**Clinic Assessment Tool**

Colorectal Cancer Screening

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| **Health System:** Click or tap here to enter text. **Clinic Assessed:** Click or tap here to enter text. |
| **Name of Person Completing Assessment**: Click or tap here to enter text. |
| **Title:** Click or tap here to enter text. |
| **Part I - Introduction****Clinic Characteristics**  |
| 1 | **Type of facility being assessed:**[ ]  FQHC[ ]  FQHC look-alike[ ]  Hospital[ ]  Other Primary Care |  |
| 2 | **Number of facilities/clinics within the larger health system:**Click or tap here to enter text. |  |
| 3 | **Community characteristics:**[ ]  Urban (population of 50,000+)[ ]  Suburban (30-49% commuter flow to urban)[ ]  Large rural (population of 10,000 – 49,000)[ ]  Small town/isolated rural (population below 10,000) |  |
| 4 | **Are there currently planned or ongoing quality improvement initiatives, other than this one for CRC?** [ ]  Yes [ ]  Not at this time**⮩If yes, provide a brief description of other QI initiatives:** Click or tap here to enter text. |  |
| 5 | **Are current policies/procedures already in place for CRC screening?**  [ ]  Yes [ ]  Not at this time**⮩If yes, provide a brief description:** Click or tap here to enter text. |  |
| 6 | **Are members of the health care team authorized to refer a patient to CRC screening without having to first obtain a physician order (standing orders)?**  [ ]  Yes [ ]  Not at this time |  |

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| **Part II – Work Flow****Patient Identification** |
| 8 | **Is there a clinic-wide protocol to determine who is eligible for CRC screening?** [ ]  Yes, there is a clinic-wide standard or protocol to determine who is eligible for CRC screening. [ ]  No, eligibility is determined on a case-by-case basis by individual providers. [ ]  Other: Click or tap here to enter text.**⮩If yes, which criteria are used to determine eligibility for CRC screening? Check all that apply.**[ ]  Age[ ]  Risk (family history, other health conditions, etc.)[ ]  Last completed screening result[ ]  Other: Click or tap here to enter text. |  |
| 9 | **Which of the following processes are used to identify patients due for CRC screening? Check all that apply.**[ ]  Huddle reports / Pre-Visit Checklist[ ]  E.H.R. alerts for providers[ ]  CRC screening specific registry / EHR-generated patient lists[ ]  Other: Click or tap here to enter text. [ ]  None at this time |  |
| 10 | **Is a specific clinical team member responsible for identifying whether patients are due for screening?**[ ]  Yes[ ]  Not at this time**⮩If yes, please describe which team member is responsible:** Click or tap here to enter text. |  |
| **Patient Visit** |
| 11 | **Are any of the following CRC-related educational materials available for patients? Check all that apply.**[ ]  Brochures/handouts[ ]  Videos in waiting rooms, etc. [ ]  Posters or flyers in patient spaces[ ]  Other: Click or tap here to enter text.[ ]  None at this time |  |
| 12 | **Do staff routinely ask about previous CRC screenings if none are known or documented?**[ ]  Yes [ ]  Not at this time**⮩If yes, do staff attempt to obtain results for past screening tests?**[ ]  Yes [ ]  Not at this time |  |
| 13 | **How would you describe the prevailing decision-making process for CRC screening at the clinic for average risk patients? (FIT-First, provider preference, patient preference, etc.)** Click or tap here to enter text. |  |
| 14 | **Is there a specific policy addressing patient refusal of CRC screening?**[ ]  Yes[ ]  Not at this time |  |
| 15 | **What sort of education is provided to patients when recommended CRC screening? Check all that apply.**[ ]  How to complete and return a FIT test[ ]  Who to contact to schedule the colonoscopy[ ]  Information about colonoscopy procedure/prep[ ]  Information about next steps in case of an abnormal result[ ]  Other: Click or tap here to enter text.[ ]  None at this time |  |
| 16 | **Which team member(s) are responsible for educating patients on how to complete a screening test?** Click or tap here to enter text. |  |
| **Post-Visit/Patient Navigation**Processes in terms of screening referral, results tracking and follow-up. |
| 17 | **Does the clinic offer a fully navigated experience for patients who need help completing their CRC screening?** [ ]  Yes[ ]  Not at this time**⮩If yes, please describe the following:** * **Staff who provide navigation (e.g. position title(s))**

Click or tap here to enter text.* **# of FTE navigators**

Click or tap here to enter text. |  |
| 18 | **Which of the following are navigators/clinic staff trained to address? Check all that apply.** [ ]  Scheduling of the screening colonoscopy[ ]  Follow-up colonoscopy (positive FIT)[ ]  Reviewing prep instructions [ ]  What happens when patients are uninsured/underinsured[ ]  Information on nearby specialists that providers will refer to[ ]  Knowledge of typical wait-time for receiving a colonoscopy☐ Coordinating transportation[ ]  Other/Not at this time |  |
| 19 | **Is a process in-place for systematically identifying and following-up with patients who have not completed a previously ordered screening test?**[ ]  Yes[ ]  Not at this time**⮩If yes, describe the process:** Click or tap here to enter text. |  |
| 20 | **Is a process in-place for contacting specialists to confirm receipt of screening and obtain a copy of the results (i.e. “closing the referral loop”)?**[ ]  Yes[ ]  Not at this time**⮩If yes, describe the process:** Click or tap here to enter text. |  |

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| **Part III – EHR Data****Documenting Patient Data**How the clinic captures data in order to track referrals and calculate reliable CRC screening rates.  |
| 21 | **What EHR vendor does the clinic use?**Click or tap here to enter text. |  |
| 22 | **Does the clinic use any of the following EHR overlays, dashboards or population health tools?**[ ]  Azara DRVS[ ]  Aledade[ ]  Other: Click or tap here to enter text. |  |
| 23 | **Are the following currently documented in the EHR? Check all that apply.** [ ]  Previous screening results[ ]  Referrals for screening [ ]  Current results[ ]  Patient refusal[ ]  Follow-up needed  |  |
| 24 | **Is data on CRC screening history captured in clickable, structured-data fields or is it within free-text notes?** [ ]  Structured-data fields [ ]  Free text notes |  |
| 25 | **Are screening results from specialists manually entered into the EHR, scanned or imported?** [ ]  Manually entered[ ]  Scanned [ ]  Imported |  |
| 26 | **Is there a standard operating procedure for documenting screening results from specialists in the EHR?**[ ]  Yes[ ]  Not at this time**⮩If yes, describe the process:** Click or tap here to enter text. |  |
| 27 | **Has a medical chart review ever been conducted to validate the clinic’s EHR-generated CRC screening rate?**[ ]  Yes [ ]  No**⮩If yes, when was the chart review conducted and how did the results compare to the EHR-generated rate?**Click or tap here to enter text. |  |
| **Process Improvement** Current capacity to use EHR data for process improvement.  |
| 28 | **Is the EHR regularly used for any of the following purposes? Check all that apply.** [ ]  Identify patients due for screening[ ]  Pre-screen patient records to facilitate provider recommendations[ ]  FIT test tracking[ ]  Tracking referrals to specialists[ ]  None at this time |  |
| 29 | **Does the clinic have capacity to modify/configure the EHR to run specific reports as needed?**[ ]  Yes[ ]  Not at this time.  |  |
| 30 | **Is the clinic currently able to generate the following CRC-specific reports? Check all that apply.**[ ]  stool tests distributed vs. returned[ ]  all colonoscopies referred vs. completed[ ]  follow-up colonoscopies referred vs. completed |  |
| 31 | **At which level is the health center able to “drill drown” or disaggregate screening rates? Check all that apply.**[ ]  By individual provider panel[ ]  By care team[ ]  By individual clinic[ ]  By patient’s insurance status[ ]  Other: Click or tap here to enter text. [ ]  Currently unable to disaggregate CRC screening  |  |
| 32 | **Which quality standards reporting systems does the clinic submit data to?**[ ]  UDS[ ]  HEDIS[ ]  Other: Click or tap here to enter text. |  |
| 33 | **Which metric does the clinic use to report CRC screening data?** [ ]  NQF[ ]  UDS[ ]  Other: Click or tap here to enter text. |  |
| 34 | **Please discuss how CRC screening data is currently used by the clinic for quality improvement:** Click or tap here to enter text. |  |
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| **Part IV: Current Implementation of Recommended Strategies** **Provider Assessment and Feedback** Provider assessment and feedback interventions evaluate provider performance in delivering or offering screening to patients (assessment) and present providers with information about their performance in providing screening services (feedback). A provider can be generalized to any clinical staff providing direct care to patients.  |
| 35 | **Is a process in-place to regularly assess the number of eligible patients who are recommended CRC screening by each provider?**  [ ]  Yes  [ ]  Not at this time |  |
| 36 | **Is a process in place to regularly assess the number of eligible patients who complete a CRC screening test?** [ ]  Yes  [ ]  Not at this time |  |
| 37 | **If yes to either of the above, who is being assessed (i.e. at what level is the data being aggregated)?** **Check all that apply.** [ ]  Individual providers[ ]  Clinic teams[ ]  Clinic sites[ ]  N/A |  |
| 38 | **What format is currently used to provide CRC screening feedback to providers? Check all that apply.** [ ]  Provider score cards[ ]  Provider rankings / Competition[ ]  Comparison to target rate[ ]  Other: Click or tap here to enter text.[ ]  Feedback not given at this time**⮩If applicable, how often is this feedback given (monthly/quarterly/etc.)?**Click or tap here to enter text. |  |
| 39 | **How is quality data on CRC screening discussed with providers/clinic staff? Check all that apply.**[ ]  Written reports[ ]  Interactive meetings[ ]  Other: Click or tap here to enter text.[ ]  Not discussed at this time |  |
| 40 | **If applicable, please provide examples of how quality improvement is currently incentivized among providers:**   Click or tap here to enter text.  |  |
| **Provider Reminders**Provider reminders inform health care providers it is time for a patient’s cancer screening test or that a client is overdue for screening. Provider reminders are sometimes referred to as “alerts.” |
| 41 | **How are providers alerted that a patient is due or overdue for CRC screening? Check all that apply.**[ ]  EHR alert[ ]  Manual flag/note on chart[ ]  Verbally, during daily huddles[ ]  Other: Click or tap here to enter text.[ ]  No provider reminders/alerts at this time |  |
| 42 | **If provider reminders are in-place, provide a description of the process (how it is delivered, who receives alert, any action required to close out the alert/tracking, etc.):**Click or tap here to enter text. |  |
| **Patient Reminders**Patient reminders are written (letter, postcard, email) or phone messages (including robocalls) that advise patients when they are due for screening.  |
| 43 | **Do patients receive alerts when they are due or overdue for a CRC screening (outside of a doctor’s visit)?**  [ ]  Yes  [ ]  Not at this time**⮩If yes, how are patients alerted when due or overdue for CRC screening?**[ ]  Letter/postcard[ ]  Text message[ ]  Phone call[ ]  Patient portal message[ ]  Other: Click or tap here to enter text.[ ]  N/A |  |
| 44 | **If patient reminders are in-place, please describe how the method was determined and what information is relayed to patients:** Click or tap here to enter text. |  |
| 45 | **If patient reminders are in-place, please describe the reminder process until the screening test is completed (How many alerts will the patient receive? At what interval? By whom?):** Click or tap here to enter text. |  |
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| **Reducing Structural Barriers**Structural barriers are non-monetary obstacles that make it difficult for patients to access screening. Such barriers may include distance from screening location, limited hours of operation, lack of translation services or limited ability to navigate healthcare system.  |
| 46 | **Is there a formal or informal process in place for assessing/identifying obstacles to screening completion?**  [ ]  Yes  [ ]  Not at this time**⮩If yes, please describe the process:** Click or tap here to enter text. |  |
| 47 | **What obstacles for patients completing CRC screening have been identified?** Click or tap here to enter text. |  |
| 48 | **Are there any efforts underway to reduce structural barriers around CRC screening?** [ ]  Yes  [ ]  Not at this time**⮩If yes, please describe which barriers are being addressed and how:** Click or tap here to enter text. |  |

**End of Clinic Assessment**