

Person-Centered Contraceptive Counseling Measure (PCCC) Key Workflow Considerations Checklist for Clinical Sites

The following questions can assist key health center personnel to implement the Person-Centered Contraceptive Counseling measure (PCCC) in their health center. This document is intended to be a self-guided walk through and a living document where clinical sites can form their implementation plan.

Key personnel are encouraged to hold two meetings:

1. **PCCC Initial Planning Meeting:** Key personnel will consider each question in this document (see sample agenda) and develop plans for patient identification, survey distribution, data management, and project management. Key personnel should discuss each question and use responses as a guide for introducing the project plan to the larger health center staff at a PCCC Kick-off Meeting.
2. **PCCC Kick-off Meeting:** Key personnel will present to the larger team/staff the plans developed in the initial planning meeting. Any unresolved questions will put forth for input from the larger health care team/staff.

Site name: _____

Before answering questions below, please review the *PCCC Measure Workflow Template* for a visual overview of the workflow

1. Patient Identification

For the PCCC, contraceptive counseling is defined as:

What: Any contraceptive education and/or discussion that may inform or influence a patient’s choice of a contraceptive method...

Who: Delivered by a provider* to a patient who is not pregnant...

When: During a patient visit of any type, except for prenatal visits or other visits with pregnant patients.

*A provider can be anyone who gives counseling as part of their job role, including clinicians and non-clinicians (e.g. counselors or health educators).

- a. How will the health care delivery site identify all patients who are eligible to complete the patient survey?

- b. Who will be responsible for identifying eligible patients (i.e., serve as **eligibility identifiers**)?

- c. How will patient identifiers communicate which patients are eligible to staff distributing the survey (i.e., survey distributors)?

- d. Will the process for identifying eligible patients vary based on the day of the week or health center schedule? If yes, how?

- e. How will the process of patient identification be communicated to all pertinent health center staff?

- If applicable, how will variations in this process for identifying eligible patients be communicated to health center teams?

- f. What specific training will health center teams receive on how to identify patients who are eligible to complete the survey?

- How does this training plan account for staff turnover?

2. Survey Distribution

- a. How will the PCCC survey be delivered to eligible patients (e.g. on paper, or electronically on a tablet computer, at a computer station, or at or kiosk)?

- b. Who will be responsible for distributing the PCCC survey to patients (i.e., serve as **survey distributors**)?

- c. How will **survey distributors** know which patients are eligible to complete the survey?

- d. When will the survey be delivered in relation to the eligible patient's visit (e.g., in the exam room after services are provided, at check-out)? Specify all possible scenarios.

- e. Will this process of survey delivery be consistent, or will it vary depending on the day of the week, health center schedule, or other factors? If so, how?

- f. How will the process of survey distribution be communicated to all pertinent health center staff?

- If applicable, how will variations in this process for distributing the survey to eligible patients be communicated to health center teams?

- g. What specific training will health center teams receive on how to distribute the survey to eligible patients?

- How does this training plan account for staff turnover?

- h. What protections will be in place to protect patient privacy and confidentiality?

3. Data Management

- a. How will survey data be compiled and stored?

For paper surveys:

- Where will completed paper surveys be stored prior to data entry?

- What staff person(s) will be responsible for data entry and managing survey data (i.e. serve as **data managers**)?

For electronic surveys:

- What staff person(s) will be responsible for managing electronic survey data (i.e. serve as **data managers**)?

4. Project Management

- a. Which staff person(s) will be responsible for managing the overall process of patient identification, survey distribution, and data management at the health care delivery site? (Project management includes ensuring identification and distribution are taking place, ensuring the quality of these activities, and helping to build and maintain staff buy-in.)

- Organizational level:

and/or

- Site level:

- b. How will staff who are responsible for project management identify and troubleshoot issues related to use of the measure as they arise (e.g., incorrect identification of patients, missing of eligible patients, challenges working survey distribution into flow of care delivery)?

- How frequently will these activities take place?

- c. What channels will the health care delivery site use to communicate updates, specifically those to address issues with implementation, to the larger health center team (e.g., all-staff meetings, in leadership meetings, on visual bulletin board used by staff)?

5. Materials needed

List all materials needed to support implementation of the measure (e.g. printed surveys, flyers and one-pagers for staff, boxes for completed surveys):