



Blue Shield of California Foundation is an independent licensee of the Blue Shield Association



Data Collection Success Checklist

Use this tool to help you develop a clear, written workflow for making and receiving warm handoffs/referrals, and clearly identify staff roles and responsibilities.

FOR HEALTH PARTNERS TO COMPLETE

1. Clearly identified staff roles

- Who is responsible for:
 - Completing DV assessments: _____
 - Doing universal education: _____
 - Documenting in patient record: _____
 - Completing record extraction and completes the Health Agency Data Collection tool: _____
 - Referral point of contact(s)
 - Making referrals as appropriate to DV partner: _____
 - Scheduling appointments for patients referred to DV site: _____
 - Following up on client referrals/appointment status: _____
 - Communicating appointment status with DV partner: _____
 - Completing the Feedback Loop Tracking tool: _____
 - Reporting data monthly to leadership: _____
 - Overseeing the success and progress of partnership and data: _____

2. Clearly identified data collection period

- Data Collection began/begins: _____

3. Clearly identified timeline for monitoring the data

- Month 1: _____ Month 7: _____
- Month 2: _____ Month 8: _____
- Month 3: _____ Month 9: _____
- Month 4: _____ Month 10: _____
- Month 5: _____ Month 11: _____
- Month 6: _____ Month 12: _____

4. Clearly identified ongoing communication with partner

- Coordinating and participating in check-in calls with DV partner
 - Date: _____ Who's participating? _____
 - Date: _____ Who's participating? _____
 - Date: _____ Who's participating? _____



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FOR DV PARTNERS TO COMPLETE

1. Clearly identified staff roles

- Who is responsible for:
 - Completing health assessments: _____
 - Doing universal education: _____
 - Documenting in client record: _____
 - Completing DV Agency Data Collection tool: _____
 - Referral point of contact(s)
 - Making referrals as appropriate to health partner: _____
 - Scheduling appointments for clients referred to health partner: _____
 - Following up on client referrals/appointment status: _____
 - Communicating with health partner about appointment status: _____
 - Documenting appointment status on the DV Agency Data Collection Tool: _____
 - Reporting data monthly to leadership: _____
 - Overseeing the success and progress of the partnership and data: _____

2. Clearly identified data collection period

- Data Collection began/begins: _____

3. Clearly identified timeline for monitoring the data

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|------------------|-----------------|
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