

## Planning and Design\*

\*Flow of the effort is generally in this order

**Establish a Command Mandate:** Has the MTF Commander directed implementation of the Preventive Health Assessment?

✓	Task	Comments
	Define the Scope of the PHA <ul style="list-style-type: none"> <li>▪ Specify target groups for pilot test of the PHA</li> <li>▪ Specify scope of services</li> </ul>	Which active duty units will participate in the PHA? When will the PHA begin? How will unit members be scheduled for their PHA? Which CPS services (screening, immunizations, lifestyle risk counseling), occupational health exposures, and deployment readiness issues will be addressed with the PHA? Have the specific objectives of this program been stated at the local level?
	Identify External Partners <ul style="list-style-type: none"> <li>▪ Unit</li> <li>▪ Community support agencies</li> <li>▪ Worksites</li> </ul>	Who at the units provides input for cardiovascular PRT screening? Which community organizations will be needed to support PHA, e.g. Public Works, Civilian Personnel, Base Safety, ? Who is responsible for health and safety issues at worksites?
	Relate Vision to Partners, Customers, and Staff <ul style="list-style-type: none"> <li>▪ Contact major commands</li> <li>▪ Promote benefits of PHA to the patients</li> <li>▪ Sell concept to all levels of staff</li> </ul>	When and how will the MTF Commander sell this program to the line? How will the program be marketed to patients as a benefit? How will the Commander gain the support of staff members?

## Direct the Change:

✓	Task	Comments
	Identify Core Staff Member Responsibilities <ul style="list-style-type: none"> <li>▪ PHA Program Manager</li> <li>▪ Primary care physician</li> <li>▪ Health Educator</li> <li>▪ Administrative Manager (HCA)</li> <li>▪ Fiscal Manager</li> </ul>	Are the specific responsibilities clear in written format? Have key staff reviewed the program and provided comment

	<ul style="list-style-type: none"> <li>▪ Data Manager</li> </ul>	
	Direct Action-taking and Delegate Responsibility	Is there to be a "kickoff"? Does the Program Manager have a clear "green light"?
	Link Fitness Reports to Performance of the PHA	Is this program taken seriously enough to make it a part of the staff's official duties and be evaluated as such?
	Plan for Continued Feedback Loop	How is feedback planned to discuss progress for implementation and evaluation?

**Resource the Program:**

✓	Task	Comments
	Document Resource Impact <ul style="list-style-type: none"> <li>▪ Personnel</li> <li>▪ Equipment</li> <li>▪ Time</li> <li>▪ Funding</li> </ul>	What resources are required to accomplish the stated goals/objectives? What additional resources will be required? Are different levels of program implementation an option, i.e., Cadillac versus Ford versions?
	Identify Additional Funding Sources/ Shared Resources with External Partners (DoD/Civ)	Who will provide funding? What resources from units or external support agencies will be supporting the program?

**Maintain Momentum:**

✓	Task	Comments
	Marketing <ul style="list-style-type: none"> <li>▪ Inform</li> <li>▪ Empower</li> <li>▪ Incentives</li> </ul>	Who will take the lead on marketing? Will non-MTF personnel be contracted to market the program? What level of sophistication and marketing expertise is possessed by the MTF staff?

**Elicit buy-in:**

✓	Task	Comments
	Identify Benefits and Barriers to Completion of PHA <ul style="list-style-type: none"> <li>▪ Internal</li> <li>▪ External (outside MTF control)</li> </ul>	Which benefits and barriers have been identified? How might identified barriers impact on program implementation and objective accomplishment?
	Establish a PHA Steering Committee <ul style="list-style-type: none"> <li>▪ Define Purpose and Scope of Interventions</li> <li>▪ Establish Memorandums of Agreement with line and support agencies</li> <li>▪ Form Working Groups and Assign Team Leaders</li> <li>▪ Establish Action Plan</li> </ul>	Is there a document that lists PHA roles, specific responsibilities, and personnel assigned to each position? How often and where will the steering committee meet to discuss issues and progress? Are other methods for team networking acceptable, e.g., intranet, phone, e-mails? How will implementation be scheduled and progress tracked? Who will do this?

**Measurement and Evaluation****Define Data Collection Methods**

✓	Task	Comments
	Identify Mechanism for PHA Scheduling and Tracking Completion	What mechanisms are in place for members to schedule appointments for their PHA? Is scheduling a PHA quick and easy? How will "no-shows" be tracked?
	Identify Coordination Processes with Occupational Health, Women's Health Clinic, etc.	Within which clinic or clinics will the PHA reside? If not a "one-stop" process, what procedures are in place to ensure minimal burden on staff and patients, e.g., scheduling additional appointments, return for screening test results, medical records management? How will medical referrals be coordinated with the PCM if other providers initiate the PHA?
	Specify Data Recording <ul style="list-style-type: none"> <li>▪ DD Form 2766</li> </ul>	Which forms will be used for the PHA? Which forms will be used that are still

	<ul style="list-style-type: none"> <li>▪ Deployment Readiness Status <ul style="list-style-type: none"> <li>✓ Deployable</li> <li>✓ Temp Non-deployable</li> <li>✓ Screening tests/immunizations required</li> <li>✓ Evaluation in Progress</li> </ul> </li> <li>▪ Immunization Tracking</li> <li>▪ Occupational Health Exposures and Monitoring</li> <li>▪ Other</li> </ul>	<p>redundant?</p> <p>How will immunizations be tracked (pending an automated ITM module)?</p> <p>How will current procedures for occupational health exposure assessments be affected by the PHA?</p> <p>Will non-occupational health personnel attempt to access occupational health exposures?</p>
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## Evaluation and Measurement

### Define Objectives

✓	Task	Comments
	Identify Outcome Metrics <ul style="list-style-type: none"> <li>▪ % of population Completing PHA</li> <li>▪ % of Patient and Provider Satisfaction</li> <li>▪ Improvement of Readiness Status</li> <li>▪ Completion of delinquent CPS</li> <li>▪ % Screened for Enrollment of Occupational Related Exposures</li> </ul>	Who will be responsible for selecting and assigning metrics and by how will data be gathered?

### Plan Evaluation Process

✓	Task	Comments
	Identify Methods and Expertise Needed to Implement Evaluation Activities <ul style="list-style-type: none"> <li>▪ Data Extraction</li> <li>▪ Data Analysis</li> <li>▪ Data Reporting</li> </ul>	What expertise is needed to produce meaningful metric data/information?
	Define Reporting Requirements, e.g., <ul style="list-style-type: none"> <li>▪ Commanders' Report (Readiness)</li> <li>▪ Resource Utilization</li> <li>▪ Referrals to Specialty Care</li> <li>▪ Readiness Status</li> <li>▪ Other</li> </ul>	Will recurrent standard reports be required? Will ad hoc (specific purpose) reports be required?

### Training

✓	Task	Comments
	Orientation to PHA (Coordinate with Marketing) <ul style="list-style-type: none"> <li>▪ Line Leadership</li> <li>▪ Stakeholders</li> </ul>	Who will orient personnel to the program? Will physician or senior command personnel be required?

	<ul style="list-style-type: none"> <li>✓ Healthcare Providers</li> <li>✓ Health Educators</li> <li>✓ Resource Managers</li> <li>▪ Customers</li> </ul>	What role can IDC's and corpsmen assume?
	<p>Competency Development</p> <ul style="list-style-type: none"> <li>▪ Data Management</li> <li>▪ Health Education</li> <li>▪ Counseling skills</li> <li>▪ Program Evaluation</li> <li>▪ Marketing</li> <li>▪ Management</li> </ul>	What skills set is essential for the PHA program?
	<p>Periodicity of MTF Staff Training</p> <ul style="list-style-type: none"> <li>▪ Initial</li> <li>▪ Continuing <ul style="list-style-type: none"> <li>✓ Clinical Updates</li> <li>✓ Annual</li> <li>✓ In-processing</li> <li>✓ Intranet</li> </ul> </li> <li>▪ Outside Consultation</li> </ul>	How and when will the staff be trained? Is additional training support required to implement the PHA successfully?

## Implementation

✓	Task	Comments
	Plan a Schedule of Implementation	How much time will be required to prepare for implementation?
	<p>Identify Implementation Process (GANTT Chart)</p> <ul style="list-style-type: none"> <li>▪ Project Components and Processes (Algorithms)</li> <li>▪ Specific Taskings</li> <li>▪ Individual responsible</li> </ul>	Has a process been selected, e.g., GANTT Charts, to track implementation?
	<p>Institutionalize Change</p> <ul style="list-style-type: none"> <li>▪ Document in Strategic Plan</li> <li>▪ Document Outcomes and Impact (ROI)</li> </ul>	<p>How much did the PHA cost? Have specific cost-savings been identified? Has process improvement been achieved, e.g., improved occupational health screening, heightened readiness status, immunization compliance? Has there been a detriment to healthcare service delivery?</p>