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