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| **Site ID: \_\_\_\_\_\_\_ Learner ID: \_\_\_\_\_\_\_ Patient ID: \_\_\_\_\_\_\_ Observer ID: \_\_\_\_\_\_\_ Date/Time: \_\_\_\_\_\_\_\_\_\_\_\_\_** |

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| **Screening Components** | | | |
| **Yes No DK NA** |  | **Yes No DK NA** |  |
|  | 1. Establishes rapport and introduces the screening |  | 7. Provides Response Card and Drug List to patient |
|  | 2. Provides a rationale for asking the questions |  | 8. Accurately follows skip patterns |
|  | 3. Addresses confidentiality |  | 9. Accurately classifies drugs or standard drinks |
|  | 4. Provides a standardized introduction to screening |  | 10. Uses probing techniques to clarify ambiguities |
|  | 5. Defines time window of interest |  | 11. Scores the assessment accurately |
|  | 6. Asks questions as written |  | 12. Accurately categorizes patient risk |
| **Comments** |  | | |

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| **Brief Intervention Items** | | | |
| **Yes No DK NA** | **Content Components** | **Yes No DK NA** | **MI Spirit/Style** |
|  | 1. Asks permission to show the screening scores |  | 12. Avoids lecturing, warning, convincing -  asks permission to educate, suggest or advise |
|  | 2. Describes the levels of risk associated with the scores |  | 13. Expresses empathy |
|  | 3. Describes the risks associated with the substance: health, legal, financial, social, etc. |  | 14. Reduces resistance |
|  | 4. Describes lower-risk drinking guidelines |  | 15. Supports self-efficacy |
|  | 5. Promotes personal responsibility/choice |  | 16. Utilizes open-ended questions |
|  | 6. Provides advice related to limits of consumption: maintain, reduce, abstain |  | 17. Utilizes affirmations |
|  | 7. Provides a menu or variety of change options |  | 18. Utilizes reflective listening |
|  | 8. Utilizes importance/readiness/confidence rulers, decisional balance, pros/cons |  | 19. Generates change talk |
|  | 9. Helps patient set goals/develop a plan of action |  | 20. Closes with a summary of the conversation |
|  | 10. Provides take-home/resource materials |  |  |
|  | 11. Informs patient about additional BIs/BT and makes appointment, if applicable |  |  |
| **Comments** |  | | |

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| **Referral to Treatment Components** | | | |
| **Yes No DK NA** |  | **Yes No DK NA** |  |
|  | 1. Uses MI techniques to determine patient’s interest in additional treatment |  | 1. Makes appointment for patient for further assessment and treatment at in-house department or outside agency |
|  | 1. Collaborates with patient to assess preferences for treatment options (e.g., modality, gender specific, schedule, location) |  | 1. Provides patient agency contact information (where and when to go for assessment, but no set appointment) |
|  | 1. Determines logistical barriers (e.g., insurance, transportation, child care, employment) |  | 1. Provides patient with list of available treatment options and contact information in catchment area |
|  | 1. Offers on-site SA assessment and treatment if available (e.g., co-located within medical setting) |  | 1. Provides transportation to treatment agency directly from medical setting (e.g., sends patient to treatment agency in taxi or van) |
|  | 1. Facilitates warm handoff to therapist (e.g., sends therapist to patient’s room, walks patient to therapist’s office) |  | 1. Conducts follow-up with patient, therapist, or agency to determine treatment initiation |
|  | 1. Facilitates telephone conversation between patient and therapist (either in-house or at outside agency) for assessment and treatment |  | 1. Links patient to peer support to facilitate treatment engagement   N |
|  | 1. Facilitates telephone conversation between patient and outside agency for assessment and treatment (i.e., no specific therapist contact) |  |  |
| **Comments** |  | | |