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I. **INITIAL MEETING WITH CLINICAL CHAMPION**

A. Clinical area:

B. Perceived need for decision support:

C. Diagnosis and/or decision point(s):
   - Values-sensitive decision?

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

II. **NEEDS ASSESSMENT**

A. Present proposal to larger group in clinical area: anyone who will be touched by the project

B. **Conduct Needs Assessment to promote buy-in, identify clinical, decision-making needs, facilitators and barriers**
   - 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)

III. **INITIAL CLINICAL WORKFLOW MAPPING**

Map current sequence of care.
- Begin with scheduling patients for clinical appointments.
- End with the step that currently closes the decision-making loop for patient and clinician, i.e.
  - Follow-up call
  - Return appointment
  - E-mail contact
- Involve clinicians, managers, support staff, IT staff

IV. **PROJECT DESIGN:**

Specify clinical and decision support objectives

A. Type of project:
   - clinical integration
   - research
   - combination
   - other

B. Existing resources:

C. New resources needed:

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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:

V. REVISE CLINICAL WORKFLOW MAPPING

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

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©
  - Decisional Conflict Scale³
  - Preparation for Decision Making Scale⁴
  - Decision Self-Efficacy Scale⁵
  - Decision Quality Measures: Process⁶
  - Decision Quality Measures: Knowledge⁷
  - Decision Quality Measures: Values⁸
  - Decisional Regret Scale©⁹
  - Persistence With Choice
  - Choice/Values Match
  - Expected/Actual Outcomes
  - Satisfaction with Process Measures
  - Others:

VII. DESIGN FEED FORWARD AND FEEDBACK REPORTS

- Feed forward (display useful data in real time)
  - Individual patient report for clinician at the episode of care

- Feedback:
  - Individual patient report for clinician after the episode of care
  - Aggregate report for clinicians, admin. staff

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5 Foundation for Informed Medical Decision Making, 2005.
6 Ibid.
7 Ibid.