

Level 3 Engagement Checklist



Practice Name:

Date/Time:

Level of Engagement at the time of scheduling:

Steps

- Confirm meeting date & time at least one week prior
 - Via email / phone touch base
 - If not viable – re-scheduled date: _____

- Send out the agenda the week of the scheduled meeting
 - Via email / In-Person (ahead of virtual engagement or in-person engagement)

- Materials to bring (in-person or ahead of virtual engagement) / May provide via email/in-person
 - Copies of the 1st Five Referral Form
 - Upcoming CME/CEU educational or training events of interest to the practice (focused on supporting the birth to 5 population)
 - 1st Five brochures (color)
 - Site Coordinator business cards/contact information

- Inquire about sustainability of screening and referral protocols
 - Inquire about current screening protocols & referral processes
 - Are screenings occurring as recommended? Are there challenges/barriers?
 - Are there challenges/barriers to making referrals?
 - Are there questions about referrals or the screening process?
 - Inquire about clinic staff changes (either current or upcoming)
 - Inquire about the onboarding process for new staff and determine how 1st Five education and screening tool training might "fit" within that clinic process
 - Assess readiness for ASQSE implementation (if already implementing the ASQ)
 - Assess readiness for MCHAT implementation (if not already implementing this tool)

- Confirm next check-in (quarterly/semi-annual) depending on practice needs

