

Evaluation Planning Tool



After you implement the Be The Expert On You note sheet and the 60 Seconds To Improve Diagnostic Safety, you will need to evaluate the interventions' impact. You can use this Evaluation Planning Worksheet as a guide to help you plan how you will measure the impact of the interventions. The recommendations in this worksheet are not meant to be exhaustive. Details on other approaches to measurement of diagnostic safety are summarized in an [AHRQ issue brief](#).¹

What resources can support evaluation?

Think about the resources available to your team to help you evaluate success. Does your practice:

- Conduct patient surveys that you can add questions to (e.g., patient experience)?
- Conduct staff/provider surveys that you can add questions to?
- Have staff who can collect survey information?
- Have staff who can collect note sheets after visits?
- Have information technology support for data collection?
- Have information technology support for changes to the electronic medical record if needed (e.g., if using a “smart phrase” in the EMR for data collection)?
- Have other resources available? _____

What will we measure?

Identify the measures your practice will use to evaluate success. You should select at least one process measure and one outcome measure for each intervention.

| Measurement Type | Be The Expert On You Examples | 60 Seconds To Improve Diagnostic Safety Examples |
|---------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Process – How well did the implementation process work? | <ul style="list-style-type: none"> <input type="checkbox"/> Number or percentage of completed note sheets each week <input type="checkbox"/> Number of times Be The Expert On You is documented in visit notes or medical record | <ul style="list-style-type: none"> <input type="checkbox"/> Number of times providers document use of the 60 Seconds To Improve Diagnostic Safety in the medical record <input type="checkbox"/> Amount of time spent per patient <input type="checkbox"/> Number of times patients document use of the 60 Seconds To Improve Diagnostic Safety [via patient exit survey] |
| Outcomes – What were the outcomes of the intervention? | <ul style="list-style-type: none"> <input type="checkbox"/> Patient satisfaction with the Be The Expert On You [via patient exit survey] <input type="checkbox"/> Provider satisfaction with Be The Expert On You [via provider survey] <input type="checkbox"/> Review and summary of information on the note sheets (trends) | <ul style="list-style-type: none"> <input type="checkbox"/> Patient satisfaction with communication [via patient exit survey or communication items on a patient experience survey] <input type="checkbox"/> Provider scores from patient/staff observation tool <input type="checkbox"/> Provider satisfaction with the strategy [via provider feedback survey] <input type="checkbox"/> D Health Literacy Item Sets for the AHRQ CAHPS Clinician & Group Survey https://www.ahrq.gov/cahps/surveys-guidance/item-sets/literacy/index.html² |

How will we document the strategies in the medical record?

Some practices that participated in the field test of this toolkit used “smart phrases” to document the patient’s completion of the Be The Expert On You note sheet or the provider’s use of the 60 Seconds To Improve Diagnostic Safety intervention. They used these phrases to count the number of times the provider or the patient engaged in the intervention. Another approach was to upload the completed note sheet into the electronic medical record. Here, practices would upload the note sheet as an “other document” and tag the document to the visit.

Will your practice:

- Develop a smart phrase for the Be The Expert On You note sheet?
- Develop a smart phrase for the 60 Seconds To Improve Diagnostic Safety strategy?
- Upload the Be The Expert On You note sheet to the medical record?
- Something else? _____

How will we collect data to help us evaluate?

You may choose to evaluate diagnostic safety at the practice level. You may want to consider:

- [AHRQ Survey on Patient Safety Culture for Medical Offices.](#)³
- [AHRQ Diagnostic Safety Supplemental Items for Medical Office SOPS.](#)⁴

In addition to the validated surveys identified above, you may want to use a brief survey or observer tool to collect data for your evaluation.

Surveys can be an important tool in your evaluation plan. Brief surveys can provide a quick and easy way to get a pulse on the impact of an intervention. When planning surveys, ensure that you consider the following:

- Will you conduct the survey before and after the implementation?
- Will you conduct the survey on paper or electronically?
- How long will you collect data?

Three surveys can be used to collect information from patients, providers, or staff on the impact of the Be The Expert On You and 60 Seconds To Improve Diagnostic Safety interventions. When planning, you should review each survey to determine which ones you may want to use as part of your evaluation.