Implementation in Clinical Settings: A Planning Guide for Investigators

*Worksheet 1*

***EXAMPLE:*** *Screening, Brief Intervention and Referral to Treatment (SBIRT) for Alcohol Use Disorder*

*in Primary Care Settings*

This worksheet describes the intervention. It focuses on outlining the **core components** of the intervention – those critical for its success, and those that could be modified without changing the effectiveness of the intervention.

|  |  |
| --- | --- |
| **Intervention characteristics** | **List Here** |
| **Inputs** – resources needed to support the intervention(e.g. staff, materials, training, existing clinical workflows, funding, equipment) | * Clinical staff to complete screening (medical assistant)
* Clinical staff to complete brief intervention and referral to treatment (clinician)
* Standard alcohol use disorder screening tool built into electronic health record
* Access to alcohol use disorder treatment
* Workflow to provide and track patient referrals
* Reimbursement for patient screening, counseling and referral
 |
| **Activities** – components of the intervention itself. Activities include both actions to prepare for implementation (e.g. develop new clinical workflow) and actions for implementing and maintaining the intervention (e.g. administering the new treatment)  | * Health IT team builds screening tool into electronic health record
* Medical assistants trained on screening
* Clinicians trained on brief intervention and referral
* Medical assistants screen, notify clinicians of abnormal screening results
* Clinicians provide brief intervention and referral
* Quality improvement leader assesses implementation success
 |
| **Short term outcomes** – what you expect to occur as a result of the intervention activities. Short term outcomes may reflect modifications or changes in healthcare process (e.g., number of patients contacted) or healthcare service (e.g. number of tests performed) | * Proportion of adult patients attending a visit that complete screening
* Proportion of adult patients with high risk alcohol use
* Proportion of adults with high risk alcohol use that receive brief intervention
* Proportion of adults with high risk alcohol use that receive referral to treatment
* Proportion of adults with high risk alcohol use that engage in treatment
 |
| **Long term outcomes –** anticipated health outcomes that will occur as a result of the intervention | * Proportion of adults with high risk alcohol use that reduce or abstain from alcohol
* Proportion of patients with medical complications related to alcohol use disorder
 |

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**BLANK TEMPLATE**

**ACTION 1**: **Describe the characteristics of your intervention**

Use this worksheet to describe your intervention. Focus on outlining:

* The **core components** of the intervention – those critical for its success, and
* The components that could be modified without changing the effectiveness of the intervention.

|  |  |
| --- | --- |
| **Intervention characteristics** | **List Here** |
| **Inputs** – resources needed to support the intervention(e.g. staff, materials, training, existing clinical workflows, funding, equipment) |  |
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