



Four Action Steps

CP3 Toolkit: Planned Care

The following was adapted from a [September 21, 2016 presentation](#) by Carolyn Shepherd, formerly of Clinica Family Health in Colorado. It describes the four action steps involved in team-based care.

1. Assess performance.
 - Evaluate practice systems and ability to execute key functions with ambulatory guide assessments
2. Build and maintain effective core teams.
 - Plan for reassessment of core team
 - Build relationship with the patient
 - Include resources and time
3. Use rapid cycle tests of change to evaluate process changes
 - Improving key functions is complex disruptive change management
 - Be rigorous about applying improvement science-small tests of change
4. Make new or improved functions standard work and sustainable.
 - Leadership critical
 - Dismantle old systems
 - Incorporate change into standard work culture
 - Explicit role definitions
 - Workflows and process diagrams
 - EHR alterations and documentation
 - Training
 - HR job descriptions, competency checklists, pay structure