

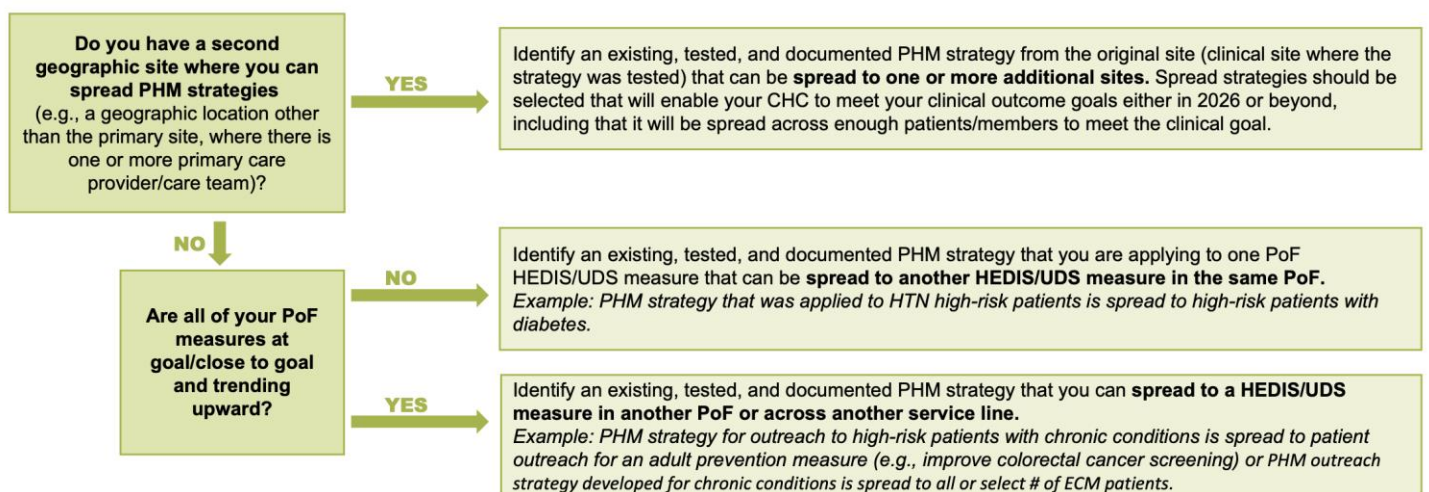
## PHMI 2026 Spread Team Worksheet

### Conditions for Spread

- ❑ **Strategy has been tested and aligned with 2026 clinical goal:**  
The strategy is evidence-based and derived from a credible source (which includes PHMI resources), and/or the original site was able to demonstrate effectiveness through tracking and monitoring over at least 3 months. There is confidence that this strategy supports reaching the 2026 clinical goal.
- ❑ **Strategy is adaptable in a new context:**  
The strategy is relatively easy to adapt in other settings and has relative advantages compared to the “old” way. There is a designated team (including one or more individuals who have implemented the strategy) to support spreading to a new setting. The technology is portable and can be easily adapted in new context/location.
- ❑ **Strategy has clinical/operational structure in place:**  
The strategy is documented (protocols, workflows, policies). It has been designed so that it is easy to do the right thing, such as EMR smart phrases and defaults. It can be tracked for progress with a designated technology platform.
- ❑ **Strategy has organizational structures in place:**  
There are organizational structures to support spreading this strategy, including a leader who has been designated as champion. If appropriate, there is a governance structure, and a plan for training and capacity building at the new locations/sites. New staff training is updated to include this strategy if applicable.
- ❑ **Strategy shows promise of financial sustainability:**  
The strategy is considered in the context of financial sustainability, e.g., it creates operational efficiency, leads to maximizing billing/revenue, or has potential cost savings. The team is considering tracking a financial indicator for this strategy.

### Our 2026 Clinical SMARTIE Goal:

### Step 1: Define what spread means for your health center.



## Step 2: Create a short list of PHM strategies to spread.

When identifying potential strategies, consider your sustainability plan where you outlined strategies for hardwiring and/or a PHM strategy that you consider a best practice.

Option 1:	Option 2:	Option 3:
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## Step 3: Vet short list of identified strategies against the five conditions for spread.

Refer to the 'conditions for spread' (page 1) and vet your potential strategies through the five conditions.

Condition	Does the strategy meet the conditions (yes, no, need more info)?
<b>Strategy has been tested and aligned with 2026 clinical goal</b>	Option 1 Option 2 Option 3
<b>Strategy is adaptable to new context</b>	Option 1 Option 2 Option 3
<b>Strategy has clinical/operational structure in place</b>	Option 1 Option 2 Option 3
<b>Strategy has organizational structures in place</b>	Option 1 Option 2 Option 3
<b>Strategy shows promise of financial sustainability</b>	Option 1 Option 2 Option 3

### Next Steps:

- Identify follow-up actions before finalizing spread strategy.** This could include a short list of who you need to speak to regarding spreading to a specific location/service line. Determine technology modifications that will be needed, identify champions, and determine if documentation needs work.
- Consider the scale of the spread strategy:** Will the strategy be spread across one location or more than one location (with specificity to the number of care teams considering the conditions above)?
- Draft a spread SMARTIE goal,** review with your PT coach, and finalize by March 31.