

## Don't Just Wait and See: Improving Developmental Screening and Follow-up Record Review Tool

Please review up to the first 5 patient charts/records who received health supervision visits by you during the specified review month for the following sets of patients:

- Patients seen for the 9-month health supervision visit
- Patients seen for the 18-month health supervision visit
- Patients seen for the 24- and/or 30-month health supervision visit

1. Select the appropriate patient set:

- Patients seen for the 9-month health supervision visit
- Patients seen for the 18-month health supervision visit
- Patients seen for the 24- and 30-month health supervision visit

### **9-Month Health Supervision Visits**

2. Is there documentation in the medical record that a standardized developmental screening was conducted at the 9-month visit? **(If NO, skip to question #5.)**

- Yes
- No

3. Is there documentation that developmental screening results were discussed with the patient's family at the time of the screening?

- Yes
- No

4. If a positive developmental screen was identified, is there documentation in the medical record that the patient was referred for follow-up care within 7 calendar days? **(Note: Follow-up care examples include Part C Early Intervention Program, developmental-behavioral pediatrician, child psychologist, speech and language evaluation; see additional examples below.)**

- Yes       N/A (choose N/A only if the patient did not have a positive developmental screen)
- No

### **18-Month Health Supervision Visits**

5. Is there documentation in the medical record that a standardized developmental screening was conducted at the 18-month visit? **(If NO, skip to question #8.)**

- Yes
- No

6. Is there documentation that developmental screening results were discussed with the patient's family at the time of the screening?
- Yes  
 No
7. If a positive developmental screen was identified, is there documentation in the medical record that the patient was referred for follow-up care within 7 calendar days? (**Note: Follow-up care examples include Part C, Early Intervention Program, developmental-behavioral pediatrician, child psychologist, speech and language evaluation; see additional examples below.**)
- Yes       N/A (choose N/A only if the patient did not have a positive developmental screen)  
 No
8. Is there documentation in the medical record that a standardized autism screening was conducted at the 18-month visit (**If NO, skip to question #11**)?
- Yes  
 No
9. Is there documentation that autism screening results were discussed with the patient's family at the time of the screening?
- Yes  
 No
10. If a positive autism screen was identified, is there documentation in the medical record that the patient was referred for follow-up care within 7 calendar days? (**Note: Follow-up care examples include Part C Early Intervention Program, developmental-behavioral pediatrician, child psychologist, speech and language evaluation; see additional examples below.**)
- Yes       N/A (choose N/A only if the patient did not have a positive autism screen)  
 No

**24- and/or 30-Month Health Supervision Visits**

11. Is there documentation in the medical record that a standardized developmental screening was conducted at the 24- or 30-month visit? (**Note: you may choose either 24 or 30 month patient charts for this measure depending on when you conduct developmental screening**) (**If NO, skip to question #14.**)
- Yes  
 No
12. Is there documentation that developmental screening results were discussed with the patient's family at the time of the screening?

Yes

No

13. If a positive developmental screen was identified, is there documentation in the medical record that the patient was referred for follow-up care within 7 calendar days? (**Note: Follow-up care examples include Part C Early Intervention Program, developmental-behavioral pediatrician, child psychologist, speech and language evaluation; see additional examples below.**)

Yes      N/A (choose N/A only if the patient did not have a positive developmental screen)

No

14. Is there documentation in the medical record that a standardized autism screening was conducted at the 24-month visit? (**If NO, your chart review is complete; skip questions #15 and #16.**)

Yes

No

15. Is there documentation that autism screening results were discussed with the patient's family at the time of the screening?

Yes

No

16. If a positive autism screen was identified, is there documentation in the medical record that the patient was referred for follow-up care within 7 calendar days? (**Note: Follow-up care examples include Part C Early Intervention Program, developmental-behavioral pediatrician, child psychologist, speech and language evaluation; see additional examples below.**)

Yes      N/A (choose N/A only if the patient did not have a positive autism screen)

No

## Record Review Tool – Key Terms

**I. AAP Policy Statement: [Identifying Infants and Young Children with Developmental Disorders in the Medical Home: An Algorithm for Developmental Surveillance and Screening](#)**

**II. *Communicating Developmental Screening Results with Families***

- Centers for Disease Control and Prevention: [Tips for Talking with Parents](#)
- AAP Section on Developmental and Behavioral Pediatrics Newsletter: [Explaining the Results of a Failed Screen](#)
- [Sugar-coaters and Straight Talkers: Communicating About Developmental Delays in Primary Care](#)

**III. *Positive Developmental Screen***

A positive developmental screening result refers to a result from a validated developmental screening tool that indicates the patient tests positive for risk of a developmental delay.

**IV. *Referral for Follow-up Care***

Referral for follow-up care is defined as the formal event in which the clinician

- i. provides a referral to the patient's family (and does not include any further steps in the process such as securing the appointment, confirming appointment attendance, etc.)
- ii. refers to any type of therapy, intervention, or education to mitigate developmental delays
- iii. can be within the medical home or outside of the medical home.

A referral can also include a form of watchful waiting by which the clinician offers practice-based intervention(s) and schedules a follow-up visit within 3 months. Some referral types are listed as examples below, but this list is not exhaustive:

- Part C Early Intervention Program
- Referral for Follow-up Testing
- Home Visiting for 0-5
- Physical Therapist
- Occupational Therapist
- Speech/Language Pathologist
- Medical home Clinician Internal
- Specialty Clinician External
- Early Head Start
- Network Care Manager
- Family-to-Family Support
- Hearing and Vision Specialists
- Mental Health Specialist

## V. Screening vs Surveillance

**Developmental and behavioral screening** is a first line check of a child's development, using a developmental and behavioral screening tool. A developmental and behavioral screening tool is a formal research-based checklist that asks questions about a child's development, including language, motor, cognitive, social, and emotional development. The results of a screening can help you plan how to best support the development of the child in your care. A screening does not provide a diagnosis, rather, it indicates whether a child is on track developmentally and if an evaluation with a specialist is needed.

- [\*Birth to 5 Watch me Thrive: A Primary Care Provider's Guide for Developmental and Behavioral Screening\*](#)

**Developmental surveillance** is the tracking of a child's development over time. It is different from screening in that it is a flexible, continuous process during which primary care professionals attend to parental or caregiver concerns, obtain a relevant developmental history, document observations of children using clinical judgment, and share opinions and concerns with relevant professionals. Pediatricians may use [age-appropriate developmental checklists to record milestones](#) during well child visits as part of developmental surveillance.