Put your new ideas into action. Use this worksheet to develop a plan for systems change. This is a basic checklist and should not limit the development of system modifications for your practice.

<table>
<thead>
<tr>
<th>TASK</th>
<th>PERSON RESPONSIBLE</th>
<th>DATE TO BE COMPLETED</th>
<th>CHECK WHEN COMPLETED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conduct initial meeting with staff</td>
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<tr>
<td>Cultivate a culture of health equity</td>
<td></td>
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<tr>
<td>• Provide training on social determinants of health and health equity</td>
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<tr>
<td>• Assess implicit biases among the health care team</td>
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<tr>
<td>• Provide training for cultural proficiency</td>
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<td></td>
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<tr>
<td>• Other __________________________________</td>
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<tr>
<td>Track the patient experience and highlight opportunities for addressing social determinants of health</td>
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<tr>
<td>Update vital signs (if needed)</td>
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<tr>
<td>Create flags, prompts, and templates for electronic health records or paper charts</td>
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<tr>
<td>Formalize protocol for addressing social determinants of health</td>
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<tr>
<td>Provide staff training on new protocols</td>
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<tr>
<td>Update billing process to ensure payment</td>
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<tr>
<td>Create a list of community-based resources, or incorporate use of outside services (Aunt Bertha, 2-1-1, etc.)</td>
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<tr>
<td>Create a patient registry</td>
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<tr>
<td>Create and implement a system to track and communicate success</td>
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<td></td>
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<tr>
<td>Make staff assignments</td>
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<tr>
<td>Define roles of:</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>• Physician(s)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Nurse(s)</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>• Health educator(s)</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>• Medical assistant(s)</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>• Administrator(s)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Receptionist(s)</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

**DISCLAIMER**

Download these resources* for use in workplaces, health systems, and other places in your community.

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**ACKNOWLEDGMENT**

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Margot Savoy, MD, MPH, FAAFP  |  Venis T. Wilder, MD  |  David O’Gurek, MD, FAAFP

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