**Mental Health Screening Action Planning Checklist**

This form is intended to help school teams in planning and implementing a mental/behavioral health screening instrument. This document is meant to be a companion to the Mental Health Screening Guide. Available here:

We recognize that this is not an exhaustive checklist. **Please feel free to add questions/columns as your team determines necessary.**

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| Gather a Team (Step 1) |
| **Tasks** |
|  | Identify key stakeholders  |
|  | Assign roles to each team member. *Note: Roles should be not the job title,* but a description of what the person is responsible for |
|  | Team Member Name | Role |
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| Review Existing Data Sources |
| Current Data Source(s) | What Does It Tell Us? |
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| What is Missing/What questions do we still have to answer? |
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| Determine Best Fit Screener & Method |
| **Tasks** |
|  | Identify desired outcome |
|  | Review evidence-based screeners based on desired outcome; narrow down to no more than 3 possibilities |
|  | Discuss level of buy-in from staff, students, and families |
|  | Discuss potential benefits and drawbacks |
|  | Review potential screeners using the [Hexagon tool](https://implementation.fpg.unc.edu/resources/lesson-1-hexagon-tool) |
|  | Develop screening budget |
|  | Determine who will be screened, using what method |
| **Best Fit Screener & Methods Notes** |
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| Implementation Logistics |
| **Tasks** |
|  | Determine what kind of consent is needed\* |
|  | Develop a screening timeline |
|  | Schedule necessary informational/training meetings with school staff (before, during, after) |
|  | Schedule necessary informational meetings with families (before, during, after) |
|  | Create necessary written materials (e.g. consent forms, follow up forms, notification letters) |
|  | Test technology |
|  | Ensure that staff have allocated necessary time for follow up based on timelines |
|  | Develop and review referral pathway |
| **Implementation Logistics Action Plan** |
| Who | Will Do What | By When |
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| Team Self-Reflection |
| **Tasks** |
|  | Review data |
|  | Discuss whether data generated intended outcome |
|  | Discuss unintended consequences (both positive and negative) |
|  | Discuss actual benefits and drawbacks |
|  | Monitor effectiveness of services provided |
|  | Using the [Stop, Start. Continue](https://www.youtube.com/watch?time_continue=66&v=MSIk8FvdNjo)  process, determine next steps |
| **Self-Reflection Notes** |
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**Adapted from:**

Dowdy, E., Furlong, M., Eklund, K., Saeki, E., & Ritchey, K. (2009). Screening for mental health and wellness: Current school-based practices and emerging possibilities. In B. Doll (Ed.), *Handbook of Prevention Science* (pp. 70-95)*.* Bethesda, MD: National Association of School Psychologists.