Example: Project Planning Worksheet
Care Coordination Implementation

Now that you've chosen a priority task and brainstormed what is needed, you can start to plan out more detailed next steps. You will need to either modify a current process to include these changes or create a new one. Identify the staff you have available and plot out the steps that will need to occur in order to reach your goal. Identify who will fill each roles, what training staff should receive, and if you need any additional resources or support.

Planning Your Next Steps

Now that you've chosen a priority task and brainstormed what is needed to implement, you can start thinking about next steps. Use the table below to identify that your next steps are, who will carry them out, who will be involved in implementation, what kind of training will be needed, etc.
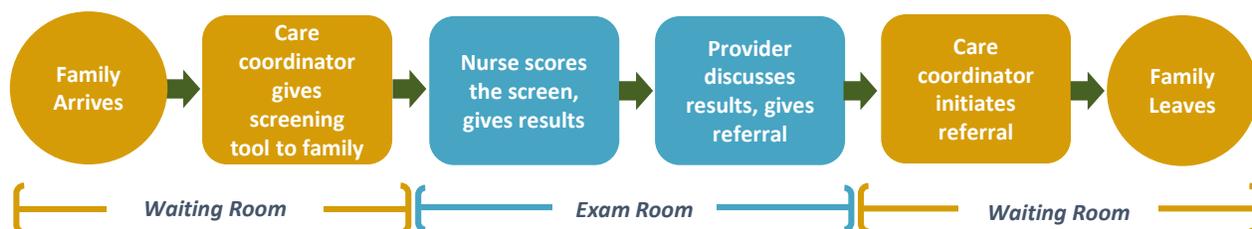
Next Steps	Person (s) Assigned	Notes
Leadership proposal – seek approval for project	Clinic manager	Clinic manager will present idea to leadership on 1/10
Team will meet to discuss what is needed (process, technology, staff)	Front desk staff, Nurse practitioner, Clinic manager, Licensed practical nurse	Clinic manager will schedule meeting and provide project overview. Will create a process (using process mapping) for defining CYSHCN population/flagging charts and identify staff who will be involved in the process.
Get feedback and approve the plan	All staff involved	Clinic manager will send plan to leadership and staff involved to give them the opportunity to review and provide feedback.
Train staff	All staff involved	Supervisors will identify training needs and make sure each staff member knows how to carry out their role.
Test strategy	All staff involved	Use the Plan Do Study Act Worksheet to test flagging charts between 2/5/25-2/9/25.

Planning Tool: Process Mapping

Process mapping may be a helpful tool to use as you plan out your project. Process mapping is exactly what it sounds like – mapping out each step of a specific process to show how it works in a given setting. They can help your implementation team identify problems, solutions, and improvement opportunities within current systems. They can also be helpful for creating processes and explaining them to others
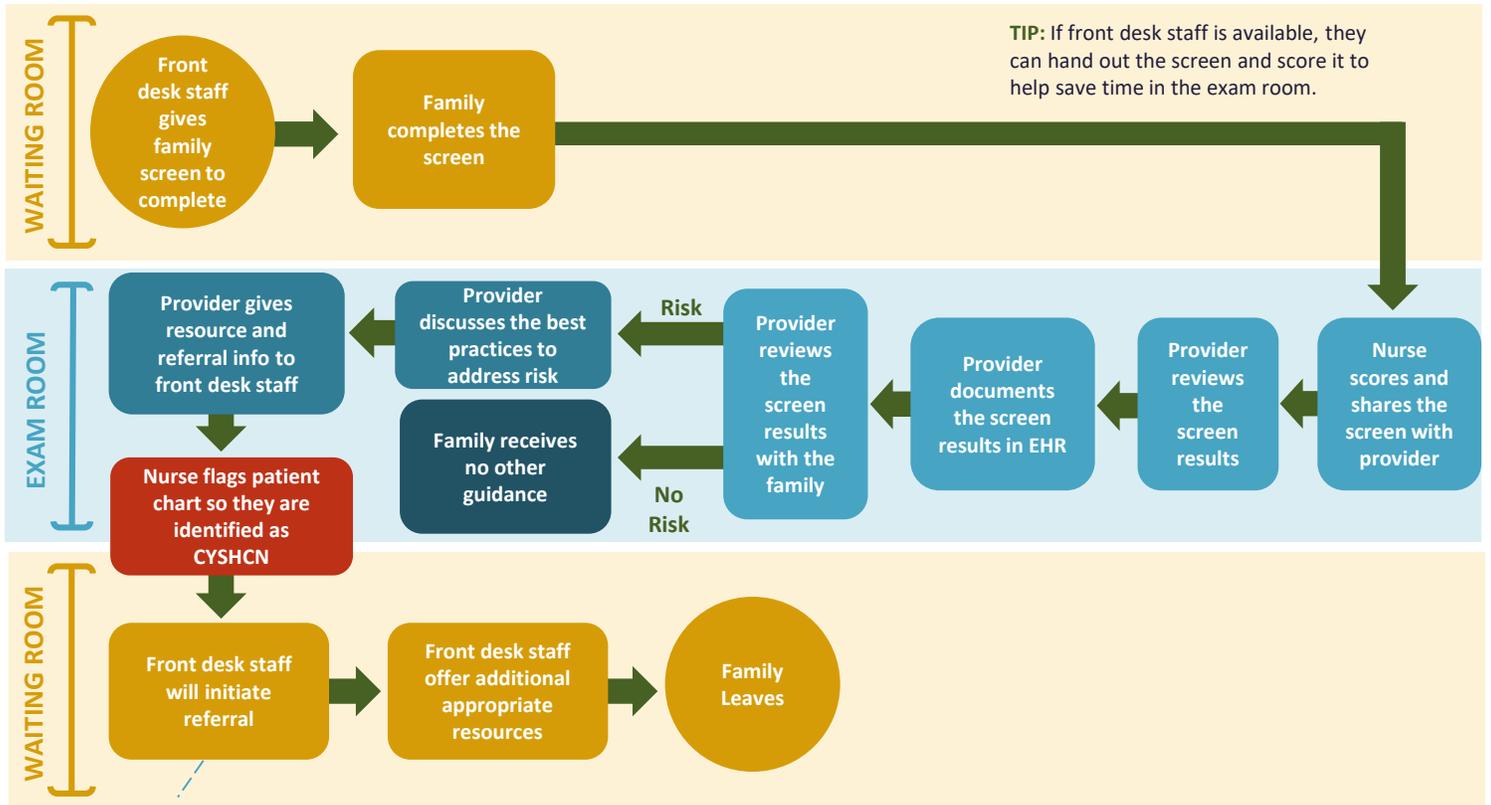
A process map illustrates the sequence of activities and flow of work. Consider staff you have available to do each step you identify. Use different colors and shapes to help distinguish between categories. Grab a blank piece of paper and create a process map for the priority task you identified. Check out the example below, additional examples in the Appendix, and this video on how to use a process map to help guide you.

For each step of the process, be sure to include: **What** happens, **Who** is involved, and **Where** the step will take place. Once you have that, you can begin to identify specific people who will be involved and what training they will need.

Family Arrives → Care coordinator gives screening tool to family → Nurse scores the screen, gives results → Provider discusses results, gives referral → Care coordinator initiates referral → Family Leaves

Waiting Room | Exam Room | Waiting Room

Process Mapping Example

Below is an example of what a process map could look like. You can draw your process map on a blank piece of paper or even use sticky notes on an empty wall to easily move things around.

WAITING ROOM

Front desk staff gives family screen to complete → Family completes the screen

TIP: If front desk staff is available, they can hand out the screen and score it to help save time in the exam room.

EXAM ROOM

Provider gives resource and referral info to front desk staff ← Provider discusses the best practices to address risk ← **Risk** ← Provider reviews the screen results with the family ← Provider documents the screen results in EHR ← Provider reviews the screen results ← Nurse scores and shares the screen with provider

Family receives no other guidance ← **No Risk** ← Provider reviews the screen results with the family

Provider gives resource and referral info to front desk staff ↓ Nurse flags patient chart so they are identified as CYSHCN

WAITING ROOM

Front desk staff will initiate referral → Front desk staff offer additional appropriate resources → Family Leaves

Opportunity to build staff capacity: Who has the time and resources to provide services?