

	Checklist Question	Action Completed
Assess	<i>Where are we in terms of assessing our pre-project patient engagement level?</i>	
	1. Has someone completed a pre-assessment of the clinic's patient engagement level online at: https://www.surveymonkey.com/r/FPEA2018	<input type="checkbox"/> Online assessment completed
	2. Have we reviewed the pre-assessment results with the QAPI team?	<input type="checkbox"/> Reviewed results with staff.
	3. What are the quality indicators we want to use?	<input type="checkbox"/> Identified quality indicators and trends.
Plan	<i>Where are we in terms of planning sustainable PE in our facility?</i>	
	1. What are the opportunities for improvement we have identified from the assessment phase?	<input type="checkbox"/> Identified opportunities for improvement <input type="checkbox"/> #1 _____ <input type="checkbox"/> #2 _____
	2. What are our goals? Which of the CMS objectives do we want to work toward?	<input type="checkbox"/> Goal(s): _____ <input type="checkbox"/> Selected CMS Objective #1 Establish a group #2 Incorporate patient/family into QAPI team #3 Develop P&P and/or increase participation in POC.
	3. What is our timeline for actions	<input type="checkbox"/> Developed timeline
	4. What strategies will we use to meet our goal? How will we engage our NPR and other patients into this process?	<input type="checkbox"/> Identified strategies/interventions <input type="checkbox"/> #1 _____ <input type="checkbox"/> #2 _____
	5. Have we written down our plan for sustainable patient engagement? Including who will lead the strategies?	<input type="checkbox"/> Plan for PE <input type="checkbox"/> Identified action steps <input type="checkbox"/> Identified who will complete steps <input type="checkbox"/> Identified by when for each step <input type="checkbox"/> Discussed possible barriers and solutions?
Implement	<i>Where are we in terms of implementing our facility sustainable patient engagement plan?</i>	
	1. Have we deployed our PE plan?	<input type="checkbox"/> Initiated plan activities <input type="checkbox"/> Educated team on plan
	2. Have we begun implementing the strategies/interventions?	<input type="checkbox"/> Intervention #1 (started, in progress, done) <input type="checkbox"/> Intervention #2 (started, in progress, done)
	3. How are the strategies working? Do we need to adopt, adapt or abandon any of the strategies/interventions? If not, do we need to return to planning an new intervention?	<input type="checkbox"/> Intervention #1 (adopt, adapt, abandon) <input type="checkbox"/> Intervention #2 (adopt, adapt, abandon) <input type="checkbox"/> New interventions needed- return to planning phase
Monitor	<i>Where are we in terms of monitoring our facility sustainable patient engagement plan?</i>	
	1. Have we met our goal?	<input type="checkbox"/> Reviewed goal <input type="checkbox"/> Met goal?
	2. What do our quality indicators tell us?	<input type="checkbox"/> Tracked quality indicators <input type="checkbox"/> Trending of quality indicators
	3. Are there any lapses in performance? What do we need to do to address them?	<input type="checkbox"/> Reviewed performance toward goal sustainability