

Field Guide for Assessing Readiness to Implement Evidence-Based Cancer Screening Interventions Activities Checklist

Phase 1: Convene Team Members and Determine Assessment Activities

- 1.1 Adapt the phase 1–4 activities checklists for your setting.
- 1.2 Establish your team. Engage individuals to join the team who can contribute:
 - Knowledge about screening tests and clinical processes.
 - Knowledge about clinic data systems and electronic health records (EHRs).
 - A commitment to supporting and institutionalizing policies and practices that promote cancer screening, including readiness assessment completion. This person may be called a *screening champion*.
 - Experience in assessment, evaluation, quality assurance, and/or quality improvement.
- 1.3 Convene your team. Together, team members will:
 - Review the overall goals of the Colorectal Cancer Control Program (CRCCP) and readiness assessment in the CRCCP Program Manual.
 - Review and agree upon activities for each phase.
 - Identify phases for each team member’s involvement.
 - Document each team member’s role in the activities of each phase.

Phase 2: Design and Administer the Readiness Assessment

- 2.1 Determine the relevance and feasibility of evidence-based interventions (EBIs) for the clinic setting.
- 2.2 Understand the six CRCCP-required readiness assessment domains.
- 2.3 Review existing readiness data collection tools.
- 2.4 Convene the team to determine data collection strategies.
 - Identify and discuss what data the clinic is already collecting and what new data may need to be collected to meet readiness assessment requirements.
 - Decide where and how assessment data will be stored.
 - Determine how the available data can be compiled for analysis and decide how new data can be collected (in person, online, on paper, or by phone or video) considering available expertise and resources.
 - Design or adapt data collection instruments.
 - Establish a timeframe for conducting the assessment and analyzing the information (data) you have gathered.
- 2.5 Gather data to assess the minimum required assessment domains for the readiness assessment.
*Items with an asterisk are routinely collected as part of CRCCP clinic data baseline records.
 - Clinic characteristics*
 - Colorectal cancer screening tests the clinic uses or is planning to use*
 - Baseline screening rate*
 - How the clinic validates screening rates*

- EBIs currently implemented*
- EBI implementation processes
- Workflow processes for each colorectal cancer screening testing method (FIT or colonoscopy referral), including workflows for referrals, scheduling, and results
- Current evaluation practices for EBI implementation
- Clinic resources and capacity
- EHR processes and capacity
- 2.6 Review the data.
- 2.7 Resolve any discrepancies.

Phase 3: Evaluate Assessment Data

- 3.1 Calculate the baseline screening rate (see CDC's Guide for Measuring Cancer Screening Rates in Health System Clinics at www.cdc.gov/cancer/crccp/guidance_measuring_crc_screening_rates.htm.)
- 3.2 Evaluate the workflow for each screening test and identify gaps.
- 3.3 Examine how each EBI is being implemented.
- 3.4 Determine if EBI implementation aligns with CDC's EBI Planning Guide processes. Note: The EBI Planning Guide resource does not include small media and patient navigation.
- 3.5 Identify information technology (IT) challenges that impede workflows and data reporting.
- 3.6 Summarize assessment results in writing.

Phase 4: Develop an Implementation Plan

- 4.1 Share and collaboratively interpret assessment findings.
- 4.2 Agree on gaps and efforts needed to improve screening rate reporting and validation.
- 4.3 Identify and document gaps and resources available to implement or enhance EBIs.
- 4.4 Agree upon a minimum of two EBIs that should be **implemented** at this time. If EBIs are already implemented, identify which are appropriate for **enhancement**. EBIs identified for implementation or enhancement should:
 - Address the gaps identified and agreed upon as clinic priorities.
 - Be feasible for the clinic to implement given clinic resources and capacity.
 - Meet activity guidelines described in the EBI Planning Guide.
 - Have potential for integration and long-term sustainability.
- 4.5 Document **processes, team members involved, and leadership support** for EBI implementation or enhancement.

- 4.6** Develop a plan to address IT challenges, including IT processes to:
 - Improve workflows.
 - Improve reporting.
 - Support EBI implementation.
 - Capture clinic data required for monitoring progress, improvements, and annual reporting.

- 4.7** Plan for long-term sustainability. Describe plans to maintain:
 - Staff, leadership, and stakeholder engagement.
 - Systems for monitoring and evaluation to identify and address inefficiencies and document program outcomes.
 - Integration of colorectal cancer screening processes into routine clinical workflows.
 - Training to ensure adherence to colorectal cancer screening best practices.
 - IT support required to maintain workflows and reporting.