Monitor & Sustain Guide

This is the closing out stage in which the Practice Facilitator takes one month to help prepare the site to continue the work independently. The Monitor & Sustain stage work with the Practice Facilitator includes:

1. Final action plan meeting
2. Pre-final site visit work
3. Final site visit

After the final site visit, the site will continue the work of implementing the Six Building Blocks, which includes activities such as the following.

#### Leadership & consensus

[ ]  Continue to protect time for improvement team to meet

[ ]  Emphasize project importance with updates at weekly & monthly staff meetings

[ ]  Assess adequacy of resources needed for tracking and monitoring and identify additional resources if needed

[ ]  Identify specific clinicians/patients with successes and share stories

[ ]  Obtain feedback from staff and clinicians and adjust as necessary

[ ]  Identify reluctant providers and identify strategies to improve engagement

[ ]  Stay up to date with guidelines (Medicaid, AMDG, CDC, etc.)

#### Policies, patient agreements, & workflows

[ ]  Revisit and revise policies, patient agreements, and workflows, as needed based on experiences and new evidence

#### Tracking & monitoring patient care

[ ]  Adjust and iterate best possible tracking & monitoring approaches for pre-visit planning & monitoring success

#### Planned, patient-centered visits

[ ]  Offer training opportunities for empathic communication and patient involvement

[ ]  Adjust and iterate workflows to risk-stratify patients, identify COT patients, review their charts for care gaps, and prepare for visits

#### Caring for complex patients

[ ]  Ensure clear referral pathways for complex patient resources and close the loop on referrals

[ ]  Implement and iterate workflows to screen for and identify complex patients

#### Measuring success

[ ]  Produce provider-specific reports on COT performance measures and discuss during medical staff meetings

[ ]  Regularly review performance measure data (run charts) at the level of the clinic during all staff meetings and other opportunities

[ ]  Identify additional opportunities for improvement and implement small cycle tests of change

## 1. Final action plan meeting

### Objective

Develop a plan for the close-out site visit and for the site moving forward independently.

### What’s going on during this step

The Practice Facilitator leads the Opioid Improvement Team in:

* Reviewing work done & making a plan for overcoming challenges
* Reviewing program successes
* Developing an action plan for moving forward independently
* Planning for the close-out site visit

## 2. Pre-final site visit work

### Objective

Prepare for the final site visit

### What’s going on during this step

*Practice Facilitator*

* Edits the final site visit presentation and sends it to the Project Manager
* Works with the Project Manager to determine how many people will attend the final site visit
* Confirms everything is ready at the site
* Makes copies of the survey and other materials, as requested
* If possible, makes preparations to bring food and beverages to the final site visit

*Site*

* Invites attendees and makes sure their schedules are clear for attendance
* Ensures there is a room available with an LCD projector and laptop

### Resources used

* Final site visit PowerPoint
* Site visit survey

## 3. Final site visit

### Objective

Develop a plan for the site moving forward independently. Celebrate successes. Assess progress from first site visit.

### What’s going on during this step

The Six Building Blocks team meets with clinicians & staff to:

* Review successes
* Review path forward
* Give the site visit survey

### Resources used

* Final site visit PowerPoint
* Site visit survey