This is a general guide for developing and distributing MAAP-NS Practice Profiles. This process may change as the project evolves in partnership with the NSHA.

1. ☐ **Schedule team brainstorm meeting.**
   In advance, decide with EM the theme of the Profile. Ask the analyst to collate interesting, relevant, and significant study results related to the theme. Use the meeting to narrow down which data to present. Brainstorm related survey questions. Several iterations may be required to identify interesting, relevant, and significant findings.

2. ☐ **Collate draft materials.**
   Draft the questionnaire – search for previously tested items and include where possible. Ask the analyst to compile the relevant findings (tables or simple graphs/plots).

3. ☐ **Schedule meeting with graphic designer.**
   Present the data to the graphic designer and discuss. The designer plays a major role in shaping the data into a coherent story. After this meeting, the graphic designer will produce an initial draft of Practice Profile template and questionnaire.

4. ☐ **Iterative internal review of templates.**
   Continue review cycles over email until the internal team is satisfied with the templates.

5. ☐ **External review of templates.**
   Share the templates with the MAAP-NS Provider Panel and with the NSHA team (Deidre Taylor, Tara Sampalli, Shawna Chennell). Provide feedback to graphic designer for revisions. May require iteration.

6. ☐ **Graphic designer produces final draft of templates.**

7. ☐ **Submit final drafts of templates to REB for approval.**
   Submit final documents to Reb as an amendment. Approval can take up to a week; steps 8-11 can proceed without the approval letter but the letter must be in place for the Profiles are mailed out. Work with graphic designer *and printing company, if necessary) to complete any revisions required by REB.

8. ☐ **Prepare data tables.**
   Ask the analyst to prepare the data tables that will go to the printing company. This includes a data file with names and address that will be used for the envelops and a second data files with the profile data (both files linked by a common study index number). This step can begin before REB approval.

9. ☐ **Send documents to printing company & request proofs.**
   Send Practice Profile template, questionnaire, and data tables sent to Russell House Printing (direct mail marketing company). The printing company will merge the data with the templates. Ask them to send batches of proofs to be reviewed for quality.

10. ☐ **Schedule research assistant for quality checks.**
    Based on the timeline provided the printing company, schedule the research assistant (Mark Akbari) via her manager (Tara Sampalli). The research assistant much complete the quality checks in the Department of Family Medicine offices. Coordinate with Barb to ensure there is a workspace available on the day(s) s/he will come in.

11. ☐ **Supervise quality checks.**
Prepare a checklist template of the data elements (see past ones in the drive) to help the research assistant perform the quality checks. If there are any issues, work with Russel House to resolve, and then perform a second quality check. Repeat until no errors are found.

12. ☐ **Printing company prints and mails Practice Profiles!**
<u>REB approval must be in place and the live proofs must be error free</u>. Give the printing company the green light to mail the individualized Practice Profile packages.

13. ☐ **Receive and file returned surveys.**
Surveys will arrive in the department fax machine. File securely. Check for participants who wish to be removed from the project and communicate to the analyst to remove them from future mail lists. The analyst typically manages the receipt and filing of incoming surveys and of maintaining the lists.

14. ☐ **Send reminder to non-responders.**
Only if approved by the NSHA, send a reminder mailout to non-responders approximately one month after original mailout (or another time as decided by EM). Prepare cover letter text and send to graphic designer to be put into a creative file. Send data file of non-responders (addresses) with the cover letter to the printing company for mail out. No data checks are required because there is no personalized information.

15. ☐ **Schedule research assistant for data entry.**
When there are no longer surveys being returned and when there is a critical mass of returned surveys, schedule the research assistant (Mark Akbari) via her manager (Tara Sampalli). The research assistant much complete the data entry in the Department of Family Medicine offices. Coordinate with Barb to ensure there is a workspace available on the day(s) s/he will come in.

16. ☐ **Supervise data entry.**
Ask analyst to prepare a data entry excel sheet. Orient research assistant to the questionnaire and have him/her enter the data. Have him/her flag any illegible text for review by the study team. Survey data are entered into database by NSHA research assistant at Dalhousie offices.

17. ☐ **Survey data are analyzed by Dalhousie analyst.**
Ensure future mailing lists are updated based on responses.