

Intake Protocol

Operational definitions

Referred patient: A patient that has been referred to the Two Generation Clinic (Two Gen).

Admitted patient: A patient who has provided verbal consent for admission and has an appointment in the Two Generation Clinic.

Intake Procedures

- 1) When a patient is referred to Two Gen Clinic, Aida will add the patient to the “Referral Spreadsheet.” The Referral Spreadsheet is located on the UIC HIPAA compliant Box titled “Two Generation Clinic.” The Referral Spreadsheet includes the patient’s first and last name, date of birth, medical record number, insurance type, date of referral, source of referral, phone number, call date, and disposition (admitted, declined admission). If any information is missing, Aida will add “unknown.”
- 2) Aida will call the referred patient within 24 hours or Monday if it is a weekend. Aida will provide the patient with a description of the Two Gen Clinic, obtain verbal consent for admission, and schedule an appointment.

Steps to schedule an appointment:

1. *Verify insurance status
2. Log into Epic
3. Select appointments
4. Find and select the appropriate patient
5. Select registration
6. Hover over patient information to locate insurance information
7. Schedule appointment
8. Review with patient appointment time and clinic location

*If insurance is not accepted, assist patient in changing their insurance.

- 3) Once the patient becomes an admitted patient (patient provided verbal consent for admission and has an appointment in the Two Gen Clinic), Aida will add the patient to the “Admitted Patient Spreadsheet.” The Admitted Patient Spreadsheet includes the patient’s first and last name, date of birth, medical record number, date of clinic visit, related to another patient, if yes, name of related patient(s), relationship, Family ID, Study ID, primary provider (Aida, Crystal, or Bianca), and comments.
- 4) Aida will contact Abby and request the Study ID(s) and Family ID numbers.
- 5) Abby will assign StudyID(s) and Family ID numbers and upload them to Box using the “Admitted Patient IDs (For Box)” spreadsheet. Abby will maintain a locked (password

protected) version of the Admitted Patient and the Admitted Patient IDs Spreadsheets on the shared drive.

Patient Assignment

- 1) Once a patient is admitted and assigned a Study ID and Family ID, Aida will assign each patient a primary Two Gen provider. Mothers and their children will be assigned the same provider. All patients with known mental health needs and/or are Spanish speaking will be assigned to Aida. All other patients will be divided between Crystal and Bianca.
- 2) Each patient will have a primary provider (Aida, Crystal, or Bianca). Aida will also assign a Community Health Worker/Health Coach (Crystal or Bianca) to each of her patients as a secondary provider. Each Two Gen patient will have a Community Health Worker/Health Coach. Not all patients will need services from the Community Health Worker/Health Coach.
- 3) All providers who identify patients with mental health needs will be referred to Aida. All providers who identify patients with lactation needs will be referred to Shirley.
- 4) Aida will maintain an up-to-date spreadsheet with a list of each Two Gen provider and assigned patients. The list will include any secondary providers. If a patient no longer receives care in Two Gen, Aida will remove the patient from the list.

Example patient providers:

- A patient has a primary provider of Aida and secondary providers of Crystal and Shirley.
(This patient has identified mental health, social care, and lactation needs)
- A patient has a primary provider of Crystal only.
(This patient does not have identified mental health or lactation needs)
- A patient has a primary provider of Bianca and a secondary provider of Shirley.
(This patient has identified lactation needs but does not have identified mental health needs)

Patient Intake/Data Collection Protocol

- 1) Once a primary Two Gen provider is assigned to a patient, the provider will create a new record in both the REDCap “Family” Project and the “Maternal and/or Child” Project as applicable. See REDCap Data Manual for instructions.
- 2) The provider will then call the patient and/or mother of the patient to remind the patient about their upcoming appointment and provide directions if necessary. This call should occur within 24 hours or Monday if it is a Friday after admission to Two Gen.
- 3) The provider also will complete some or all of the intake forms. The provider completes maternal forms for all admitted mothers, child forms for all admitted children, and family forms for each admitted patient. If a dyad (mother and child) is admitted, only one family form is completed. Note, family forms must be completed for each admission. If the forms are not completed during the call, either the provider calls back the mother to complete the forms or completes the forms at the upcoming appointment. All intake information is entered into REDCap.

Note: Given the sensitive nature of the questions, for example the E-Hits, it is important for the provider to use good judgement about the appropriateness of completing the forms both in over the phone and in person.

Below are lists of the forms that should be completed.

Maternal Forms

- Demographic
- Patient Health
- Mental Health History
- Discrimination
- PC-PTSD
- CAGE-AID
- E-HITS
- Edinburgh Postnatal Depression Scale OR PHQ-9

Child

- Demographic
- Patient Health

Family

- Family and Household Profile
- TwoGen Patient information
- SDOH screening tool

Screening Disposition Protocol

Providers must follow the protocol outlined in the “Screening Tool Disposition Procedures.” This document outlines each tool, what is considered a positive screening, the responsible provider, and workflow.