



# Make Action Plans

An action plan, created together by the patient and clinician, outlines one or more easy steps a patient can take to attain a health goal such as losing weight or improving self-management of a chronic condition. This tool will guide clinicians through the process of creating and using action plans in collaboration with their patients.

## **Ask permission to talk about health behaviors.**

“Would it be OK if we talked about improving your blood sugar level?”

“Would it be OK to talk a bit about your weight?”

## **Determine motivation.**

Does the patient express the motivation to change? If patients do not show interest in making changes (i.e., a score of 5 or less), explore what barriers might stand in their way and what they see as possible benefits of changing their lifestyle.

## **Have patients choose the goals.**

Does the patient express the motivation to change? If patients do not show interest in making changes (i.e., a score of 5 or less), explore what barriers might stand in their way and what they see as possible benefits of changing their lifestyle.

## **Help patients break down goals into manageable steps.**

Have patients pick one specific step they are likely to do. Steps should be small and realistic to do over a short time (e.g., 1 week).

## **Fill out an action plan form.**

Use a form to outline exactly what the patient will do. The simple Action Plan Form on the back can be modified to fit your needs. This Action Plan Form from the University of California at San Francisco Center for Excellence in Primary Care is available in English and Spanish.

## **Assess confidence.**

Assess the patient’s confidence by asking, “On a scale of 1 to 10, how sure are you that you can follow this action plan?” Research shows that a confidence level of 7 or above increases the likelihood that the patient will carry out the plan. If they are not, the clinician and patient should explore ways to revise the plan so the patient feels more confident.

## **Identify barriers.**

Ask the patient “What might stop you from following this action plan?” Problem solve about how to overcome barriers.

## **Make a copy of the action plan.**

Give a copy to the patient and place a copy in the patient’s medical record. If your practice has an EHR, determine how to standardize documentation, since there may be more than one place to capture action planning.

## **Follow up after the visit.**

Followup lets patients know that you are interested in helping them achieve behavior change. Ideally, set up a time to follow up a week or two after the patient’s visit.

- If the goal wasn’t met, help patients develop a plan that can be achieved.
- If the goal was achieved, celebration and praise are in order. Work with patients to plan the next step. Each small step gets patients closer to the ultimate goal of improving their health-related behaviors.
- Update the medical record to reflect the current plan the patient is following.

# My Action Plan

Date \_\_\_\_\_

I \_\_\_\_\_ and \_\_\_\_\_  
have agreed that to improve my health I will:

## 1. Choose ONE of the activities below

\_\_\_\_\_ Work on something that is bothering me.

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\_\_\_\_\_ Stay more physically active

\_\_\_\_\_ Take my medications

\_\_\_\_\_ Improve my food choices

\_\_\_\_\_ Reduce my stress

\_\_\_\_\_ Cut down on smoking

## 2. Choose your confidence level

How sure are you that you can do the action plan? (If <7, then change plan)



10. Very sure.



7. Sure.



5. Somewhat sure.



0. Not sure at all.

## 3. Fill in the details of your activity:

What:

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How much:

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When:

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How often:

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Where:

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With whom:

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Start Date:

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Follow-Up Date:

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Best Way to Follow-Up:

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