

Retaining Employment and Talent After Injury/Illness Network: Operational Planning and Implementation Guidance Checklist

Overview

Planning and implementing your Retaining Employment and Talent After Injury/Illness Network (RETAIN) demonstration project requires attention across key categories. This resource is designed to guide, and support RETAIN states in operational and initial implementation planning. The checklist is divided into 14 categories demonstrated to be key to ensuring readiness for implementation. Each category includes a brief description and guiding questions for related tasks, space to check whether the task has been completed or is in progress, and a section to provide general next steps to address gaps or task areas still in progress.

The checklist can support states in broadly determining where they are and where they want to be in their operational planning to support their RETAIN implementation. It is designed to be used at any point of the operational planning process and may be applied across RETAIN teams to help your multisector partnership understand key tasks that occur throughout the state team to support readiness for implementation. A summary of the Operational Planning and Implementation Guidance Checklist can be found on pages 20–21 of this guide.

In this document, return-to-work (RTW) coordinators are defined as RETAIN project staff coordinating healthcare and employment-related supports and services. These individuals may also be described as health services coordinators, RTW navigators, or similar titles.

Categories

The checklist's 14 categories include:

1. [Project staffing and organizational structure](#)
 - Project Staffing Plans
 - Organizational Structure
2. [Partnership recruitment and definition of partner roles and responsibilities](#)
 - Partnership Recruitment
 - Defining Partner Roles
3. [Participant eligibility, identification, recruitment and enrollment plans, processes, and implementation](#)
 - Establish Worker Eligibility Criteria for the RETAIN Program
 - Specify or Identify Sources of Referral
 - Systems and Processes for Identifying Eligible Workers
 - Recruitment Processes—RETAIN Participants

4. [Stay-at-work and return-to-work coordination strategies](#)
 - Early Communication and Coordination Strategies
5. [Return-to-work coordinator or health services coordinator roles and processes](#)
 - Coordinator Roles and Processes
6. [Recruiting care providers](#)
 - Recruitment Process—Care Providers
 - Agreements, Contracts, or MOUs—Care Providers
7. [Recruiting employers](#)
 - Recruitment Process—Employers
 - Agreements, Contracts, or MOUs—Employers
8. [Communication and outreach plans with stakeholders](#)
 - Communication Plans
9. [Training initiatives: Target audiences, training focus and content, and training modalities and delivery](#)
 - Training Initiatives
10. [Clinical practices to support stay-at-work and return-to-work goals](#)
 - Clinical Practices
11. [Best practices in pain management](#)
 - Pain Management
12. [Information systems to support stay-at-work and return-to-work programs](#)
 - Information Systems
13. [Facilitators of early intervention implementation](#)
 - Implementation Strategies to Facilitate Adoption of Best Practices
14. [Continuous quality improvement strategies](#)
 - Performance Improvement Strategies

[Summary of operational planning and guidance checklist](#)

Operational Planning and Implementation Guidance Checklist

1. Project Staffing and Organizational Structure Checklist	Yes	No	In Progress/NA
Project Staffing Plans			
<i>Project staffing plans are plans that are developed and used to allocate or dedicate human resources, knowledge, and experience to complete project tasks and achieve project goals.</i>			
<ul style="list-style-type: none"> • Have you specified: <ul style="list-style-type: none"> ___ How many project team members, positions, and/or full-time equivalents will be needed ___ What skills will be required ___ The roles and responsibilities of each position ___ What human resources are available, including HR competencies and workload capacities ___ Position descriptions to guide and manage performance that may include descriptions of responsibilities and needed knowledge and skills <ul style="list-style-type: none"> » Return-to-work (RTW) coordinator position description » Other 			
<ul style="list-style-type: none"> • Have you assigned staff roles and responsibilities to specific project personnel and/or defined positions, including roles of key positions (e.g., RTW coordinator)? 			
<ul style="list-style-type: none"> • Have your project-related position descriptions been approved by the respective partner organizations and RETAIN management team? 			
<ul style="list-style-type: none"> • Have you specified target ratios of RTW coordinators to participating workers (i.e., care coordination caseloads)? 			
<i>Describe how you intend to complete the step(s) with checks in the “no” or “in progress” columns:</i>			
Organizational Structure			
<i>An organizational structure includes an organizational or hierarchical chart that graphically represents the project’s structure, supported by written descriptions. It illustrates the reporting and advisory relationships between different roles and positions in your state RETAIN project.</i>			
<ul style="list-style-type: none"> • Does the organizational chart that you developed for your RETAIN proposal continue to be relevant and appropriate? 			
<ul style="list-style-type: none"> • If the answer is “no” to the above question, have you identified the need to modify any parts of your RETAIN project organizational chart? 			
<ul style="list-style-type: none"> • Have you established clear channels of communication among project team members, including between partnering agencies? 			
<ul style="list-style-type: none"> • Does your organizational structure provide flexibility to adapt to change? 			
<i>Describe how you intend to complete the step(s) with checks in the “no” or “in progress” columns:</i>			

2. Partnership Recruitment and Definition of Partner Roles and Responsibilities	Yes	No	In Progress/NA
<p>Partnership Recruitment</p> <p><i>Partnership recruitment includes identifying project partners that have the focus, services and attributes needed to achieve your project goals and that appropriate memoranda of understanding (MOUs) or other agreements are completed.</i></p>			
<ul style="list-style-type: none"> • Have you and your partners taken time to review the services, skills, and resources you need; the goals you have set; and what your project can offer for all partners? 			
<ul style="list-style-type: none"> • Have you taken steps to assess potential partners based on their value statements and missions, the services they provide, their geographic service areas, and mutual benefits? 			
<p><i>Describe how you intend to complete the step(s) with checks in the “no” or “in progress” columns:</i></p>			
<p>Defining Partner Roles</p> <p><i>Defining partner roles includes specifying the partners’ level of participation in the project, involvement in leadership and administration, partnership structure, involvement in decision-making, application of financial and non-financial resources, and assigned tasks.</i></p>			
<ul style="list-style-type: none"> • Have you negotiated the parameters of the partnership, including partnership roles, responsibilities, and a shared vision of success? 			
<ul style="list-style-type: none"> • Have you developed channels for open and honest communication with partners? 			
<p><i>Describe how you intend to complete the step(s) with checks in the “no” or “in progress” columns:</i></p>			

3. Participant Eligibility, Identification, Recruitment and Enrollment Plans, Processes, and Implementation	Yes	No	In Progress/NA
Establish Worker Eligibility Criteria for the RETAIN Program			
<i>Establishing worker eligibility criteria includes specifying factors, such as whether injuries or illnesses are work- or non-work-related; types of injuries or illnesses, possibly including diagnostic codes; length of time since the injury or illness occurred; geographic location; employment type; risk of leaving employment or the workforce; and other factors.</i>			
<ul style="list-style-type: none"> Have you developed specific participant eligibility criteria? 			
<ul style="list-style-type: none"> Have you developed operational definitions that support your eligibility criteria? 			
<ul style="list-style-type: none"> Have you identified or developed criteria, processes, interview questions, and/or tools to assess the worker’s potential risk of leaving the workplace? 			
<i>Describe how you intend to complete the step(s) with checks in the “no” or “in progress” columns:</i>			
Specify or Identify Sources of Referral			
<i>Identifying sources of referral involves specifying health care organizations, departments and providers, and/or employers or other sources that will refer individuals or workers to your RETAIN project.</i>			
<ul style="list-style-type: none"> Have you identified and specified health services organizations, departments, and/or clinicians who are expected to screen and enroll patient or worker participants in RETAIN? 			
<ul style="list-style-type: none"> If you plan to have participating employers play a role in the worker participant recruitment process, have you identified and specified employers who will identify potentially eligible workers for participation in RETAIN? 			
<ul style="list-style-type: none"> If you plan to utilize or develop a nurse hotline or other form of hotline to identify potential patient or worker participants, have you planned this recruitment mechanism? 			
<ul style="list-style-type: none"> If you plan to have a mechanism for patients or workers to self-refer to the RETAIN project, have you specified a mechanism for this recruitment approach? 			
<ul style="list-style-type: none"> Do you have strategies for other patient or worker recruitment processes not specified above? <ul style="list-style-type: none"> If yes, have these strategies been identified and planned? 			
<i>Describe how you intend to complete the step(s) with checks in the “no” or “in progress” columns:</i>			

3. Participant Eligibility, Identification, Recruitment and Enrollment Plans, Processes, and Implementation	Yes	No	In Progress/NA
Systems and Processes for Identifying Eligible Workers			
<i>Identifying eligible workers involves having structures and procedures in place that allow for early identification of eligible workers or patients.</i>			
<ul style="list-style-type: none"> • Do you plan to monitor appointment schedules in clinical settings as one approach to identifying potentially eligible participants? <ul style="list-style-type: none"> – If yes, do you have structures and/or processes developed to implement this as one part of your recruitment strategy? 			
<ul style="list-style-type: none"> – If yes, do you have structures and/or processes developed to implement this as one part of your recruitment strategy? 			
<ul style="list-style-type: none"> • Do you plan to screen or assess eligibility for potential participants in clinical settings? <ul style="list-style-type: none"> – If yes, have you developed a process for implementing screening practices in clinical settings? 			
<ul style="list-style-type: none"> – If yes, have you developed a process for implementing screening practices in clinical settings? 			
<ul style="list-style-type: none"> • Do you plan to use clinical decision support tools, provider reminders, care pathways, algorithms, or other tools for identifying potentially eligible participants? <ul style="list-style-type: none"> – If yes, have you developed specific plans and strategies? 			
<ul style="list-style-type: none"> – If yes, have you developed specific plans and strategies? 			
<ul style="list-style-type: none"> • Do you plan to involve employers in identifying potentially eligible participants for RETAIN? <ul style="list-style-type: none"> – If yes, have you specified a process for identifying injured and ill workers in the employment setting and referring them to the project for possible enrollment? 			
<ul style="list-style-type: none"> – If yes, have you specified a process for identifying injured and ill workers in the employment setting and referring them to the project for possible enrollment? 			
<ul style="list-style-type: none"> • Do you plan to use a nurse hotline or other hotline as one component of your recruitment approach? <ul style="list-style-type: none"> – If yes, have you developed specific plans and processes to engage and modify an existing hotline or develop a RETAIN-specific hotline for this purpose? 			
<ul style="list-style-type: none"> – If yes, have you developed specific plans and processes to engage and modify an existing hotline or develop a RETAIN-specific hotline for this purpose? 			
<p><i>Describe how you intend to complete the step(s) with checks in the “no” or “in progress” columns:</i></p>			
Recruitment Processes—RETAIN Participants			
<i>Participant recruitment processes involve communicating with potentially eligible patients or workers about RETAIN, describing the project, eliciting potential interest in the project, asking if the individual will participate, conducting informed consent, documenting recruitment efforts and results, and completing other recruitment steps.</i>			
<ul style="list-style-type: none"> • Have you developed a written procedure that describes the steps in recruiting RETAIN participants? 			
<ul style="list-style-type: none"> • Have you developed plans and processes for documenting recruitment actions and results at the worker level? 			

3. Participant Eligibility, Identification, Recruitment and Enrollment Plans, Processes, and Implementation	Yes	No	In Progress/NA
<ul style="list-style-type: none"> Have you developed or adapted existing information systems to support documentation of recruitment actions and results? 			
<ul style="list-style-type: none"> Do you plan to develop a specific communication plan or script to guide the information sharing process for informing potential participants about the RETAIN project? 			
<ul style="list-style-type: none"> – If yes, have you developed this plan and/or script? 			
<ul style="list-style-type: none"> Have you developed plans and processes for conducting informed consent with potential participants? 			
<p><i>Describe how you intend to complete the step(s) with checks in the “no” or “in progress” columns:</i></p>			

4. Stay-at-Work and Return-to-Work Coordination Strategies	Yes	No	In Progress/NA
Early Communication and Coordination Strategies			
<i>Communication and coordination strategies focus on information sharing between project partners, such as health systems and employers, regarding enrolled participants; developing early intervention plans to support the employee in returning to or staying at work; linking patients or workers with needed services to support health and stay-at-work (SAW) or RTW goals; working on job-task or workplace modifications or other accommodations to support ongoing employment; and monitoring patient or worker progress.</i>			
<ul style="list-style-type: none"> • Have you developed a plan and strategies for early communication to facilitate SAW/RTW among: <ul style="list-style-type: none"> ___ care providers; ___ employers; ___ RTW coordinators; and ___ workers 			
<i>Describe how you intend to complete the step(s) with checks in the “no” or “in progress” columns:</i>			

5. Return-to-Work Coordinator or Health Services Coordinator Roles and Processes	Yes	No	In Progress/NA
<p>Coordinator Roles and Processes</p> <p><i>RTW coordinator roles and processes refer to the policies and procedures intended to help coordinators achieve project goals through actions such as sharing information regarding enrolled participants in a timely manner with health systems and employers, linking patients or workers with needed services to support health and SAW/RTW goals, working with employers on job-task or workplace modifications or other accommodations to support ongoing employment, and monitoring patient or worker progress.</i></p>			
<ul style="list-style-type: none"> • Have you developed or established policies and operational processes for RTW coordinators regarding coordination processes? 			
<ul style="list-style-type: none"> • Have you developed structures and processes to help facilitate collaboration between RTW coordinators and participating employers, health services providers, workforce agencies, and other agencies? 			
<ul style="list-style-type: none"> • Have you developed strategies, tools, and/or resources to support RTW coordinators in working with employers on SAW/RTW plans and processes that leverage best practices? For example, are there tools and resources that support the RTW coordinator in guiding employers to assign lighter or modified duties, adjust work schedules and tasks, modify the worksite, find a balance between injury and accommodation, develop a progressive plan for work responsibilities, communicate strategies to support injured or ill workers, and documentation plans? 			
<p><i>Describe how you intend to complete the step(s) with checks in “no” or “in progress” columns:</i></p>			

6. Recruiting Care Providers	Yes	No	In progress/NA
Recruitment Process—Care Providers			
<i>Recruitment involves specifying health care agency and/or provider inclusion and exclusion criteria; identifying health care agencies, systems, and providers that match the provider eligibility criteria; conducting outreach; engaging health care providers in discussions about the RETAIN project; assessing interest in participating; and developing and negotiating participation agreements or MOUs.</i>			
<ul style="list-style-type: none"> • Have you established eligibility criteria for care provider recruitment? 			
<ul style="list-style-type: none"> • Have you developed outreach and recruitment plans for recruiting care providers? 			
<ul style="list-style-type: none"> • Have you identified care providers to potentially participate? 			
<ul style="list-style-type: none"> • Have these recruitment plans changed from what you outlined in your proposal? <ul style="list-style-type: none"> – If yes, what are the changes or additions? 			<i>Changes or additions:</i>
<ul style="list-style-type: none"> • Have you developed recruitment materials, communication messages, and/or other specific communication strategies to support your care provider recruitment efforts? 			
<ul style="list-style-type: none"> • Does your outreach and recruitment plan include strategies for tracking the recruitment process? 			
<i>Describe how you intend to complete the step(s) with checks in “no” or “in progress” columns:</i>			
Agreements, Contracts, or MOUs—Care Providers			
<i>MOUs are agreements between two or more entities that define the terms and responsibilities of each entity.</i>			
<ul style="list-style-type: none"> • Have you developed a contract or MOU template to be used in formalizing partnerships with health care providers, systems, or agencies? 			
<ul style="list-style-type: none"> • Have you negotiated specific agreements, contracts, or MOUs with your partnering health services providers? 			
<ul style="list-style-type: none"> • Do you have a process for managing these agreements, contracts, or MOUs? 			
<i>Describe how you intend to complete the step(s) with checks in the “no” or “in progress” columns:</i>			

7. Recruiting Employers	Yes	No	In Progress/NA
Recruitment Process—Employers			
<i>Recruiting employers involves specifying employer inclusion and exclusion criteria, identifying employers that match the employer eligibility criteria, conducting outreach, engaging employers in discussions about the RETAIN project, assessing interest in participating, and developing and negotiating participation agreements or MOUs.</i>			
<ul style="list-style-type: none"> Have you established eligibility criteria or parameters for recruiting employers? 			
<ul style="list-style-type: none"> Have you developed outreach and recruitment plans for recruiting employers? 			
<ul style="list-style-type: none"> Have you identified potential employers to participate? 			
<ul style="list-style-type: none"> Have these outreach and recruitment plans changed from what you outlined in your proposal? If yes, describe the changes or additions? 	<i>Describe:</i>		
<ul style="list-style-type: none"> Have you developed recruitment materials, communication messages, and/or other specific communication strategies to support your employer recruitment efforts? 			
<ul style="list-style-type: none"> Does your outreach and recruitment plan include strategies for tracking the recruitment process? 			
<i>Describe how you intend to complete the step(s) with checks in “no” or “in progress” columns:</i>			
Agreements, Contracts, or MOUs—Employers			
<i>MOUs are agreements between two or more entities that define the terms and responsibilities of each entity.</i>			
<ul style="list-style-type: none"> Have you developed a contract or MOU template to be used in formalizing partnerships with employers? 			
<ul style="list-style-type: none"> Have you negotiated specific agreements, contracts, or MOUs with your partnering employers? 			
<ul style="list-style-type: none"> Do you have a process for managing these agreements, contracts, or MOUs? 			
<i>Describe how you intend to complete the step(s) with checks in “no” or “in progress” columns:</i>			

8. Communication and Outreach Plans With Stakeholders	Yes	No	In Progress/NA
Communication Plans			
<i>Communication plans involve developing approaches to facilitate two-way sharing of information among project partners and participants, designing sample messages and tools, and specifying the communication channels that may be used.</i>			
<ul style="list-style-type: none"> • Have you developed communication plans that outline strategies for exchanging information with: <ul style="list-style-type: none"> a. Project partners b. Employers c. Health systems or providers d. Workers or participants e. Or other state agencies and programs <ul style="list-style-type: none"> – If yes, please list 			
	a.		
	b.		
	c.		
	d.		
	e.		
	List:		
<i>Describe how you intend to complete the step(s) with checks in “no” or “in progress” columns:</i>			

9. Training Initiatives: Target Audiences, Training Focus and Content, and Training Modalities and Delivery	Yes	No	In Progress/NA
<p>Training Initiatives</p> <p><i>Training plans for target audiences involve planning and implementing educational and/or mentoring processes that may incorporate a range of modalities for the RETAIN leadership team, RETAIN employees, health care providers and their support staffs, employers, and other stakeholders as needed.</i></p>			
<ul style="list-style-type: none"> • Target Audiences <ul style="list-style-type: none"> – Have you identified your target audiences for trainings, such as: <ul style="list-style-type: none"> <input type="checkbox"/> Clinicians and other health care professionals and support staff <input type="checkbox"/> Employers <input type="checkbox"/> RTW coordinators <input type="checkbox"/> The RETAIN project team <input type="checkbox"/> Other stakeholders 			
<ul style="list-style-type: none"> • Training Needs and Topics <ul style="list-style-type: none"> – Have you identified training needs and topics, for specific audiences including: <ul style="list-style-type: none"> <input type="checkbox"/> Participating clinicians <input type="checkbox"/> Other health care professionals <input type="checkbox"/> Support staff <input type="checkbox"/> Participating employers <input type="checkbox"/> RTW coordinators <input type="checkbox"/> RETAIN leadership (if needed) <input type="checkbox"/> Community members and/or other stakeholders (if needed) 			
<ul style="list-style-type: none"> • Training Modalities <ul style="list-style-type: none"> – Have you identified training modalities that will best match the needs of each target audience 			

9. Training Initiatives: Target Audiences, Training Focus and Content, and Training Modalities and Delivery	Yes	No	In Progress/NA
<ul style="list-style-type: none"> • Training Content <ul style="list-style-type: none"> – Have you developed training content for identified topics, including: <ul style="list-style-type: none"> ___ Importance of staying-at-work or returning-to-work for the worker, employer, and society ___ RETAIN project overview ___ Best practices in occupational health ___ Best practices in pain management ___ Best practices in functional assessment ___ Clinician: Developing recommendations for SAW/RTW ___ Clinician: Developing and writing an activity plan that communicates the worker’s ability to participate in work activities, activity or work restrictions, and the provider’s treatment plans ___ RETAIN project processes ___ Actions and best practices employers can take to facilitate SAW/RTW ___ Care coordination and case management strategies ___ Other-Describe 			
<ul style="list-style-type: none"> • Training Planning, Timeline and Scheduling <ul style="list-style-type: none"> – Have you developed specific training plans that include a timeline and schedule? 			
<p><i>Describe how you intend to complete the step(s) with checks in “no” or “in progress” columns:</i></p>			

10. Clinical Practices to Support Stay-at-Work and Return-to-Work Goals	Yes	No	In Progress/NA
<p>Clinical Practices <i>Clinical practices include patient interview approaches, assessment techniques, functional assessments, pain assessment, health care interventions, treatment strategies, patient-centered or family-centered communication strategies, care coordination, and other interventions employed by clinicians and other health professionals</i></p>			
<ul style="list-style-type: none"> Have you developed a specific process for clinicians and/or support personnel to complete and submit a Report of Accident (ROA), First Report of Injury (FROI), or other equivalent form, in two business days or less, for any RETAIN participants that are workers' compensation claimants? 			
<ul style="list-style-type: none"> Have you developed strategies for communicating directly with RETAIN staff and employers when injured workers are off or expected to be off work? 			
<ul style="list-style-type: none"> Have you developed strategies for assessing the injured worker's barriers to RTW and developing a plan to overcome them? 			
<ul style="list-style-type: none"> Have you developed a process to support clinicians in their efforts to assess barriers to the worker staying at work or returning to work and to collaboratively create a plan to overcome potential obstacles? 			
<ul style="list-style-type: none"> Have you developed specific plans, approaches, and/or scripts to support clinicians and RTW coordinators in their efforts to communicate with injured and ill workers about their work plans? 			
<ul style="list-style-type: none"> Have you identified and/or developed plans, tools, and/or resources to support clinician efforts to develop recommendations for RTW/SAW? 			
<ul style="list-style-type: none"> Have you identified and developed plans, tools, and resources to support clinician efforts to develop and write an activity plan that communicates the worker's ability to participate in work activities, activity or work restrictions, and the provider's treatment plans? Examples of activity plan content include: Lighter or modified duties, adjustments to work schedules and tasks, modifications to the worksite, finding a good fit between injury and accommodation, and developing a progressive plan for work responsibilities. 			
<p><i>Describe how you intend to complete the step(s) with checks in "no" or "in progress" columns:</i></p>			

11. Best Practices in Pain Management	Yes	No	In Progress/NA
Pain Management			
<i>Pain management includes methods for assessing pain sensations and possible functionality; and methods to prevent, reduce, or stop the sensation of pain, which may include use of prescription medications, over-the-counter medications, physical methods, mindfulness, biopsychosocial, and/or psychological methods.</i>			
<ul style="list-style-type: none"> • Have you identified and/or developed strategies, tools, and/or resources to support clinicians in assessing and helping workers manage pain? 			
<ul style="list-style-type: none"> • Have you identified or developed tools, resources, or guidelines that will support clinicians’ focus on functionality as part of the pain assessment process? 			
<i>Describe how you intend to complete the step(s) with checks in “no” or “in progress” columns:</i>			

12. Information Systems to Support Stay-at-Work and Return-to-Work Programs	Yes	No	In Progress/NA
<p>Information Systems</p> <p><i>Computerized systems and other systems or processes designed to collect, store, track, share, and distribute specific information, such as systems to support participant identification and enrollment, track participant progress and outcomes, and document RTW coordinator assessments, actions, interventions, outcomes, and plans.</i></p>			
<ul style="list-style-type: none"> • Have you developed plans for project-related information systems that may be used to: <ul style="list-style-type: none"> ___ Identify potentially eligible participants ___ Track participant, employer, and/or health care provider recruitment ___ Document case coordination and care management services ___ Share information across systems or partners ___ Monitor and evaluate project progress and outcomes ___ Support performance improvement 			
<p><i>Describe how you intend to complete the step(s) with checks in “no” or “in progress” columns:</i></p>			

13. Facilitators of Early Intervention Implementation	Yes	No	In Progress/NA
Implementation Strategies to Facilitate Adoption of Best Practices			
<i>Implementation strategies are special interventions aimed at promoting behavior change among health professionals and others; this is closely related to the concept of knowledge translation that involves taking research results and applying them in practice. Examples of implementation strategies include provider-reminder systems or clinical decision-support tools, academic detailing or educational outreach visits, audit and feedback, and use of financial incentives and/or penalties.</i>			
<ul style="list-style-type: none"> Do you have plans to use financial incentives to encourage participating health care providers to implement best practices in occupational health? 			
<i>If yes, describe what types of financial incentives you plan to use and what behaviors or actions will be incentivized:</i>			
<ul style="list-style-type: none"> Do you have plans to use nonfinancial incentives to encourage participating health care providers to implement best practices in occupational health? 			
<i>If yes, describe what types of nonfinancial incentives you plan to use and what behaviors or actions will be incentivized:</i>			
<ul style="list-style-type: none"> Do you plan to use academic detailing or educational outreach visits as strategies to support implementation of RETAIN processes in clinical practices? <ul style="list-style-type: none"> If yes, have you developed specific plans and processes for this approach? 			
<ul style="list-style-type: none"> Do you plan to use clinical decision-support tools or other provider-reminder systems to support clinician-related tasks and interventions? <ul style="list-style-type: none"> If yes, have you developed specific plans and processes for these interventions? 			
<ul style="list-style-type: none"> Do you plan to incorporate communication strategies, such as health coaching, as a behavior change strategy to be used by care providers, employers, and/or RTW coordinators? <ul style="list-style-type: none"> If yes, have you developed specific plans or processes? 			
<i>Describe how you intend to complete the step(s) with checks in “no” or “in progress” columns:</i>			

14. Continuous Quality Improvement Strategies	Yes	No	In Progress/NA
<p><i>Continuous Quality Improvement (CQI)</i> CQI is a cyclical process that aims to promote continuous improvement among organizations, systems, and projects. It generally involves setting goals, developing plans, measuring progress and outputs or outcomes, making improvements based on what is learned, and repeating this process to continuously improve effectiveness and efficiency.</p>			
<ul style="list-style-type: none"> • Have you developed plans to track and monitor process and performance? 			
<ul style="list-style-type: none"> • Have you specified performance improvement data elements and sources? 			
<ul style="list-style-type: none"> • Do you plan to collect monitoring data for purposes of performance improvement? 			
<ul style="list-style-type: none"> • Do you plan to apply a specific performance improvement approach or strategy, such as Plan-Do-Study-Act or Six Sigma and Lean? 			
<p><i>Describe how you intend to complete the step(s) with checks in “no” or “in progress” columns:</i></p>			

Summary of Operational Planning and Implementation Guidance Checklist

	Yes	No	In Progress/NA
1. Project staffing and organizational structure			
Project Staffing Plans			
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2. Partnership recruitment and definition of partner roles and responsibilities			
Partnership Recruitment			
Defining Partner Roles			
3. Participant eligibility, identification, recruitment and enrollment plans, processes, and implementation			
Establish Worker Eligibility Criteria for the RETAIN Program			
Specify or Identify Sources of Referral			
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8. Communication and outreach plans with stakeholders			
Communication Plans			
9. Training initiatives: Target audiences, training focus and content, and training modalities and delivery			
Training Initiatives			
10. Clinical practices to support stay-at-work and return-to-work goals			
Clinical Practices			

	Yes	No	In Progress/NA
11. Best practices in pain management			
Pain Management			
12. Information systems to support stay-at-work and return-to-work programs			
Information Systems			
13. Facilitators of early intervention implementation			
Implementation Strategies to Facilitate Adoption of Best Practices			
14. Continuous quality improvement strategies			
Performance Improvement Strategies			

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