**QI Project Preliminary Worksheet for PI CME**

*Basic components of an eligible project are outlined below. Briefly highlight plans for each step.*

* *If not yet known, enter “TBA.”*
* *To check boxes, hover pointer over the box and click (usual “left” click).*

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|  | **1. Date** *(this version)***:** |
|  | **2. Key individuals**  a. Project leader:  b. Clinical leader who oversees project leader regarding the project: |
|  | **3. Title of QI project:** |
|  | **4. Approximate number of health care providers involved**:   |  |  | | --- | --- | | Practicing physicians |  | | Residents/Fellows |  | | Physicians’ Assistants |  | | Nurses (APNP, NP, RN, LPN) |  | | Other Licensed Allied Health (e.g., PT/OT, pharmacists, dieticians, social workers) |  | |
|  | **5. Patients involved** *(e.g., age, medical condition, where seen/treated)***:** |
| ***PLAN*** | **6. General purpose** “  a. Problem with patient care (“gap” between desired state and current state) *(from logic diagram):*  (1) What should be occurring and why should it occur (benefits of doing this)?  (2) What is occurring now and why is this a concern (costs/harms)?  b. Project goal: |
|  | **7. Measure(s). For each performance measure, list its name** *(e.g., Percent of . . ., Mean of . . ., Frequency of . . .)* **and how it is calculated** *(denominator and numerator)***:** |
| *(Data 1)* | **8. Baseline performance**  a. What are the beginning and ending dates for the baseline measurement period?  b. By when will the data be collected and reported?  c. Insert or attach an example of a table or figure that will be used to present the results. *(It should display the time periods, the measures, and places to enter the sample sizes and results).* |
|  | **9. Review baseline results, identify causes, and plan interventions**  a. Who is involved (e.g., by profession or role)?  b. How will they meet(e.g., clinic staff meeting)?  c. On approximately what date will the review of baseline data and planning occur? |

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|  | **10. Baseline underlying/root cause(s) and planned interventions to address each cause.**  *As background, some summary examples of common causes and interventions to address them are presented in the table immediately below. The entries reflect linked causes and interventions illustrated in the center section of logic diagram for structured problem solving.*   |  |  | | --- | --- | | ***Common Causes*** | ***Common Relevant Interventions*** | | *Individuals: Are not aware of, don’t understand.* | *Education about evidence and importance of goal.* | | *Individuals: Believe performance is OK.* | *Feedback of performance data.* | | *Individuals: Cannot remember.* | *Checklists, reminders.* | | *Team: Individuals vary in how work is done.* | *Develop standard work processes.* | | *Workload: Not enough time.* | *Reallocate roles and work, review work priorities.* | | *Suppliers: Problems with provided information/materials.* | *Work with suppliers to address problems there.* |   *For the baseline results, list the primary underlying/root causes for the problem(s) that the project can address and the planned intervention(s) to address each cause – from logic diagram resulting from review of baseline data. (If baseline results are not yet available, list the currently hypothesized causes and likely interventions to address them. After baseline data are reviewed, the causes and interventions identified at that time will be included on the report of the project.)* | | |
|  | | **Cause(s) of Baseline Results** | **Planned Intervention(s) to Address** |
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| ***DO*** | **11. Intervention implementation.** By what date are the intervention(s) implemented? | | |
| ***CHECK***  *(Data 2)* | **12. Post-intervention performance**  a. What are the beginning and ending dates for the post-intervention measurement period?  b. By when will the data be collected and reported? | | |
| ***ADJUST*** | **13. Review post-intervention results, identify causes, and plan interventions**  a. Who is involved (e.g., by profession or role)?  Same as #9a?  Different than #9a *(describe)*:  b. How will they meet(e.g., clinic staff meeting)?  Same as #9b?  Different than #9b *(describe)*:  c. On approximately what date will the review of post-intervention data and planning occur? | | |