

# HIV, STIs, Viral Hepatitis and LTBI Routine Screening Toolkit: Patient intake

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## Step 2: Patient intake

Frequently, sporadic visits to the emergency department or multiple community health centers might be a patient's only interaction with the health care system and can lead to challenges in health record traceability and continuity of care. Obtaining medical records to guide the clinical decision-making process can pose a challenge especially among patients who are uninsured and underinsured and the primary care provider.

Additionally, patient discomfort with discussing sexual history negatively impacts access to care, disrupts important risk assessment conversations and often prevents test consent. Letting the patient play a larger role in the screening process by actively engaging them in the intake process in conjunction with automated support, can help give a better view of the patient's screening needs.

## Critical considerations at this stage

- Incomplete medical history stored across multiple care locations
- EHR excludes patient records from other health care systems
- Inconsistent demographic information
- Patient discomfort in discussing personal history
- Staff discomfort in discussing personal history with patients

## What can you do?

### **1** Involve patients in the screening process

Proactive engagement with patients at intake, through written or tablet surveys, allows clinics to gather information that will expedite the screening workflow, enable privacy and help form a more robust patient record. Front desk staff should be trained to provide patients with self-assessments. Patient navigators can assist with self-assessments, if available.

## Related resources

**Self-assessment templates:** The following links provide you with examples of self-assessment templates that you can leverage in your practice.

- HIV
- STIs
- Viral hepatitis
- LTBI

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## Register patients into EHR portals

Registering patients into EHR portals such as MyChart helps connect visitation data over time and keeps patients informed of the need for return visits. They also have ownership over their health information, which can go with them wherever they go.

## Related resources

- AMA STEPS Forward®: Patient Portal Optimization: This training module from AMA STEPS Forward® outlines how patient portals can help both the care team and patients and how you can encourage your patients to enroll.

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## Collect comprehensive patient demographics and sexual history

Developing a standardized method to collecting patient demographics, including race and ethnicity data, and sexual history can not only help you understand the screening needs for your patient, but can also be a mechanism to help identify quality improvement initiatives related to population health and improve health equity in your practice. Patient discomfort and stigma surrounding sexual history negatively impacts access to care and oftentimes disrupts screening consent. Equipping clinicians in your organization with tools and resources to capture this information as part of routine in an accurate and sensitive manner will help increase screening.

## Related resources

- **AMA STEPS Forward®: Collecting Patient Data—Improving Health Equity in Your Practice:** This training module from AMA STEPS Forward® highlights why it is important to collect patient race and ethnicity data and how you can establish standards for and train your staff to collect this data.
- **Discussing Sexual Health with Your Patients:** The resource from the CDC outlines strategies and tips for facilitating discussions with and asking patients sensitive questions related to sexual health.
- **A Guide to Taking a Sexual History:** This CDC resource offers a framework for discussing sexual health issues to help health care clinicians complete the overall picture of their patient’s health.
- **HIV Prevention and Care for the Transgender Population:** This CDC resource outlines information and tips for health care professionals to facilitate the disclosure of sexual history information from transgender patients where obtaining this information is particularly sensitive due to potential prior experiences of discrimination in health care.

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**Define clear approach and team member roles for routine screening**

A lack of a clear protocol for routine screening, compounded by an overwhelming demand for care, causes staff roles to blur. A clear routine screening plan, streamlined by EHR support, can help clarify care team member roles.

**Related resources**

- **Streamlined testing cascade (refer to green bubbles):** This set of infographics outlines the testing cascade for each infectious disease in this toolkit, including opportunities to optimize, and can be used as a tool to help clarify care team member roles at each step as well as define a clear post-test protocol.
  - Routine Screening Toolkit: Streamlined Testing Cascade, HCV (PDF)
  - Routine Screening Toolkit: Streamlined Testing Cascade, HIV (PDF)
  - Routine Screening Toolkit: Streamlined Testing Cascade, LTBI (PDF)
  - Routine Screening Toolkit: Streamlined Testing Cascade, STI (PDF)
- **Care team members roles and responsibilities (PDF):** This resource outlines potential care team member roles in your organization and the part that they play in the routine screening process.

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## **Additional toolkit steps and related materials**

The HIV, STIs, Viral Hepatitis and LTBI Routine Screening Toolkit is organized across the screening continuum and offers helpful resources and best practices for the care team.