



Social Prescribing Documentation Guide

This guide, created at the beginning of 2024, is a reference tool for how to document and track Social Prescribing referrals and consultations in PS Suite (PSS), using a series of custom forms.

This guide provides information about:

1. documenting a Social Prescribing encounter using a Social Prescribing Encounter Form which includes a **suggested** set of ENCODES;
2. documenting a Social Prescribing referral/connection by adding the Social Prescription option to the Service Provided section of existing encounter forms;
3. documenting an internal Social Prescribing referral to a link worker or another team member who engages in consultations with clients;
4. documenting additional information related to Social Prescribing consultations and/or referrals, including types of Social Prescriptions provided;

Note: How Social Prescribing encounters and referrals are documented will be determined by organizational workflows and processes.

Additional information not included in this guide:

- All custom forms presented in this guide are available through the Alliance for Healthier Communities' Social Prescribing Team and need to be uploaded into PSS by the organization that wishes to use them.
- For more info about these custom forms, or how to import the forms into PSS, please contact Christine Randle at christine.randle@allianceon.org.
- The approach to documenting Social Prescribing consultations and making Social Prescribing referrals outlined in this guide is recommended to help your organization collect data about your Social Prescribing program that can be used for improvement and future program planning.

Note: if you are participating in a specific Social Prescribing project there may be additional documentation and data collection requirements, not outlined in this guide. Please check with the project lead to ensure you have the necessary tools for documentation and data collection related to that project.



1) Documenting a Social Prescribing Encounter Using the Social Prescribing Encounter Form (Recommended)

It is recommended that individuals in Link worker/Navigator or other similar roles, chart all Social Prescribing encounters using the Social Prescribing Encounter Form (see Figure 1). The form includes a suggested set of ENCODES that are relevant to Social Prescribing.

Please note: this is only a suggested set of ENCODES and other ENCODES can be used.

What may be new to providers, or your organization, is an option for 'social prescription' in the Services Provided section of the encounter form. In order to pull your Social Prescribing data in a standardized way, this box **needs** to be checked off.

Please see a sample of the form below:

Social Prescribing Encounter Form

File

Location: Centre - Main location(s) ▾

Type: Individual - In person ▾

Mode: Scheduled appointment ▾

Language: English ▾

Visit type: ▾

Created by: HWJ

Referred by: ▾

Provider: Henri Walton Jones

Role: Doctor

Reviewed by: ▾

Reason for Visit

<input type="checkbox"/> Inadequate social supports	<input type="checkbox"/> Low Income	<input type="checkbox"/> Anxiety
<input type="checkbox"/> Inadequate family supports	<input type="checkbox"/> Poverty	<input type="checkbox"/> click to select
<input type="checkbox"/> Social Isolation	<input type="checkbox"/> Feeling Down	<input type="checkbox"/> click to select
<input type="checkbox"/> Need Assistance with Financial Activities	<input type="checkbox"/> Loneliness	<input type="checkbox"/> click to select
<input type="checkbox"/> Need Assistance Social/Cultural Activities	<input type="checkbox"/> Advice on Community Resources	<input type="checkbox"/> click to select
<input type="checkbox"/> Food Insecurity	<input type="checkbox"/> Request for Advocacy	<input type="checkbox"/> click to select
<input type="checkbox"/> Loss of Significant Relationship	<input type="checkbox"/> Visit for Advice on Leisure Activities	<input type="checkbox"/> click to select

Issues Addressed

<input type="checkbox"/> Inadequate social supports	<input type="checkbox"/> Low Income	<input type="checkbox"/> Anxiety
<input type="checkbox"/> Inadequate family supports	<input type="checkbox"/> Poverty	<input type="checkbox"/> Depression
<input type="checkbox"/> Social Isolation	<input type="checkbox"/> Feeling Down	<input type="checkbox"/> Social Exclusion/Rejection
<input type="checkbox"/> Need Assistance with Financial Activities	<input type="checkbox"/> Loneliness	<input type="checkbox"/> Adjusting to New Community
<input type="checkbox"/> Need Assistance Social/Cultural Activities	<input type="checkbox"/> Advice on Community Resources	<input type="checkbox"/> click to select
<input type="checkbox"/> Food Insecurity	<input type="checkbox"/> Request for Advocacy	<input type="checkbox"/> click to select
<input type="checkbox"/> Loss of Significant Relationship	<input type="checkbox"/> Visit for Advice on Leisure Activities	<input type="checkbox"/> click to select
<input type="checkbox"/> Limitation Due to Disability	<input type="checkbox"/> Visit for Advice on Physical Activities	<input type="checkbox"/> click to select
<input type="checkbox"/> Inability to Acquire Transportation	<input type="checkbox"/> Inability to access Computer/Internet	<input type="checkbox"/> click to select
<input type="checkbox"/> Language Barrier	<input type="checkbox"/> Family Relationship Problem	<input type="checkbox"/> click to select

☐ Attach Issue diagnosis codes to encounter note ☒ Include Issues addressed in progress note

Services Provided

<input type="checkbox"/> Social prescription	<input type="checkbox"/> Dispense medication	<input type="checkbox"/> Minor assessment
<input type="checkbox"/> Anonymous HIV service	<input type="checkbox"/> Family/couple counselling	<input type="checkbox"/> Occupational therapy
<input type="checkbox"/> Application for limited eligibility	<input type="checkbox"/> Family planning/birth control	<input type="checkbox"/> Other identification services
<input type="checkbox"/> Care plan documentation	<input type="checkbox"/> Foot care	<input type="checkbox"/> Palliative care
<input type="checkbox"/> Chart review		

Discard

Figure 1: Screenshot of Social Prescribing Encounter Form in PSS.



Issues Addressed

The suggested set of ENCODES reflects common areas of client need that are frequently reported for clients referred to Social Prescribing.

Services Provided

Link workers/Navigators or other team members performing a similar function can now select 'Social Prescribing' as a service provided to track Social Prescribing referrals in PSS.

2) Documenting a Social Prescribing Referral/ Connection in Existing Encounter Forms (Recommended)

Not all individuals who receive a Social Prescription require a referral to a Link worker/Navigator or other team member performing a similar function. In this case providers who refer clients to non-clinical programs and services can document this referral in an encounter form that they choose to use by adding the Social Prescription option to the Services Provided section of the existing encounter forms.

Instructions to add this:

Copy an existing Service from the Service Provided section of the form using Control C, paste it using the Control V command. It is important that you do this in the 'All' section of Services Provided not the Favorites. If you would also like this item to show in the Favorites section then copy and paste it once the changes have been made. The original must remain in the 'All' section. Ensure that the following 'Property' fields are changed.

Name	Services Provided Social Prescription
ID	Services Provided Social Prescription
Text	Social Prescription
Resource Name	SOCIALPRESCRIPTION



3) Additional Optional Custom Forms

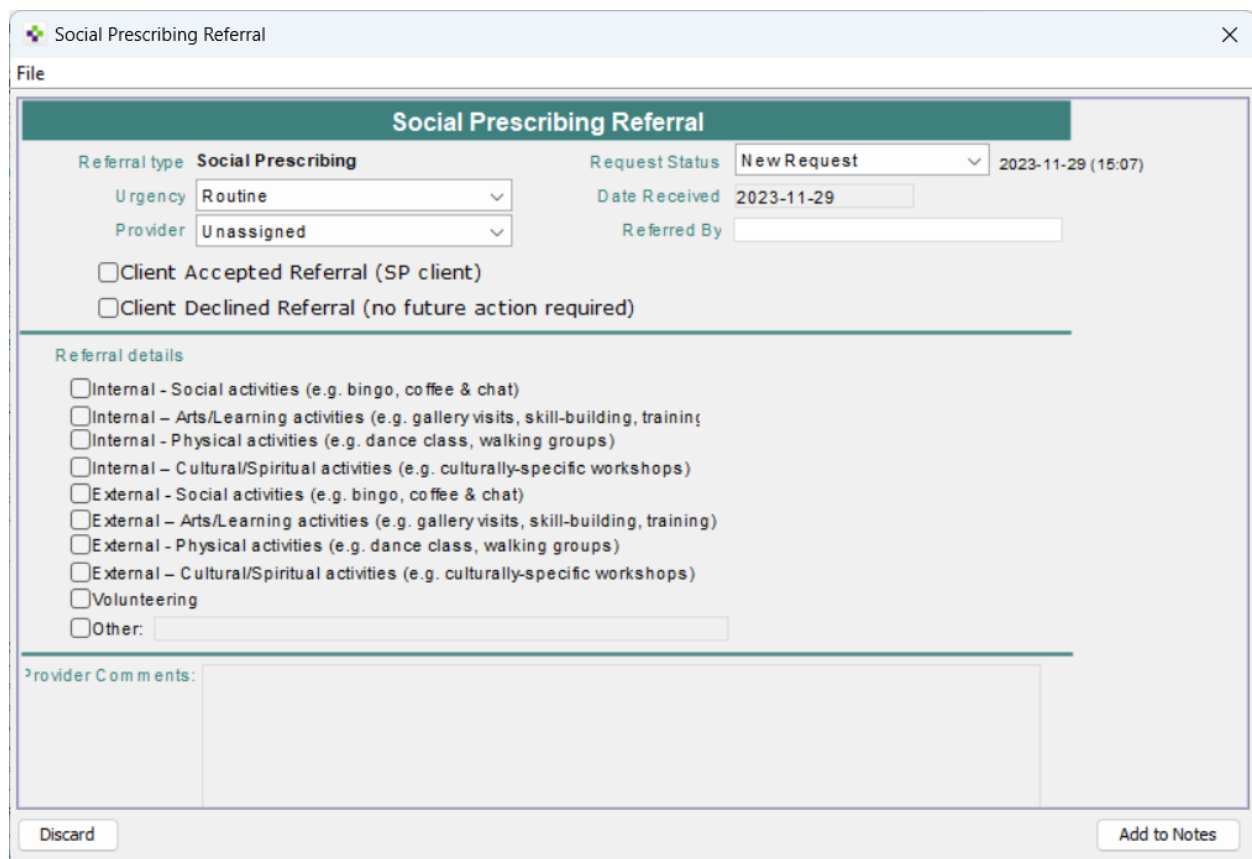
If your organization would like to collect additional data related to Social Prescribing referrals and types of social prescriptions provided then these data need to be collected in other ways that align with existing processes and workflows at your organization.

The two forms described below provide options for documentation that will enable your organization to collect these additional data.

A) Social Prescribing Referral Form (Optional)

The Social Prescribing Referral Form (see Figure 2) may be used by providers and other client-facing staff who are sending Social Prescribing referrals to a link worker, system navigator, or other team member who will engage in a Social Prescribing consultation with clients.

Please see below for a sample of the Social Prescribing Referral Form (Optional):



The screenshot shows a web-based form titled "Social Prescribing Referral" within a browser window. The form is organized into several sections. At the top, there's a header bar with the title. Below it, a "File" tab is visible. The main form area contains fields for "Referral type" (set to "Social Prescribing"), "Request Status" (set to "New Request"), "Urgency" (set to "Routine"), "Date Received" (set to "2023-11-29"), "Provider" (set to "Unassigned"), and "Referred By" (an empty text field). There are also checkboxes for "Client Accepted Referral (SP client)" and "Client Declined Referral (no future action required)". A section titled "Referral details" lists various activity types with checkboxes: "Internal - Social activities (e.g. bingo, coffee & chat)", "Internal - Arts/Learning activities (e.g. gallery visits, skill-building, training)", "Internal - Physical activities (e.g. dance class, walking groups)", "Internal - Cultural/Spiritual activities (e.g. culturally-specific workshops)", "External - Social activities (e.g. bingo, coffee & chat)", "External - Arts/Learning activities (e.g. gallery visits, skill-building, training)", "External - Physical activities (e.g. dance class, walking groups)", "External - Cultural/Spiritual activities (e.g. culturally-specific workshops)", "Volunteering", and "Other:" (with an empty text field). At the bottom, there's a "Provider Comments:" section with a large text area. The form has a "Discard" button at the bottom left and an "Add to Notes" button at the bottom right.

Figure 2: Screenshot of Social Prescribing Referral Form in PSS.



Client Accepted/Declined Referral

These checkboxes are used to flag Social Prescribing clients in PSS. If a client declines a Social Prescribing referral, checking this option enables the organization to track data around the number of clients who have been offered the option of a social prescription.

Referral Details

Providers can select what type of referral the client is interested in by checking any, or multiple, boxes under the Referral Details subheading. If the client would benefit from wraparound supports in order to access their social prescription, or if there are notes you want the link worker to see, **providers should include this information in their encounter notes as well.**

Provider Comments

For additional comments, the open textbox at the bottom of this form can be helpful to communicate details about the client's interests or scheduling availability **that are not in their encounter notes.** Link workers will receive this form and these comments as part of the warm hand-off of clients from providers.

If your centre does not have a link worker or similar role, you may not find the above form useful, however, you may want to use the "Social Prescribing Form" described below to collect more specific data related to Social Prescribing referrals and client needs.



B) Social Prescribing Form (Optional)

If your centre **does not have** a link worker or team member who performs a similar function, providers and other team members can start a Social Prescribing referral with this custom form instead.

Please see below for sample of the Social Prescribing Form (Optional):

The screenshot shows a web-based form titled "Social Prescribing". At the top, there is a "File" menu. Below the title, there is a section "Social Prescribing client" with a checkbox. This is followed by a "Social Prescribing referral" section containing two columns of checkboxes for various activities, categorized as "Internal" or "External". Below these are checkboxes for "Follow-up call, did client attend?" with "Yes" and "No" options. A "Notes" section is present with a text area and a note that "(Encounter Detail Form must also be created)". At the bottom, there are "Discard" and "Add to Notes" buttons.

Social Prescribing

File

Social Prescribing client ☐

Social Prescribing referral

<input type="checkbox"/> Social Prescribing staff	<input type="checkbox"/> External - Social activities (e.g. bingo, coffee & chat)
<input type="checkbox"/> Internal - Social activities (e.g. bingo, coffee & chat)	<input type="checkbox"/> External - Learning activities (e.g. skills, training)
<input type="checkbox"/> Internal - Learning activities (e.g. skills, training)	<input type="checkbox"/> External - Physical activities (e.g. dance class, walking groups)
<input type="checkbox"/> Internal - Physical activities (e.g. dance class, walking groups)	<input type="checkbox"/> External - Food
<input type="checkbox"/> Internal - Food	<input type="checkbox"/> Cab Ride
<input type="checkbox"/> Internal - Food Bank Delivery Program	<input type="checkbox"/> Other: <input type="text"/>
<input type="checkbox"/> Internal - Tech Support	<input type="checkbox"/> Client Declined Referral

Follow-up call, did client attend? ☐ Yes ☐ No

Notes: (Encounter Detail Form must also be created):

Discard Add to Notes

Figure 3: Screenshot of Social Prescribing Form in PSS.

Social Prescribing Client

This checkbox allows providers and client-facing staff to flag Social Prescribing clients in PSS. If a client declines their Social Prescribing referral, move on to the next section and select 'Client Declined Referral.'

Please note that this form is not a substitute for charting an encounter. Using ENCODES and checking the social prescription service provided box must both be completed for accurate data collection.

Social Prescribing Referral

Broad categories of internal and external referrals are available on this form to track the types of social prescriptions being made at your centre.



If the client is interested in multiple referrals, each type of referral or wraparound support can be confirmed in this section without needing to open a new form per referral. Any other details about these referrals should be added to the **client encounter notes**.

Follow-Up Call

This checkbox reminds providers and client-facing staff to check if a client has attended their Social Prescribing referral, and is a key step in the Social Prescribing workflow.

If a client has not attended their Social Prescribing referral, select the 'No' checkbox and end the Social Prescribing referral. If the client lists any reasons for why they did not attend their referral, these reasons can be documented under Clinical Note in the next section of this form.

Note: It is also suggested to ask clients if they encountered any barriers to participating in their referral, or if a client needs support with attending. These barriers can also be included in an **encounter note** and under Clinical Note in this form.

Clinical Note

Any comments about a client's interests, scheduling, availability, or barriers to participation and other supports needed for attendance can be included in the open textbox here.

Note: Free text comments enable team members to communicate effectively and support clients, they are not data that be pulled from the EMR and are not a substitute for charting encounters.

