



Navigator Conversation Guide for Follow Up of the Social Needs Questionnaire

Guide Purpose Statement: The purpose of this guide is to prepare asthma navigators for having a follow up conversation with families related to their responses on the Social Needs Questionnaire and providing support for social needs identified. This guide outlines the parts of the conversation and provides sample wording. We expect that each conversation will include the steps described, but understand each conversation will be a little different based on the needs, preferences and circumstances of the family you are working with. We hope the sample wording provides ideas for developing your personal approach to these conversations. At the end of the guide we discuss common challenges during conversations about Social Needs questionnaire responses and when providing resource referrals. We present possible solutions and sample responses for challenges. We expect you will encounter additional challenges and that the solutions and sample responses may not always work. As we continue to work together, we will support you in addressing challenges and update the guide as needed.

Step 1: Introduce screener

- a. Sample introduction: *"Our next step during this visit is going to be screening for any social needs that might affect your ability to care for your child's asthma. We know there are a lot of reasons why managing asthma can be challenging and the things we ask about on the questionnaire often make it more difficult for families to do so."*
- b. Read through the confidentiality statement on the screener: *"This information is being collected to help your family get the resources you need. This form is confidential and the information you share will not be shared with anyone else."*

Step 2: Fill out screener

- a. Consider asking about literacy/ability to fill it out
- b. They will fill out the paper version on their own

Step 3: Set the stage for the follow up conversation

- a. Sample conversation introduction: *"Thank you for completing the social needs questionnaire. Is it ok if we spend a few minutes talking about your answers on the questionnaire? I understand that our talk today might be uncomfortable so please feel free to let me know if you do not feel comfortable."*
- b. Consider asking: *"Do you have any concerns or questions before we get started?"*

Step 4: Review positive answers in the section where families indicate they want to be connected to resources AND provided resource referrals as applicable

- a. Sample wording: *"I see you circled that you want us to help with challenges with _____. Tell me more about your needs in that area."*
- b. Provide information on available resources to address these needs.

- c. If they screened positive for three or more, encourage them to help you prioritize
 - Sample wording: *“what is your top priority/what is most needed/what is most important to get help with at this time?”*

Step 5: Review positive answers but don't want to be connected to resources

- a. Sample wording: *“I see you circled that health insurance is a challenge, but you don't need help with that today. Can you share a little bit more about that?”*
- b. If this discussion leads to the family stating they would like help in that area, then provide information on available resources.

Step 4: Review negative answers

- a. Sample wording if they have both positive and negative answers: *“I see you are not currently facing challenges in any other areas that we asked about on this questionnaire. Now that we have talked about resources in other areas, does that bring up any concern areas that you might not have marked on the questionnaire?”*
- b. Sample wording if they DO NOT have any positive answer: *“I see you didn't mark that you have any needs in the areas we asked about on the questionnaire. We have found that some people discover or think about needs after they have finished the questionnaire, have you thought of any challenges you are facing in managing your child's asthma?”*
- c. If this discussion leads to the family stating they would like help in that area, then connect to resources.

Step 5: Ask if there are any additional needs

- a. Sample wording: *“Today, we asked about challenges where we know we can offer you some help. There may be other things that can make caring for a child with asthma hard. If you'd like to tell us about other challenges, we are here to listen and help if we can, but we might not be able to offer support in every area.”*
- b. If this discussion leads to family stating they would like help in an area for which we are prepared to provide resources then provide information on available resources
- c. If this discussion leads to family stating they would like help in an area that is out of scope of the project empathize with the family and if applicable encourage them to ask other community organizations (e.g. school, clinics, churches, their PCP, school resource liaison) if they may be able to help them and to use their social supports to help them cope.

Step 6: Closing the conversation

- a. Sample closing: *I appreciate you sharing this information with me as I know that sometimes it can be hard to ask for help. I hope that the information I provided today will be of help to you and your family. I will be following up with you to ask if the referrals/resources were helpful but if you have trouble with any of these referrals please contact me.*



Addressing Common Challenges During Follow Up of the Social Needs Questionnaire

1. Family has marked down many needs

- a. Determine their highest priority needs (at most 2-3) and try and address those. Schedule another conversation in a month to give the family time to work on prior referrals. In the additional conversation you can determine if they have followed up and if they still want help in the other areas they have marked
- b. Sample wording: *"I see you have marked you need help in _____ areas. Today I would like to focus on giving you information about addressing your needs in the areas that are most important to you or you are having the most trouble with. What would you most like me to help you with today?"*

2. Screener is not completed

- a. Sample wording: *"I see the screener is not completed; would we be able to go over it together today?"*
- b. If yes, put paper screener in front (of family and navigator) then review each question together. Address according to method before
 - Family can indicate to complete screener themselves but starting by going over it prevents families from having to disclose that they cannot read well enough to complete the screener on their own
- c. If no, *"Thanks for letting me know. Would you mind sharing why you don't want to complete the screener?"*
 - *"On the screener we talk about barriers like health insurance, transportation problems, etc. Do you have any of those type of barriers in caring for your child's asthma?"*
 - *"Is there anything we can help you with today related to barriers to your child's asthma?"*

3. There are no available resources

- a. Sample wording: *"I am sorry there is not help in our community for _____ at this time. I know that is frustrating to hear. If I learn of any assistance in that area in the future I will make sure to let you know." We help you get connected to resources, though we can't guarantee that will be the case."*

4. You are unaware if there are resources

- a. Sample wording: *"I am sorry but I don't have information on assistance for _____ today. I am going to look into this and get back in touch with you in the next 2 weeks. I hope we can get you connected to assistance with _____ though we can't guarantee that will be the case."*

5. Resources are out of scope for this project

- a. Sample wording: *I'm sorry but I don't have resources to help with that because this is focused on the most common barriers to asthma care. However, I can suggest that you talk to someone who can help you [your PCP, school resource provider, etc.]*

6. Family states something like “I tried that resource before and it has never worked”

- a. Ask what is it that didn't work?
- b. That is different info than we have, let me get in touch with them to find out some more information
- c. If relevant: Encourage you to try again because organizations are always changing how they do things [may have different requirements, different people, etc.]
- d. Give another resource from our database

7. Family does not want to pursue resource because of immigration concerns

- a. Sample wording *“Can you tell me more about why you don't want to pursue that?”*
- b. If Medicaid or SNAP, provide encouragement that this can not result in a public charge designation
- c. If applicable, reminder of confidentiality. Sample wording: *The resources we are referring you to are used to working with families who are immigrants and protecting their information*

8. Language barriers to following up on resource referrals

- a. If unsure of language accommodation, call resource and clarify what is available to accommodate

9. The family member does not want to talk about needs or is not opening up

- a. Reiterate confidentiality (doing this to help, want to support, not sharing info)
- b. Sample wording: *“take some time and think about it and next time we meet, we can talk again”*