

PRIMARY CARE PROJECT CHECKLIST
INTEGRATING DECISION SUPPORT INTO CLINICAL CARE: Clinical only, no research

	Steps	Responsible Personnel	Start Date	End Date
I.	LEADERSHIP			
	A. Identify a clinical champion			
	B. Define project vision			
	C. Obtain endorsement of vision from key thought leaders			
	D. Present vision to key stakeholders			
II.	GOALS AND SCOPE OF PROJECT:			
	Specify clinical and decision support objectives			
	A. Clinical area:			
	B. Type of project:			
	<ul style="list-style-type: none"> • clinical integration <ul style="list-style-type: none"> ▪ prevention and screening decisions ▪ acute care decisions ▪ chronic disease management ▪ advance care planning, misc. 			
	C. Perceived need for decision support:			
	D. Existing resources: personnel, financial, infrastructure, etc.			
	<ul style="list-style-type: none"> • Decision aid(s): 			
	E. New resources needed:			
	•			
	•			
	F. Personnel and roles within project:			
	<ul style="list-style-type: none"> • Clinical champion PI • Co-PI/early adopter physicians • • Nursing staff • Management staff • Other: 			
III.	INITIAL CLINICAL WORKFLOW MAPPING	Responsible Personnel	Start Date	End Date
	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. 			

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	<ul style="list-style-type: none"> ▪ Follow-up call ▪ Return appointment ▪ E-mail contact • Involve clinicians, managers, support staff, IT staff 			
IV.	REVISE CLINICAL WORKFLOW MAPPING			
	A. Based on II and III above, revise current sequence of care map to reflect decision support integration point(s) and method(s)			
	B. Consider resources (financial, personnel, etc)			
	C. Determine feasible pairings of DA/delivery method/timing <ul style="list-style-type: none"> • e.g.: mail screening DAs pre-visit • e.g.: prescribe acute care DAs post-visit 			
V.	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 • Go live date 			
VI.	DESIGN AN EVALUATION PLAN: Instruments that demonstrate degree of success: <ul style="list-style-type: none"> • Clinical outcomes • Quality of life • Satisfaction • Improved knowledge, values/choice concordance 			