



INDIANA UNIVERSITY

SBIRT Implementation Planning Worksheet



This planning worksheet lists common questions that often need to be answered to build out a process flow for an integrated SBIRT program. Your organization can use this document as a discussion tool to support decision making, but this list is not intended to be inclusive or exclusive of all possible ideas.

Question	Your Response
Prescreening and Screening Stage	
How often will our agency provide SBIRT to a typical patient?	
Will our agency use prescreening (a small number of questions to determine eligibility for a full screening)?	
Will screenings be self-administered or staff-administered?	
What staff roles will administer or manage screening processes?	
What types of screening do we plan to provide?	
Alcohol?	
Tobacco?	
Other Drugs?	
Depression/Anxiety?	
Other?	
Post Screening Stage	
Who will interpret the results of the screening tools?	
Which staff members will provide brief intervention (BI) services?	

For more information, go to IndianaSBIRT.org

Question	Your Response
Post Screening Stage (<i>continued</i>)	
What will the protocol be for treatment (referral? pharmacotherapy? multiple pathways?)	
Who will ensure that treatment is initiated or referral is effectuated?	
Agency Infrastructure	
Who will be involved in designing the SBIRT process for our agency?	
How will SBIRT fit into our patient flow?	
How will prescreening/ screening results and documentation be integrated into patient records?	
How will staff members be cued to provide SBIRT (e.g., EMR note? Paper file?)?	
How will providers be informed about the outcomes of screenings?	
Planning and Preparation	
What training is needed by staff members (Motivational interviewing? Substance/drug use? Mental health? SBIRT implementation?)	
What staff roles need which types of training?	
How much time can each role dedicate to training?	
When and how will each training be completed?	
Who will provide each of the training courses (In-house expertise? Outside expertise?)?	

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Question	Your Response
Patient Outcomes	
What data does our agency already collect that evaluates the health of our patients?	
How can patient outcomes be measured in our clinic?	
Supply Needs	
What supplies are needed for this project (e.g., resources for charting, communication, education, referral, or awareness)?	
What information will be made available to patients about our SBIRT process?	
How will we deliver SBIRT-related resources and information to patients?	
How will providers be informed about the outcomes of screenings?	
Timing Questions	
When will SBIRT services begin (selecting a target date)?	
How will the rollout occur (All patients? Staggered selection by provider or clinic? Regionally?)?	
Other Notes	

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