

Be The Expert On You Planning Worksheet



When planning your implementation, be sure to have the following materials available so that you can adapt them to your practice's plan.

- Be The Expert On You Note Sheet
- Evaluation Planning Worksheet
- One-Page Handout for Staff Training
- Practice Orientation and Training slides

1

Set scope

- Which patients will receive the Share Your Story strategy?
 - All patients?
 - Patients with select diagnoses?
 - Patients with acute visits?
 - Telehealth visits?

2

Establish workflow

- When will you give patients the note sheet? Before visit At visit intake
- How will you give patients the note sheet?
 - In person
 - Email
 - Patient portal
 - Other _____
- Who will give patients the note sheet?
- How will the note sheet be explained to the patient?
- Will you adapt and use the One-Page Handout for Staff Training?
- Will you ask staff to help patients fill out the note sheet?
- Will the note sheet be collected after the visit, or will it remain with the patient?
- Will you document the note sheet in the EHR? How and where?
- Will you print the note sheet and poster in the office or order printing?
- Who will be responsible for maintaining a supply?
- Do you need Spanish versions?
- Review and adapt the Practice Orientation and Training Slides to reflect your chosen workflow (Slides 11-13), plans for evaluation (Slide 14), and next steps (Slide 15) of the Toolkit.

3

Encourage use of the strategy

- How will you encourage patients to use the note sheet?
- How will you encourage or facilitate use of the note sheet by patients who are not interested in participating?

4

Determine training plan

- How will you train providers and staff?
- Who will provide the training?
- When will the training be conducted?