

Detailed Ambulatory CDS/QI Worksheet*

Target =	
Current Performance on Target =	

		Optimal State (sample activities to optimize performance)			Current State (Your current CDS/QI configuration)					Potential Enhancements			
Decision Support Opportunity	Care Activities	Examples of Care Activities	Notes	CDS 5 Rights					Notes	Proposed Enhancements (locally or by EHR vendor)	Notes		
				Who? (People)	What? (Information)	Where? (Channels)	How? (Formats)	When? (Workflow)					
Patient-specific Activities	Not Visit-Related	Patient understands condition and treatment; follows care plan developed in collaboration with care team											
	Before Patient Comes to Office	Patient reviews/updates/submits pertinent health status data. Remind patient about visit											
	Daily Care Team Huddle	List visit action items and preparations for each patient to be seen during the day											
	During Office Visit	Check-in	Review/verify/update patient information										
			Waiting	Gather patient data, provide educational info									
		Rooming	Clinical support staff documents/reviews key information with patient before provider encounter										
			Provider Encounter	History and Physical									
		Documentation											
		Assessment/Diagnosis and Care Plan											
		Ordering											
		Encounter Closing	Procedures										
	Patient Education												
	Encounter Closing	Additional education and Checkout											
After Patient Leaves Office	Ensure care plan is executed appropriately												
Population-oriented Activities	Outside Patient-specific Encounters	Identify/address care gaps across the patient panel											

*This worksheet adapted from version developed under the ONC CDS4MU project to support the National Learning Consortium, building on work of the CDS/PI Collaborative (supported by the California Healthcare Foundation), which builds, in turn, on the HIMSS CDS Guidebook Series. See bit.ly/CDSQIResources for more details and tools.