Be The Expert On You Planning Worksheet

When planning your implementation, be sure to have the following materials available so that you can adapt them to your practice’s plan.

- Be The Expert On You Note Sheet
- Evaluation Planning Worksheet
- One-Page Handout for Staff Training
- Practice Orientation and Training slides

1. Set scope
   - Which patients will receive the Share Your Story strategy?
     - All patients?
     - Patients with select diagnoses?
     - Patients with acute visits?
     - Telehealth visits?

2. Establish workflow
   - When will you give patients the note sheet?
     - Before visit
     - At visit intake
   - How will you give patients the note sheet?
     - In person
     - Email
     - Patient portal
     - Other _____________
   - Who will give patients the note sheet?
   - How will the note sheet be explained to the patient?
   - Will you adapt and use the One-Page Handout for Staff Training?
   - Will you ask staff to help patients fill out the note sheet?
   - Will the note sheet be collected after the visit, or will it remain with the patient?
   - Will you document the note sheet in the EHR? How and where?
   - Will you print the note sheet and poster in the office or order printing?
   - Who will be responsible for maintaining a supply?
   - Do you need Spanish versions?
   - Review and adapt the Practice Orientation and Training Slides to reflect your chosen workflow (Slides 11-13), plans for evaluation (Slide 14), and next steps (Slide 15) of the Toolkit.

3. Encourage use of the strategy
   - How will you encourage patients to use the note sheet?
   - How will you encourage or facilitate use of the note sheet by patients who are not interested in participating?

4. Determine training plan
   - How will you train providers and staff?
   - Who will provide the training?
   - When will the training be conducted?