

# Ready to Engage Checklist



Practice Name:  
Practice Phone Number:  
Practice Fax Number:  
Hours of Operation:

## Preparation & Planning Steps

- Visit the Health Care Website for the Practice  
*(If no website exists rely on historical information and/or collect updated information directly from points of contact/internal staff)*

Information to note:

- Review 1<sup>st</sup> Five Referral Reports to gather information about referral and screening history of the practice. Use 1<sup>st</sup> Five Data Management System (1st Five Referrals Data Report > Champion Provider & 1st Five Referrals Data Report > Referrals by Organization)

Information to note:

- Develop understanding of previous history with 1<sup>st</sup> Five screening and referral patterns

Information to note:

- Categorize the practice using the Levels of Engagement One-Pager

Level of Engagement is:

- Consider strategies for advancing to the next level of engagement using the Leveraging Language. Are there opportunities to consider a peer-to-peer consultation?

- Strategies considered for advancing the partnership to the next level

*(Include activity details & a timeline for each step)*

- If possible, identify the practice point of contact you will be engaging

Information to Note (email & contact information):

