

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

Date	Activity	Due Date	Lead
<b>I.</b>	<b>INITIAL MEETING WITH CLINICAL CHAMPION</b>		
	A. Clinical area:		
	B. Perceived need for decision support:		
	C. Diagnosis and/or decision point(s): <ul style="list-style-type: none"> <li>• Values-sensitive decision?</li> </ul>		
	D. Decision aid(s): yes    no Title(s)		
	E. Consult statistician/data analyst to plan data gathering methods and tools early in the integration project. If research, discuss power analysis.		
	F. Determine programming/database needs		
<b>II.</b>	<b>NEEDS ASSESSMENT<sup>1</sup></b>		
	A. Present proposal to larger group in clinical area: anyone who will be touched by the project		
	<b>B. Conduct Needs Assessment to promote buy-in, identify clinical, decision-making needs, facilitators and barriers</b>		
	▶ clinicians		
	▶ staff		
	▶ patients		
	C. 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)		
<b>III.</b>	<b>INITIAL CLINICAL WORKFLOW MAPPING</b>		
	<b>Map current sequence of care.</b> <ul style="list-style-type: none"> <li>• Begin with scheduling patients for clinical appointments.</li> <li>• End with the step that currently closes the decision-making loop for patient and clinician, i.e. <ul style="list-style-type: none"> <li>▪ Follow-up call</li> <li>▪ Return appointment</li> <li>▪ E-mail contact</li> </ul> </li> <li>• Involve clinicians, managers, support staff, IT staff</li> </ul>		
<b>IV.</b>	<b>PROJECT DESIGN: Specify clinical and decision support objectives</b>		
	A. Type of project:		
	▶ clinical integration		
	▶ research		
	▶ combination		
	▶ other		
	B. Existing resources:		
	▶		
	▶		
	▶		
	C. New resources needed:		
	▶		
	▶		

<sup>1</sup> 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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	D. Personnel and roles within project		
	▶ PI		
	▶ Co-PI		
	▶ Consultants		
	•		
	•		
	▶ Administrative staff		
	▶ Research associate		
	▶ Programmer		
	▶ Data analyst		
	▶ Nursing staff		
	▶ Management staff		
	▶ Other:		
<b>V.</b>	<b>REVISE CLINICAL WORKFLOW MAPPING</b>		
	Based on II, III and IV above, modify current sequence of care map to reflect:		
	▶ Data capture that addresses clinical objectives		
	▶ Decision support integration points and methods		
<b>VI.</b>	<b>DESIGN DATA COLLECTION PROCESS to meet clinical objectives, based on II, III and IV above</b>		
	What measurement tools and decision support instruments will be used?		
	▶ Decision aid(s):		
	▶ Generic decision support tool (OPDG <sup>2</sup> )		
	▶ Decision-specific modification of OPDG <sup>®</sup>		
	▶ Decisional Conflict Scale <sup>3</sup>		
	▶ Preparation for Decision Making Scale <sup>4</sup>		
	▶ Decision Self-Efficacy Scale <sup>5</sup>		
	▶ Decision Quality Measures: Process <sup>6</sup>		
	▶ Decision Quality Measures: Knowledge <sup>7</sup>		
	▶ Decision Quality Measures: Values <sup>8</sup>		
	▶ Decisional Regret Scale <sup>®9</sup>		
	▶ Persistence With Choice		
	▶ Choice/Values Match		
	▶ Expected/Actual Outcomes		
	▶ Satisfaction with Process Measures		
	▶ Others:		
<b>VII.</b>	<b>DESIGN FEED FORWARD AND FEEDBACK REPORTS</b>		
	▶ <b>Feed forward</b> (display useful data in real time)		
	○ Individual patient report for clinician <u>at the episode of care</u>		
	▶ <b>Feedback:</b>		
	○ Individual patient report for clinician <u>after the episode of care</u>		
	○ Aggregate report for clinicians, admin. staff		

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

<sup>3</sup> O'Connor, 1995, revised 2005.

<sup>4</sup> Graham, O'Connor, 1995, revised 2005.

<sup>5</sup> O'Connor, 1995.

<sup>6</sup> Foundation for Informed Medical Decision Making, 2005.

<sup>7</sup> Ibid.

<sup>8</sup> Ibid.

<sup>9</sup> O'Connor, 1998.