event Series

**Audience:** CCOs, CBOs, & clinical providers

- Hear from experts in the field
- Opportunity for CCOs, CBOs, and providers to engage in dialogue

**Upcoming Topic: (Mar 18)**  
Data Coordination Between Social Services & CCOs – [Register Here](#)

## Bi-Monthly Office Hours

**Audience:** CCO Measure Leads

- Talk through questions with TA providers and other CCOs
- Structured resources on a specific topic area

**Upcoming Topic: (Apr 12)**  
Aligning SDOH Metric with the 1115 Waiver & Other Initiatives – [Register Here](#)

## Learning Collaboratives (LCs)

**Audience:** CCO Measure Leads

- Share strategies and learn from one another
- Topics will center high priority needs and metric must-pass elements

**Upcoming Topic: (Apr 25)**  
Addressing Referral Resources & Gaps + REALD – [Register Here](#)

## Individualized Technical Assistance

- One-on-one technical assistance is available to all CCO staff responsible for metric implementation
- Support tailored to the needs of individual CCOs
- Contact **Claire Londagin** ([londagin@ohsu.edu](mailto:londagin@ohsu.edu)) for individualized TA