

Session 2



EPT Program: Health-Related Social Needs (HRSN) Milestone Office Hours Series

Session 2: HRSN Triage & Response Protocols
March 2, 2026

Facilitated by HealthBegins in collaboration with the Population Health Learning Center

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Welcome & Introductions

Our Facilitators



Monica Dedhia, LCSW

Senior Program Manager

Population Health Learning Center



Kathryn Jantz, MSW, MPH

Consultant

Hearthwise Consulting

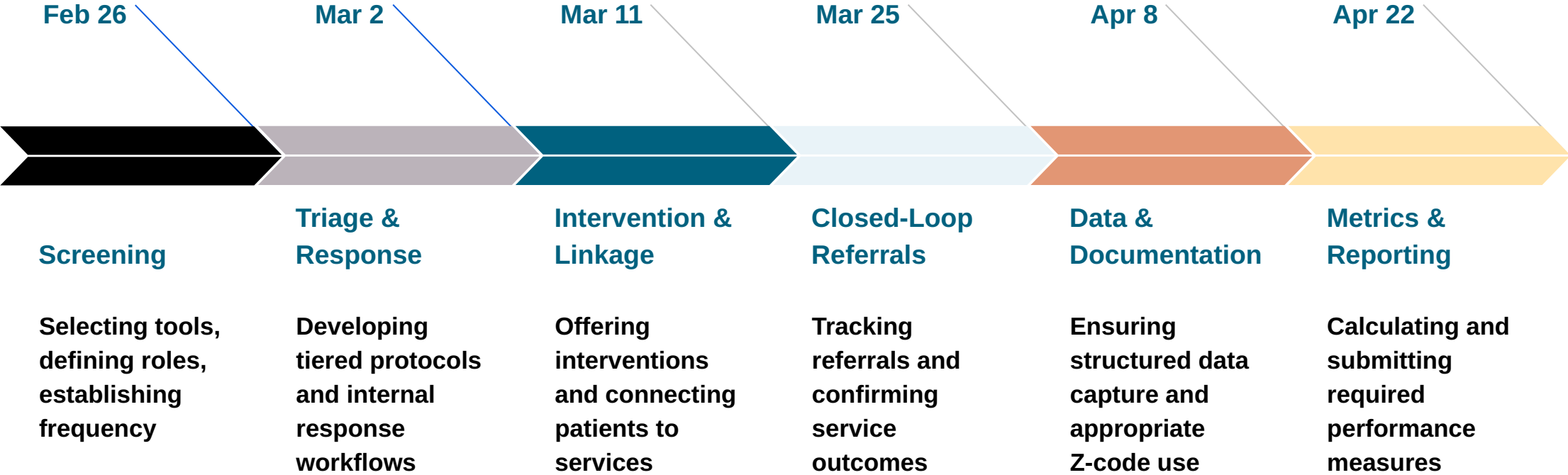
Check In Question

Please put your name, role, organization in the chat and respond to our check in question:

What is your favorite kitchen appliance?

Office Hours Series Overview

This Office Hours Series is structured to support implementation across the full HRSN process:



Session Learning Objectives

Remember: These sessions are designed to help you to meet the requirements in the HRSN Documentation Template & EPT Rubric.

By the end of this session, participants will be able to:

1. **Establish** a triage process to assess needs, including a protocol for assessing safety.
2. **Support** development of a training plan that ensures all staff have the knowledge, skills and attitudes to offer person-centered trauma-informed screening and referral.

Live Polls: Triage & Response Workflow Baseline

To begin the discussion, we invite you to complete five brief poll questions **to understand:**

- Your current approach to triaging positive HRSN screens
- Where and when triage occurs in your workflow
- Whether you prioritize certain needs for faster response
- Who is responsible for assessing and responding to identified needs
- How confident you are in managing safety and mandatory reporting

Triaging is the structured process of determining *how, where, and when* a patient receives assistance based on their identified social needs, available internal and external resources, actions already taken, and their personal priorities and preferences.

It ensures each positive screen is systematically reviewed and routed to the most appropriate intervention, including:

- Separate protocols and response timeframes by need type
- Defined staff responsibilities based on need and acuity

Goal: Ensure a consistent, appropriate response to every positive screen.

- Use strengths-based, trauma-informed approaches
- If safety risk is present, use the **CUES Method**
 - Communicate limits to confidentiality (mandatory reporting)
 - i. Domestic violence does **not** automatically require reporting
 1. Required for child physical injury/risk
 2. May report for serious emotional harm/risk to a child
 - ii. Homelessness does **not** require reporting
 - Universal Education & Empowerment
 - Support

Source: ipvhealth.org; aclusocal.org

Designing a Tiered Triage Protocol

Questions?

Tier 1 – Urgent / High Risk

- IPV, safety threats, imminent housing loss
- Immediate safety protocol & escalation (warm handoff as needed)

Tier 2 – Moderate

- Active coordination and referral within defined time frame

Tier 3 – Lower Acuity

- Education, resource navigation, or next-visit follow-up

Across All Tiers

- Defined role, documentation standards, and follow-up plan

Key Principle: Not all social needs require the same response.

Example: Small Independent Practice Workflow

Context

Questions?

- Small independent practice with embedded behavioral health staff
- Tool Selection: AHC (included Interpersonal Violence Screening)

Screening Workflow & Role Assignments

- **Medical Assistant** administers screening privately (asking family to step out) and triages housing, food, utilities and transportation needs
- **Medical Assistant** alerts behavioral health provider to positive responses on interpersonal violence
- **Behavioral Health** uses empathic inquiry to build trust, ask open ended questions, identify strengths and develop a plan
- **Medical Assistant (with Behavioral Health guidance)** initiates referral or resource linkage

Training & Workflow Readiness

Questions?

Effective social needs response requires:

- Knowledge: community resources & mandatory reporting
- Skills: trauma-informed screening & empathic inquiry
- Attitudes: commitment to patient-centered response

Key Questions

- Who is trained?
- How often?
- How is competency reinforced?

Goal: Staff confidence and consistent response

Training Resources

eLearning Modules

- Module 1: Getting Started–Understanding Health-Related Social Needs
- Module 2: Building a Social Needs Strategy
- Module 3: Enhancing Social Needs Data Integration & Community Partnerships

Toolkits

- [Interpersonal Violence Health Partners Toolkit](#)

Key Takeaways & Next Steps

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Key Takeaways

- Every positive screen requires a defined response pathway
- Triage could differentiate urgent vs. routine needs
- Staff training ensures consistent, trauma-informed response

Before Session 3

- Confirm your triage protocol is documented and tiered
- Clarify role ownership across the response pathway
- Identify training gaps
- Prepare questions on referral workflows and partnerships

Next Session: Intervention & Linkage to Services

Questions?



Thank You!

Thank you for your participation and engagement.

If you have questions after today's session or would like additional support, please reach out to info@pophealthlc.org or info@healthbegins.org.

We look forward to continuing this work together in the next session!

