Implementation Plan Template

Outline for Patient-Reported Outcomes Measures Implementation Plan

Prepared in conjunction with implementation of Epic PROs

as part of the EASI-PRO grant U01TR001806,

National Center for Advancing Translational Sciences (NCATS)/

National Institutes of Health (NIH)

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See *PRO Planning Toolkit Overview* (below) for a full list of authors

February, 2020

# Notice:

This document is one component of a four-member set of PRO implementation planning “decision tools” comprised of the following documents:

1. The document entitled *PRO Planning Toolkit Overview* explains this set of documents more fully and provides a full list of authors and acknowledgements. This document also provides brief instructions for using these planning tools. http://doi.org/10.18131/g3-ejp7-cb85
2. The *PRO Planning Guide* includes structured lists of specific questions that should be answered to implement PROs as well as resources to aid in decision making. http://doi.org/10.18131/g3-0shy-pn30
3. The *Decision Log* based on the *PRO Planning Guide* was created to serve as a record of planning decisions. http://doi.org/10.18131/g3-vy44-c949
4. The *Implementation Plan Template* functions as a model for a clinic implementation plan. https://doi.org/10.18131/g3-fev6-hc15

**Please access the public URL for this collection to download the latest versions of all documents:**

https://digitalhub.northwestern.edu/collections/e71c88e3-3a0b-4b56-90ce-8ddc75a78e81

**NOTE: Decision Log and Template on the website are editable.**

**Patient-Reported Outcomes Measures Implementation Plan**

**For [Institution], [Clinic]**

Version 1: [Date]

Prepared by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Prepared for: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Patient-Reported Outcomes Measures Implementation Plan**

**For [Institution], [Clinic]**

1. Introduction

**Clinic Implementation Plan**

1. Site for pilot
   1. Institution and clinic(s)
2. Study team and roles
   1. Institution-level roles
   2. Primary lead
   3. Clinician champion
   4. Other clinical users
   5. Technical staff
3. Aims of PRO collection
   1. Additional details about the aims of PRO collection
4. Pilot patients to be assessed
   1. Initial eligibility criteria
   2. Initial exclusion criteria
5. Pilot patient-reported outcome measures in order of administration
   1. List all patient outcome measures here.
6. PRO data collection workflow
   1. What triggers assessment?
   2. Alerting patient about assessment (schedules and assessment intervals)
   3. Patient assessment completion workflow (NOTE: Even if the institution prefers that patients complete assessments at home, patients may arrive at the clinic with incomplete PROs. These completion options should specify in as much detail as possible when patients are expected to complete PROs, where they will be physically located, who will direct patients in proper procedure, and what equipment will be used to complete PROs.)
      1. PRO completion option 1 (usually at-home completion)
      2. PRO completion option 2 (usually in-clinic completion)
         1. Include data collection devices and connectivity
7. Receiving Scores
   1. Score availability for clinicians
   2. Notification of provider for PRO responses
   3. Clinician access to PRO scores and actions to be taken
      1. Include detailed information, especially if certain score thresholds will trigger different actions.
   4. Patient access to PRO scores (if applicable)
8. Training plan
9. Practical matters
   1. Work Team for Implementation
   2. Schedule for implementation
   3. Financial plan
10. Evaluation of pilot
    1. Evaluation process and deliverables
       1. Qualitative evaluation
       2. Usage metrics
       3. Evaluation by patients, if any

**Institutional Implementation Plan**

1. Key institutional stakeholders
2. Top institutional priorities
3. Criteria for institutional “success”
4. Institutional oversight and governance plan
5. Barriers and facilitators noted during planning process