

Appendix C

SELF-ASSESSMENT TOOL FOR THE CLINICAL SUPERVISOR IN PRIMARY CARE

Self-Assessment Tool for the Clinical Supervisor in Primary Care	
Competency	Rating 1 = low 7 = high
Domain 1: Primary Care Knowledge	
1: Has knowledge of BHC competencies	
2: Understands the mission and vision of the primary care culture and context (4Cs of primary care: comprehensiveness, first contact access, coordination, and continuity); where primary care fits within the health care ecosystem	
3: Understands the impact of social determinants of health on patient outcomes	
4: Employs all aspects of GATHER (generalist, accessible, team based, high productivity, educator, routine pathways) in practice	
5: Can differentiate the roles of primary care and specialty mental health care within the larger health care continuum	
6: Employs cultural humility in all aspects of primary care	
7: Strives for health equity in all aspects of primary care	
8: Employs a biopsychosocial approach to patient care	
9: Understands the function and process of behavioral change	
10: Understands the importance of self-management in the context of patient care in the primary care setting	
11: Understands ethical quandaries and differences in ethical guidelines that are inherent in the primary care context	
12: Has medical knowledge/behavioral medicine knowledge specific to the primary care setting	
13: Shows mastery of BHC competencies	

(continues)

Competency	Rating 1 = <i>low</i> 7 = <i>high</i>
14: Engages in continuous team-based care practices	
15: Understands the role of population health/public health models in primary care	
16: Employs basic medical terminology in the primary care setting (e.g., patient instead of client, visit instead of session)	
17: Engages in continuous interprofessional communication	
18: Understands the importance of technology in primary care	
19: Has knowledge of point-of-care resources within the electronic medical record	
20: Understands various payment structures related to billing and coding in the primary care setting (e.g., fee for services, value-based contracts)	

Competency	Rating 1 = <i>low</i> 7 = <i>high</i>
Domain 2: Clinical Supervision Skills	
1: Creates and facilitates a positive learning environment (e.g., nonthreatening, psychologically safe)	
2: Executes an onboarding/shadowing plan for the learner at the beginning of a clinical rotation	
3: Models the PCBH skill set and professionalism for the learner	
4: Monitors learner clinical performance	
5: Employs flexibility in clinical teaching appropriate for the context of primary care	
6: Develops an individual, developmentally appropriate learning plan for the learner at the beginning of clinical training and modifies it throughout training when appropriate	
7: Encourages self-directed learning for the learner	
8: Encourages the learner to engage in self-care practices	
9: Models self-care practices	
10: Reviews/signs learner notes (that are consistent with documentation in PCBH) in a timely manner	
11: Encourages learner professionalism practices	
12: Completes academic program requirements for the learner when required (e.g., evaluations, supervision meetings, MOU)	
13: Delivers and manages supervision expectations	
14: Teaches measurement-based techniques in the context of case discussions	

Competency	Rating 1 = low 7 = high
15: Understands the nature of the training/training level from which the learner is coming	
16: Adapts training needs for the learner based on the nature of their training program/level	
17: Is located on-site when the learner is engaging in clinical activities (in person or virtually)	
18: Manages clinical supervision (e.g., time management in supervision)	

Competency	Rating 1 = low 7 = high
Domain 3: Clinical Supervisor Development	
1: Is able to critically self-reflect on their own supervisor development within the context of primary care	
2: Employs cultural humility in the clinical supervision context	
3: Engages in continuous self-assessment of skills as a clinical supervisor in primary care	
4: Engages in continuous quality improvement to improve the clinical learning environment	
5: Engages in continuous professional development and self-directed learning related to clinical supervision in primary care	
6: Can communicate up-to-date research/evidence-based practices specific to primary care	
7: Evaluates the learner's experience with the clinical supervision process	
8: Engages in evidence-based practices related to giving and receiving feedback	
9: Cultivates a learner-centered training focus	
10: Employs billing and coding practices specific to the clinical learning environment, following state regulations	
11: Employs clinical supervision models appropriate for the primary care context (e.g., IDM, CBT, MI, Relational)	
12: Has knowledge of professional guild-specific requirements for training preparation (e.g., LPC, LMFT, LCSW, LP)	
13: Has knowledge of andragogical/adult learning tools (e.g., Socratic questioning, transformative learning approaches, one-minute preceptor, PARSE model) to facilitate clinical teaching	

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Notes:

Note. BHC = behavioral health consultant; PCBH = primary care behavioral health; MOU = memorandum of understanding; IDM = integrated developmental model; CBT = cognitive behavior therapy; MI = motivational interviewing; LPC = licensed professional counselor; LMFT = licensed marriage and family therapist; LCSW = licensed clinical social worker; LP = licensed psychologist; PARSE = Patient Ask Recommend See Evaluate. Use a rating scale of 1 (*low*) to 7 (*high*) to assess skill competence in attributes within each of the domains. Place rating in the “Rating” column corresponding to the skill rating that best describes current skill level. A BHC may use this tool for self-assessment and career development planning and/or a BHC supervisor may use it as part of a training and evaluation process for clinical supervision in primary care. Adapted from “Using a Delphi Technique to Define Primary Care Behavioral Health Clinical Supervision Competencies,” by S. A. Ogbeide and B. Bayles, 2024, *Journal of Clinical Psychology in Medical Settings*, 31(1), pp. 12-13 (<https://doi.org/10.1007/s10880-023-09964-2>). Copyright 2024 by Springer Nature BV. Adapted with permission.