

Preconception Screening and Assessment Tools

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In June of 2006, the Consumer Work Group of the Preconception Care Implementation Committee began to compile a set of preconception assessment tools. A call for preconception and screening tools was distributed to a large number of organizations and listservs. The March of Dimes and the Centers for Disease Control and Prevention sent a second solicitation for tools out in the fall of 2006.

Responses were received between June of 2006 and April of 2007. Additional searches of the internet were conducted to look for untapped resources. Telephone and email follow up was done with organizations thought to have current tools. Assessments for both consumers and providers were submitted. A number of individuals also sent in website addresses for sites they thought relevant to preconception health. Links to the websites were posted on www.mombaby.org in the preconception section under CDC Consumer Group. This document attempts to summarize the tools submitted in response to these solicitations.

Summary:

- Despite repeated solicitations to a wide audience, few submissions were received. There are several factors that may have contributed to this relatively small response:
 - There may be few assessment tools in use across the country specifically identified as addressing preconception issues.
 - Our solicitations may not have reached groups who have such tools to share.

- Our solicitations may have reached the right groups, but those groups are reluctant to share their work.
- The tools received vary widely in terms of how comprehensive they are. Some cover fewer than 30 items, touching on basic health topics, while some cover over 70 items and explore a wide range of issues that may affect a woman’s health. This variety raises the question of how much information is “enough” to adequately assess a woman’s preconception health status. Thinking about the time needed to complete and review each tool also raises questions around how well such tools can be integrated into time limited interactions between women and their health care providers.
- The tools also varied in terms of their accessibility to patients with lower literacy abilities. While many were designed to be written self-report tools, it seems likely that they could all be adapted to be administered by a health care provider or other trained interviewer.
- There are a large number of health insurance plans that offer health appraisal tools to their clients. These tools assess basic health conditions many of which impact preconception health. Many of the plans are self-assessments and are often online tools. They are not generally targeted at women considering a pregnancy. These tools were not submitted to this solicitation and are not reviewed in detailed.

Review:

Becoming a Parent, 2nd Edition – Wisconsin Association for Perinatal Care

This is a written, ten page self-report checklist. All of the following sections ask for information about woman and her male partner:

- Family Medical History
- Patient and Partner Medical History
- Reproductive Health
- Nutrition
- Home, Work, or Social Hazards
- Parenting Considerations
- Addition Questions or Concerns

A companion booklet entitled “Becoming a Parent” discusses the factors that may affect one’s decision to become a parent. The booklet emphasizes planning for pregnancy, and outlines recommendations for planning and having a healthy pregnancy:

- Complete a preconception checklist
- Develop your pregnancy plans
- Meet with your healthcare provider
- Adopt the recommended health practices
- Assess possible changes in your lifestyle and relationships
- Review your expectations about parenthood
- Maintain your fertility awareness

A “Health Care Provider Reference to Becoming a Parent: Preconception Checklist” is also provided. This reference outlines the significance of each risk factor included in the checklist and provides recommendations for provider responses to each risk factor.

The checklist and accompanying booklets are available in the public domain at www.perinatalweb.org/content/view/23/81/

Comprehensive Perinatal Services Program – Initial Combined Assessment, California

This is a comprehensive, written tool designed to be administered by a Certified Perinatal Health Worker. While designed to be used during early pregnancy, many of its items fit within a preconception framework. It covers 97 items across 12 themes:

- Personal Information
- Economic Resources
- Housing
- Transportation
- Current Health Practices
- Pregnancy Care
- Nutrition
- Infant Feeding
- Coping Skills
- Tobacco, Drug, and Alcohol Use
- Education and Language
- Educational Interests (related to pregnancy and parenthood)

An annotated version of the assessment provides explanations for the significance of many items, highlights opportunities for provider follow up based on specific responses, and some recommendations for provider responses.

Both the checklist and the annotated guide are available in the public domain at www.dhs.ca.gov/publications/forms/mch.htm

Georgia Preconception / Interconception Online Health Assessment Project

This assessment tool is still in development as part of a preconception/interconception project sponsored by the Georgia March of Dimes chapter. The tool is anticipated to be available during the Summer of 2007 on the Georgia March of Dimes website: www.marchofdimes.com/georgia .

The assessment tool has two versions, one for women of child-bearing age and one for health care providers. The tool for women will have the following components:

- Welcome/Overview
- Pre Test
- Pre/Interconception Educational Information
- Risk Category

- Analysis
- Recommended Behavior Modifications
- Questions to Ask Your Healthcare Provider
- Post Test
- Post Test Results & % Knowledge Increase
- User Survey
- Incentive Item: Printable Coupon
- Become More Involved With the March of Dimes

The tool for health care providers follows a similar outline:

- Welcome/Overview
- Pretest
- Pre/Interconception Educational Information
- Recommended Questions for Patients
- Post Test
- Post Test Results and % Knowledge Increase
- User Survey
- Incentive Item: Continuing Medical Education Credit
- Become More Involved With the March of Dimes

Improving Preconception Care – Bronx, NY – Bernstein, Sanghvi & Merkatz

A “Preconception Health Screening/Counseling” chart insert was developed as part of this research project. This insert covers eight themes: family planning, social history, nutrition history, medical history, infectious disease history, medications, reproductive history, and family history. Each theme has between two and eleven specific topics listed to guide providers’ assessments. The insert has columns for “Date Done, Pending Action, and Comments/Provider’s Initials” for each theme area. This tool is designed to be completed by the medical provider and does not specifically target questions to the patient’s spouse or partner.

An article regarding the results of this project was published in the *Journal of Reproductive Medicine* Vol 45 No 7. 2000.

Preconception Health Assessment Tool – www.b4pregnancy.org, the Medical University of South Carolina and the March of Dimes

This tool was designed to be an interactive online assessment. A Preconception Health report accompanied the assessment tool; these were designed to be used along with a physical exam to guide the development by the patient and provider of an individualized preconception health plan.

The website has not been updated since 2004, and many of its interactive features (including the assessment) are not currently available. The site may be upgraded and reactivated in the future, in which case a link will be posted from www.mombaby.org.

Preconception / prenatal family history questionnaire – The March of Dimes

This is a written self-report checklist designed to gather information about the patient and patient's spouse/partner. The questions cover basic demographic information, past medical and developmental history, and current medical issues and health behaviors for both the patient and the patient's spouse/partner. The past medical and developmental history section covers a wide range of specific conditions and asks the patient to provide information for herself and her partner as well as their extended families.

This tool contains a small space for “office use only” in which significant findings and recommendations can be discussed. This space also asks for the date discussed with patient/family, the health care provider's signature, and the patient's signature.

Preconception Health Assessment – University of North Carolina at Chapel Hill

This is a written self-report tool designed to be completed by patients. It uses a combination of checklist and open-ended questions to cover ten topic areas:

- Allergies
- Medication History
- Medical History
- Surgical History
- Infectious Disease History
- Reproductive History
- Family History
- Nutrition History
- Social History
- Immunizations
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The survey begins with the question “What is your main reason for seeking preconception counseling?” The tool also includes a one-page checklist to assess risk factors for genetic disorders. This checklist contains 20 items highlighting specific conditions and risk factors related to age and ethnicity.

Preconception Risk Survey – Boston

This tool was designed for the “Negative Pregnancy Test: An Opportunity for Preconception Care” study based out of Brown University School of Medicine. It is a written self-report checklist covering eleven themes:

- Ethnic Background
- Baseline Health Assessment
- Nutrition
- Environmental Exposures
- Reproductive History
- Lifestyle Factors

- Pregnancy Planning
- Psychosocial Factors
- Barriers to Care
- Infectious Disease Risks
- Family History/Indications for Genetic Counseling (this is the only section that specifically asks for information about the patient's partner)

There is space at the end of the survey for a provider to list ten "Problems Identified" and ten "Follow-up Recommended" items.

An article regarding the results of this project was published in the *Archives of Family Medicine* Vol. 4 No. 4. 1995.

Women's Health History – Columbus, Ohio Public Health, Women's Health Clinic

This is a brief, two page, written self-report tool available in English and Spanish. It begins by asking patients to list current medications, drug allergies, and surgeries/major illnesses, hospitalizations. The tool covers 28 check list items over four themes:

- Menstrual/Pregnancy History
- Sexual History
- Social History
- Preventive Care (this item asks only for date of last Pap Smear)

Women's Health Questionnaire – Boston Healthy Start Initiative

This is a comprehensive ten page written tool covering 63 items (with additional sub-items) over three broad themes:

- Introduction
 - o Basic demographic information
- Physical Health
 - o Prevention
 - o Immunizations
 - o Medical Questions
 - o Sexual and Reproductive Health
- Social and Emotional Health
 - o Home and Community
 - o Work and Economic Support
 - o Safety
 - o Stress

This tool is designed to be either self administered or filled out with an interviewer. Several of the items and sub-headings have brief narratives explaining how the information requested is related to women's health. It concludes with a question regarding problems communicating with health care providers.

The tool includes a Provider Report. This report is a summary of the patient's responses to the questionnaire and includes highlighted areas of concern along with recommendations for further questioning or counseling in those areas.

There is also a corresponding Patient Report. Based on each woman's answers, specific health improvement suggestions and activities are suggested, with an overall emphasis on asking the health care provider for more information.

Further background information about this assessment tool is available in the public domain at <http://archive.naccho.org/modelpractices/Result.asp?PracticeID=43>

Women's Health Questionnaire – The Magnolia Project, Duval County Florida

This is a written self-report checklist covering 44 items across seven themes:

- Health History
- Nutrition and Physical Activity
- Chronic Health
- Stress and Mental Health
- Abuse History
- Social Support
- Substance Abuse

This questionnaire is designed to guide a personalized approach to the Well Woman and Prenatal Education and Counseling curriculum component of the Magnolia Project, which focuses on improving interconception health for women at risk of future poor birth outcomes.

An overview presentation of the Magnolia Project is available in the public domain at http://www.marchofdimes.com/files/PR_Brady.ppt

Women's Health Questionnaire – Pinellas Healthy Start & Florida Department of Health

This tool is part of the "What About Mom" interconception program. Mothers who participate in this program receive care and services from a public health nurse based in a pediatrician's office. The two page, written self-report checklist covers 21 items over five themes:

- Women's Health, Access to Health Care, Maternal Infections, Baby Spacing
- Nutrition, Physical Activity, Health Behavior
- Health Screening
- Stress and Mental health
- Environment Exposure

PKC Preconception Guidance Tool

The Problem Knowledge Couplers Preconception Guidance Tool provides information on planning for a pregnancy. It includes general information on basic topics such as fertility and conception, diet, vitamin supplementation, exercise, and avoidable hazards. The Coupler identifies any risks to the mother or child related to existing maternal medical conditions, medications, chemical exposures, infectious diseases, and family history. Genetic testing may be suggested based on risk factors. The Coupler also provides fertility and risk information based on the male partner's personal and family health history.

The Coupler asks for information regarding both partners in a couple, so it may be helpful to complete the questionnaire together. This Coupler is not intended for use by pregnant women as a prenatal guidance tool.

The PKC has a tool set with over 100 Couplers such as this one available to individuals for a monthly subscription cost. Institutions can license the entire set or a subset of tools, such as Preconception Guidance, for a fee. For more information go to www.pkc.com or contact Lisa Souza at lms@pkc.com.