



Appendix 2.3

Documentation Implementation Planning

The following plan will help guide your work to implement documentation of disability status and accommodation needs at your organization.

INSTRUCTIONS: Use this worksheet to guide your overall organizational/clinic plan for documenting disability status and accommodation needs. For each of the questions below, select or complete all that may apply. Questions that are not applicable may be skipped. The following could serve as a practical worksheet or a thought exercise for your implementation team.

GOALS FOR THIS PLAN:

(Examples: “We plan to implement collection of patients communication disability and accommodation needs.”; “We plan to focus on collecting patients’ disability status during new patient registration.”)

Team

WHO will be on the team to implement collection of disability status and accommodation needs?

WHO will be on the team to monitor and evaluate collection of disability status and accommodation needs?

WHO will coordinate disability and accommodation screening in the clinics, call centers, etc.?

WHAT other institutional partners will you need to engage?

Questions and Electronic Health Record (EHR) Build

WHICH disability status questions or categories will you collect? See Appendix 2.7: *Documentation Disability Questions* or Appendix 2.11: *Documentation Sample Script and Questions Prompts* for a list of recommended questions.

- Mobility
- Visual
- Hearing
- Communication
- Cognition
- Activities of Daily Living
- General screening question
- Other: _____

Will all patients get all questions, or will they get the screening question first?

WHICH accommodations will you include in the EHR build? Refer to Appendix 0.8: *Disability Accommodations Examples* in the General Resources chapter for a list of recommended accommodations.

- Sound amplifier
- Height adjustable examination table
- Assistance with written forms
- Other: _____

WHAT EHR features will you include in your build? See Appendix 2.4: *Documentation EHR Features* for a list of the features.

Methods for Collecting

For each question, consider how methods may or may not differ for initial screening and subsequent verification.

WHICH method of collection will you use?

- Staff documentation screener
- Paper screener at the time of check-in
- E-check-in
- Patient kiosk
- Patient portal
- Other: _____

WHICH patients will be screened?

- All patients 18 and over
- Patients with a particular condition
 - Specify:
- Patients presenting for a health maintenance/preventative care visit
- Patients participating in telehealth or phone appointments
- All patients at all appointment types
- All admitted patients
- Other: _____

WHAT units will screening take place in?

- Outpatient
 - Primary care
 - Specialty care
 - Imaging
 - Other: _____
- Inpatient
- Emergency or urgent care

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- Other: _____

WHO will screen the patients?

- Registration staff
- Scheduler
- Triage nurse
- Front desk staff
- Medical assistant/Nurse
- Provider
- Patient (self-disclose)
- Other: _____

WHEN will screening take place?

- Registration
- Scheduling (online or phone)
- Triage
- E-check-in
- Kiosk
- At check-in
- In the examination room
- At a patient's leisure (e.g., they will be prompted to complete via email)
- Other: _____

HOW will the question be prompted to be completed?

- Registration workflow
- Scheduling workflow
- Send patient email or letter to prompt to complete
- Triage
- E-check-in
- In-person check-in workflow
- Rooming workflow
- Other: _____

HOW often will patients complete/verify the disability status questions? Will all patients verify once completed, or only those with an indicated disability status?

- Once a year
- Once a quarter
- Each visit
- Beginning of hospitalization
- Other: _____

HOW often will patients complete/verify the accommodation needs questions? Will all patients verify once completed, or only those with an indicated accommodation need?

- Once a year
- Once a quarter
- Each visit

- Beginning of hospitalization
- Other: _____

Training and Buy-In

HOW will you inform staff and clinicians that your organization is collecting patients' disability status and accommodation needs?

- Newsletters
- Presentations at staff meetings
- Email announcements
- Other: _____

HOW will you get staff and clinicians excited and increase buy-in for collecting patients' disability status and accommodation needs?

- Training
- Kudos
- Other: _____

WHAT tools will you use to promote completion of the fields?

- EHR tools (e.g., hard stop or yield signs)
- Email reminders
- Reminders at staff meetings
- Other: _____

HOW will you train staff to collect? Choose one or more.

- IT will turn on portal/online check in
- Medical staff will complete online training
 - Internal training materials
 - External training materials
- Monthly check in at staff meeting
- Other: _____

WHERE will training materials be located?

- Internal website
- Other: _____

HOW often will you provide training?

- New employee orientation
- Yearly
- Other: _____

HOW will you inform patients of this screening? Choose one or more.

- Notice by placards/flyers at front desk, waiting room, exam rooms
- Communication during appointment scheduling
- Medical staff will communicate during visit

Other: _____

Privacy and Equity

HOW will you ensure that the process of collecting disability status does not reinforce stigma and discrimination?

- Training staff and clinicians
- Using prompts before the questions
- Monitor patient complaints
- Use the data to track care delivered
- Other: _____

HOW will you protect the security of the data collected?

HOW will you ensure that data isn't used in a problematic way? For example, how will you ensure the data will not be used to justify decisions that impact the quality of care delivered to the patient with a disability, such as avoiding scheduling appointments with certain providers?

- Regular monitoring
- Monitor patient complaints
- Other: _____

HOW will you inform patients about your data security procedures and processes?

- Information posted on website
- Information posted in waiting rooms
- Email to patients
- Other: _____

Planning for Implementation and Evaluation

WHAT is your timeline for implementing collection of disability status and accommodation needs?

HOW will you monitor your progress in collecting disability status and accommodation needs?

- EHR audits
- Meet with staff for feedback
- Other: _____

HOW often will you monitor your progress?

- Weekly
- Monthly
- Quarterly
- Other: _____

HOW will you monitor whether the staff is appropriately asking the questions?

- Observation
- Recordings of calls

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- Other: _____

HOW will you monitor whether your processes align with federal, state, accreditation, etc. standards?

- Work with your organization's Disability Coordinator
- Work with your compliance office
- Other: _____

HOW will you continue to engage leadership support in this work?

- Regular reporting of data
- Highlight positive patient stories
- Other: _____

Use of Data

HOW will you include disability status and accommodation needs in regular reporting?

- Quality dashboards
- Daily/weekly rounds
- Department appointment report
- Scheduling reports
- Other: _____

HOW will you use collected disability status data?

- Monitor quality on the following metrics (e.g., cancer screening rates, vaccination rates, etc.)
- Other: _____

HOW will you use collected accommodations data?

- Monitor what equipment is used
- Identify where in the organization more accommodations are needed
- Other: _____

Resources

WHAT resources will you need?

- FAQ pages
- Training materials
- Scripts
- Other: _____

WHERE will you identify resources needed?

- Internally
 - Team meetings
 - Other departments/clinics
- Externally
 - [Disability Equity Collaborative](#)



- Other: _____

Materials and Resources

1. Appendix 0.8: Disability Accommodations Examples
2. Appendix 2.4: Documentation EHR Features
3. Appendix 2.12: Documentation Training Materials

**Appendix 0.8 can be accessed in the General Resources chapter.*