Creating a Clinical Reminder

This playbook will help you apply a human-centered design process to the building of a clinical reminder.

The sections that follow suggest actions to follow during each phase of your project. It is up to you to decide where your time and efforts are best spent based on your project goals, timelines, and priorities.

OVERVIEW

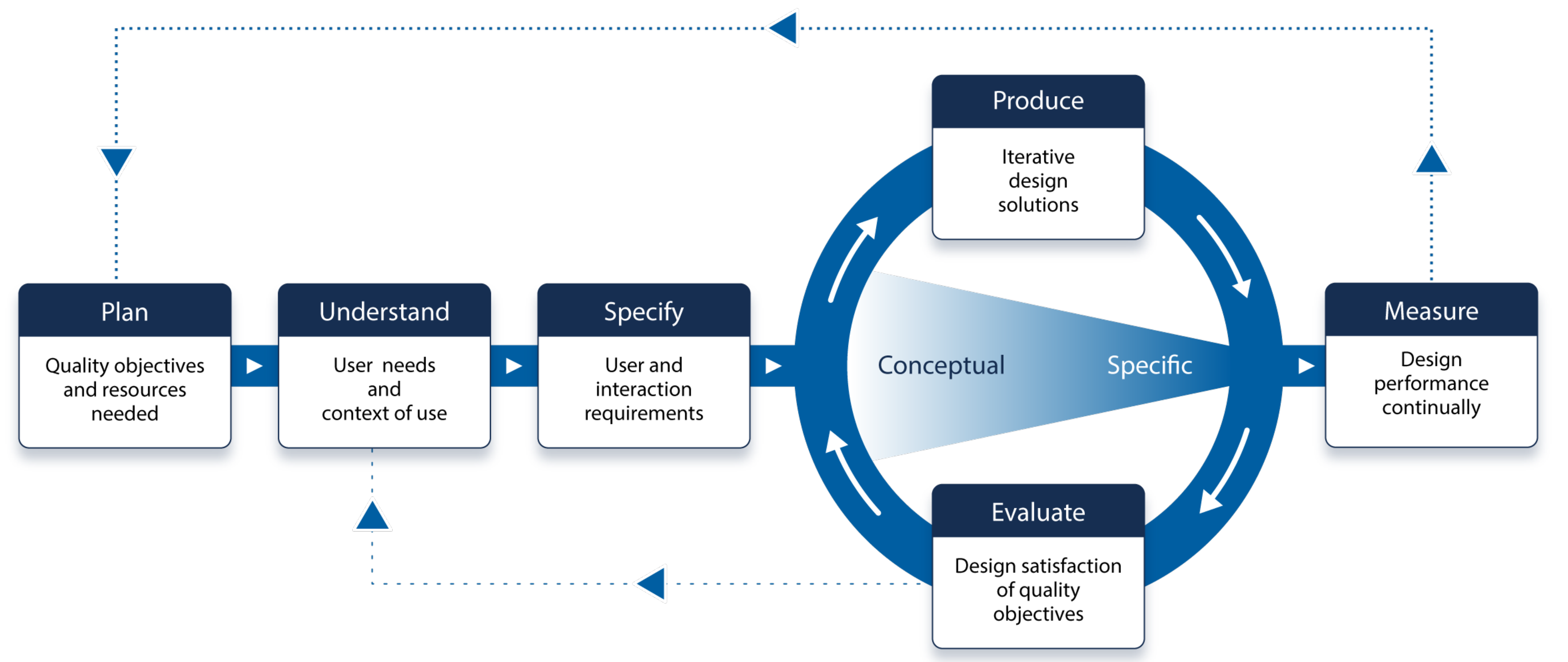
Applying the human-centered design process to your clinical reminder projects makes them safer and easier to use.

The approach works because it asks "What is best for the user?" at every step, from the initial request to delivery of the product.

The overall steps, called phases, are shown in the figure below.

Each phase has its own goals that depend on the where the project is in terms of development. Although phases tend to follow one after the other, there can be some overlap — and even some back and forth between them.

A hallmark of the human-centered design process is the back and forth cycling between Produce and Evaluate. The idea is to get feedback on designs before they are carved in stone. By following this principle, course corrections can be made more easily, avoiding resource expensive re-work later.



Plan

The Plan phase identifies the project's objectives and sets the stage for successful project completion.

Planning entails getting answers to fundamental questions:

- What is the problem that the clinical reminder solves?
- What is the scope of the project?
- What is the timeline?
- What activities and resources will be needed?
- How will the team know that the project was a success?

Checklist

When you are finished with this phase, you will have:

- [ ] Identified stakeholders.
- [ ] Conducted a kick-off meeting.
- [ ] Drafted a problem statement.

Step 1: Identify the Stakeholders

The stakeholders will likely include the individual(s) making the work request.

Other stakeholders may include people that will use the template or the generated note.

Sometimes management need to be included to determine if there are impacts to other areas that need to be considered.

Step 2: Schedule and Conduct a Kick-off Meeting

The kick-off meeting addresses fundamental questions with all the stakeholders sitting at the table.

- Clarify the work request and document the details.
- Draft a **problem statemen**t to clearly define the objectives and make sure they are easy to share
- Gain stakeholder agreement on the scope of the project
- Establish a timeline to set expectations.
- Inform stakeholders of their responsibilities, and when their input is needed.
- Identify additional inputs that are required.

The group setting best supports the most important activity: getting everyone to agree the task, the timing, and the responsibilities.

Finally, it is critical that the decisions made in the kick-off meeting are communicated in writing to everyone involved.

Below are the methods, examples and tools you can use to complete the Plan phase.

Recommended Methods

This method will help you in this phase:

Drafting a Problem Statement

Example Outputs

Sample kick-off meeting agenda (coming soon)

Sample problem statement (coming soon)

Tools

Kick-off Meeting agenda template (coming soon)

Intake form (coming soon)

Understand

Specify

Produce

Evaluate

Measure

Other playbooks you might be interested in: