

MEASUREMENT-BASED CARE In Mental Health



Collect.



Share.



Act.

MBC Implementation Planning Worksheet Version 2 (September 2024)

Quick Start Guide

- You and your site/clinic/team get to decide who/what/where/why/when/how to implement MBC in a way that fits for your setting.
- Working through the document below can help you and your team brainstorm different decision points and create a plan towards successful MBC implementation.
- It is best to fill out the plan with input from everyone on the team who will be involved in MBC. The best way to do that is to complete it collaboratively in a working meeting format. If this is not possible, team members and stakeholders can share their input and feedback on the document in an iterative process.
- The plan works best when it is reviewed regularly in team meetings and revised as needed. You should consider it to be a “living document” that changes over time as you learn more about what works for your setting.
- Overwhelmed? Start by circling 2-3 items on the plan that you/your team anticipates can be completed first.
- **REMEMBER: There is no wrong way to fill out the implementation plan!**

Dollar, K.M., Kirchner, J.E., DePhilippis, D., Ritchie, M.J., McGee-Vincent, P., Burden, J.L. & Resnick, S.G. (2020). Steps for Implementing Measurement-Based Care: Implementation planning guide development and use in quality improvement. *Psychological Services*, 17(3), 247-261.

MBC Implementation Planning Worksheet

Location/clinic/program:

Identified Lead:

Roles/Tasks	Actionable Items & Examples	Plan (Including timeframe)	Who's in Charge	Potential Barriers & Notes
<p>A. Identify setting & participating Staff</p> <ul style="list-style-type: none"> - Clinic(s) & Team(s) - Lead - Participating providers 	<ul style="list-style-type: none"> - Identify setting(s): - Identify lead - Determine staff to participate: e.g., LCSWs, Psychiatrists, Psychologists, Addiction therapists, Trainees, Admin support staff etc. <p><i>We strongly encourage participation of as many providers & shareholders as possible</i></p>			
<p>B. Engage and Train Staff</p>	<ul style="list-style-type: none"> - Engage all staff through meetings and communications - Ensure all staff complete all MBC training as needed - Determine which staff will be involved in Implementation Planning process - Hold a meeting to complete the rest of this sheet <p><i>We recommend including as many participating shareholders as possible in the implementation planning meeting</i></p>			

Roles/Tasks	Actionable Items & Examples	Plan (Including timeframe)	Who's in Charge	Potential Barriers & Notes
C. Determine ways leadership can support MBC	<ul style="list-style-type: none"> - Provide recognition for participating providers - Consider resources that may be available to support implementation such as: admin support, dedicated time for champion or lead during initial implementation phase, budget supports for MBC materials (e.g., color printers), tablets, etc. - Other _____ 			
D. Determine which clients will be current focus	<ul style="list-style-type: none"> - Identify client population to receive MBC All clients served by participating providers/programs or clinics - Subset of clients (e.g., those engaged in new episodes of care, group tx, individual tx, those who screen positive for specific diagnoses, etc.) - Other _____ 			

Roles/Tasks	Actionable Items & Examples	Plan (Including timeframe)	Who's in Charge	Potential Barriers & Notes
E. Determine measures & frequency	<ul style="list-style-type: none"> - Select measures: Tailor measures to your clients and their needs. - Consider whether all clients will get the same measures vs. tailored measures to individual client needs. - Determine timing of measurement. Measures should be given regularly throughout care, frequently enough to allow for repeated opportunities to review progress and to use the data for treatment adjustments (i.e., Share and Act). - Examples of frequencies include: <ul style="list-style-type: none"> • Every visit • Frequency defined by instructions on PROM (e.g., PHQ-9 focuses on last 2 weeks) • at relevant clinical milestones: treatment-plan updates; changes in treatment goals; • As recommended by a particular evidence-based practice protocol • Other predetermined intervals? • If so, document _____ 			
F. Determine method of administration & who will administer	<ul style="list-style-type: none"> - Determine method for administering measures. <ul style="list-style-type: none"> • Paper survey • Tablet • Client at a computer • Client device • Other _____ - Determine who administers (if different than above) <ul style="list-style-type: none"> • Client (self-administered) • Provider • other staff (e.g., admin support, trainees) • Other: _____ - Determine timing of administration during visit: <ul style="list-style-type: none"> • Lobby, before session • In session with provider • Different at intake/first visit than subsequent visits • Other: _____ 			

Roles/Tasks	Actionable Items & Examples	Plan (Including timeframe)	Who's in Charge	Potential Barriers & Notes
G. Determine method of documentation and capturing data in medical record	<ul style="list-style-type: none"> - Establish method to ensure that data is properly captured in your medical record - If administration method is paper & pencil or otherwise not directly into medical record or other data collection technology, identify who will enter data <ul style="list-style-type: none"> • Provider • Other clinical staff • Administrative support • Other - When will data entry or documentation happen? <ul style="list-style-type: none"> • At time of administration • Other: _____ 			
H. Determine clinical use of MBC	<ul style="list-style-type: none"> - Based on data collection method, determine if scores can be available at time of visit - Provide training and resources to support clinicians using MBC for clinical discussions, shared decision-making, and individualize treatment in this particular setting (i.e., Share and Act) How will you know MBC data is being used in clinical encounters in line with your goals? <ul style="list-style-type: none"> • Ongoing agenda item in team meetings • Share success stories • Brainstorm barriers • Other: _____ 			

Roles/Tasks	Actionable Items & Examples	Plan (Including timeframe)	Who's in Charge	Potential Barriers & Notes
I. Decide how to engage Clients	Identify how clinic/team will collect and incorporate client input/feedback on implementation of MBC (e.g., random selection of clients to complete a satisfaction survey on the MBC process).			
J. Defining MBC success	Identify why this is important; what are your clinic/team's goals and how would you define success?			
K. Develop implementation support plan	<ul style="list-style-type: none"> - Identify frequency/format of meetings for clinic implementation team to self-assess progress, navigate any barriers, celebrate success (e.g., MBC implementation becomes a standing agenda item for team meetings). - Identify how participating staff can regularly communicate about shared goals - Other ideas: _____ 			
L. Determine MBC start date	<p>Identify start date for MBC</p> <ul style="list-style-type: none"> - It is okay to have kinks in the plan. This is about learning together, not about doing it perfectly. - Sites with more barriers or more complex implementation plans may opt for a phased approach, starting with a bare bones implementation plan for the first few months and adding to that plan later (e.g., broaden clinical target, more measures, etc.). 			
M. Determine how to sustain MBC	<ul style="list-style-type: none"> - Develop Standard Operating Procedures (SOP) for MBC (<i>this document can serve that purpose as it evolves</i>) - Recognize high MBC implementers - Celebrate implementation of MBC 			