



CHANGE IDEA: Implement a care coordination protocol with a feedback loop.

STEP 1: GET READY (TASKS)

- A. Convene a planning team including providers, care coordinators, and administrative staff to review the [care coordination protocol](#).
- B. Identify ways to reduce manual entry and improve consistency using the pre-built early intervention [referral template](#) in the electronic health record (EHR).
- C. Consider meeting with other health centers with the same EHR to understand template functionality.
- D. Define the target population: children ages 0-5 referred for early intervention (Parts C and B).
- E. Assign roles: who completes the referral in the EHR, confirms receipt with early intervention partners, and documents follow-up. Consider assigning a community liaison or care coordinator.
- F. Train staff on the EHR template and reinforce documentation in care coordination logs.
- G. Define key metrics: number of referrals made, percentage with follow-up confirmation, and staff feedback.

STEP 2: PLAN AND PRACTICE

- A. Pilot the EHR referral template with one care coordinator and one provider for 2 weeks.
- B. Use the pre-populated template for all early intervention referrals during the pilot.
- C. Log all follow-up contacts with the early intervention agency in the EHR notes.
- D. Use the protocol's feedback loop to review family experiences and identify issues or delays.
- E. Observe the workflow and identify friction points.

STEP 3: REVIEW AND REFINE

- A. Conduct a review huddle with the pilot team.
- B. Evaluate how many referrals were made using the EHR template.
- C. Assess whether manual data entry decreased and documentation quality improved.
- D. Gather staff feedback about usability and communication outcomes.
- E. Identify training gaps or suggestions for modifying the referral form.

STEP 4: EXPAND

- A. If the pilot is successful, expand the use of the template to additional care coordinators and providers.
- B. Host quick check-ins to support new users and troubleshoot issues.
- C. Continue tracking referrals, follow-ups, and satisfaction using existing documentation tools or EHR metrics.

STEP 5: SUSTAIN

- A. Integrate the referral template and protocol into standard operations for pediatric visits and care coordination.
- B. Monitor early intervention referral quarterly and address workflow issues.
- C. Celebrate improvements in coordination, follow-up, and family engagement.
- D. Share success stories and include the protocol in new staff training.
- E. Maintain regular contact with early intervention partners to sustain strong referral pathways.
- F. Based on feedback, refine the template content or workflow (e.g., add dropdowns or reminders).
- G. Update job aids or standard operating procedures to reflect best practices.
- H. Reinforce updated workflows in staff meetings and ongoing training.