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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)
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| **[ ]  [ ]  [ ]  [ ]**  | 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
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| **[ ]  [ ]  [ ]  [ ]**  | 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)
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| **[ ]  [ ]  [ ]  [ ]**  | 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
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| **[ ]  [ ]  [ ]  [ ]**  | 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)
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| **Comments** |  |