

OHA e-Referral Project Planning Worksheet

The purpose of this planning worksheet is to ensure adequate preparation, readiness and commitment of health care systems and partners to begin implementation of electronic referrals to the Oregon Tobacco Quit Line. **Please refer to the Oregon Tobacco Quit Line e-Referral Guide for information and guidance.**

Please provide information on the following questions. This worksheet should be completed and submitted to the OHA prior to meeting with Optum. OHA will review and contact the submitter to discuss next steps. OHA is also available to answer questions and provide technical assistance as you complete this worksheet.

Project Management

1. Organization leading this project
2. Main point of contact for this project (Project Coordinator)
3. Name and title of program or budget Manager (if different from above)

Project Impact

1. Healthcare system, clinic or facility establishing e-referrals to the Quit Line
2. Counties or Tribes impacted by this change (i.e., coverage area)
3. Approximate total number of patients served, number or percentage of tobacco users, and description of overall patient population
4. Equity focus: Who is most burdened by tobacco in this population, or otherwise experiencing health inequities, and how will this project improve services for this population?

Project Team and Leadership

1. Do you have an e-referral project team? Please list names, organization and roles for each team member. Please refer to the Oregon Tobacco Quit Line e-Referral guide for more information on team roles and responsibilities.
 - Project Coordinator
 - Medical Director or Chief Operating Officer (key decision maker)
 - Clinical Champion
 - Quality Improvement (QI) specialist for training and system improvements
 - EHR Site specialist (technician who works directly with EHR system and Optum)
 - EHR vendor, if necessary, depending on the type of EHR used by your health system or clinic
 - County and/or Tribal tobacco program staff (if any)
 - Equity Coordinator (for example, a representative of an equity-based coalition or workgroup)
2. To what extent do you have the support of your health system or clinic leadership regarding this project? Are they committed and able to allocate time/resource costs to implement this project?

Technical Considerations

1. Have you ensured the availability of an EHR site specialist to work directly with Optum, OHA and the EHR vendor (if necessary) to set up, configure and test the e-referral process?
2. What are needed fees for EHR set up, configuration and yearly EHR maintenance? What is your plan for covering these costs? Have you identified funding for the above fees? Please explain.

Non-Technical Considerations

1. How are you working toward progress on the following non-technical issues, including the socio-cultural and organizational indicators to implement an e-referral process?
 - a. What have you discussed with health system partners about resources public health can provide and a plan to support equity-focused clinical cessation training? (Note: Consider any restrictions on the use of state funds and speak with your contact at OHA if you have questions.)
 - b. What is the health equity focus of this project? How will you prioritize health equity in your program planning, training, implementation and ongoing monitoring?
 - c. How are clinical staff trained in workflows for e-referral implementation?
 - d. What plans are in place for continuous process improvement by Quality Improvement staff?

Evaluation

1. What is your plan for process evaluation? Do you have support to develop an evaluation plan?
2. What specific outcomes do you hope to achieve by implementing e-referrals? Please explain.

Other

Do you have any other questions or concerns going forward?

Signatures:

Project Manager:

Project Coordinator: