

Principles of Valid Screening Tools

1. **Evidence-based.** Any and all screening tools selected for use must be psychometrically sound and have reasonable justification for use with the intended patient population. In other words, research has demonstrated that the screening tool is 1) valid (i.e., it measures what it is intended to measure), 2) reliable (i.e., it is consistent over several administrations), and it has standardized norms (i.e., there are accepted “normative values” from which patient scores can be compared).
2. **Easy to administer.** The screener includes a brief set of questions, with clear instructions that are user-friendly for both patients and clinicians. Simplicity in language and structure improves accessibility, minimizes response burden, and reduces the likelihood of errors. Integrating tools into electronic medical record (EMR) systems is ideal, when possible, as it enables seamless administration, scoring, and tracking. When integrated into an EMR, patients with technology access and literacy can complete any assigned screeners in advance of a visit as a part of their pre-visit-check-in. All these factors support efficiencies that help facilitate system adoption while also reducing burden.
3. **Repeatable across time.** To track symptom severity or treatment progress, screening tools should be sensitive to changes over time. Repeatability ensures that fluctuations in scores reflect true changes in a patient’s condition rather than inconsistencies in measurement. Tools like the Patient Health Questionnaire-9 (PHQ-9) are designed for periodic reassessment, enabling clinicians to adjust treatment plans based on measurable outcomes. This capacity to monitor trends supports the principles of measurement-based care (MBC) and treatment to target (discussed later in this unit and in MC 6).
4. **Freely available.** Using tools that are in the “public domain” ensures accessibility and equity, removing financial barriers for healthcare providers and organizations. Freely available tools can be widely implemented without additional costs for licensing, training, or payment per use.
5. **Can be administered by licensed clinicians and trained support staff alike.** Screening tools that can be administered and scored by a range of members on a healthcare team, including trained support staff, provide many benefits. This flexibility supports efficient workflows, even in resource-limited settings. It also helps to promote screening tool use in high-volume practices like primary care clinics.