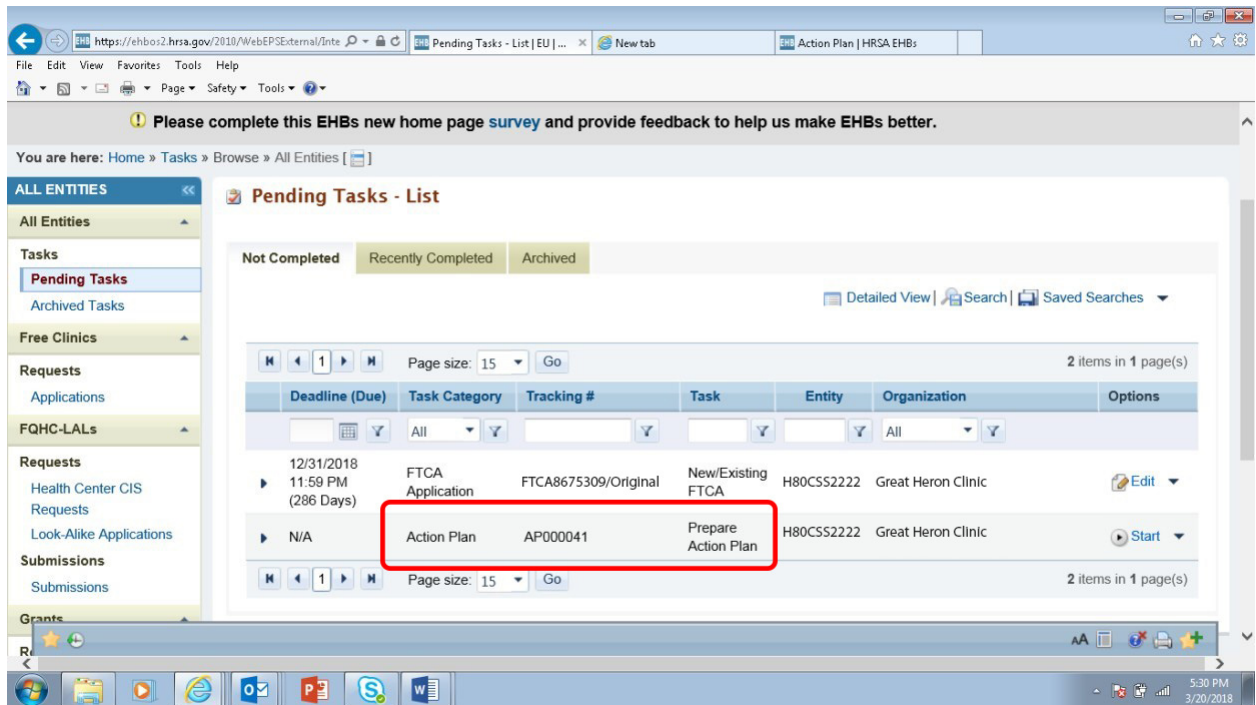# EHBs Action Plan – Helpful Tips for Health Centers

The information below should be used by health centers in conjunction with the
HRSA Electronic Handbooks (EHBs) Instructions for the Action Plan (includes video overview).

After the operational site visit or performance improvement site visit, the HRSA/BPHC Project Officer will initiate the Diabetes Action Plan within the EHBs. The health center Project Director will receive a Prepare Action Plan task in the EHBs to review and concur with the Plan.

Screenshot* – Prepare Action Plan in Health Center's Queue

Health center clicks, **Start**. Then, click **edit**.

> TIP: The Project Director can assign additional users to access the Action Plan from the Grants Folder in the EHBs.

Once the health center accesses the Action Plan, staff should review the **Interventions/Actions** that have been pre-populated by the Project Officer. The interventions/actions are the three performance improvement actions that health centers identified during the site visit root cause analysis discussion. **Review and return the Action Plan within 15 calendar days.**

> TIP: Although the expectation is that the action steps remain the same as those that were identified on site, health centers may make minor changes, if needed, to the actions. For example, health centers may want to add information to ensure the actions are measurable, results-focused, and time-bound. HRSA/BPHC is monitoring the three actions as one Action Plan finding over the course of one year.

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*Screenshots were created for illustrative purposes only and do not represent actual content.

Upload any relevant Supporting Documents to share with the Project Officer (optional).

Then, click **Mark as Complete**. Finding must be marked as complete before the Plan can be returned to HRSA/BPHC.

Click, **Submit**. A confirmation page appears. Click **Confirm and Send** to return to Project Officer for final review and approval.

Screenshots - Resolve Action Plan/Updating the Finding in Health Center's Queue

Once the Project Officer approves the Action Plan, a **Resolve Action Plan** task is sent to the health center.
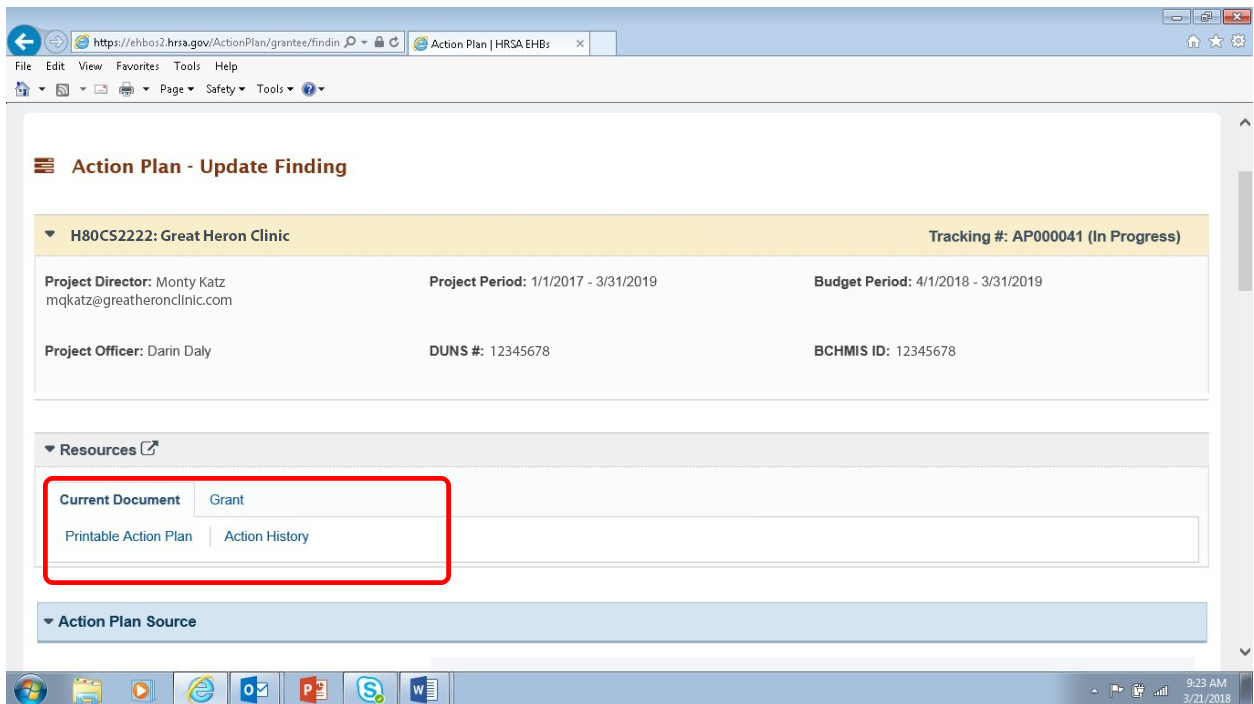
> TIP: A Monitor Action Plan task populates to the Project Officer's queue as the EHBs Action Plan is a shared task. Project Officers will use the Action Plan to monitor the health center's progress toward accomplishing the three diabetes performance improvement actions using quarterly progress updates and UDS diabetes data provided by the health center.

Health center clicks, **Start**. Then, click **Edit** next to the Action Plan finding.

The **Action Plan – Update Finding** page loads:

> HINT: Health centers can print the Action Plan and/or view the Action Plan history, including communications with the Project Officer, under Resources.

On a quarterly basis, health centers use the **Progress Notes** field to provide updates on the three actions. For specific information on quarterly progress updates, talk to your Project Officer. See also: "Diabetes Action Plan Progress Report Instructions for Health Centers," attached in Supporting Documents - HRSA Staff.

*Screenshots were created for illustrative purposes only and do not represent actual content.

3
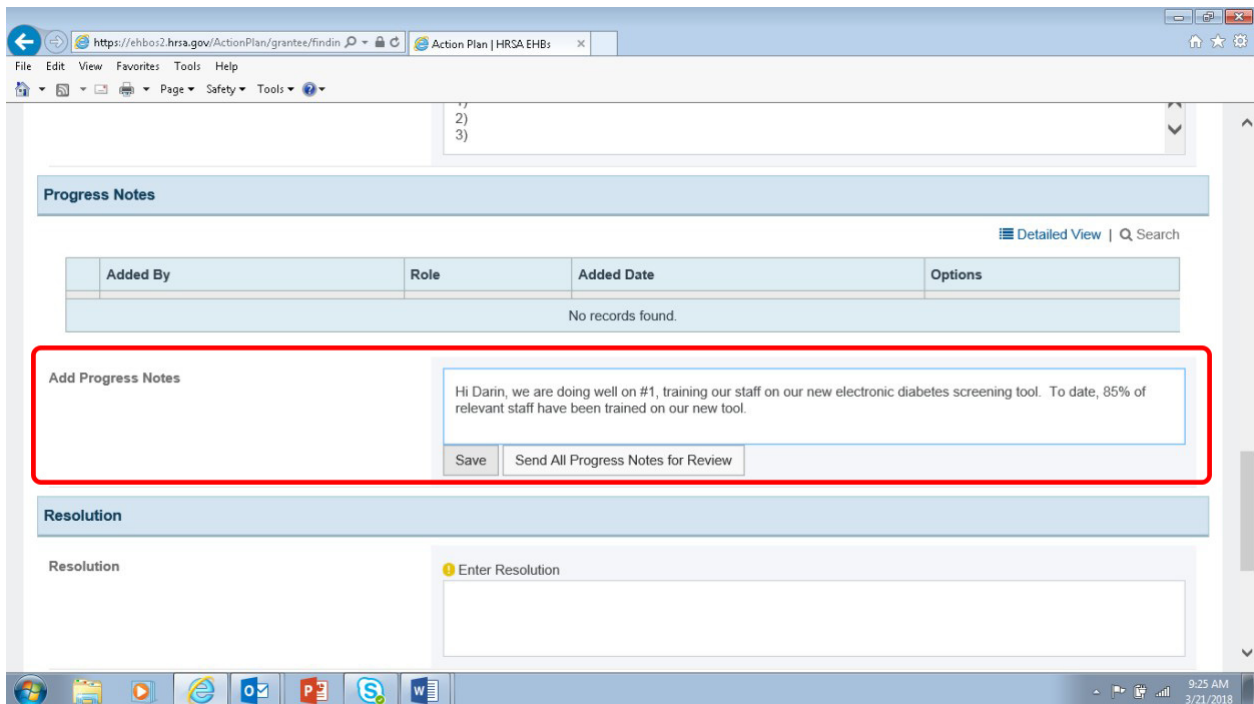
Click **Save**, add another Progress Note if needed, then click **Send Progress Note for Review** (see screenshot below).

> TIP: This is a shared screen within the Action Plan. Project Officers can use the Progress Notes feature as well to communicate to health centers. Health centers may receive feedback from the Project Officer via a Progress Note. These can be viewed within the Update Finding screen.
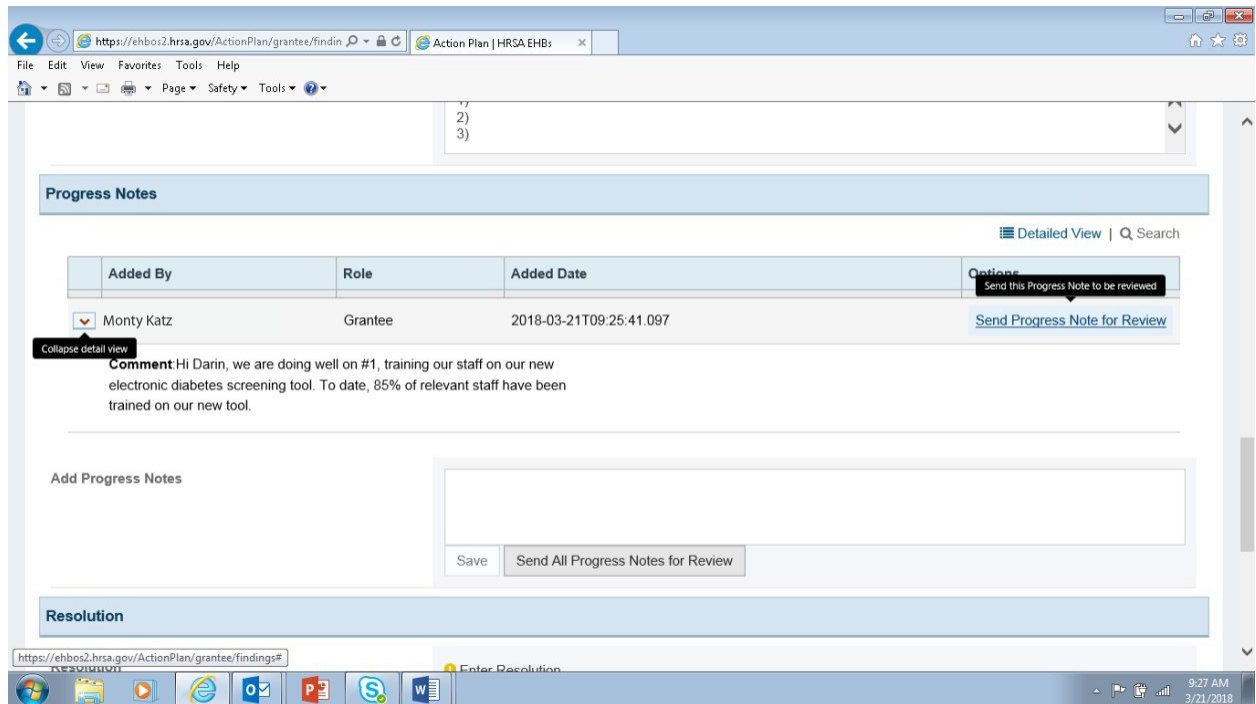
Health centers can also add supporting documents. This is optional. After selecting a file and uploading, click **Save** or **Save and Continue**. Click **GO (**not Submit**)** to send to the Project Officer.


Screenshots – Resolving the Action Plan in Health Center's Queue (FINAL STEP)

Once all of the diabetes actions have been completed, or achieved, complete the **Resolution** field. Reminder: This should occur approximately one year from the initiation of the Action Plan. Do not use the Resolution field for progress updates as this locks the Action Plan for HRSA to approve the resolution.

The health center should enter brief text regarding the completion of the three diabetes performance improvement actions and specifically address the following questions:

1) Were all the action steps completed? Why or why not?

2) What had the greatest impact on improving patient diabetes and improving the UDS diabetes measure?

The health center may upload any relevant supporting documents (see screenshot next page).
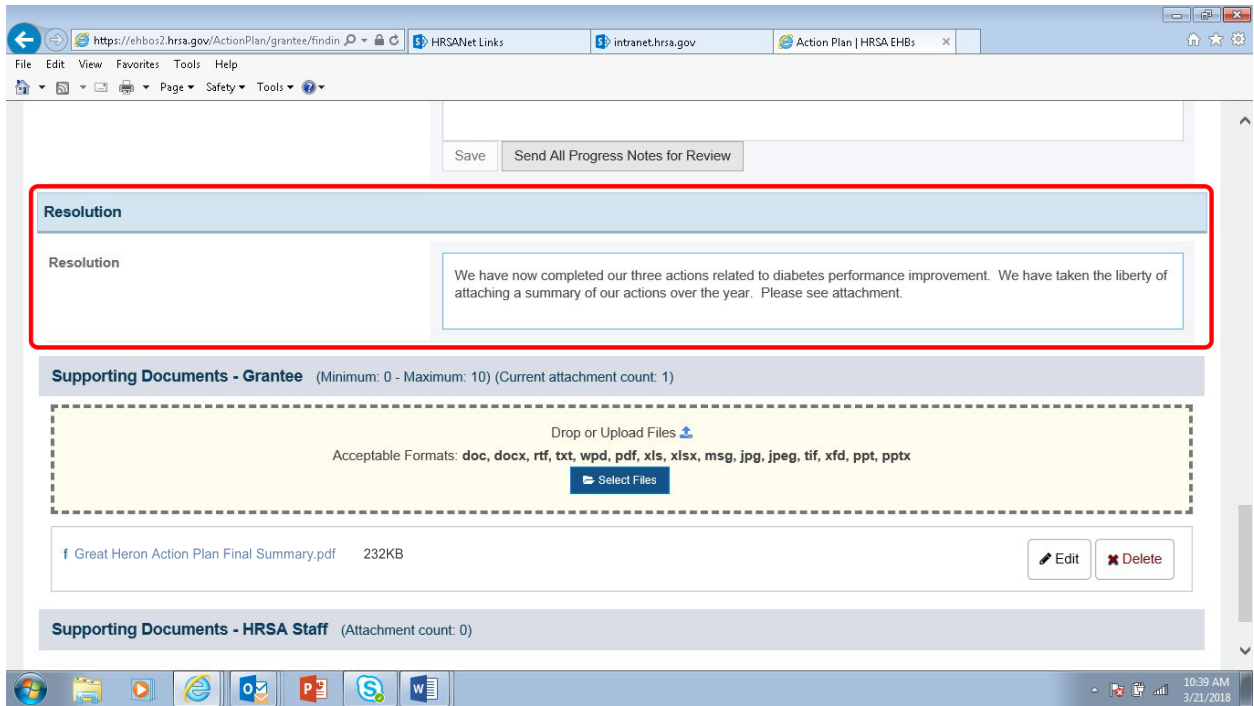
Click **Submit**, then **Go**. Health centers will see a screen that shows the finding is Pending Resolution from HRSA staff:
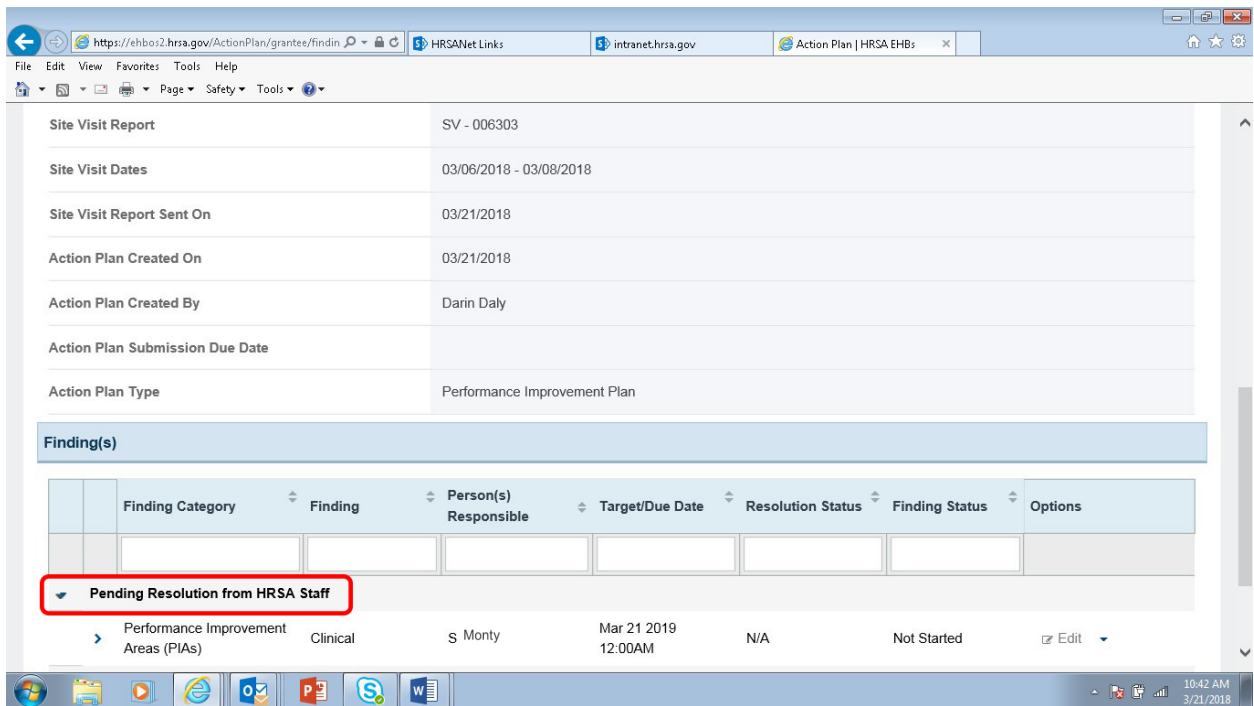
The pending Action Plan can no longer be edited (Edit is greyed out). Once the PO approves the resolution, the health center receives a notification that the Action Plan has been resolved. The Resolve Action Plan task is removed from the health center's queue. Health Centers can access the resolved plan within the Completed Tasks Tab.