Step 1 Collect SDOH Data
Any member of a person’s care team can collect SDOH data during any encounter.
- Includes providers, social workers, community health workers, case managers, patient navigators, and nurses.
- Can be collected at intake through health risk assessments, screening tools, person-provider interaction, and individual self-reporting.

Step 2 Document SDOH Data
Data are recorded in a person’s paper or electronic health record (EHR).
- SDOH data may be documented in the problem or diagnosis list, patient or client history, or provider notes.
- Care teams may collect more detailed SDOH data than current Z codes allow. These data should be retained.
- Efforts are ongoing to close Z code gaps and standardize SDOH data.

Step 3 Map SDOH Data to Z Codes
Assistance is available from the ICD-10-CM Official Guidelines for Coding and Reporting.¹
- Coding, billing, and EHR systems help coders assign standardized codes (e.g., Z codes).
- Coders can assign SDOH Z codes based on self-reported data and/or information documented in an individual’s health care record by any member of the care team.²

Step 4 Use SDOH Z Code Data
Data analysis can help improve quality, care coordination, and experience of care.
- Identify individuals’ social risk factors and unmet needs.
- Inform health care and services, follow-up, and discharge planning.
- Trigger referrals to social services that meet individuals’ needs.
- Track referrals between providers and social service organizations.

Step 5 Report SDOH Z Code Data Findings
SDOH data can be added to key reports for executive leadership and Boards of Directors to inform value-based care opportunities.
- Findings can be shared with social service organizations, providers, health plans, and consumer/patient advisory boards to identify unmet needs.
- A Disparities Impact Statement can be used to identify opportunities for advancing health equity.

For Questions: Contact the CMS Health Equity Technical Assistance Program
USING SDOH Z CODES
Can Enhance Your Quality Improvement Initiatives

Health Care Administrators
Understand how SDOH data can be gathered and tracked using Z codes.
- Select an SDOH screening tool.
- Identify workflows that minimize staff burden.
- Provide training to support data collection.
- Invest in EHRs that facilitate data collection and coding.
- Decide what Z code data to use and monitor.

Develop a plan to use SDOH Z code data to:
- Enhance patient care.
- Improve care coordination and referrals.
- Support quality measurement.
- Identify community/population needs.
- Support planning and implementation of social needs interventions.
- Monitor SDOH intervention effectiveness.

Health Care Team
Use a SDOH screening tool.
- Follow best practices for collecting SDOH data in a sensitive and HIPAA-compliant manner.
- Consistently document standardized SDOH data in the EHR.
- Refer individuals to social service organizations and appropriate support services through local, state, and national resources.

Coding Professionals
Follow the ICD-10-CM coding guidelines.
- Use the CDC National Center for Health Statistics tool to search for ICD-10-CM Browser tool to search for ICD-10-CM codes and information on code usage.
- Coding team managers should review codes for consistency and quality.
- Assign all relevant SDOH Z codes to support quality improvement initiatives.

Z code Categories
- **Z55** – Problems related to education and literacy
- **Z56** – Problems related to employment and unemployment
- **Z57** – Occupational exposure to risk factors
- **Z59** – Problems related to housing and economic circumstances
- **Z60** – Problems related to social environment
- **Z62** – Problems related to upbringing
- **Z63** – Other problems related to primary support group, including family circumstances
- **Z64** – Problems related to certain psychosocial circumstances
- **Z65** – Problems related to other psychosocial circumstances

This list is subject to revisions and additions to improve alignment with SDOH data elements.