

2025

Complete Set

CHW-SYSTIM

Training Workbook

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INTRODUCTION

The CHW-SYSTIM research study aims to help people living with diabetes and high blood pressure at community health centers. CHW-SYSTIM stands for **Community Health Workers SYStematically assessing and addressing social determinants of health To IMprove outcomes in community-based health centers**. In this study, Community Health Workers (CHWs) will screen patients about their social needs and strive to get them the necessary help. We refer to these steps as “social needs activities.”

In this intervention, you will talk with patients about needs they might have around things like food, housing, transportation, and medical costs. You will also try to connect patients who are interested with services and resources to help meet these needs. We will learn about how to do these social needs activities together throughout this project.

Note: We will refer to your role on this project as a Community Health Worker (CHW), but we realize that you may not have “CHW” in your health center title or job description. Regardless of your title, we will work to build and strengthen foundational CHW skills as a group.

Tip: Remember, while we may not always be able to connect patients with the resources they need, each conversation offers a valuable opportunity to build trust and listen with empathy.

YOUR TIME ALLOCATION ON THIS PROJECT

As part of signing up for this project, your health center agreed to have designated time for you and your Champion to do the activities involved as seen in Table 1.

Table 1: CHW and Champion time allocation throughout the CHW-SYSTIM project, from late January through December 2025.

This table shows the estimated weekly time commitment for CHWs and Champions during the training, recruitment and intervention, and follow-up periods of the CHW-SYSTIM project.

Role	Training Period Jan - Apr 2025	Recruitment & Intervention Period May - Oct 2025	Follow-Up Period Nov - Dec 2025
CHW	8 hrs/week	32 hrs/week	16 hrs/week
Champion	1 hr/week	1 hr/week	1 hr/week

HOW TO USE THIS WORKBOOK

This interactive workbook will be your one stop shop for learning what you need to succeed in this project. Inside you will find:

- Glossary of acronyms, partnering organizations, and terms
- Learning objectives for every training module
- Checklists for keeping track of the online courses you complete
- Activities to complete after each training module

Every activity has a designated space to type in your response. Some include multiple choice responses.

This workbook lives in your SharePoint folder titled *Your Health Center Name*. Through the course of this project you will be expected to complete the online trainings and activities weekly. Your Support Coach will review completed activities throughout the training period to address any questions.

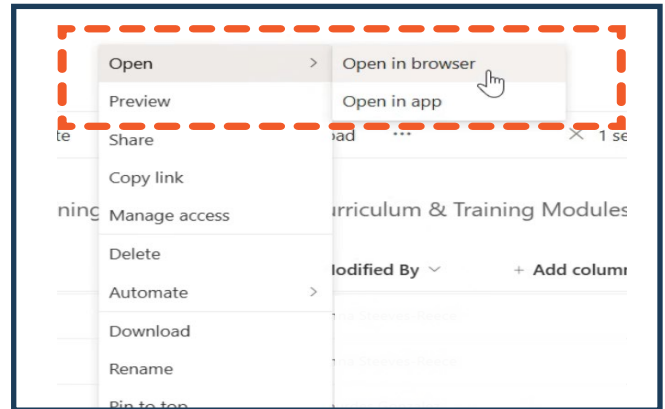


Image 1: Opening document in browser

This image shows the SharePoint menu option to open the workbook in browser.

Please open this workbook using an online browser. To open your workbook, right click on the document, select “Open,” then select “Open in browser.” After you make changes to the workbook, please remember to save your work by clicking on the “Save Changes” button on the top of your screen.

Online trainings and activities are typically due on **Mondays at the end of your work day.**

Due dates will be shown in a blue bar, like the one below. The due date may change due to holiday schedules.

Trainings & Activities Due: **Monday, Date, Time**

TRAINING SCHEDULE

Training will be weekly on Tuesdays from February 4th through April 22nd, 2025. If you live on Pacific, Mountain, Central, or Eastern time zones, the timing of sessions will change on March 11th, 2025 due to daylight savings time. If you live in Hawaii or Puerto Rico, the training times will remain the same.

Table 2: CHW-SYSTIM training schedule by week, day, and region before and after daylight savings time, from February 4th, 2025 - April 22nd, 2025.

This table shows the CHW-SYSTIM 12-week training schedule by week, date, and regional time zone before and after daylight savings time.

Week	Day	Honolulu	Los Angeles	Denver	Chicago	Atlanta	San Juan, PR
Before Daylight Savings Time							
1	Feb 4	9 - 10 am	11 am - 12 pm	12 - 1 pm	1 - 2 pm	2 - 3 pm	3 - 4 pm
2	Feb 11	9 - 10 am	11 am - 12 pm	12 - 1 pm	1 - 2 pm	2 - 3 pm	3 - 4 pm
3	Feb 18	9 - 10 am	11 am - 12 pm	12 - 1 pm	1 - 2 pm	2 - 3 pm	3 - 4 pm
4	Feb 25	9 - 10 am	11 am - 12 pm	12 - 1 pm	1 - 2 pm	2 - 3 pm	3 - 4 pm
5	Mar 4	9 - 10 am	11 am - 12 pm	12 - 1 pm	1 - 2 pm	2 - 3 pm	3 - 4 pm
After Daylight Savings Time							
6*	Mar 11	9 - 10 am	12 - 1 pm	1 - 2 pm	2 - 3 pm	3 - 4 pm	3 - 4 pm
7	Mar 18	9 - 10 am	12 - 1 pm	1 - 2 pm	2 - 3 pm	3 - 4 pm	3 - 4 pm
8	Mar 25	9 - 10 am	12 - 1 pm	1 - 2 pm	2 - 3 pm	3 - 4 pm	3 - 4 pm
9	Apr 1	9 - 10 am	12 - 1 pm	1 - 2 pm	2 - 3 pm	3 - 4 pm	3 - 4 pm
10	Apr 8	9 - 10 am	12 - 1 pm	1 - 2 pm	2 - 3 pm	3 - 4 pm	3 - 4 pm
11	Apr 15	9 - 10 am	12 - 1 pm	1 - 2 pm	2 - 3 pm	3 - 4 pm	3 - 4 pm
12	Apr 22	9 - 10 am	12 - 1 pm	1 - 2 pm	2 - 3 pm	3 - 4 pm	3 - 4 pm

* The timing of sessions will remain the same for Hawaii and Puerto Rico health centers throughout the training period. It will change for those on Pacific, Mountain, Central, and Eastern time as of March 11, 2025.

GLOSSARY OF ACRONYMS, PARTNERING ORGANIZATIONS & TERMS

Table 3: Glossary of acronyms and partnering organizations for the CHW-SYSTIM project.

This table defines the acronyms and partnering organizations used throughout the CHW-SYSTIM project.

Acronyms & Partnering Organizations	Definition
CEAL	Community Engagement Alliance
CHW-SYSTIM	<u>C</u> ommunity <u>H</u> ealth <u>W</u> orkers <u>S</u> YStematically assessing and addressing social determinants of health <u>T</u> o <u>I</u> mprove outcomes in community health centers
HCN	Health Choice Network
MSM	Morehouse School of Medicine
NCPCR	Network for Community-Engaged Primary Care Research
NIH	National Institutes of Health
OCHIN	Not an acronym. OCHIN is a health technology nonprofit organization that provides healthcare technology and support services to community-based healthcare organizations, advancing community health and well-being.
ORPRN	Oregon Rural Practice-based Research Network
SERCN	Southeast Regional Clinicians Network

Table 4: Glossary of terms for the CHW-SYSTIM project.

This table defines key CHW-SYSTIM project terms, including Champion, Practice-based Research Network, randomized controlled trial, social determinants of health, social needs, social needs activities, and Support Coach

Term	Definition
Champion	Supports and oversees project activities at their health center, including maintaining capacity and motivation on the project. One of their main roles is to help ensure that you (the CHW) can work effectively towards project goals and objectives.
Practice-based Research Network (PBRN)	PBRNs are groups of primary care clinicians and practices working together to answer community-based health care questions and translate research findings into practice. HCN, ORPRN, OCHIN, and SERCN (listed above) are all PBRNs.
Randomized Controlled Trial (RCT)	A randomized controlled trial (RCT) is a study design that compares the effectiveness of interventions by randomly assigning participants to intervention or control groups.
Social Determinants of Health (SDOH)	The conditions in which people are born, live, work, play, and age that influence health. They impact communities and can be both positive and negative. For example, economic stability, and access to parks, health care, and transportation.
Social Needs	The immediate challenges an individual faces that affect their health. These are unmet basic needs (like housing or food) that directly impact their wellbeing and that they would also like help in resolving.
Social Needs Activities	Activities related to screening patients about their social needs and connecting them with the resources and supports necessary to address them.
Support Coach	An individual from outside of the health center who works directly with the CHW and the Champion, providing tailored guidance, tools, and coaching to help put new knowledge into practice and drive meaningful change.

GETTING STARTED

Onboarding Period

Activities Due: **Monday, 2/3/2025, 11:59 PM**

Activities to Complete On Your Own

Activity 1: Your Project Folders and Enrolling in CIRTification Training

- ☐ Make sure you can access CHW-SYSTIM Project folders, located in SharePoint. If you have any trouble, please e-mail Janae Fuller at jfuller@msm.edu.
- ☐ Review this CHW-SYSTIM Training Workbook, Part One.
- ☐ Enroll in the [CIRTification: Community Involvement in Research Training](#).
 - » For Site, select Morehouse School of Medicine from the drop-down menu.
 - » For Title/Role, select Community Health Worker from the drop-down menu.

About “CIRTification: Community Involvement in Research Training”

This training ensures that everyone on our study team knows how to work responsibly and ethically when recruiting and engaging with research participants. Most people complete all components of this training in about four hours.

This is a human research protections training program that will cover important topics such as recruiting research participants, obtaining informed consent, and collecting data. This training is designed especially for community research partners, members of community advisory boards, and community members on institutional review boards. You are taking this training because you have an important role in research.

TRAINING MODULE 1

Project Orientation, Social Needs Interventions

Learning Objectives: By the end of this training module, CHWs will be able to...

1. Describe the purpose and objectives of the CHW-SYSTIM project.
2. Identify where and how to access all needed CHW-SYSTIM written materials and resources.
3. Identify who to contact (e.g., Champion, Support Coach) for different types of CHW-SYSTIM questions and support and how to contact those individuals.
4. Define social needs and explain their impact on people's health and well-being, particularly for people living with diabetes and hypertension.
5. Describe the ways in which CHW-led social needs interventions may support the health and well-being of people living with diabetes or hypertension.

Week 1: 2/3/2025 – 2/7/2025

Activities Due: **Monday, 2/10/2025, 11:59 PM**

Online Trainings to Complete on Your Own

CIRTification Trainings: Course Intro, Intro to Research, Research History

- Complete the following CIRTification training units on the [CIRTification Training Portal](#):
 - ☐ Course Introduction
 - ☐ Introduction to Research
 - ☐ Research History

Tip: Finished with an online course? Click on the check box to the left of the course to track your progress.

Activities to Complete on Your Own

Activity 2: Your CHW-SYSTIM Team

Instructions: Over the course of your first week on this training, you've met a lot of people. Based on what you've learned to date over the emails that you've received on this project, write down the name of your Champion and Support Coach and their email address in the spaces provided below. If you're unsure about who your Champion or Support Coach are, please contact Janae Fuller at jfuller@msm.edu.

Champion Name:

Email:

Support Coach Name:

Email:

Type any notes in the box below:

Activity 3: Describing Your Work on the CHW-SYSTIM Project

Imagine you bump into a friend at the grocery store. As you catch up, they ask, “what do you do for work?”

Instructions: Based on what you’ve learned so far, write a sentence or two describing your work on this project. Think about how you would explain it to someone who is unfamiliar with the details. This activity may also help you realize what questions you might have for the training team or what aspects of the project are unclear to you.

Describe your work on this project:

Write down any questions you might have for the training team about what you’ve learned:

Week 2: 2/10/2025 – 2/14/2025Trainings & Activities Due: **Tuesday, 2/18/2025, 11:59 PM**

Online Trainings to Complete on your Own

CIRTification Trainings: Eligibility & Recruitment, Informed Consent

- Complete the following CIRTification training units on the [CIRTification Training Portal](#):
 - ☐ Eligibility & Recruitment
 - ☐ Informed Consent

Activities To Complete on Your Own

Activity 4: Setting Yourself Up for Success: Making Connections and Introducing the Project to Your Colleagues

For this project to be successful, it will be important for you to share what you're working on with your health center colleagues to coordinate efforts, integrate their existing knowledge into your work, and regularly identify opportunities for positive change. This week, schedule a check-in with your Champion. Together, identify health center colleagues who it would be good to touch base with about this project, both from the start and on an ongoing basis.

For example, are there staff at your health center, such as social workers, patient navigators, nutritionists, or pharmacists, who regularly work with people who have diabetes or hypertension? Are there health center staff with expertise about social needs activities? Once you have a list of people, schedule check-ins to tell them about the CHW-SYSTIM project and find opportunities to work together to strengthen all of your efforts.

Instructions: Create a list of key people from your health center by filling out the form on the next page. Fill in each box with the person's name, role, and notes on the perspectives or resources they might offer and any opportunities for collaboration.

Example 1:

Name: Susan Vázquez

Role: Patient Navigator

Notes: Susan has experience referring patients to food resources in the community. She maintains a list of organizations she trusts and has an existing relationship with. She can help introduce you to some of the contacts she knows at each organization.

Example 2:

Name: Minh Nguyen

Role: Pharmacist

Notes: Minh has experience answering patients' questions about diabetes and hypertension medications. He knows a lot about medications' costs and which ones are covered by different types of insurance.

Name: Role:

Notes:

Name: Role:

Notes:

Name: Role:

Notes:

Name: Role:

Notes:

Name: Role:

Notes:

Name: Role:

Notes:

TRAINING MODULE 2

Patient Outreach, Eligibility, and Consent

Learning Objectives: By the end of this training module, CHWs will be able to...

1. Describe which patients are eligible for the CHW-SYSTIM intervention.
2. Summarize the process for receiving and working with updated lists of eligible patients.
3. Produce a workflow for when and how to contact eligible patients.
4. Describe the process for confirming patients' eligibility, receiving verbal patient consent to participate, and documenting each of these steps.

Week 3: 2/17/2025 – 2/21/2025

Training & Activities Due: **Monday, 2/24/2025, 11:59 PM**

Online Trainings to Complete on Your Own

CIRTification Trainings: The IRB, Collecting & Protecting Data

- Complete the following CIRTification training units on the [CIRTification Training Portal](#):
 - ☐ The Institutional Review Board (IRB)
 - ☐ Collecting & Protecting Data

Activities to Complete On Your Own

Activity 5: Reaching Out to Eligible Patients

As part of this project, you will be screening eligible patients for social needs by calling or meeting with them in person. Remember, it might take a few attempts to get a response, but your persistence can make a difference in whether they get connected with resources and is an opportunity to build trust and connection.

Instructions: Work with your Champion to:

Decide how you will contact eligible patients. Select all that apply.

☐ Phone call ☐ In person ☐ Other:

Type any notes about your approach to contacting patients in the box below:

Activity 6: Planning Your Patient Outreach

Think about your daily schedule from late April onward. Create a plan for patient outreach, including what days of the week and times work with your schedule. Consider whether you will have access to a private space and a computer at your health center. This plan may change, but this activity will help you get started.

Instructions: Working with your Champion, answer the following questions to develop your patient outreach plan. *For example, you might decide to start by reaching out to patients on Monday, Tuesday, Wednesday, and Friday from 9 - 11 am and 3 - 5 pm in your supervisor's office using a loaner laptop from your health center.*

Select the days of the week for you to complete patient outreach by clicking on the check boxes:

☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday

Notes:

Select all of the times for you to complete patient outreach by clicking on the check boxes:

☐ 8:00 am - 9:00 am ☐ 9:00 am - 10:00 am ☐ 11:00 am - 12:00 pm

☐ 12:00 pm - 1:00 pm ☐ 1:00 PM - 2:00 pm ☐ 2:00 pm - 3:00 pm

☐ 3:00 pm - 4:00 pm ☐ 4:00 pm - 5:00 pm ☐ Other:

Will you have access to a private space at your health center to do this work?

☐ Yes ☐ No ☐ Other:

Will you have consistent access to a computer to document your work for this project?

☐ Yes ☐ No ☐ Other:

If you answered “no” to any of the questions above, please reach out to your Champion or Support Coach to find a solution together.

Week 4: 2/24/2025 – 2/28/2025Trainings & Activities Due: **Monday, 3/3/2025, 11:59 PM**

Online Trainings to Complete on Your Own

CIRTification Trainings: Issues in the Field, Course Review, Final Quiz

- Complete the following CIRTification training units on the [CIRTification Training Portal](#):
 - ☐ Handling Issues in the Field
 - ☐ Course Review & Final Quiz

Activities to Complete on Your Own

Activity 7: Anticipating Patient Questions About the CHW-SYSTIM Patient Enrollment & Consent Process

This week we continued to review the process of outreaching to patients and getting their consent to join the CHW-SYSTIM project. We discussed how this process is outlined in the CHW-SYSTIM Patient Enrollment & Screening Guide. We also reviewed that the text in purple can be modified and the text in blue cannot change.

The purpose of this activity is to help you become more comfortable and gain confidence in using the guide, especially through the patient consent portion. Answering the questions below will help improve our interactions with patients and ensure that every patient feels comfortable with the process.

Instructions: First, locate the **CHW-SYSTIM Patient Enrollment & Screening Guide** in SharePoint. Open the document and please read pages 1 through the top of page 4, including part b. “Read consent language to patient > answer patient questions > confirm patient consent > send full research project details to patient.”

As you read through this document, reflect on and write down any points of confusion or questions that a patient might have about this material.

How might you answer the patient's questions or help clarify any points of confusion? Write down any ideas you have. For example, how could you rephrase something on the guide to make it more clear. If you're unsure how to respond to their questions or concerns, please take note of this. We can discuss this later.

TRAINING MODULE 3

Patient-Centered Social Needs Screening and Documentation

Learning Objectives: By the end of this training module, CHWs will be able to...

1. Name strategies for ensuring positive patient experiences with social needs screening.
2. Use *CHW-SYSTIM Patient Enrollment & Screening Guide* to facilitate patient-centered social needs screening.
3. Describe the process for documenting social needs screening results in REDCap.

Week 5: 3/4/2025 – 3/10/2025

Activities Due: **Monday, 3/10/2025, 11:59 PM**

Activities to Complete on Your Own

Activity 8: Introducing Social Needs Screening Questions to Consented Patients

Instructions: Review the *CHW-SYSTIM Patient Enrollment & Screening Guide*, located in *Your Health Center Name* SharePoint folder. Familiarize yourself with the language around introducing the social needs screening questions to patients (section “c.”) and whether there’s anything about the language you’d like to change. Take note of **Table 1** in **section “c.”**, which relates to the next activity for this week (Activity 9) in this workbook. Write down any questions you have about section “c.” of the *CHW-SYSTIM Patient Enrollment & Screening Guide* in the box below:

Activity 9: Selecting Your Social Needs Screening Questions

As social needs screening grows over time, so have the number of different screening tools. Four common screening tools are listed in the **CHW-SYSTIM Social Needs Questions Matrix** on pages 25-26. Each tool's questions are mapped to the social needs categories you will be asking about for this study (food, housing, transportation, medical costs).

Instructions: Review the screening questions with your Champion and select which questions you will use by marking the check boxes associated with those questions. **Once you decide which questions to use for each social needs category, please copy and paste them into Table 1 of section "c." of your *CHW-SYSTIM Patient Enrollment & Screening Guide*, which is saved in *Your Health Center Name* folder in SharePoint.**

As you and your Champion review the questions in the matrix, here are a few items to consider:

- If you select a screening tool that has 2 questions for a social need category, please use both questions.
- It is not a requirement to use questions from the same tool. Please feel free to mix and match questions.

As you review the matrix, consider:

- What questions do you think would be most comfortable for your patients to answer?
- What amount of detail will be most helpful?

Ask Yourself: Does your health center use certain social needs screening questions as a part of your existing workflow? If so, please copy the questions you use and paste them into your ***Patient Enrollment & Screening Guide*** (saved in ***Your Health Center Name*** folder in SharePoint), so the study team knows which questions you will be using.

Table 5. CHW-SYSTIM Social Needs Questions Matrix

This matrix compares social needs screening questions for food, housing, transportation, and medical costs across four screening tools to help CHWs and Champions choose questions for patient screening. Matrix continues on pages 26-27.

		SOCIAL NEEDS SCREENING QUESTIONS			
		AHC ¹	PRAPARE ²	WellRx ³	Thrive Screening ⁴
SOCIAL NEEDS CATEGORY		☐ Some people have made the following statements about their food situation. Please answer whether the statements were OFTEN, SOMETIMES, or NEVER true for you and your household in the last 12 months. Within the past 12 months, you worried that your food would run out before you got money to buy more. • Often true • Sometimes true • Never true Within the past 12 months, the food you bought just didn't last and you didn't have money to get more. • Often true • Sometimes true • Never true	☐ Adapted PRAPARE Question: In the past year, have you been unable to get food when you really needed it? • Yes • No	☐ Adapted WellRx Question: In the past 2 months, did you eat smaller meals or skip meals because you didn't have money for food? • Yes • No	☐ Some people have made the following statements about their food situation. Please answer whether the statements were OFTEN, SOMETIMES, or NEVER true for you and your household in the last 12 months. Within the past 12 months, you worried that your food would run out before you got money to buy more. • Often true • Sometimes true • Never true Within the past 12 months, the food you bought just didn't last and you didn't have money to get more. • Often true • Sometimes true • Never true
	Food				

¹ [Accountable Health Communities \(AHC\) Health-Related Social Needs \(HRSN\) Screening Tool](#); Centers for Medicare & Medicaid Services

² [Protocol for Responding to and Assessing Patient Assets, Risks, and Experiences \(PRAPARE\)](#); National Association of Community Health Centers, Inc.

³ [WellRx](#); University of New Mexico

⁴ [Thrive Screening](#); Boston Medical

		SOCIAL NEEDS SCREENING QUESTIONS			
		AHC ¹	PRAPARE ²	WellRx ³	Thrive Screening ⁴
SOCIAL NEEDS CATEGORY	Housing	☐ What is your living situation today? • I have a steady place to live • I have a place to live today, but I am worried about losing it in the future • I do not have a steady place to live (I am temporarily staying with others, in a hotel, in a shelter, living outside on the street, on a bench, in a car, abandoned building, bus or training station, or in a park)	☐ What is your housing situation today? • I have housing • I do not have housing (staying with others, in a hotel, in a shelter, living outside on the street, on a bench, in a car, or in a park) Are you worried about losing your housing? • Yes • No	☐ Are you homeless or worried that you might be in the future? • Yes • No	☐ Do you currently live in a shelter or have no steady place to sleep at night? • Yes • No Do you think you are at risk of become homeless? • Yes • No
	Transportation	☐ In the past 12 months, has lack of reliable transportation kept you from medical appointments, meetings, work or from getting things needed for daily living? • Yes • No	☐ Has lack of transportation kept you from medical appointments, meetings, work, or from getting things needed for daily living? • Yes, it has kept me from medical appointments • Yes, it has kept me from non-medical meetings, appointments, work, or from getting things that I need • No	☐ Do you have trouble finding or paying for a ride? • Yes • No	☐ Do you have trouble getting transportation to medical appointments? • Yes • No

		SOCIAL NEEDS SCREENING QUESTIONS			
		AHC ¹	PRAPARE ²	WellRx ³	Thrive Screening ⁴
SOCIAL NEEDS CATEGORY					
	Medical Costs	☐ Adapted AHC Financial Strain Question: How hard is it for you to pay for medical care? Would you say it is: • Very hard • Somewhat hard • Not hard at all	☐ Adapted PRAPARE Question: In the past year, have you been unable to get medicine or any health care (medical, dental, mental health, vision) when you really needed it? • Yes • No	N/A	☐ Do you have trouble paying for medicines? • Yes • No

If there is a question you want to use that's not listed in the matrix, please reach out to your Support Coach to discuss.

Please use the text box below to note information about your decision-making process with your Champion and any other important information:

Week 6: 3/11/2025 – 3/17/2025Activities Due: **Monday, 3/17/2025, 11:59 PM****Activities to Complete on Your Own****Activity 10: Signing In to REDCap**

By now, you should have received communications about how to log in to REDCap for this study.

1. **In the next week, please make sure you are able to log in and access the project page.** In your next meeting with your Support Coach and Champion, you'll all be looking at this together to get oriented to what's there. **Check this box once you've completed this activity:** ☐
2. Also, please review your **CHW-SYSTIM REDCap User Guide**, which is saved in **Your Health Center Name** folder in SharePoint. **Check this box once you've completed this activity:** ☐

A few important items to note:

- *The CHW-SYSTIM REDCap User Guide* walks you through each step to take while you log in and enter data in the REDCap database.
- You may want to have this guide on hand to remind yourself of the documentation steps.

After meeting with your Support Coach and Champion, feel free to practice logging in as much as you need to get comfortable. If you have trouble logging in or have questions about how to use REDCap or the location of relevant files, please contact your Support Coach.

Activity 11: Practice Using “Form 1: Consent and Screening” in REDCap

Now that you have access to your CHW-SYSTIM Project in REDCap, you can practice entering data in **Form 1**.

Please navigate to the section **Form 1: Consent and screening steps** in your *CHW-SYSTIM REDCap User Guide*, which is saved in *Your Health Center Name* folder on SharePoint.

Now you can log in to REDCap and practice entering data using three fake scenarios on page 30. You will notice the first REDCap Form 1 step in the *CHW-SYSTIM REDCap User Guide* is to add a new record before navigating to Form 1 in REDCap. Please create new records for each of the three scenarios, and complete data entry in REDCap Form 1 for each of these records.

The data you enter will be reviewed by the study team to make sure that you are comfortable entering data in REDCap. After you have entered the data from each of the REDCap Form 1 scenarios on page 15 in REDCap, please mark the check box to the right of each scenario to indicate that the task is complete.

Feel free to use the text box below to write down any questions you have for your Champion or Support Coach.

Tip: Now is the time to play around in REDCap Form 1, test out buttons, and reflect on what questions you have! Mistakes will likely be common at this stage, which is an expected aspect of the training process.

Scenario 1

On May 1, 2025 you reached out to Palmer Riddle (MRN 2345678, DOB 05/05/1957). You told the patient about the project and the patient verbally consented. You screened the patient for social needs and they indicated they experience food insecurity and have a difficult time paying for their medications. The patient would like help with both social needs. You confirm with them that they are not pregnant.

☐ Data entered in REDCap?

Scenario 2

On May 10, 2025 you reached out to Juniper Ambrose (MRN 1234567, DOB 09/23/1992). You told the patient about the project and the patient verbally consented. You screened the patient for social needs and they indicated they have a transportation need. When asked whether they'd like help accessing resources for transportation, the patient mentions they also have a hard time paying for childcare. The patient requests help finding resources for both needs. You confirm with them that they are not pregnant.

☐ Data entered in REDCap?

Scenario 3

On June 18, 2025 you reached out to Samuel Padilla (MRN 3456789, DOB 10/19/1981). You told the patient about the project and the patient verbally consented. You screened the patient for social needs and they indicated they have a housing need. The patient declines help accessing housing resources. You confirm with them that they are not pregnant.

*Note: because the patient does not request help, you will not need to complete Form 2 in REDCap.

☐ Data entered in REDCap?

TRAINING MODULE 4

Supporting Patients with Social Needs and Documentation

Learning Objectives: By the end of this training module, CHWs will be able to...

1. Identify in-clinic and community resources related to food, housing, transportation, and medical costs.
2. Identify and/or develop processes for conducting patient-centered social needs referrals to in-clinic and community resources.
3. Document what referrals were made to in-clinic and community resources in REDCap.

Week 7: 3/18/2025 – 3/24/2025

Activities Due: **Monday, 3/24/2025, 11:59 PM**

Activities to Complete on Your Own

Activity 12: Social Needs Referral Process

Meet with your Champion to discuss your health center's social needs referral process. Don't have a standardized process? That's perfectly fine – now is a great time to make a plan together with your Champion. You may consider choosing one method or multiple methods depending on the urgency of your patients' needs and the time you have to navigate individual patients to resources.

Here are some options to consider:

- **Internal referrals to health center resources.** This could be a referral to another care team member with expertise supporting patients with specific social needs, or providing the patient with on-hand resources like transportation vouchers or food from a food pantry located in your health center.
- **Provide patients with written information about the resource.** This could include a printed flier, a text message, an after-visit summary text, or a patient portal message.
- **Use a social needs referral platform,** such as 211, Unite Us, or Findhelp.

- **Provide personalized navigation support.** Offer to help patients access services, like conducting a three-way call with a community-based organization (with patient consent) or helping the patient fill out application forms.

Please use the text box below to describe the referral process you plan to use.

Activity 13: Community Resource Mapping

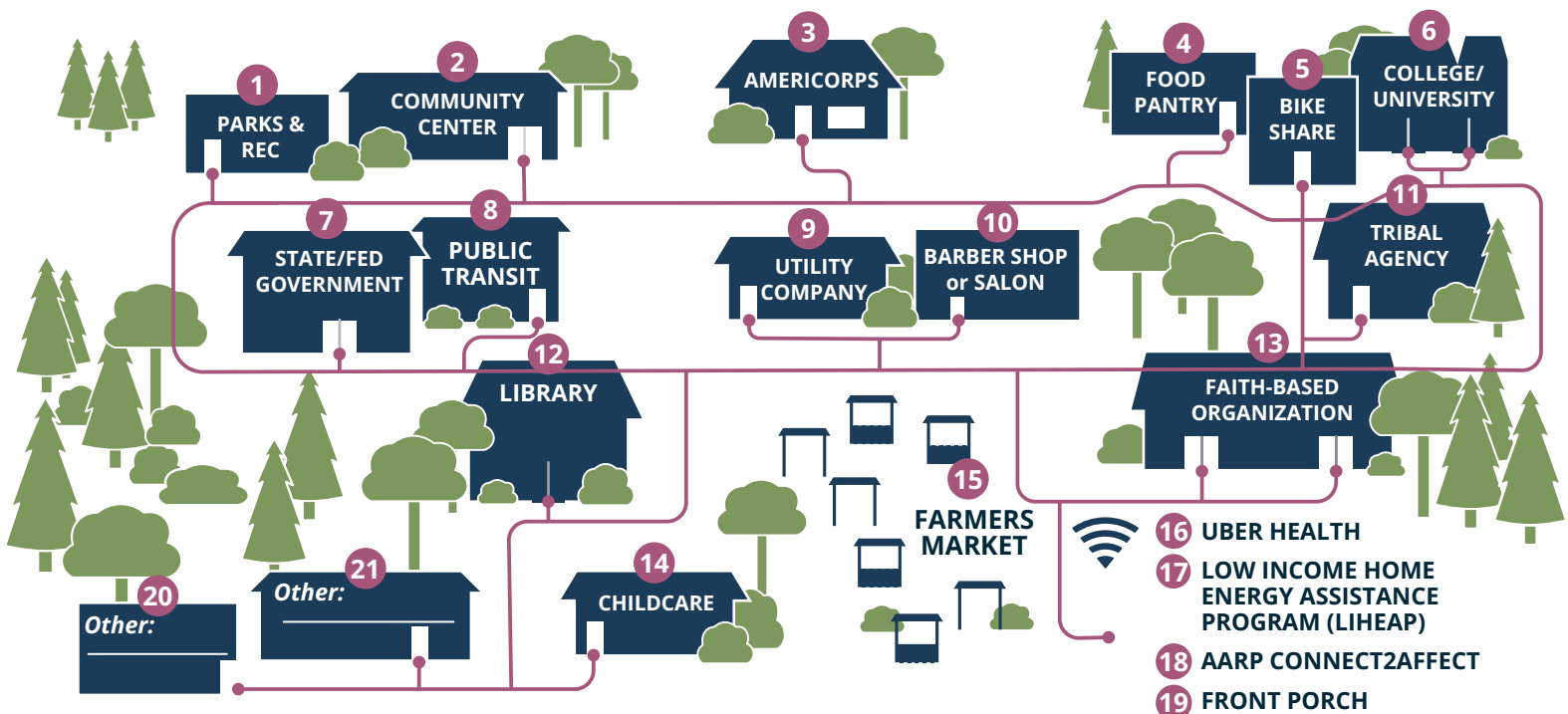
Instructions: For each of the social needs for this project (food, housing, transportation, medical costs), identify two organizations that might be a good partner for referrals in your community. The map below can help you brainstorm what possibilities might be out there. Enter in your responses on pages 34-36.

Consider asking colleagues, others in your network, or reference 2-1-1 or Findhelp for listings based on ZIP codes. If you do not have a point of contact at the organization already, spend some time considering how you plan to connect with one.

Knowing that what supports a successful referral is more than just the organization's name, what additional details might you want for the referrals you listed on the following pages?

To help, consider asking yourself the following questions as you make your way through this activity:

- If patients need services in a language other than English, does the referral offer bilingual services?
- Do patients need to go physically to this location to get their need met? If so, is it located near where they live or work? Would they need help getting to and from the location?
- What other factors do you need to consider to make sure the patient can fully benefit from this service?



FOOD SECURITY

• Organization Name:

• Point of Contact:

• Services:

• Eligibility:

• Other Notes:

• Organization Name:

• Point of Contact:

• Services:

• Eligibility:

• Other Notes:

HOUSING

• Organization Name:

• Point of Contact:

• Services:

• Eligibility:

- Other Notes:

-
- Organization Name:

- Point of Contact:

- Services:

- Eligibility:

- Other Notes:
-

TRANSPORTATION

- Organization Name:

- Point of Contact:

- Services:

- Eligibility:

- Other Notes:
-

- Organization Name:

- Point of Contact:

- Services:

• Eligibility:

• Other Notes:

MEDICAL COSTS

• Organization Name:

• Point of Contact:

• Services:

• Eligibility:

• Other Notes:

• Organization Name:

• Point of Contact:

• Services:

• Eligibility:

• Other Notes:

Week 8: 3/25/2025 - 3/31/2025Activities due: **Monday, 3/31/2025, 11:59 PM****Activity 14: Practice Using “Form 2: Referral and Follow-up” in REDCap**

Similar to Activity 11, you will practice entering data into **Form 2: Referral and Follow-up** in REDCap.

Instructions: Please navigate to the section **Form 2: Referral and follow-up steps** in your *CHW-SYSTIM REDCap User Guide*, which is saved in *Your Health Center Name* folder on SharePoint and read through each step.

Please log in to REDCap and practice entering data using the two fake scenarios on page 37. You will be adding data into REDCap Form 2 for the two fake patient records that required social needs referrals from Activity 11 (on pages 29–30). This is for the referral section of REDCap Form 2, only; you will get to practice the follow-up data entry later. Please read the scenarios on page 23 and enter the data in your REDCap Form 2 for each scenario.

The data you enter will be reviewed by the study team to make sure you are comfortable entering the data in REDCap.

Feel free to use the text box below to write down any questions you have for your Champion or Support Coach.

Tip: As with Activity 11, now is the time to play around in the REDCap Form 2, test out buttons, and reflect on what questions you have! Mistakes will likely be common at this stage, which is an expected aspect of the training process.

Scenario 1

On May 2, 2025, you sent Palmer Riddle (MRN 2345678) referral information about local food banks and information about reducing medication costs using SmithRx or RxSaver. You sent this information to the patient via their patient portal.

☐ Data entered in REDCap?

Scenario 2

On May 12, 2025, you reached out to Juniper Ambrose (MRN 1234567). You gave them referral information for transportation by mailing a bus pass voucher. You could not locate childcare resources, so you added a note with the bus pass letting the patient know that no resources are available at this time.

☐ Data entered in REDCap?

TRAINING MODULE 5

Following Up on Patients' Social Needs and Documentation

Learning Objectives: By the end of this training module, CHWs will be able to...

1. Produce a workflow for when and how to follow up with patients regarding whether they accessed resources within the health center or in the community.
2. Document whether patients accessed in-clinic or community resources in REDCap.

Week 9: 4/1/2025 – 4/7/2025

Activities Due: **Monday, 4/07/2025, 11:59 PM**

Activities to Complete on Your Own

Activity 15: Social Needs Follow-up Process

Instructions: Please meet with your Champion to discuss and document in this workbook your patient follow-up workflow for the CHW-SYSTIM intervention and research study. “Follow-up” is the stage of the intervention where you check to see whether patients were able to access resources to help with their social needs. We recommend having the slides from Session 9 of the training (saved in [SharePoint](#)) on hand during this conversation, as they have general guidance for follow-up practices. For example, we recommend that initial follow-up to occur within 1–2 weeks of the referral date, and that the patient understands when and how they should expect to hear from you.

In your conversation with your Champion, please discuss:

- When will you follow up? (For example, how many days or weeks after the initial patient referral?)
- How will follow up with a patient occur? (For example, by phone, in-person, both by phone and in-person)
- How will you remember to follow up? (For example, will you take notes about this in your Patient Outreach Tracking Sheet, or in an existing health center document or system?)

- What will documentation of follow up look like? (For example, what details will you want to capture in your follow-up notes from your conversation with the patient? When will you set aside time to enter follow-up notes in REDCap?)

Please use this text box to describe your health center's follow-up plans, including answers to the questions listed above.

Week 10: 4/8/2025 – 4/14/2025Activities Due: **Monday, 4/14/2025, 11:59 PM**

Activities to Complete on Your Own

Activity 16: Practice Completing the “Social Needs Follow-up” Section of “Form 2: Referral and Follow-up” in REDCap

This activity continues to build on the work you completed for Activity 11 (pages 29–30) and Activity 14 (pages 37–38) in your previous CHW-SYSTIM Workbook (Part 2).

Instructions: Please navigate to the section **Form 2: Referral and follow-up steps** in your *CHW-SYSTIM REDCap User Guide*, in *Your Health Center Name* folder in SharePoint, and review all of the steps involved on pages 10–11, starting from step 4. The second section of Form 2 is “Social Needs Follow-up.”

Please log in to REDCap and practice entering data using the two made-up scenarios on page 38 of this training workbook. You will add data in **REDCap Form 2: Referral and Follow-up** for the two made-up patient records (P. Riddle and J. Ambrose) that you previously worked on for Activities 11 and 14 in your CHW-SYSTIM Workbook Part 2. Please read the scenarios on page 38 and enter the data in your REDCap Form 2 for each scenario. The data you enter will be reviewed by the study team to make sure you are comfortable entering the data in REDCap.

Feel free to use the text box below to write down any questions you have for your Champion or Support Coach.

Tip: Now is the time to play around in REDCap Form 2, test out buttons, and reflect on what questions you have! Mistakes will likely be common at this stage, which is an expected aspect of the training process.

Scenario 1

On May 9, 2025, you follow up with P. Riddle (MRN 2345678) to see whether they were able to connect with the resources that you had referred them to for their food insecurity and medication costs on May 2, 2025. Reviewing the first section of the REDCap Form 2: Referral and Follow-up for P. Rabbit, you remember that you had sent them referral information about local food banks and information about reducing medication costs using SmithRx or RxSaver. The patient answers the phone and lets you know that they connected with a local food bank that has helped them access more and healthier foods. They no longer need your help with this need. The patient still has not been able to find a solution for their high medication costs and would appreciate some help from you to keep brainstorming solutions together.*

☐ Data entered in REDCap?

**Note: Since the patient would still like to work with you to resolve their medication need, you may want to keep REDCap Form 2 marked as "Incomplete" to help remind you to come back and update it later.*

Scenario 2

On May 19, 2025, you follow up with J. Ambrose (MRN 1234567) to see whether they received the bus pass voucher you mailed to them on May 12, 2025. The patient answers and lets you know that they received the voucher and found it helpful. They don't request any further support with transportation or other needs.*

☐ Data entered in REDCap?

** Note: Since the patient got their need met and did not request further assistance, you can mark REDCap Form 2 as "Complete."*

TRAINING MODULE 6

Moving From the Training to the Intervention Phase of the CHW-SYSTIM Project

Learning Objectives: By the end of this training module, CHWs will be able to...

1. Produce a workflow for the CHW-SYSTIM research study. The workflow will include your steps for patient outreach, consent, screening, referral, and follow-up.
2. Describe and identify the different support activities and systems that will be in place for when questions and challenges arise during the intervention period.

Week 11: 4/15/2025 – 4/21/2025

Activities Due: **Monday, 4/21/2025, 11:59 PM**

Activities to Complete on Your Own

Activity 17: Putting it All Together. Your CHW-SYSTIM Health Center Workflow

Over the previous 11 weeks, you learned about all of the major steps of the CHW-SYSTIM research study: 1) patient consent and screening for social needs; 2) social needs referral making; and 3) following up with patients on whether they accessed resources for their social needs. You also learned about where and how to document information about these steps (for example, in your Patient Outreach Tracking Sheet and in REDCap). In this activity, you will think through how all of these steps fit together in more detail.

Instructions: Please meet with your Champion and add in details about your CHW-SYSTIM health center workflow in the table below (pages 44–45). Go through each of the intervention steps (columns 1 through 3) one by one, talking through and writing down: what staff will be involved (including you, the CHW); any notes on the intervention processes and documentation; what materials or tools you will need on-hand to complete these steps; and any other notes about things that will be important for your workflow.

You will meet with your Support Coach the week of April 28th to review this table and get any questions answered about how to carry out the intervention, which you will begin on May 5th.

Table 6. CHW-SYSTIM Health Center Workflow Table

This table helps health centers document staff roles, processes, documentation steps, needed materials, and other workflow notes for patient consent and screening, referral making, and follow-up. Table continues on page 45.

		CHW-SYSTIM INTERVENTION STEPS		
		1. Patient Consent and Screening for Social Needs	2. Social Needs Referral Making	3. Following Up with Patients on Whether They Accessed Resources
WORKFLOW NOTES (Details on how your health center will carry out the intervention)	Staff Involved & Responsibilities			
	Processes & Documentation			
	Materials Needed			

	Other Notes			
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Week 12: 4/22/2025 – 5/2/2025

Activities Due: **Friday, 5/2/2025, 11:59 PM**

Activities to Complete on Your Own

Activity 18: Review the CHW-SYSTIM Intervention Support Plan

Congratulations! You are almost at the end of the CHW-SYSTIM Training Period, and you will begin carrying out the intervention on Monday 5/5/2025. As we transition from the training to the intervention, our shared learning is really just getting started. Especially in the first days and weeks of the Intervention Period, you and your health center may need to adjust your CHW-SYSTIM intervention workflow, experience challenges, and/or have questions for the study team. **With that in mind, we developed a plan so that you and your health center can quickly get questions answered, work through challenges with your Support Coach, and share with and learn from other health centers as you carry out the intervention (May through December 2025) of the CHW-SYSTIM research study.** We also want to make sure that you feel valued throughout this project, and that your successes are highlighted.

Instructions:

1. **Please review the two tables on the next pages of this workbook (pages 47-48) to learn more about upcoming project activities and the support that will be provided to you during the intervention.**

Mark this check box once you complete your review: ☐

2. Meet with your Support Coach and Champion to go over your CHW-SYSTIM workflow (Activity 17 of this workbook) and discuss any questions you have or support you need for the start of the intervention on Monday 5/5/2025. **Your Support Coach will reach out to schedule this meeting (if they haven't already).** Prior to meeting with your Support Coach and Champion, use the text box below to write down any questions you have about your activities for the first week of the Intervention Period and/or the CHW-SYSTIM Intervention Support Plan.

Mark this check box once you have met with you Support Coach and Champion and feel ready to implement the intervention: ☐

Write any questions you have for your Support Coach and Champion in the text box on page 47.

Notes:**Table 7. Intervention Support Plan Activities Table**

This table summarizes the intervention support activities available to CHWs and Champions, including office hours, check-in surveys, Support Coach meetings, and learning collaborative meetings.

Intervention Support Plan Activities	Descriptions
CHW-SYSTIM Office Hours <i>Optional, twice every four weeks</i>	Blocked times when CHWs and/or Champions can drop into a virtual meeting and ask questions or get support from someone on the CHW-SYSTIM research study team, if needed.
Intervention Check-In Surveys <i>5-10 minutes, once every four weeks</i>	Brief survey for CHWs to share how intervention activities are going and whether they have questions or need support. The survey will be emailed to CHWs, and Support Coaches will review responses.
Support Coach/Health Center Meetings <i>60 minutes, once every four weeks</i>	Meetings with CHW, Champion, and Support Coach to talk through how things are going, highlight successes, identify any questions or challenges, and develop next steps/solutions as a group.
CHW Learning Collaborative Meetings <i>90 minutes, once every four weeks</i>	Shared learning space for CHWs and Support Coaches to come together for any intervention updates or reminders, to consult with peers on challenges, share successes, and learn from each other's project experiences and local expertise.

Table 8. Intervention Support Plan Cadence

This table shows the planned dates for CHW-SYSTIM support activities during the first three intervention support blocks from May through July 2025.

Week (Monday)	Intervention Block 1				Intervention Block 2				Intervention Block 3			
	5/5	5/12	5/19	5/26	6/2	6/9	6/16	6/23	6/30	7/7	7/14	7/21
Intervention Support Activities												
CHW-SYSTIM Office Hours	5/6			5/27	6/3			6/24	7/1			7/22
Intervention Check-In Surveys	5/7				6/4				7/2			
Support Coach/Health Center Meetings		TBD				TBD				TBD		
CHW Learning Collaborative Meetings			5/20				6/17				7/15	

** Note: Each “intervention support block” will be 4 weeks long. There will be 8 blocks, total, from May through December 2025. The schedule will be modified in November and December to account for holidays.*

End of CHW-SYSTIM Training Workbook