

SDOH Screening Reporting in Behavioral Health

This summary template provides a standardized structure to complement a Social Determinants of Health (SDOH) report for behavioral health programs. It captures the core elements needed to monitor screening activities, evaluate performance across programs or sites, and maintain alignment with payer and regulatory expectations (e.g., CCBHC, NC Tailored Plans, Medicaid quality frameworks). The template focuses on the screening tool used, eligible population, completed screenings, and defined exclusion criteria.

Template: SDOH Screening Summary Entry

Screening Tool Used	Enter the name of the tool (e.g., PRAPARE, Accountable Health Communities [AHC] Tool, SafeD, custom organizational SDOH screener). Include version or year if applicable.
Eligible Population Definition	Describe who was eligible for screening during the reporting period (e.g., all new intakes, all Medicaid beneficiaries, individuals with at least one behavioral health encounter, CCBHC-required populations such as crisis, veterans, or care coordination clients).
Completed Screenings Count	Enter the total number of completed SDOH screenings for the reporting period. Include notes on partial completions if tracked.
Exclusion Criteria	List exclusions (e.g., patient declined screening, cognitive impairment, already screened within required timeframe, non-English-speaking without interpreter, telehealth visits where screening is not feasible).
Notes / Reporting Considerations	Indicate any data limitations, workflow barriers, inconsistent documentation sources, or EHR configuration issues affecting screening rates.