Implementation Quick Start Guide

Be Prepared To Be Engaged

1 Review intervention and training materials

- Understand the purpose, use, and benefits of the Be Prepared strategy.
- Review the training toolkit.

2 Make decisions for your implementation

Obtain materials

- Will you print materials in the office or order printing?
- Who will be responsible for maintaining a supply?
- Do you need Spanish versions of the patient materials?

Set scope

- Which patients will receive a note sheet? All patients? A specific patient population?

Establish workflow

- When will you give patients the note sheet?
- Who will give patients the note sheet?
- Where will you document Be Prepared in the EHR?

Encourage use of the sheet

- How will you encourage patients to use the note sheet?
- Will you put up the posters? If yes, where?
- Will you ask staff to help patients fill out the note sheet?
- How will clinicians use the note sheet during a visit?

Identify champions

- Who will champion the strategy within each role on the team?

3 Customize training for your practice

- Customize the training materials to reflect your decisions.

4 Train team members

- Use staff meetings and huddles.
- Strive for training meetings of at least 15 minutes.
- Provide staff with scripts.

5 — Go live with implementation

- Inform staff of timeline.
- Go live.
- Identify good implementors and use them as peer coaches.
- Continue to promote Be Prepared and encourage its use.

6 — Evaluate your progress

Evaluate effectiveness

- How many followup questions (calls and emails) do you get pre- and post-implementation?
- What is the average visit length with and without the note sheet?
- What is patient satisfaction with Be Prepared?
- What is clinician satisfaction with Be Prepared?

Evaluate implementation success

- What percentage of patients receive the note sheet?
- What percentage of patients fill out the note sheet?