Agency Readiness Assessment

Use the checklist below to identify the preparations necessary to implement STEPS to Care in your agency. If viewing on your computer and connected to the internet, you may click directly on the links provided to connect to tools and resources on the STEPS to Care website.

Agency readiness

Appropriate infrastructure

☐ **Do you have sufficient technological capacity?**

You will need:

- ☐ *Staff access to computers, laptops, or tablets with Internet access to use the STEPS to Care website. The STEPS to Care website supports Chrome, Safari, Firefox, and Internet Explorer 8 and above, and includes videos for staff to view online.*
- ☐ *Medical records management system (electronic and/or paper)*
- ☐ *Microsoft Office*

☐ **Do you have the appropriate facilities?**

You will need:

- ☐ *Access to patient medical records (On-site medical care preferred)*

  If you don't have on-site (co-located) medical care, you will need to establish a strong partnership with agencies that do offer clinical care. These partnerships must include access to patient medical records.
- ☐ *Private space for meeting with clients*
- ☐ *Secure storage of patient records*

☐ **Have you determined patient acceptance criteria?**

It's important that staff understand the key characteristics of clients for whom the STEPS to Care model provides the most benefit and consult with their client's medical provider.

Recommended Client Selection Criteria

☐ **Have you developed a budget?**

The STEPS program has cost categories that need to be considered in the budgeting process. Use the budget form to help you plan and track the anticipated cost of implementing STEPS to Care.

Download Budget Toolkit

Hiring the right people

☐ **Are you clear on the staff you need and their roles and responsibilities?**

Download Staff Roles and Responsibilities

See Recommended Staffing Criteria

☐ **Have you written job descriptions for your staff?**

Download Sample Program Director Job Description

Download Sample Care Coordinator Job Description

Download Sample Patient Navigator Job Description

Staff and provider buy-in

☐ **Do agency stakeholders and staff have a complete understanding of STEPS to Care?**

You should work on soliciting provider buy-in as early as possible and doing so begins with ensuring that they have an understanding of the STEPS to Care program.

Visit the STEPS Website for More Information

☐ **Do you have buy-in from medical providers and/or other key individuals at your agency?**

You should work on soliciting provider buy-in as early as possible and doing so begins with ensuring that they have an understanding of the STEPS to Care program and which patients are eligible for the program.

Visit the STEPS Website for More Information and refer medical providers to the Recommended Client Selection Criteria

Staff and work readiness

Forms for staff use

☐ **Intake assessment and logistics for patient navigation forms**

Care coordinators and patient navigators will need this form to assess client needs at intake.

Download Sample Intake Assessment Form

Download Sample Logistics for Patient Navigation and Contact Information Form

☐ **Care team meeting form**

Completing a care team form at each formal care team meeting will help meetings stay on track and will ensure accurate record keeping.

Download Care Team Meeting Form

☐ **Comprehensive care plan form**

A comprehensive care plan is used by the care team to help guide clients to set and achieve their goals.

Download Comprehensive Care Plan form

Policies and procedures

☐ **Missed appointments and outreach**

Staff should be clear on the policies and procedures for missed appointments and the steps and persons responsible for following up after a client has missed an appointment or fallen out of care.

Download Sample Missed Appointment Protocol

Download Sample Outreach Protocol

☐ **Field safety**

It is critical that staff know what steps they should take to be safe in the field.

Download Sample Field Safety Protocol

See Staying Safe in the Field Training

☐ **Relationship boundaries**

Having recommended policies and procedures in place help staff navigate the difficult task of setting and keeping relationship boundaries with clients.

See Establishing Relationship Boundaries with Clients Training

☐ **Confidentiality**

Policies and procedures for confidentiality help staff identify confidentiality restrictions and how to avoid confidentiality breaches.

Download Sample Confidentiality Protocol

See Confidentiality with Clients Training

Knowledge and skills training resources for staff

Use the Key Components Checklist to determine which tools would be most useful to agency staff working to implement STEPS to Care strategies.