**Map the Workflow Worksheet**

Knowledge of clinical guidelines is only half of the challenge. The other half is to ***successfully tailor your office system to allow for efficient implementation of the guidelines into your busy practice setting***. Use this worksheet to identify key staff participants, discuss areas of potential system adjustments, identify tools to utilize, appoint staff to address necessary changes, and set a time to meet as a group in the near future to assess your progress.

**I. Identify “key” practice staff who will help implement office system changes**

Physician Champion \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Practice Manager \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Nursing Manager \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**II. Identify areas for improvement**

Utilizing the table below, critically examine each step in the evidence-based prevention and treatment of childhood obesity to determine if these are occurring efficiently and effectively at all preventive medicine visits for your patients

|  |  |  |
| --- | --- | --- |
|  | **KNOWLEDGE & EFFECTIVENESS** | **EFFICIENCY** |
| **Step 1: Assess Risk Factors** | Poor Fair Good Excellent | Poor Fair Good Excellent |
| **Step 2: Measure BMI and Assign Weight Category** | Poor Fair Good Excellent | Poor Fair Good Excellent |
| **Step 3: Assess Readiness for Change** | Poor Fair Good Excellent | Poor Fair Good Excellent |
| **Step 4: History and Physical Examination** | Poor Fair Good Excellent | Poor Fair Good Excellent |
| **Step 5: Intervention** | Poor Fair Good Excellent | Poor Fair Good Excellent |
| **Step 6: Laboratory Evaluation** | Poor Fair Good Excellent | Poor Fair Good Excellent |
| **Step 7: Referrals and Resources** | Poor Fair Good Excellent | Poor Fair Good Excellent |
| **Step 8: Follow-up** | Poor Fair Good Excellent | Poor Fair Good Excellent |
| **Other** |  |  |

**III. Strategies to Implement Changes**

Utilizing the table below, list your areas for improvement and identify resources and tools that could help address your concerns

|  |  |  |  |
| --- | --- | --- | --- |
| **Identified Areas for Improvement** | **Tools/Resources to Utilize (see list below)** | **Personnel to Implement Changes** | **Specific Workflow Changes (ordering supplies, handing out and scoring the tools, etc.)** |
| **1.** |  |  |  |
| **2.** |  |  |  |
| **3.** |  |  |  |
| **4.** |  |  |  |

|  |  |
| --- | --- |
| * Office Assessment Tool | * AAP Coding Fact Sheet |
| * Parent Questionnaire | * U R What You Eat Handout |
| * 5210 Handout | * ChooseMyPlate Handout |
| * Healthy Weight Plan | * Breakfast is Best! Handout |
| * Community Resources Handout |  |

**IV. Plan Next Steps**

**When will we meet again? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Who will conduct staff orientation? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

# Conduct Staff Orientations: Introduce the new workflow and procedures to your staff. Walk through the process and determine if it works the same in practice as it did on paper. Adjust as necessary. Formally incorporate the map into the office protocols. Periodically monitor progress, offer feedback, and make adjustments if necessary.

Adapted from North Carolina *ABCD Project* and the Illinois Chapter of the AAP’s *STEPP’s Program.*