# **Narrative Reporting Template**

**Guidance**: This document should grow every month. Fill this in as you go to chronicle your improvement journey.

* **Tip:** You don’t have to complete every cell every month. Only include the things related to your reporting month.
* **Tip:** To get more spaces in the tables, put your cursor in the very last cell of the table (bottom, far right) and press the “tab” button.

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| **Team Name:** |
| **Team Members:** |
| **Aim Statement:** |
| **Select Focus Area (select all that apply):**  Aim Focus 1: Diagnosis and Treatment Initiation  Aim Focus 2: Treatment Retention and Optimal Dosing  Aim Focus 3: Quality of Life and Bundle of Care |
| **Population of Focus** (describe your population of focus and provide numeric values if available) |

# **Changes and Improvement Activities**

***In this month:***

1. **What change(s) are you making? Describe your Plan-Do-Study-Act cycles.**

E.g. Implementing appointment reminder calls; liaising with pharmacies to remind patients of appointments; implementing proactive outreach for missed doses; etc.

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| **Plan**:  What, who, when, where? What will happen? Discuss theories. |  |
| **Do:**  Document any problems and unexpected observations. |  |
| **Study:**  What were the answers to the question in the plan? Compare to your predictions. |  |
| **Act:**  What changes are to be made? Plans for the next cycle. |  |
| **What did you learn from these changes? What worked well and what didn’t?** |  |

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| **What did you learn from these changes? What worked well and what didn’t?** |  |
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1. **How have you engaged & used client or family voice for improvement?**

E.g. Efforts to define problems (e.g., needs assessment, review of data, process mapping, client journey mapping, etc.); Discussions with clients about what needs to change or how to change; engaged clients through a consumer survey; establish client advisory committee.

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| **Describe your strategies** |
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1. **What do you plan to do tomorrow? Describe your planned PDSA cycles.**

E.g. Formal or official changes to policy, training for staff, informing stakeholders about the change; communicating widely with staff, patients, and stakeholders; hiring new staff, reviewing, monitoring, or auditing new processes; etc.

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| **Objective**:  What is the change or idea you will test? What is your objective with this PDSA cycle? What questions do you want to answer? |  |
| **Plan:**  What, who, when, where? What will happen? Discuss theories. What will be your PDSA-level measures? Balancing measures? |  |

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1. **What resources have you been using? What has been effective/ineffective and why?**

E.g. Change Package, Guide to Measurement, listerv, etc.

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1. **Is there anything else you would like to share?**

E.g. Calls for peer assistance; event announcements; challenges you have overcome; measuring, tracking, reporting data; staffing-related issues; clinic operations; time-related issues; capacity and funding issues; knowledge barriers; communication-related issues

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