

**PRIMARY CARE PROJECT CHECKLIST
INTEGRATING DECISION SUPPORT INTO CLINICAL CARE**

Date	Activity	Due Date	Lead
I.	INITIAL MEETING WITH CLINICAL CHAMPION		
	Clinical area:		
	Perceived need for decision support:		
	Diagnosis and/or decision point(s): ▶ Values-sensitive decision?		
	Decision aid(s): yes no		
	Title(s)		
II.	NEEDS ASSESSMENT¹		
	Present proposal to larger group in clinical area: anyone who will be touched by the project		
	Conduct Needs Assessment to promote buy-in, identify clinical & decision-making needs, facilitators and barriers, define project		
	▶ clinicians		
	▶ staff		
	▶ patients		
	Report findings to larger group. Continue to report at regular intervals to those who will take part in/be affected by this change: (physicians, mid-level providers, nurses, secretarial and support staff, section managers)		
III.	PROJECT DESIGN:		
	A. Specify clinical and decision support objectives		
	1. Type of project:		
	▶ clinical integration ■ prevention and screening decisions ■ acute care decisions ■ chronic disease management ■ advance care planning, misc.		
	▶ research		
	▶ combination		
	▶ other		
	2. Existing resources:		
	▶		
	▶		
	▶		
	3. New resources needed:		
	▶		
	▶		
	4. Personnel and roles within project:		
	▶ PI		
	▶ Co-PI		
	▶ Consultants		
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¹ M.J. Jacobsen, A. O'Connor, Population Needs Assessment: A Workbook For Assessing Patients' and Practitioners' Decision Making Needs with Appendix A: Personal Interview Questions For Key Informants: Practitioner Version and Appendix B: Personal Interview Questions For Key Informants: Consumer/Patient Group Version, 1999.

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	▶ Administrative staff		
	▶ Research associate		
	▶ Programmer		
	▶ Data analyst		
	▶ Nursing staff		
	▶ Management staff		
	▶ Other:		
	B. Consult statistician/data analyst/programmer to plan data gathering methods, tools, power analysis		
IV.	INITIAL CLINICAL WORKFLOW MAPPING		
	Map current sequence of care. <ul style="list-style-type: none"> ▶ Begin with scheduling patients for clinical appointments. ▶ End with the step that currently closes the decision-making loop for patient and clinician, i.e. <ul style="list-style-type: none"> ■ Follow-up call ■ Return appointment ■ E-mail contact ▶ Involve clinicians, managers, support staff, IT staff 		
V.	REVISE CLINICAL WORKFLOW MAPPING		
	A. Based on II, III and IV above, revise current sequence of care map to reflect: <ul style="list-style-type: none"> ▶ Data capture that addresses project objectives ▶ Decision support integration points and methods 		
	B. Determine optimum decision aid distribution method(s) <ul style="list-style-type: none"> Consider resources (financial, personnel, etc) Consider optimum pairings of decision/delivery method/timing <ul style="list-style-type: none"> ▶ e.g.: mail screening DAs pre-visit ▶ e.g.: prescribe acute care DAs post-visit 		
VI.	DESIGN DATA COLLECTION PROCESS to meet clinical objectives (based on II, III and IV above)		
	What measurement tools and decision support instruments will be used?		
	Decision aid(s):		
	Generic decision support tool (OPDG ²)		
	Decision-specific modification of OPDG ²		
	Decisional Conflict Scale ³		
	Preparation for Decision Making Scale ⁴		
	Decision Self-Efficacy Scale ⁵		
	Decision Quality Measures: Process ⁶		
	Decision Quality Measures: Knowledge ⁷		
	Decision Quality Measures: Values ⁸		
	Decisional Regret Scale ⁹		
	Persistence With Choice		
	Choice/Values Match		

² 2004, O'Connor, Jacobsen, Stacey. Ottawa Personal Decision Guide, Ottawa Health Research Institute, Canada.

³ O'Connor, 1995, revised 2005.

⁴ Graham, O'Connor, 1995, revised 2005.

⁵ O'Connor, 1995.

⁶ Foundation for Informed Medical Decision Making, 2005.

⁷ Ibid.

⁸ Ibid.

⁹ O'Connor, 1998.

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	Expected/Actual Outcomes		
	Satisfaction with Process Measures		
	Others:		
VII.	DESIGN FEED FORWARD AND FEEDBACK REPORTS		
	<ul style="list-style-type: none"> ▶ Feed forward (display useful data in real time) <ul style="list-style-type: none"> ■ Individual patient report for clinician at the episode of care 		
	<ul style="list-style-type: none"> ▶ Feedback: <ul style="list-style-type: none"> ■ Individual patient report for clinician during/after episode of care ■ Aggregate reports for clinicians, admin. staff 		
VIII.	DESIGN A ROLL-OUT PLAN		
	<ul style="list-style-type: none"> ■ Number of clinicians: early adopters, all, randomized groups? ■ Number of decision aids: ■ Pilot or full roll-out? ■ Information/training sessions for clinicians, staff ■ Update plan: feedback to clinicians, staff ■ Define measures of success 		
IX.	DESIGN AN EVALUATION PLAN: Instruments that demonstrate degree of success:		
	<ul style="list-style-type: none"> ■ Outcomes ■ Quality of life ■ Satisfaction ■ Improved knowledge, values/choice concordance ■ Decisional regret 		