



Skills Building Performance Measures: Crosswalk, Discussion, and Quality Improvement

Objectives

1. Ensure clear understanding of definitions.
2. Discuss challenges or potential challenges of performance measures.
3. Share successes related to performance measures.
4. Discuss quality improvement strategies.



**What are your biggest anxieties
around this topic?
Let's discuss (briefly).**

Why this data? Why these measures?



Tell the story of Healthy Start



Show the value of Healthy Start



Provide value in Healthy Start programs and to participants



Make a difference in Healthy Start communities

CROSSWALK: Performance Measures (a.k.a. Benchmarks) and Screening Tools



How does it fit together?

Labeling Note

Screening Tools are the tools and the related data that is gathered,

Performance Measures are the reporting,

Benchmarks are the aspirational goals that were laid out in the FOA,

then there are the **Goals/Objectives** you set forth in your project workplan.

Bring Together Various Needs

Care Coordination/
Case Management

3 Ps

National
Evaluation

HSMED

Benchmarks



**Screening
Tools**

Screening Tool Resources

HealthyStartEPIC.org> Healthy Start Implementation> Screening Tools

HEALTHY START HEALTHY START IMPLEMENTATION TRAINING AND EVENTS RESOURCES HEAR FROM YOUR PEERS ABOUT HS EPIC CENTER

Screening Tools

Screening Tools
Training and TA
Development Process
Approaches
Monitoring, Data, and Evaluation

Thanks to the collective efforts of [Healthy Start CoIIN members](#), MCH Bureau officers, JSI/EPIC Staff and Healthy Start grantees, together we have developed and refined a set of standardized, evidence-based screening tools that will substantially improve our ability to document our participants' needs for care coordination and satisfy our required reporting. These screening tools received official OMB approval in November 2016 and are ready for implementation. The Healthy Start EPIC has created opportunities to [assist you with implementation](#).

Screening Tools

HRSA has given the HS EPIC Center permission to post the OMB approved versions of these tools here for easy access.

Please refer to this recently updated [Screening Tool Terminology Clarification Document](#) to prevent any confusion.

Current versions of the screening tools are available below. A complete list of updates to the tools is available in the [Table of Updates](#). The date of each change is noted in this document. No substantive changes will be made to the screening tools that may affect data collection or reporting after March 2017.

Since March, EPIC has received a number of questions from grantees implementing the tools which benefited from clarification. In response, selected instructions have been updated to provide clarity. None of these clarifications affect the data collection or the export but they do ensure that all grantees are interpreting questions consistently.

The EPIC Center is maintaining a list of enhancements to the tools that require IRB approval. If you have comments or changes, you are encouraged to contact EPIC and they will record the proposed change.

- [Demographic Intake \(doc\)](#) (Updated 3/9/17)
- [Pregnancy History \(doc\)](#) (Updated 6/2/17)
- [Prenatal \(doc\)](#) (Updated 3/9/17)
- [Preconception \(doc\)](#) (Updated 3/9/17)
- [Postpartum \(doc\)](#) (Updated 5/12/17)
- [Interconception/ Parenting \(doc\)](#) (Updated 5/12/17)

Spanish Versions:

- [Herramienta de evaluación demográfica \(doc\)](#) (Updated 3/9/17)
- [Herramienta de evaluación de antecedentes de embarazo \(doc\)](#) (Updated 6/2/17)

Did you know?

1. Spanish language screening tools are available.
2. The dates next to the screening tools, are dates they have been updated.
 - All updates since March have been only clarification and fine tuning instructions.
 - You can see all of these updates here.
3. Training and TA Tools are in the left column.



Performance Measures

- **Calculating performance measures can (and should, when possible!) be done from the information captured in the screening tools.**
 - You can use your paper forms, your internal system, or HSMED reports.
 - Information used for Performance Measures is a **small subset** of total screening tool questions.

Access the Crosswalk

[HEALTHY START](#)[HEALTHY START IMPLEMENTATION](#)[TRAINING AND EVENTS](#)[RESOURCES](#)[HEAR FROM YOUR PEERS](#)[ABOUT HS EPIC CENTER](#)

Training and TA

[Screening Tools](#)[Training and TA](#)[Development Process](#)[Approaches](#)[Monitoring, Data, and
Evaluation](#)

During the remainder of this funding period (May 30, 2017), JSI/EPIC Center will provide support to Healthy Start grantees adopting the screening tools including working with grantees who plan to use the tools in their current form and grantees who will integrate questions from the tools into their existing screening processes. The following page provides ways in which you can connect with the HS EPIC Center for assistance.

Implementation Resources

- [Screening Tool Flowchart](#) (Last Updated 01/30/17)
- [Screening Tool FAQ](#)
- [Screening Tool Frequently Asked TA Questions \(FATAQ\)](#)
- [Healthy Start EPIC Online Screening Tool FATAQ](#)
- [Screening Tool Implementation Checklist](#)
- [Screening Tool Pilot Test Report](#)
- [Performance Measure Data Dictionary](#)
- [Crosswalk of Screening Tools to Performance Measures](#)
- [Evidence Based Resources for Screening Tools](#)
- [Reference for Medical Conditions](#)
- [Reference for Medications](#)

How many have
accessed this
crosswalk?

Healthy Start Screening Tools Technical Assistance Questions

This frequently asked technical assistance questions document includes the most commonly asked questions from the EPIC Center Helpdesk and EPIC Center screening tool webinars



Components of Performance Measures

Definition, from data dictionary

How to calculate from Screening Tools

Performance Measurement	Comparison Statistic	Performance Measure Definition	Denominator	Screening Tool	Screening Tool Question(s) that Determine Inclusion in Numerator	Responses NOT included in the Numerator
The percent of Healthy Start women and child participants with health insurance.	National Survey of Children's Health National Health Interview Survey	1a. WOMEN Numerator: Number of Healthy Start (HS) women participants with health insurance as of last assessment in the reporting period. Denominator: Number of total women HS participants in the reporting period.	1a. All women who have completed any screening tool in the reporting period. 1b. All children under 24 months who have been reported on by their parent/ caregiver within a postpartum on interconception screening tool; DOB for child from Postpartum Question 1.1 or Interconception Question 1.	Preconception	1a/ Woman: Question 16	If response to this question is <ul style="list-style-type: none">no insuranceIndian Health Servicedon't knowselects 'Other' and identifies a type of insurance that only covers one type of service (such as family planning or accidents) The participant is not included in the numerator.
		Prenatal		1a/ Woman: Question 11		
		Postpartum (Child)		1b/ Child: Question 13		
		Postpartum		1a/ Woman: Question 32		
		Interconception		1b/ Child: Question 14		

You have all measures on your crosswalk handout.



Don't Know/ Declined to Answer **AND** Did not Ask/ Missing



CONTROVERSY!

- Each question has “Don’t know” or “Declined to Answer” as an option.
- There is also the possibility that the answer is missing, because the question was not asked or for some other reason.
- In EHB performance measure reporting (or anywhere that the performance measures/ benchmark is reported strictly as a Num/ Den or %), those participants for whom the data is missing or declined to answer should be removed from the numerator and denominator. Responses of “Don’t know” should be included in the denominator, but excluded from the numerator.

Crosswalk: Health Insurance Measure

The percent of Healthy Start women and child participants with health insurance.

1a.= Woman;

1b.=Child

Definition (TWO PARTS)

1a. Numerator: Number of Healthy Start (HS) women participants with health insurance as of last assessment in the reporting period. **Denominator:** Number of total women HS participants in the reporting period.

1b. Numerator: Number of Healthy Start (HS) child participants whose parent/ caregiver reports that the child has health insurance as of the last assessment in the reporting period. **Denominator:** Number of total child HS participants in the reporting period.

Inclusion in Denominator

1a. All women who have completed any screening tool in the reporting period.

1b. All children under 24 mo. who have been reported on by their parent/ caregiver within a postpartum on interconception screening tool **DOB for child from Postpartum Question 1.1 or Interconception Question 1.**

Crosswalk: Health Insurance Measure

Cont'd

Screening Tool Question that Determine Inclusion in Numerator	Responses NOT included in Numerator
Preconception: 1a/ Woman: Question 16	<p>If response to this specified question is:</p> <ul style="list-style-type: none"> <input type="checkbox"/> no insurance <input type="checkbox"/> Indian Health Service <input type="checkbox"/> don't know <input type="checkbox"/> selects 'Other' and identifies a type of insurance that only covers one type of service (such as family planning or accidents) <p>The participant is <u>not</u> included in the numerator.</p>
Prenatal: 1a/ Woman: Question 11	
Postpartum (Child): 1b/ Child: Question 13	
Postpartum: 1a/ Woman: Question 32	
Interconception (Child): 1b/ Child: Question 14	
Interconception: 1a/ Woman: Question 35	

Crosswalk: Health Insurance Measure

Cont'd

*Please tell me what kind of health insurance your child has:
Select all that apply for each child.*

	Child 1	Child 2	Child 3	Child 4
Private health insurance through my job, or the job of my husband, partner or parents				
Insurance purchased directly from an insurance company				
Medicaid, Medical Assistance, or any kind of government assistance plan for those with low incomes or a disability				
TRICARE or other military health care				
Indian Health Service				
Other, specify				
No insurance				
Don't know				
Declined to answer				

Please tell me what kind of health insurance you have: Select all that apply.

- ☐ Private health insurance through my job, or the job of my husband, partner or parents
- ☐ Insurance purchased directly from an insurance company
- ☐ Medicaid, Medical Assistance, or any kind of government assistance plan for those with low incomes or a disability
- ☐ TRICARE or other military health care
- ☐ Indian Health Service
- ☐ Other, specify: _____
- ☐ No insurance
- ☐ Don't know
- ☐ Declined to answer

Crosswalk: Reproductive Life Plan Measure

The percent of women with a reproductive life plan.

Definition

Numerator: Number of Healthy Start (HS) women participants with a documented reproductive life plan in the reporting period.

Denominator: Number of HS women participants in the reporting period.

Inclusion in Denominator

Denominator includes women in all perinatal phases who were enrolled in the reporting year. All women who completed any screening tool within the measurement year should be included.

Screening Tool Question(s) that Determine Inclusion in Numerator

Preconception: Questions 42-43.1

Prenatal: Questions 50-51.1

Postpartum: Questions 14-15.1

Interconception: Questions 16-18.1

Responses **NOT** included in the Numerator

If these screening tool questions are NOT completed within the measurement year and no other reproductive plan that meets the requirements (documenting whether a participant wants to become pregnant in the next year and what actions are being taken to support that goal), then the participant is NOT included in the numerator.



Crosswalk: Reproductive Life Plan Measure

All appropriate questions must be complete, but NOT be Declined to Answer.

Do you plan to have any more children?

Select one only.

- ☐ Yes (Go to question 14.1)
- ☐ No (Go to question 15)
- ☐ Unable to get pregnant (Go to question 16)
- ☐ Don't know (Go to question 15)
- ☐ Declined to answer (Go to question 15)

How many children would you like to have?

STAFF: Please enter the number of children.

_____ Children

- ☐ Don't know
- ☐ Declined to answer

Would you like to become pregnant in the next 12 months?

Select one only.

- ☐ Yes (Go to question 15)
- ☐ No (Go to question 14.3)
- ☐ I am okay either way (Go to question 15)
- ☐ Don't know (Go to question 15)
- ☐ Declined to answer (Go to question 15)

How long would you like to wait until you become pregnant?

Select one only.

- ☐ 1 year -17 months
- ☐ 18 months to 2 years
- ☐ More than 2 years
- ☐ Don't know
- ☐ Declined to answer

Are you using any form of contraception or birth control to either prevent pregnancy or prevent sexually transmitted infections?

Select one only.

- ☐ Yes (Go to question 15.1)
- ☐ No (Go to question 16)
- ☐ Don't know (Go to question 16)
- ☐ Declined to answer (Go to question 16)

Are you satisfied with your birth control method?

Select one only.

- ☐ Yes
- ☐ Don't know
- ☐ No
- ☐ Declined to answer



Crosswalk: Postpartum Visit Measure

The percent of women with a postpartum visit.

Definition

Numerator: Number of Healthy Start (HS) women participants who enrolled prenatally or within 30 days after delivery and received a postpartum visit between 4-6 weeks after delivery .

Denominator: Number of HS woman participants who enrolled prenatally or within 30 days after delivery during the reporting period.

Inclusion in Denominator

Women who delivered within the reporting period and whose date of enrollment is prior to delivery or within 30 days of delivery.

Delivery date may come from Postpartum Question 1.1 or Interconception Question 1.

Screening Tool Question(s) that Determine Inclusion in Numerator

Responses **NOT** included in the Numerator

Postpartum: Question 33-33.1 or Question 33-33.2; visit must be completed

If Q=33= No or Don't Know **AND** Q 33.2 = a date less than 4 weeks **or** more than 6 weeks from date of delivery, No **OR** Q 33 = Yes **AND** Q 33.1= a date less than 4 weeks **or** more than 4 weeks from delivery date.

Interconception: Question 40-40.1; visit must be completed

If Question 40= No **or** Question 40-Yes, **but** Question 40.1 is less than 4 weeks or more than 6 weeks.



Crosswalk: Postpartum Visit Measure

XX. Since your child was /children were born, have you had a postpartum visit for yourself?

A postpartum visit is the regular checkup a woman has 4-6 weeks after she gives birth. Select one only.

- ☐ Yes (Go to question 33.1)
- ☐ No (Go to question 33.2)
- ☐ Don't know (Go to question 33.2)

XX.1 When did you have your postpartum visit?

STAFF: Please enter day of postpartum visit.

___ / ___ / ____ (month/day/year) (Go to question 33)

XX.2 Do you have one scheduled? Select one only.

- ☐ Yes: Please indicate date of scheduled appointment: ___ / ___ / ____ (month/day/year)
- ☐ No
- ☐ Declined to answer

Screening Tool Question(s) that Determine Inclusion in Numerator

Postpartum:
Question 33-33.1
or
Question 33-
33.2; visit must
be completed

Interconception:
Question 40-
40.1; visit must
be completed

Responses **NOT** included in the Numerator

If Q=33= No or Don't Know **AND** Q 33.2 = a date less than 4 weeks **or** more than 6 weeks from date of delivery, No **OR** Q 33 = Yes **AND** Q 33.1= a date less than 4 weeks **or** more than 4 weeks from delivery date.

If Question 40= No **or** Question 40-Yes, **but** Question 40.1 is less than 4 weeks or more than 6 weeks.

Crosswalk: Usual Source of Care Measure

The percent of women and children with a usual source of medical care.

4a. Women; 4b. Child

Definition (TWO PARTS)

4a. Numerator: Total number of Healthy Start (HS) women participants that report having a usual source of care as of the last assessment in the reporting period.

Denominator: Total number of women HS participants in the reporting period.

4b. Numerator: Total number of Healthy Start (HS) child participants whose parent/ caregiver reports that they have a usual source of care as of the last assessment in the reporting period.

Denominator: Total number of child HS participants in the reporting period.

Inclusion in Denominator

4a. All women who have completed any screening tool in the reporting period.

4b. All children under 24 months who have been reported on by their parent/ caregiver within a postpartum or interconception screening tool.

DOB for child from Postpartum Question 1.1 or Interconception Question 1.



Crosswalk: Usual Source of Care Measure

Cont'd

Screening Tool Question(s) that Determine Inclusion in Numerator	Responses NOT included in the Numerator
Preconception: 4a/ Woman: Question 14; Question 15	If the response to these questions are as follows: [In each screening tool] First Question= No, Second Question= No or <i>Don't Know</i> , then patient is NOT included in numerator. It is appropriate to assess answer to follow up question to ensure that patient is not identifying emergency department, urgent care, or minute clinic as usual source of care.
Prenatal: 4a/ Woman: Question 9, Question 10	
Postpartum (Child): 4b/ Child: Question 10, Question 11	
Postpartum: 4a/ Woman: Question 30, Question 31	
Interconception (Child): 4b/ Child: Question 12, Question 13	
Interconception: 4a/ Woman: Question 33, Question 34	

Crosswalk: Usual Source of Care Measure

Cont'd

A personal doctor or nurse is a health professional who knows you well and is familiar with your health history. This can be a general doctor, a specialist doctor, a nurse practitioner, or a physician's assistant.

Do you have one or more persons you think of as your personal doctor or nurse? Select one only

- | | |
|---|---|
| <input type="checkbox"/> Yes, one person | <input type="checkbox"/> Don't know (Skip next 2 Qs) |
| <input type="checkbox"/> Yes, more than one person | <input type="checkbox"/> Declined to answer (Skip next 2 questions) |
| <input type="checkbox"/> No (Skip next 2 questions) | |

Is there a place that you USUALLY go for care when you are sick or need advice about your health? Select one only

- | | |
|---|--|
| <input type="checkbox"/> Yes (Go to next question) | <input type="checkbox"/> Don't know (Skip next Q) |
| <input type="checkbox"/> No (Skip next question) | <input type="checkbox"/> Declined to answer (Skip next question) |
| <input type="checkbox"/> There is more than one place | |

Recommend assessing the answer to the following to ensure that participant has an appropriate usual source of care (something other than an emergency or urgent care location)

What kind of place do you go to most often when you are sick or you need advice about your health? Is it a doctor's office, emergency room, hospital outpatient department, clinic or some other place? Select one only

Crosswalk: Well-Woman Measure

The percent of women with a well-woman visit.

Definition

Numerator: Number of Healthy Start (HS) women participants who received a well-woman or preventive visit in the 12 months prior to last HS contact.

Denominator: Total number of HS women participants during the reporting period.

Inclusion in Denominator

All women who have completed any screening tool in the reporting period.

Screening Tool Question(s) that Determine Inclusion in Numerator

Responses **NOT** included in the Numerator

Preconception: Question 17

No or *Don't know*, then not included in numerator.

Prenatal: Question 7

Don't know or *I didn't go for prenatal care* then not included in numerator.

Postpartum: Question 33, 33.1, 33.2

No or *Don't know* AND none is scheduled, then not included in numerator without additional information. If scheduled, there should be follow up to confirm that appt happens, at which point the information should be updated.

Interconception: Question 36

No or *Don't know* then not included in numerator.

Crosswalk: Well-Woman Measure

Cont'd

*During the past 12 months, did you see a doctor, nurse, or other health care worker for preventive medical care, such as a physical or well visit **checkup**? Select one only*

☐ Yes

☐ No

☐ Don't know

☐ Declined to Answer

**Screening Tool
Question(s) that
Determine Inclusion
in Numerator**

Responses **NOT included in the
Numerator**

Preconception:
Question 17

No or *Don't know*, then not included in numerator.

Prenatal:
Question 7

Don't know or *I didn't go for prenatal care* then not included in numerator.

Postpartum:
Question 33,
33.1, 33.2

No or *Don't know* AND none is scheduled, then not included in numerator without additional information. If scheduled, there should be follow up to confirm that appt happens, at which point the information should be updated.

Interconception:
Question 36

No or *Don't know* then not included in numerator.



Crosswalk: Safe Sleep Measure

The percent of children who are placed to sleep following safe sleep behaviors.

Definition

Numerator: Number of Healthy Start (HS) child participant (aged <12 months) whose parent/ caregiver reports that they are placed to sleep following three key AAP-recommended safe sleep practices.

Denominator: Total number of HS child participants aged <12 months

Inclusion in Denominator

All children less than 12 months of age identified on an interconception or postpartum screening tool:
DOB for child from Postpartum Question 1.1 or Interconception Question 1.

Screening Tool Question(s) that Determine Inclusion in Numerator

Responses **NOT** included in the Numerator

Postpartum: Question 5, Question 6, Question 7

If, Q 5 = an answer other than on back,
Q6 = an answer other than always or often **OR**
Q7 = an answer other than crib, bassinet, or pack and play,
then NOT included in numerator.

Interconception: Question 5, Question 6, Question 7

If responses are as follows then participant is NOT included in numerator:
Q 5 = On his or her side; On his or her stomach
Q6 = Any answer other than always or often **OR**
Q7 = not crib etc.



Crosswalk: Safe Sleep Measure

Cont'd

STAFF: Ask questions 5, 6, 7 about safe sleep for children less than 12 months old only.

In which one position do you most often lie your baby/babies down to sleep now? *STAFF: Please read responses to participant. Select one response only for each child.*

	On his or her side	On his or her back	On his or her stomach	Declined to answer
Child 1				
Child 2				
...				

Please tell us how your child/children most often slept in the past 2 weeks.

STAFF: Please read each sleeping location to participant and select a response for each sleeping location for each child.

In the past 2 weeks, how often has your new child/have your new children slept alone in his or her/their own crib or bed? Would you say always, often, sometimes, rarely, or never? *Select one response only for each child.*

	Always	Often	Sometimes	Rarely	Never	Don't know	Declined to answer
Child 1							
Child 2							
...							

Sleeping Location	Child 1	Child 2	...
In a crib, bassinet, or pack and play			
On a twin or larger mattress or bed			
On a couch, sofa, or armchair			
In an infant car seat or swing			
With a blanket			
With toys, cushions, or pillows including nursing pillows			
With crib bumper pads (mesh or non-mesh)			
In a sleeping sack or wearable blanket			

All 3 questions must have no answers in red to be included in the numerator.



Crosswalk: Ever Breastfed Measure

The percent of children who were ever breastfed or fed breast milk.

Definition

Numerator: Total number of HS child participants aged <12 months whose parent was enrolled prenatally or at the time of delivery who were ever breastfed or fed pumped breast milk to their infant.

Denominator: Total number of HS child participants aged <12 months whose parent was enrolled prenatally or at the time of delivery.

Inclusion in Denominator

All children less than 12 months of age identified on an interconception or postpartum screening tool whose parent/ caregiver was enrolled prior to or within 3 days of delivery (based on enrollment date compared to DOB for child from Postpartum Question 1.1 or Interconception Question 1)

Screening Tool Question(s) that Determine Inclusion in Numerator

Responses **NOT** included in the Numerator

Postpartum: Question 2

Interconception: Question 2

If enrolled prenatally or at the time of delivery (per denominator instructions above) AND answer to Question 2 is *No*



Crosswalk: Ever Breastfed Measure

Cont'd

Did you ever breast feed or pump breast milk to feed your baby/babies after delivery, even for a short period of time?
Select one response only for each baby.

	Yes	No	Declined to answer
Baby 1			
Baby 2			
Baby 3			
Baby 4			

Only assess for children less than 12 months.

Screening Tool Question(s) that Determine Inclusion in Numerator	Responses NOT included in the Numerator
Postpartum: Question 2	If enrolled prenatally or at the time of delivery (per denominator instructions above) AND answer to Question 2 is No
Interconception: Question 2	

Crosswalk: Breastfed at 6 Months Measure

The percent of children who were breastfed or fed breast milk at 6 mo.

Definition

Numerator: Total number of HS child participants age 6 through 11 months whose parent was enrolled prenatally or at the time of delivery that were breastfed or were fed pumped breast milk in any amount at 6 months of age.

Denominator: Total number of HS child participants age 6 through 11 months whose parent was enrolled prenatally or at the time of delivery.

Inclusion in Denominator

All children identified on an interconception screening tool who were age 6 through 11 mos (>6 mos and <12 mos), whose parent/ caregiver was enrolled prior to or within 3 days of delivery (based on enrollment date compared to DOB for child from Postpartum Question 1.1 or Interconception Question 1).

Screening Tool Question(s) that Determine Inclusion in Numerator

Postpartum: Question 2.1

Interconception: Question 2.1

Responses NOT included in the Numerator

If enrolled prenatally or at the time of delivery (per denominator instructions above) AND answer to question is less than 6 months from delivery (based on DOB for child from Postpartum Question 1.1 or Interconception Question 1).



% Breastfed at 6 Months

How many days, weeks or months did you breastfeed or pump breast milk for your child/children?

STAFF: Please write in the number provided by the participant and enter number of days, weeks OR months for each child.

	Number of days, weeks or months (record number and circle appropriate time period)	Still/Currently breastfeeding	Don't know	Declined to answer
Child 1	<div>Days</div> <div>Weeks</div> <div>Months</div> <div>_____</div>			
Child 2	<div>Days</div> <div>Weeks</div> <div>Months</div> <div>_____</div>			
Child 3	<div>Days</div> <div>Weeks</div> <div>Months</div> <div>_____</div>			
Child 4	<div>Days</div> <div>Weeks</div> <div>Months</div> <div>_____</div>			

Compare to date of delivery.

Crosswalk: Tobacco Abstinence Measure

<p>The percent of pregnant women that abstain from cigarette smoking.</p>	<p>Definition</p> <p>Numerator: Number of Healthy Start prenatal women participants who abstained from using any tobacco products during the last 3 months of pregnancy.</p> <p>Denominator: Total number of Healthy Start prenatal women participants who were enrolled at least 90 days before delivery.</p>	<p>Inclusion in Denominator</p> <p>All women with a complete prenatal screening tool, who gave birth more than 90 days after enrollment date (Compare enrollment date with delivery date from Postpartum Question 1.1 or Interconception Question 1) OR enrolled more than 90 days prior to due date (Compare enrollment date to due date from prenatal screening tool).</p>
<p>Screening Tool Question(s) that Determine Inclusion in Numerator</p>	<p>Responses NOT included in the Numerator</p>	
<p>Prenatal: Questions 39 and 40</p>	<p>If woman was enrolled prenatally more than 90 days from delivery AND answered Yes to this question(s) in the last 3 months of pregnancy then not included in numerator.</p>	
<p>Postpartum: Question 42; <i>If participant is screened prenatally and postpartum in the reporting year, use postpartum screen question to determine inclusion.</i></p>		

Crosswalk: Tobacco Abstinence Measure

Cont'd

39. In the past 12 months, how often have you used the following? *STAFF:*
Read substances and answers to participant and enter one response for each substance.

Substance	Never	Once or Twice Monthly	Weekly	Daily or Almost Daily	Declined to answer
Alcohol (4 or more drinks per day)					
Tobacco Products (including cigarettes, chewing tobacco, snuff, iqmik, or other tobacco products like snus Camel Snus, orbs, e-cigarettes, lozenges, cigars, or hookah)					
...					

40. Do you currently smoke any cigarettes or use any tobacco products? *Select one only*

☐ Yes ☐ Declined to answer

☐ No

42. Did you smoke any cigarettes or use any tobacco products during the last 3 months of your pregnancy? *Select one only.*

Yes (Go to question 42.1)

No (Go to question 43)

Don't know (Go to question 43)

Declined to answer (Go to question 43)

1 Postpartum tool question; this is the preferred question to use.



Crosswalk: Birth Spacing Measure

The percent of women who conceive within 18 mo of previous birth.

Lower is better.

Definition

Numerator: Number of Healthy Start (HS) women participants whose pregnancy during the reporting period was conceived within 18 months of the previous live birth.

Denominator: Total number of HS women participants enrolled before the current pregnancy in the reporting period who had a prior pregnancy that ended in live birth.

Inclusion in Denominator

All women who have completed a prenatal screening tool in the reporting period AND interconception screening tool prior to the current pregnancy (meaning they were enrolled in the program before the current pregnancy) and the interconception tool indicated they had a previous live birth.

Screening Tool Question(s) that Determine Inclusion in Numerator

Interconception: Question 3; DOB of most recent live birth

Prenatal: Question 1 or 2 (used to calculate conception), DOB of most recent live birth

Postpartum: Question 1.1 (used to calculate conception), DOB of most recent live birth

Responses NOT included in the Numerator

If participant was enrolled prior to current/ most recent pregnancy during the reporting year, **AND** the time between the DOB of prior live birth is more than 18 months from estimated date of conception, then participant is NOT included in numerator.



Crosswalk: Birth Spacing Measure

Please tell me how your previous pregnancies ended.

STAFF: PLEASE READ OUT LOUD the following responses: Live birth, miscarriage, ectopic or tubal pregnancy, abortion, or fetal death or stillbirth, and enter type for each pregnancy. For any live birth and fetal death / stillbirth, please indicate how many babies for each type of pregnancy, and the date of birth.

	Live Birth	...
Pregnancy 1	# ____ Date: __/__/____	
Pregnancy 2	# ____ Date: __/__/____	
...		

How many weeks or months pregnant are you?

STAFF: Please enter number of weeks OR number of months.

____ Weeks OR ____ Months

☐ Don't know ☐ Declined to answer

What is your baby's due date?

Due Date: __/__/____

☐ Don't know ☐ Declined to answer

When was your baby / were your babies born?

STAFF: Enter birth date for each baby.

	Date: (month/day/year)
Baby 1	__/__/____
Baby 2	__/__/____
...	

Crosswalk: Well Child Visit

The percent of children with well child visit.

Definition

Numerator: Number of Healthy Start (HS) child participants whose parent/ caregiver reports that they received the most recent recommended well child visit based on the AAP schedule well child visit as of the last assessment within the reporting period.

Denominator: Total number of HS child participants

Inclusion in Denominator

All children under 24 months who have been reported on by parent/ caregiver within a postpartum on interconception screening tool; **DOB for child from Postpartum Question 1.1 or Interconception Question 1.**

Screening Tool Question(s) that Determine Inclusion in Numerator

Postpartum: Question 1.1;
Question 12

Interconception: Question 1;
Question 15

Responses **NOT** included in the Numerator

If the response to question of last well child visit is not timely, then not included in numerator. This requires comparing the date of last reported well child visit (Postpartum Q12; Interconception Q15) to birthdate of the child (Postpartum Question 1.1; Interconception Question 1) and AAP recommendations.



Crosswalk: Well Child Visit

When was your baby / were your babies born?

STAFF: Enter birth date for each baby.

	Date: (month/day/year)
Baby 1	___/___/___
Baby 2	___/___/___
Baby 3	___/___/___
Baby 4	___/___/___

When was your baby's/babies' last visit to a doctor, nurse, or other health provider for a well-child check-up? *Select one response only for each child.*

	Date of baby's last visit	Don't know	Declined to answer
Baby 1	___/___/___		
Baby 2	___/___/___		
Baby 3	___/___/___		
Baby 4	___/___/___		

If child is between...

... 1 and 2 months, did the child have their 1 month visit?

... 2 and 4 months, did the child have their 2 month visit?

... 4 and 6 months, did the child have their 4 month visit?

... 6 and 9 months, did the child have their 6 month visit?

... 9 and 12 months, did the child have their 9 month visit?

... 12 and 15 mos, did the child have their 12 month visit?

... 15 and 18 mos, did the child have their 15 month visit?

... 18 and 24 mos, did the child have their 18 month visit?

Crosswalk: Depression Screening + Referral

The percent of women who receive depression screening and referral.

Definition (TWO PARTS)

Screening Numerator: Number of Healthy Start (HS) women participants who were screened for depression with a validated tool during the reporting period.

Screening Denominator: Number of HS women participants in the reporting period.

Referral Numerator: Number of women participants who screened positive for depression during the reporting period and received a subsequent referral for follow-up period.

Referral Denominator: Number of HS women participants who screened positive for depression during the reporting period.

Inclusion in Denominator

All women participants who have completed any screening tool within the reporting period.



Crosswalk: Depression Screening + Referral **Cont'd**

Screening Tool Question(s) that Determine Inclusion in Numerator	Responses NOT included in the Numerator
Preconception: Question 32 (including sub questions and follow up box below)	Screening: If questions were not completed AND another validated tool has not been completed with that participant, then not included in numerator. Referral: If specified screening tool questions were complete AND score is >3 AND there is NO documentation of referral, then not included in numerator. If another validated tool was used, then if the participant screened positive based on the validated tool and there is no documentation of referral then that participant is not included in the numerator.
Prenatal: Question 38 (including sub questions and follow up box below)	
Postpartum: Question 40 (including sub questions and follow up box below)	
Interconception: Question 51 (including sub questions and follow up box below)	



Crosswalk: Depression Screening + Referral **Cont'd**

Part 1, Screening: BOTH QUESTIONS MUST BE COMPLETE.

*Over the past two weeks, how often have you experienced any of the following, would you say never, several days, more than half the days, or nearly every day?
STAFF: Read each problem to participant, and enter one score for each question.*

Q#	Problem	Not at all	Several Days	More than half the days	Nearly every day	Score
32.1	Little interest or pleasure in doing things	0	1	2	3	
32.2	Feeling down, depressed, or hopeless	0	1	2	3	
	Total Score					

Part 2, Referral: If indicated by screening (>3)

FOLLOW UP	
<input type="checkbox"/> Provided information/ education about resources for depression	Date _____
<input type="checkbox"/> Provided further assessment using evidence-based tool such as PHQ-9 or Edinburgh Postnatal Depression Screening Tool.	
Date _____	
<input type="checkbox"/> Provided counseling	Date _____
<div> Referred to: <input type="checkbox"/> Mental Health Center <input type="checkbox"/> Primary Care Provider </div> <div> <input type="checkbox"/> Other: Please specify _____ Date of Referral _____ </div>	

PHQ-9 or Edinburgh is additional screening. So, if that is negative, then referral is not needed.



Crosswalk: IPV Screening

<p>The percent of women who receive IPV screening</p>	<p>Definition</p> <p>Numerator: Number of Healthy Start (HS) women participants who received intimate partner violence screening using a standardized screening tool during the reporting period.</p> <p>Denominator: Total number of HS women participants in the reporting period.</p>	<p>Inclusion in Denominator</p> <p>All women participants who have completed any screening tool within the reporting period.</p>
<p>Screening Tool Question(s) that Determine Inclusion in Numerator</p>		<p>Responses NOT included in the Numerator</p>
<p>Preconception: Question 35 (including all sub questions)</p>	<p>If the denoted question AND/ OR any of the sub questions are NOT complete then the participant is NOT included in the numerator.</p>	
<p>Prenatal: Question 43 (including all sub questions)</p>		
<p>Postpartum: Question 44 (including all sub questions)</p>		
<p>Interconception: Question 54 (including all sub questions)</p>		



Crosswalk: IPV Screening

XX. We are concerned about the safety of all participants. Please answer the following questions about experiences that you may have had during the past 12 months so that we can help you if needed. STAFF: Please read each question to participant and enter one response for each question.

Q#	During the past 12 months...	Yes	No	Declined to Answer
xx.1	Did your husband or partner threaten or make you feel unsafe in some way?	ALL QUES TIONS MUST BE COMP LETE.		
xx.2	Were you frightened for your safety or your family's safety because of the anger or threats of your husband or partner?			
xx.3	Did your husband or partner try to control your daily activities, for example, control who you could talk to or where you could go?			
xx.4	Did your husband or partner push, hit, slap, kick, choke, or physically hurt you in any other way?			
xx.5	Did your husband or partner force you to take part in touching or any sexual activity when you did not want to?			
xx.6	Did anyone else physically hurt you in any way?			

Crosswalk: Father/ Partner Involvement during Pregnancy

The percent of women with father/partner involvement during pregnancy.

Definition

Numerator: Number of Healthy Start (HS) prenatal participants who report supportive father and/or partner involvement (e.g., attend appointments, classes, etc.) in the reporting period

Denominator: Total number HS prenatal participants in the reporting period.

Inclusion in Denominator

All women participants who had a completed **prenatal screening tool** within the reporting period.

Screening Tool Questions that Determine Inclusion in Numerator

Parental: Question 49 and Question 49.1

Postpartum: Question 50 and 50.1 (*only if no prenatal information is available, and this information was gathered immediately following delivery*)

Responses **NOT** included in the Numerator

If answer is something other than the following, then NOT included in the numerator:

First question= Involved and supportive of me and my baby/babies; **OR** First answer = Involved but not supportive of me or my baby/babies; **AND** the answer to the follow on question regarding involvement is Cares for baby/babies (feeding, bathing, etc.); Assists with housework and/or runs errands; Attends medical appointments; Provides emotional support; Provides financial support or Other (**review to ensure relevant**)



Crosswalk: Father/ Partner Involvement during Pregnancy

Would you describe your partner or the father of this baby as: Select only one.

- ☐ Involved in my pregnancy and supportive of me (Go to Q 49.1)
- ☐ Involved but not supportive of me (Go to Q 49.1)
- ☐ Aware that I'm pregnant but not involved (Go to Q 50)
- ☐ Not aware that I'm pregnant (Go to Q 50)

DO NOT READ OUT LOUD

- ☐ Declined to answer (Go to question 50)

What is your partner's or the father of your baby's role in your life? Select all that apply.

- ☐ Partner or father of baby is deceased
- ☐ Partner or father of baby is incarcerated
- ☐ Assists with housework and/or runs errands
- ☐ Attends prenatal appointments and/or childbirth classes
- ☐ Provides emotional support
- ☐ Provides financial support
- ☐ Partner or father of baby plays no role / is not involved
- ☐ Other (please specify): _____
- ☐ Declined to answer

Crosswalk: Father/ Partner Involvement with Child

The percent of children whose mother/ caregiver reports supportive father/ partner involvement.

Definition

Numerator: Number of Healthy Start (HS) child participants whose mother reports supportive father and/or partner involvement during the reporting period.

Denominator: Total number of child participants <24 mos.

Inclusion in Denominator

All children under 24 months who have been reported on by parent/ caregiver within a postpartum on interconception screening tool; DOB for child from Postpartum Question 1.1 or Interconception Question 1.

Screening Tool Questions that Determine Inclusion in Numerator

Interconception:
Question 59 and 59.1

Postpartum: Question 50 and 50.1

Responses **NOT** included in the Numerator

If answer is something other than the following, then NOT included in the numerator: First question= Involved and supportive of me and my baby/babies; **OR** First question = Involved but not supportive of me or my baby/babies; **AND** the answer to the follow-on question regarding involvement is *Cares for baby/babies; Assists with housework and/or runs errands; Attends medical appointments; Provides emotional support; Provides financial support or Other* (review to ensure relevant).



Crosswalk: Father/ Partner Involvement with Child

Would you describe your partner or the father of your baby/babies as: STAFF: Please read responses to participant, and select only one response.

Involved and supportive of me and my baby/babies (Go to Q50.1)

Involved but not supportive of me or my baby/babies (Go to Q50.1)

Not involved [Screening tool is complete]

Staff: DO NOT READ OUT LOUD:

Declined to answer [Screening tool is complete]

What is your partner's or the father of your baby's /babies' role in your life? Select all that apply.

Partner or father of baby/babies is deceased

Partner or father of baby/babies is incarcerated

Cares for baby/babies (feeding, bathing, etc.)

Assists with housework and/or runs errands

Attends medical appointments

Provides emotional support

Provides financial support

Partner or father of baby/babies plays no role/is not involved

Other (please specify): _____

Declined to answer



Crosswalk: Reading to Child

The percent of children read to 3+ time per week.

Definition

Numerator: Number of Healthy Start children participants whose parent/ caregiver reports that they were read to by a family member on 3 or more days during the past week during the reporting period.

Denominator: Total number of Healthy Start child participants 6 through 23 months of age during the reporting period.

Inclusion in Denominator

Child participants aged 6 through 23 months who have been reported on by parent/ caregiver within a postpartum on interconception screening tool; **DOB for child from Postpartum Question 1.1 or Interconception Question 1.**

Screening Tool Questions that Determine Inclusion in Numerator

Interconception Question 3

Responses NOT included in the Numerator

If Question 3 < 3, then participant is not included in the numerator.



% Child Participants <24 mo who are Read to 3+ times/week on average

Please tell me the number of times you or a family member read to your child during the past week. Reading includes books with words or pictures but not books read by an audio tape, record, CD, or computer.

STAFF: Record the total number of days, from 0 days (no days) to 7 days (everyday).

	Times per week (Record the number)	Don't know	Declined to answer
Child 1	If >3		
Child 2			
Child 3			
Child 4			



Quality Improvement

Improving care and services
based on data

[in turn, moving the needle on
performance measures]



Supporting communities to
give every child a Healthy Start.

Healthy Start EPIC Center

Quality Improvement

If, after calculating performance measures based on these definitions, some performance measures are not where you want them...



It's quality improvement time!

Case Study: Breastfeeding in Detroit

- No verifiable baseline; BF not its own question on intake form
- Decided to use intake form to start the conversation
 - Frontline staff provided input on how best to integrate the breastfeeding questions in the intake form.
 - Use a small part of their weekly case conference meeting to discuss ongoing progress.
- Encouraged Coffective App, which provides information about what to expect in the hospital, how to prepare for the baby to return home, and how to increase readiness for breastfeeding, as a low-resource, potentially high impact strategy
 - Upon “studying” the change, only 2 participants had downloaded the app.
 - Decided they needed to try to make staff more comfortable

This case study is available in your packet, in eNews, and on HealthyStartEPIC.org!



Case Study: Breastfeeding in the Midwest

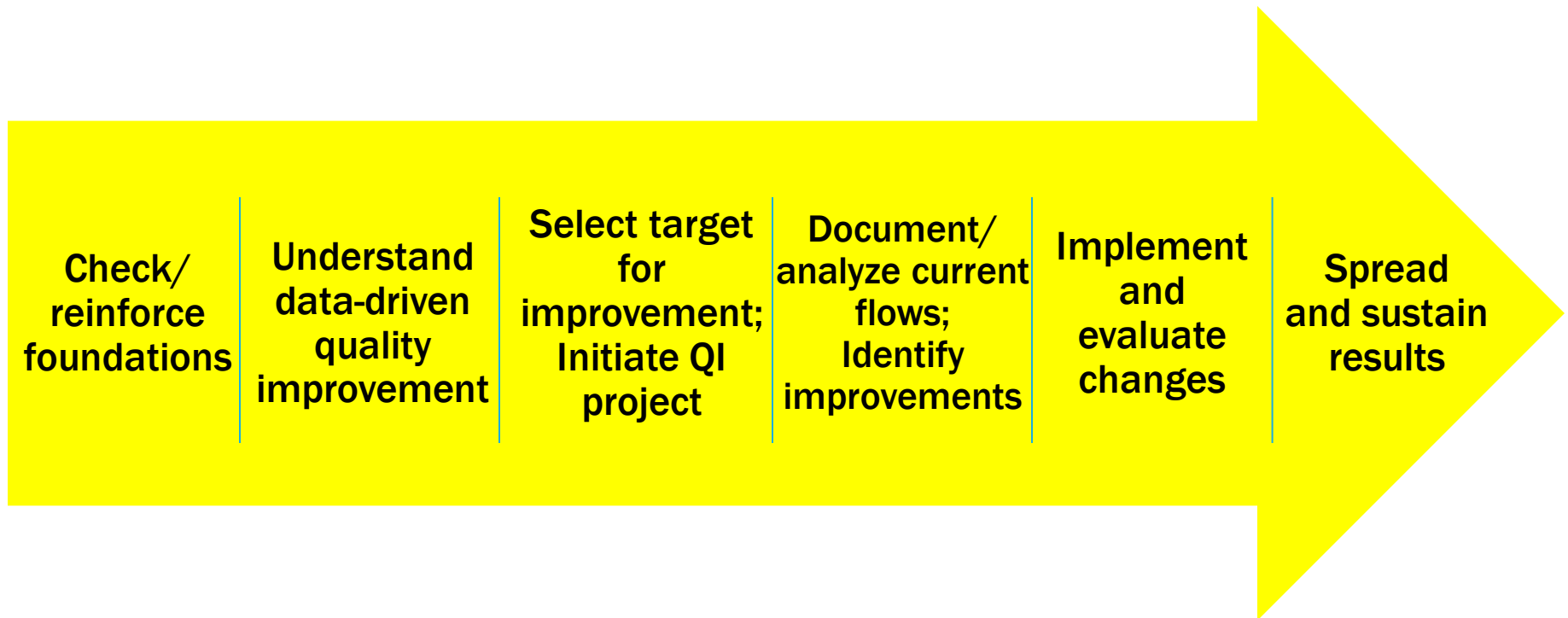
- Approx. 30% initiating and 1% at 6 months
- Chart audit showed breastfeeding was being captured in notes, but not in data field
- H.U.G. Your Baby curriculum– evidence based, trained all staff; Motivational Interviewing training
- Involved all staff in changes; asked for input and continue to discuss regularly
- Using screening tools to collect intake information; then rely on the case management record for ongoing monitoring of the performance measures, since these are continually updated
- Plan to apply similar approach to other measures

Case Study: Recruitment/Retention in Queens

- Central intake with referral to various programs (including NFP, home visiting, etc.)
- Struggling with recruitment and referrals
- Took two major approaches
 - Process mapping with complete honesty
 - How are referrals coming in? What is being done with them?
 - **Finding: Was taking up to 3 or 4 weeks!**
 - Educating referral partners
 - Many women came to Healthy Start not knowing the nature of program, leading to R+R challenges
 - **Finding: Needed succinct program description**



Quality Improvement Framework





Check / Reinforce Foundations

CROSSWALK: Performance Measures (a.k.a. Benchmarks) and Screening Tools

What foundations should be checked?

- ☐ Do we have consistent systems in place to capture needed information?
- ☐ Is that information accessible for use in QI efforts?
- ☐ Have we been doing quality assurance or validation to be sure our data accurate?
- ☐ Does the process have buy-in from leadership and staff?
- ☐ Are QI efforts aligned with organization mission/ goals/ imperatives?

Initial Calculations

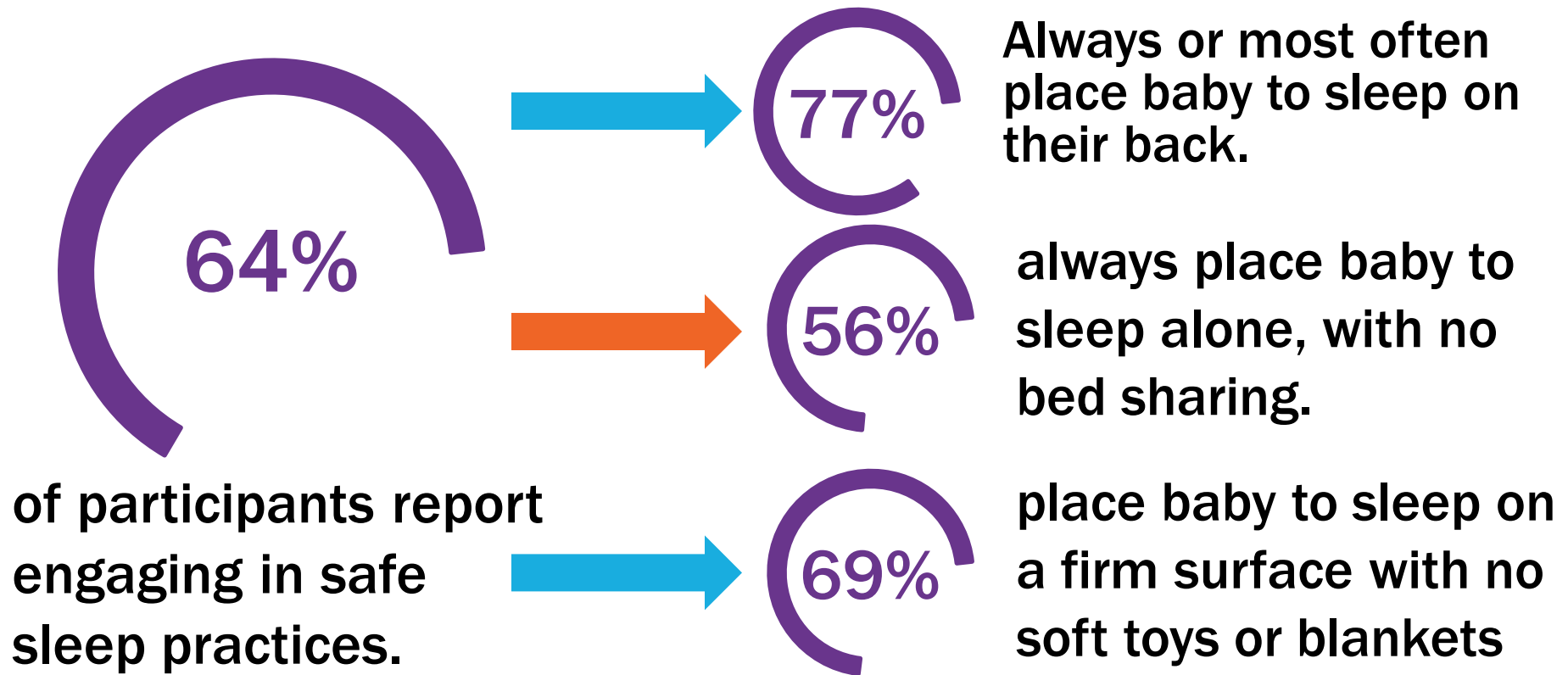
Denominator

- ✓ **Children captured on Interconception or Postpartum tool during the reporting period, who are <12 months based on DOB in Question 1.1**

Numerator

- ✓ **Using Postpartum and Interconception tool:**
 - ✓ **Add up those where, for the child in the numerator, responses are ALL as follows:**
 - ✓ **Question 5: On his/her back;**
 - ✓ **Question 6: Always or Often;**
 - ✓ **Question 7: In a crib, bassinet, or pack and play**

Dig Down



Identifying Gaps or Issues that may Impact Measures



Numerator issues

Information available leads to improper inclusion or exclusion from the calculation.



Denominator issues

Report including patients that should not be in the Denominator/ Universe: wrong timeframe, missing exclusions



Service or outcome issues

Indicated service not being provided or outcome not being achieved

Why does the type of issue matter?

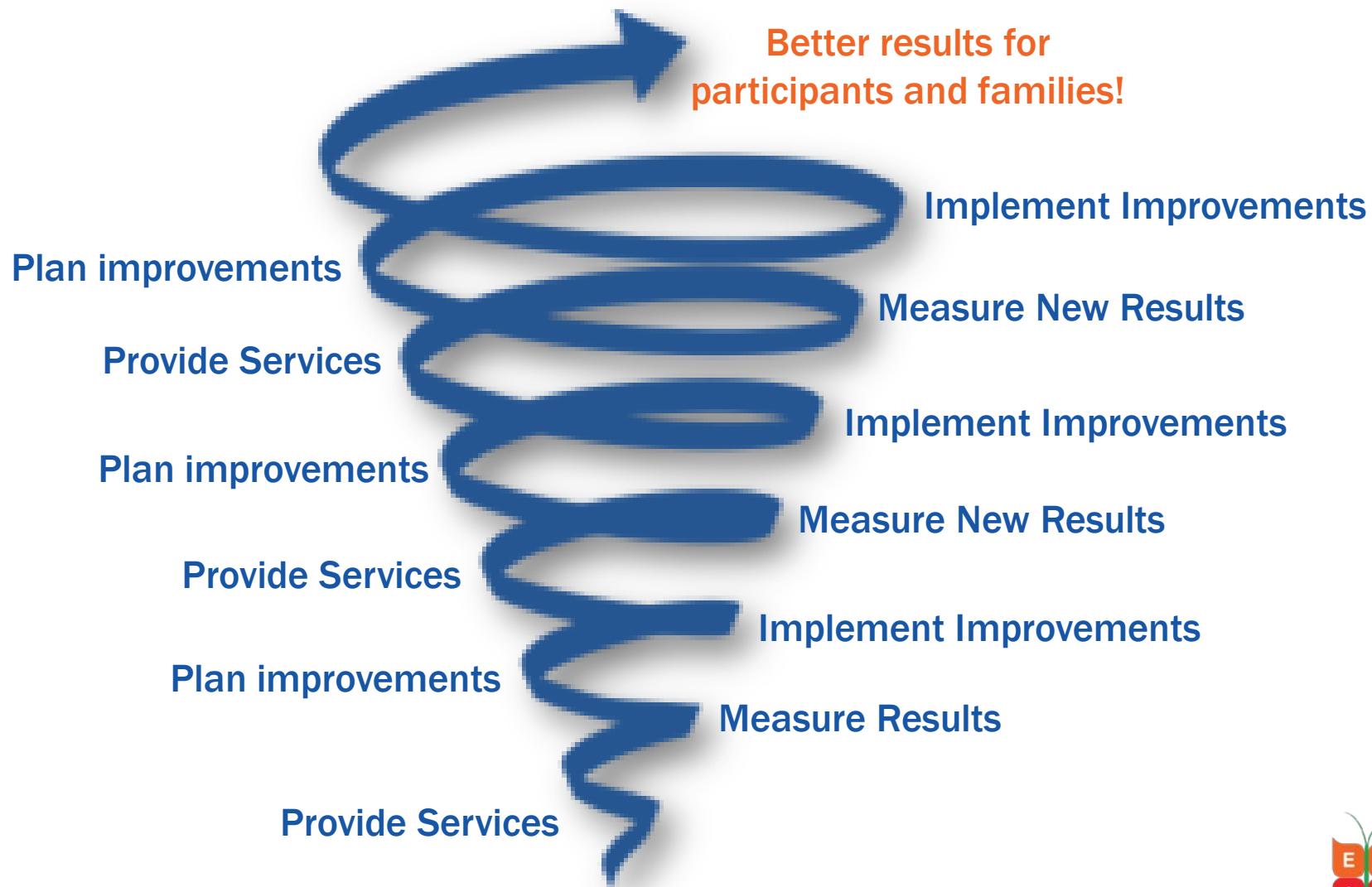
What do you think?

- ☐ Resources are limited, so targeting specific gaps is key for efficiency and best care.
- ☐ Gaps in data vs. gaps in services or outcome issues require different approaches to address.
- ☐ Illustrating specific knowledge of existing gaps to stakeholders builds credibility.
- ☐ Change fatigue is real!

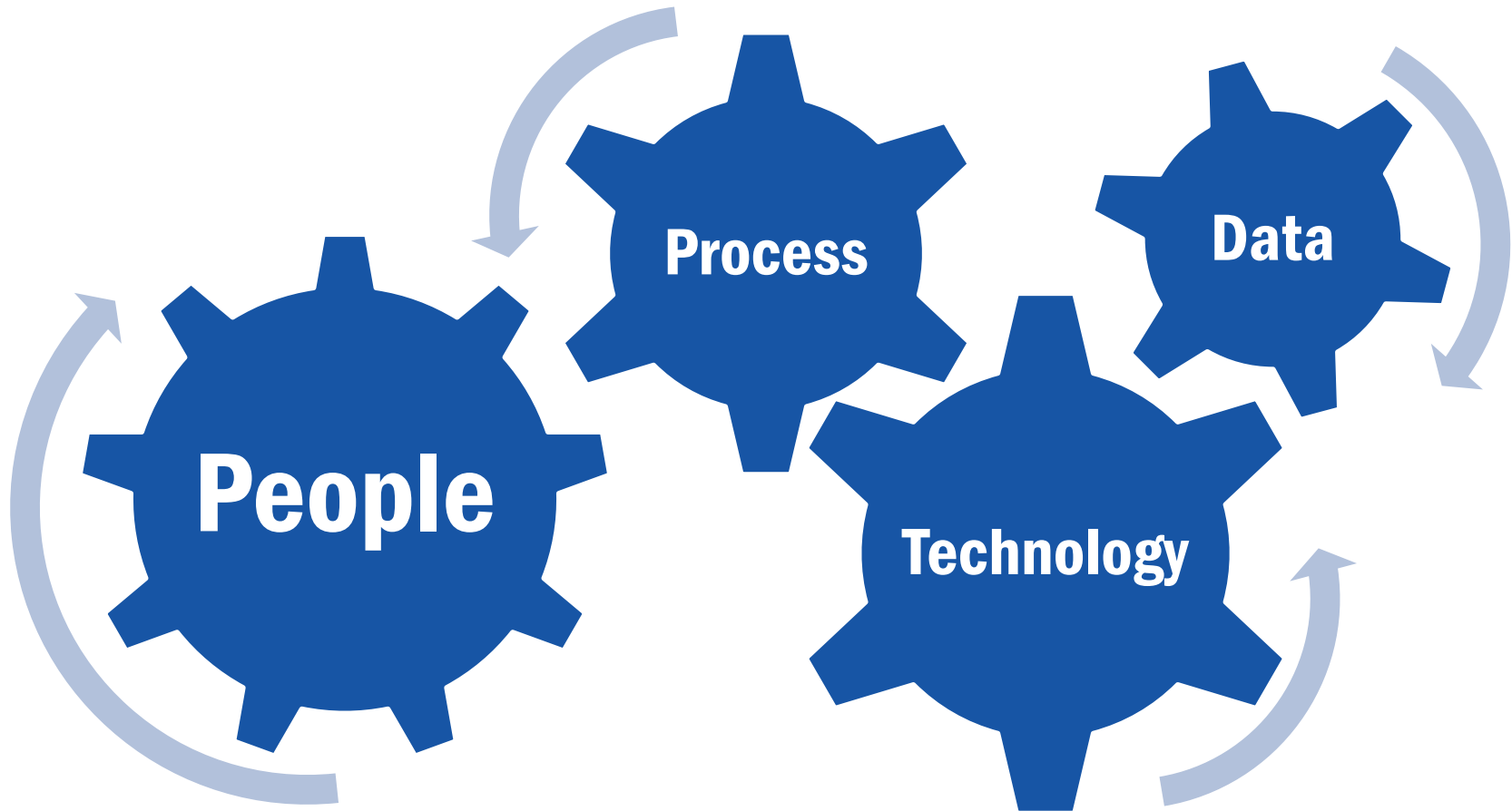


Understanding Data Driven Quality Improvement

Data Driven Quality Improvement



What does data-driven QI require?





Selecting a Target for Improvement and Initiating QI Project

What QI target is best?

Why might you choose a particular QI target?

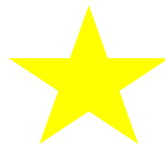
Less than optimal performance.



Greatest need in the community.

Aligns with other efforts in organization.

Leadership made the determination.



Existing resources to leverage.

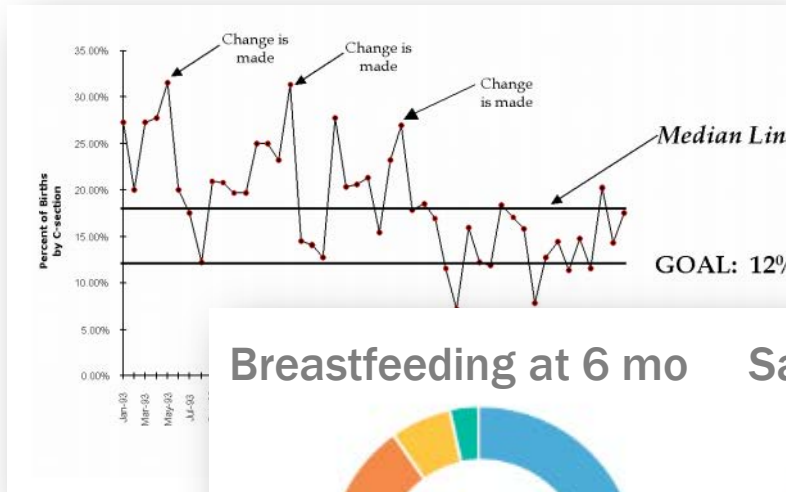
Additional Decision Support

Informed by the work we've already discussed, use a tool like this **Prioritization Matrix** to compare the options side-by-side in an “apples to apples” way.

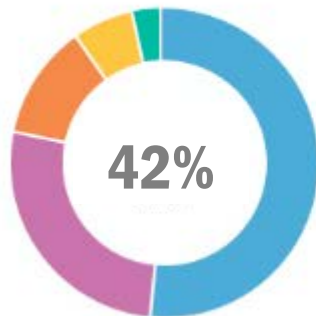
Performance Measures Needing Improvement	Difficulty (low – 3, medium 2 or high difficulty 1)	Impact (low – 1, medium 2 or high impact 3)	Rating (Difficulty x Impact)
Breastfeeding at 6 mo	1	2	2
Safe Sleep	2	2	4
Reproductive Life Plan	3	1	3

Monitoring Changes

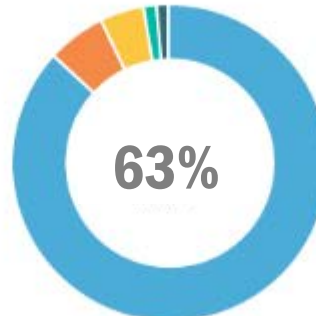
- Tracking performance over time using run charts or data dashboards allows you to identify changes when they happen, responding if necessary.



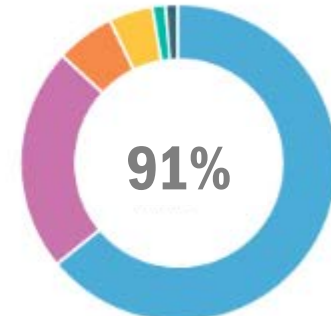
Breastfeeding at 6 mo



Safe Sleep



IPV Screen



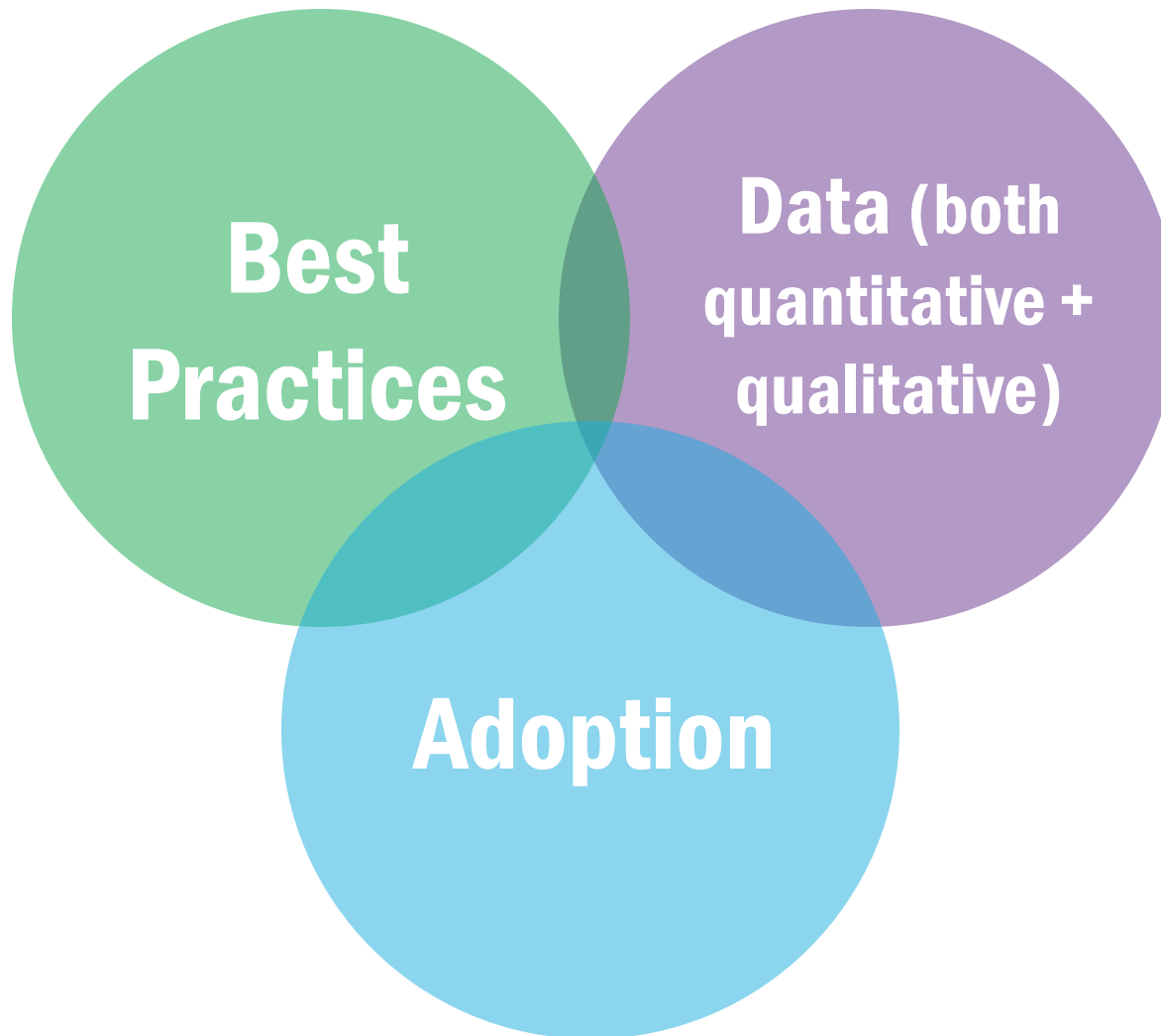


Document/ analyze current flows; Identify improvements

Now that we have chosen a target...

- What are we currently doing that is getting us the results we are currently getting?
- What should we be doing to get ideal outcomes? (i.e. what are the best practices?)
- What could we be doing differently to get closer to best practices, and therefore achieve better outcomes?
- What of these options should we adopt?

Key Aspects



Process Mapping Tool

QUALITY IMPROVEMENT Healthy Start Performance Measures | Process Mapping Worksheet



Target Performance Measure	
Current Performance on Measure	

Current Process/ Activities						Potential Improvements
Description	Who? (which staff is responsible for the activity or information)	What? (activity done; information captured)	Where? (where is information conveyed or captured)	How? (through what channel is the work done or information captured)	When? (at what point in the process)	
Initial Referral/ Enrollment						
Care Coord./ Case Mgt Meeting						

More on subsequent pages



Example: Baseline Section

Target Performance Measure	% of Healthy Start (HS) women participants who enrolled prenatally or within 30 days after delivery who received a postpartum visit between 4-6 weeks after delivery.
Current Performance on Measure	42% of Healthy Start (HS) women participants who enrolled prenatally or within 30 days after delivery who received a postpartum visit between 4-6 weeks after delivery.

Tips:

- Be as specific as possible, defining the population, etc.
- Be sure current performance is on the exact measure being targeted, not just what numbers are available!
- Stratifying data can provide additional insight

Example: Mapping Current Processes

Current Process/ Activities						Potential Improvement s
Description	Who? (person responsible for the activity/info)	What? (activity done; information captured)	Where? (where is information conveyed or captured)	How? (through what channel is the work done or information captured)	When? (at what point in the process)	
Initial Referral/ Enrollment	Case manager receiving referral	Checks fax, email, etc. for referrals, and inputs them into system		Input into case management system and added to the client list of a case manager.	Ideally within 24 hours of receipt, but currently taking about 2.5 days.	...
Care Coord./ Case Mgt Meeting	All case managers	Weekly meeting to review new clients				...

Example: Mapping Current Processes

Current Process/ Activities						Potential Improvement s
Description	Who? (person responsible for the activity/info)	What? (activity done; information captured)	Where? (where is information conveyed or captured)	How? (through what channel is the work done or information captured)	When? (at what point in the process)	
Population + Community Services	Program manager	Identify participants with open referrals		Input into case management system and added to the client list of a case manager.	Ideally within 24 hours of receipt, but currently taking about 2.5 days.	...
Foundations Protocols/ Processes/ Practices that support overall care.	1. Director 2. CAN Coordinator	1. Monitor outcomes, conduct onboarding for new staff.				...

Current Process Mapping Tips

When using the mapping worksheet:

- Be sure to involve a multi-disciplinary team to ensure all perspectives are captured.
- Under Current Processes, document what is most often done, not what should be done.
- You may want to edit the mapping worksheet to your own purposes (i.e. reorder the categories)
- Include any activities that cross the whole population in the Population Services section.
- Include policies, protocols, practices (i.e. training, mission, IT systems) in the Foundations section.

Example: Potential Improvements

Current Process/ Activities						Potential Improvements
Description	...	...	...	...	...
Initial Referral/ Enrollment	...	...	...	...	...	Include field on referral form asking whether woman has had postpartum care, and if so, asking for a date. This can be confirmed by participant at initial visit.
Care Coord./ Case Mgt Meeting	...	...	...	...	...	Review current performance on target measure as well as a list of participants who are in need of a postpartum visit on a weekly basis. The list can be generated from screening tools or system.
Prior to Initial Participant Encounter	...	...	...	...	...	Generate a list of services that likely pertain to the participant, an “Action List” – such as insurance, postpartum visit, breastfeeding, etc.

Potential Improvements Tips

When considering *Potential Improvements*, consider the following:

- Cells/ sections of the worksheet where the process is not known
- Instances where stakeholders are not aligned on processes (i.e. different case managers or sites do different things)
- Instances where no policy or reliable practice is in place.
- Instances where some portion of the 5 Ws are not clear– there is no consistent place **where** or **how** information is captured.
- Instances where policies and workflows are in place, but outcomes are still suboptimal– are there population factors?



What should we be doing to get ideal outcomes?

What could we be doing differently to get closer to best practices, and therefore achieve better outcomes?



Implement and Evaluate Changes

Review Best Practices

- In addition to potential changes you identified from current activities, also review best practices:
 - Evidence Based Practice Library on HealthyStartEPIC.org
 - Change Packages from Quality Improvement Peer Learning Networks

Consider Additional Sources

Are there additional sources of screening tool information that can be tapped into for verification or supplementation?

FQHC

**Home
Visiting**

WIC

**County
or City
Services**

Tips: Data partnerships may require a memorandum of agreement; and many begin by having “read-only” access, in order to safeguard data.

Selecting Changes

Similar to choosing a target measure, you may want to use a Prioritization Matrix to determine what change will be most efficient or impactful:

Potential Improvement	Difficulty (low – 3, medium 2 or high difficulty 1)	Impact (low – 1, medium 2 or high impact 3)	Rating (Difficulty x Impact)
Include field on referral form about receipt and date of postpartum care.	3	2	6
Review current performance on measure and list of participants who are in need of a postpartum visit on a weekly basis.	2	2	4
Generate an “Action List” for each participant– such as insurance, postpartum visit, breastfeeding, etc.	1	3	3

Plan

Using [PDSA cycles](#), engage ALL key stakeholders to design, implement and evaluate the selected changes.

The *plan* describes how you will translate the proposed improvement into action.

- Describes what change you will make to see if the enhancement results in an improvement and what you learned from the test
- Answers a series of key questions that are needed for successful test of enhancement



Considerations

When creating your plan, consider the following:

- Don't overcommit!



- Limit the scope of the test of your enhancement to one site, day, or care team.
- Limit the time frame and number of participants impacted, but be sure it is representative.
- Remember this change is not the only option.
- **Key:** Do not completely embed the enhancement before we know if it works with a representative sample (i.e., don't make expensive system or staffing changes yet!).

Considerations



Communication is a key to success.

- While the scope of the test should be limited, broader communication is likely needed.
- Communicate with everyone necessary that a new process or plan is being tested out but will not be rolled out broadly until you are sure that it works.
- **Keys:** Be sure to clearly outline the plan, scope, and responsibilities for those involved; Allow and encourage feedback from those involved.

Considerations



Define success in terms of your target and goal [from QI worksheet].

- Define success as a team, including input from those who will be *doing*.
- Avoid target drift or scope creep.
 - Often a function of defining success on what is easiest to measure rather than what we truly care about.
- Consider external barriers.
- **Keys:** Success may include multiple facets (i.e. change in key metric + increased staff satisfaction or knowledge), and must be measurable in the time available.

Considerations



Collect data related to your target

- Identify process measures and other related data to be collected to determine if enhancement is effective.
- Consider whether data should/ needs to be collected separately for the test of the enhancement.
- Be sure that data can and will be collected in the time allowed.
- **Key:** Ensure that measures and metrics used **directly relate** to both the set target and the improvement you are testing.

Study

Collect and analyze qualitative and quantitative data.

Compare data to predications and goal; seek to understand experiences of those involved.

Did the improvement work?

Did it have the intended effect? Did it progress you toward your goal? Did it do so without driving those involved crazy?

Act



ADOPT

- When the test resulted in the desired outcomes
- Expand test, and begin embedding into health center systems and processes



ADAPT

- When the test resulted in some positive outcomes, or some improvement, but not exactly the goal
- Tweak the tested enhancement and test again



ABANDON

- When the test did not result in desired outcomes
- Discontinue the change tested; ensure that it has not remained embedded in systems or processes



Questions?

Thank you!