

CHECKLIST FOR CHW VISITS

Community Health Worker (CHW) Checklist

A Quick Reference for Community Health Workers

For patients never screened or not screened within the last 2 years

(Use during home visits, outreach events, or first-time client meetings)

HOW TO USE THIS CHECKLIST

1. Start at Section 1 and work downward.

- Each step reflects how your CHW visit should flow, from introducing services, to collecting documents, to preparing the patient for enrollment and screening.

2. Check off each box as you complete the task.

- If an item does not apply, write "N/A."

3. Use the Notes/Follow-Up section whenever you schedule appointments, identify barriers, or gather missing documents.

4. Keep all forms and required materials organized in a portable folder, outreach binder, or digital folder (if using a tablet/laptop).

5. After the visit, review the checklist to ensure all needed items were completed before submitting any applications (IBCCP or other programs).

CHW CHECKLIST:

PATIENT NOT DIAGNOSED/NEVER SCREENED OR NOT SCREENED WITHIN THE LAST TWO YEARS

1. INTRODUCE SCREENING SERVICES

Explain the Breast Cancer Navigation Program offered at the Local Health Department (LHD)

2. SCHEDULE & PREPARE FOR CHW BREAST CANCER SCREENING ASSISTANCE APPOINTMENT

Set an appointment with the patient to set up a screening

(in person, at outreach table, or over the phone)

CHW to work with patient to set up breast cancer screening appointment

Confirm time, date, and location of appointment

Verify best method of contact (phone, text, email)

Verify any necessary documents needed for the appointment

Notes:



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3. DURING VISIT: INFORMATION COLLECTION STEPS DURING VISIT

- Complete face sheet or new client form
- Review "What to Bring" sheet and confirm which documents patient already has
- Determine insurance status. Private, public, or no insurance status does not exclude anyone from services
- Begin IBCCP application (as much as possible)
- Revisit insurance status and assistance with any applications or referrals if needed
- Complete consent forms (HIPAA, Cornerstone)
- Help patient gather missing documents or plan how to obtain them
- Identify any barriers (transportation, language, childcare, etc.)
- Encourage patient to use the Symptom Tracker

4. SUBMIT THE IBCCP APPLICATION (fax, upload, mail, or partner submission)

5. PREPARATION FOR SCREENING APPOINTMENT

- Confirm patient has all required documents
- Review location of appointment and transportation plan
- Verify any special needs (interpreter, disability access, etc.) and assist with those needs available at your office or provide referrals
- Confirm patient understands next steps and who to call with questions.

6. SUBMISSION & FOLLOW-UP

- IBCCP Program Steps need to be reviewed before submitting the application
- Notate submission date
- Follow up with providers as needed
- Document all attempted/received communications
- Update patient through preferred contact method

Notes: _____

8. NOTES & FOLLOW-UP TRACKING

(Use this area for documentation and future visits)

Appointment return date: _____

IBCCP application submission date: _____

Documents still needed: _____

Calls made to providers/agencies: _____

Patient barriers or special considerations: _____

Additional notes: _____