



*Appendix 2.2*

# *Documentation Needs Assessment*

### Instructions:

- This assessment can be completed by anyone at any point in implementing documentation of disability status and accommodation needs. Questions that are not applicable to your organization or clinic can be skipped.
- Please note that Needs Assessments are long processes that require input and commitment from multiple partners within the organization and community to develop a robust and sustainable plan.

### **Current State of Documentation**

This section will help you capture the current state of disability status and accommodation needs documentation at your organization or clinic. The questions will work to identify existing resources, opportunities, and current processes.

### **Background**

1. What is the motivation driving documentation of patients' disability status and accommodation needs?
  - a. Are there specific populations you are focused on (e.g., people with physical disabilities, intellectual or developmental disabilities, etc.)? If so, why?
  - b. Are there certain settings you are focused on (e.g., scheduling, specific specialty appointments, outpatient, inpatient, etc.)? If so, why?
2. What is the specific goal or desired outcome of documenting disability status and accommodation needs?
3. How does documenting disability status and accommodation needs align with current organizational priorities (e.g. quality and safety; health equity; Diversity, Equity, and Inclusion)?
4. What, if any, leadership support is there for documenting disability status and accommodation needs? What levels of support do you need (C-Suite, Director(s), Manager(s), etc.)?
5. What, if any, regulatory requirements are there for documenting disability status (e.g., Joint Commission Excellent Health Outcomes for All Certification, NCQA HEDIS reporting, CMS requirements, state-level requirements etc.)

### Processes

*\*Reminder: Questions that are not applicable can be skipped.*

1. Are there any disability status or accommodation needs questions that are systematically asked of patients across your organization?
2. Are there certain clinics or settings in which disability status and accommodation needs are already documented?
  - a. Are there specific individuals, groups, or departments within your organization who are excelling at documentation?
3. What question(s) about disability needs are systematically asked to patients?
  - a. What questions are documented?
  - b. Are the questions open- or closed-ended?
  - c. Do you have options for “no disability” or “decline to answer”?
  - d. Do you have an option for “other”?
  - e. Is there a “screeener question” or are patients asked a group of disability questions (i.e., ACS questions)?
4. What question(s) about accommodation needs are systematically asked to patients?
  - a. What questions are documented?
  - b. Are the questions open- or closed-ended?
  - c. Do you have an option for “other”?

- d. Is there a “screener question” or are patients asked a group of accommodations questions?
5. What other demographic data is currently collected?
  - a. Race/ethnicity
  - b. Language
  - c. Social determinants of health
  - d. Sexual orientation/gender identity
  - e. Other: \_\_\_\_\_
  - a. Where is this information asked?
  - b. Who is collecting this information?
6. At what point(s) during the delivery of care are disability or accommodation questions asked to patients, if at all? (can select more than one)
  - During scheduling/registration
  - Electronic check-in
  - In-person check-in
  - Exam room
  - Patient portal
  - Other: \_\_\_\_\_
7. Who (what role(s)) is currently collecting patient disability and accommodation needs information?
8. Provide a general, brief description of *how* documenting disability status and accommodations is going at your organization.

### People

1. What existing champions or committees exist to improve disability equity?
2. Who oversees EHR builds and provides approval?
3. Who might be your champions or people already working on this initiative:
  - a. Disability Coordinator (could be: “ADA Coordinator”, “Section 1557 Coordinator” or “Disability Accessibility Coordinator”)
  - b. Clinician champion(s)?
  - c. Practice managers?

d. IT department?

### **Institutional Support:**

1. What initiatives exist for documenting patients' demographics?

### **Identify Gaps and Struggles**

This section will help you to identify existing gaps and opportunities for future initiatives.

Based on the above information, describe your organization's:

1. Strengths: What internal factors exist that could facilitate the documentation of disability status and accommodations in your organization?
2. Weaknesses: What internal barriers exist that inhibit the documentation of disability status and accommodations?
3. Opportunities: What favorable external factors exist that could promote documentation at your organization?
4. Threats: What external factors exist that have the potential to inhibit the success of documentation at your organization?

### **Materials and Resources**

1. Appendix 0.3: Federal Requirements
2. Appendix 0.6: Project Planning
3. Appendix 2.1: Documentation Implementation Teams
4. Appendix 2.6: Documentation Barriers & Strategies
5. Appendix 2.8: Documentation Workflows

*\*Appendices 0.3 and 0.6 can be accessed in the General Resources chapter.*