

## KICK-OFF VISIT CHECK LIST

### PRACTICE ENHANCEMENT ASSISTANT

### ACADEMIC DETAILER

#### Four weeks before visit

- Contact AD and introduce yourself
- Determine ABCS assignment
- Print Baseline Reports & send to AD

#### Four weeks before visit

- Negotiate with Nicole Travis date/time
- Record ABCS assignment
- Review Detailing Aids and References

#### One week before visit

- Receive & Review Practice Dashboard
- Phone/E-Mail AD to prepare for visit
- Discuss practice strengths/needs
- Arrange travel to practice
- Read Guidelines for Kick-Off Visit
- Review handout for H2O project
- Arrange for food is appropriate

#### One week before visit

- Receive & Review Practice Dashboard
- Phone/E-Mail PEA to prepare for visit
- Discuss practice strengths/needs
- Arrange travel to practice
- Read Guidelines for Kick-Off Visit
- Read Handout for H2O project

#### Day of Visit

- Call practice to confirm visit
- Take practice dashboard copies
- Prepare practice progress note

#### Day of Visit

- Take copies of AD handouts
- Anticipate answers for practice dashboard

#### Conducting the AD Visit

- Write notes in Electronic Practice Record
- Write plan for Kick-Off in EPR
- Distribute dashboards per lead clinician
- Record goals
- Record baseline, target, date, strategies
- Record champion and QI team
- Note practice member/clinician responses
- Make introductory comments
- Set date and time for next PEA visit
- Thank practice for participation
- Record goals

#### Conducting the AD Visit

- Make introductions
- Check time availability for this meeting
- Answer questions about the project
- Identify champion and QI team
- "Detail" the selected guidelines (AC or BS)
- Discuss clinical implementation challenges
- Select target for each guideline
- Agree upon practice system to be changed
- Define PEA role in intervention
- Define AD role over next six months
- Thank practice for participation

#### Post Visit Debrief

- Discuss observation and notes with AD
- Give feedback to AD on approach
- Agree on plan for PEA/AD communication
- Finish progress note
- Submit travel claim

#### Post Visit Debrief

- Review PEA observations and notes
- Recommend approach to PEA
- Agree on plan for PEA/AD communication
- Write any commentary for progress note
- Submit time and reimbursement claim