

Project ECHO® (Extension for Community Healthcare Outcomes)

## Project ECHO Replication – Steps for Implementation

### Getting Started – Approximately 2 months

1. **Attend Introduction Event** – Free monthly videoconference event via Zoom. Find schedule and register at <http://echo.unm.edu/start-an-echo/orientation-events/>
2. **Attend Orientation Event** – Free monthly event in Albuquerque, NM, USA. Please register at <http://echo.unm.edu/start-an-echo/orientation-events/>
3. **Sign and Return Statement of Collaboration for Replicating Partners** – This is a “front-end” document that outlines the roles and responsibilities between Project ECHO and replicating partner organizations. Typically this is signed by the replicating partner program director or university leadership.
4. **Revise, Sign and Return Project ECHO Terms of Use Agreement** – This is a legal contract which serves to protect Project ECHO’s Intellectual Property. This needs to be reviewed, revised as necessary, finalized in collaboration with Project ECHO and signed by legal counsel of both the replicating partner and Project ECHO.
5. **Register for iECHO** – Anyone interested in replicating Project ECHO should **participate in a number of different teleECHO™ disease clinics**. The best way to do that is to **register with our online partner database, iECHO**. Here is the link: <http://echo.unm.edu/providers-partners/index.html>.
6. **Build Support Within Your Organization** – It is important to build support for the ECHO mission and model within your organization, and among legislative, funding and government stakeholders. We suggest you share with them the clinical journal articles on ECHO outcomes, the TEDxABQ talk and the NYT blog article, all found easily on our website: <http://echo.unm.edu/>.
7. **Attend Immersion Training** – This is a 3-day hands-on training in Albuquerque covering all the key areas of launching and managing teleECHO clinics: community provider recruitment, curriculum development, budget requirements, IT resources and architecture, evaluation and research tools and approaches, teleECHO clinic management, hub team development, etc. Additional training is available online or through synchronous virtual guidance by our ECHO training and replication teams. Find schedule and register at <http://echo.unm.edu/start-an-echo/orientation-events/>

### Move to Action – Approximately 2-3 months

1. **Assess:**
  - a. Gaps in care and community needs. Look for areas where the waiting list is very long, and community providers can make a difference.
  - b. Choose your disease or problem target area. It is important to be thoughtful about the ECHO topic:
    - What is the availability of “Hub” team members/experts (these are the multidisciplinary disease specialists that facilitate the teleECHO clinics). You want to choose those that are natural teachers and leaders. They **MUST** be willing to “demonopolize” their knowledge and mentor primary care providers.
    - Focus on the interests of community clinicians/“Spoke” champions.
    - Are you seeking a topic that is more or less protocol-driven?
    - Are there external motivators driving participation, such as highly toxic treatments, Drug Enforcement Administration (DEA) certification requirements, etc. There are various external factors that can motivate community clinicians.
    - How quickly do you need to show uptake and impact? Some diseases will find more traction than others.

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- Think about a topic that is not too broad nor too narrow. Successful ECHO topics are broad enough to include a broad range of subtopics, and cannot be mastered quickly, and encourage ongoing participation for months or years.
- c. Seek potential partners and organizational resources: what does your Academic Medical Center (AMC) or organization have that outlying communities do not? What other organizations have expertise you can tap? Where are the natural network partners and linkages?

### 2. Identify:

- a. Funding/Revenue Sources. Make your budget. Identify gaps.
- b. Program objectives and ways to measure success in meeting those objectives. What is your evaluation strategy?
- c. Assemble your staff team: The content experts will need assistance from a small team of people to run the ECHO sessions, send emails, and run the program. Your recommended Project ECHO program staff:
  - IT user support facilitates telecommunications between Hub & Spokes (.5 time).
  - Administrative/coordinator organizes didactic, case presentations, reportables, CME (.5 time).
  - Nurse/manager oversees clinic and public health information, collects reportable information, and monitors patient safety (.5 time).
- d. Interdisciplinary Hub team members with the following qualities: multiple perspectives, respectful of primary care teams, co-management & collaboration, training and mentoring mentality.
- e. Roles of Interdisciplinary Hub team members, such as:
  - Physician Specialist(s)
  - Pharmacist
  - Social Worker
  - Nurse Specialist
  - Psychologist
  - Others
- f. Curriculum for didactic presentations. Will this be unique to your program or are there other ECHO programs that may have or use similar materials? Check the ECHO replication resource library.
- g. IT structure and support (teleECHO architecture for Hub, telecommunications equipment for Spokes, software and IT support):
  - Zoom or other teleconferencing system (Hub)
  - Large Screen Display (Hub)
  - High Definition Camera (Hub)
  - Good microphone (Hub)
  - iECHO Software (free)
  - Microphone/Headset (Spokes)
  - Small Video Camera or PC Camera (Spokes)
- h. Community resources.

### 3. Develop:

- i. Incentives for participation:
  - Continuing Medical Education (CME)/Continuing Education (CE)/ Continuing Education Unit (CEU) credit for every hour of participation
  - Special credentialing programs or certifications

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- Enhanced knowledge and skills to serve as local expert in conditions common to primary care
  - National exposure
  - Mini-residencies
  - Research collaboration – potential for “big data”
- j. Community champions for Spokes: this recruitment process generally requires traveling to outlying communities and clinics and giving presentations or Grand Rounds on a disease topic and how the ECHO model will be used to address it. This is typically followed by a one-day on-site gathering to:
- Build relationships
  - Provide base-line clinical training if necessary
  - Discuss and design curriculum and scheduling for teleECHO clinic
  - Load any software, if necessary
  - Train in iECHO
  - Conduct a mock-clinic and practice TeleECHO clinic facilitation
- k. Program evaluation strategies and tracking tools

### **Prepare to Launch – Approximately 1 month**

- 1. Develop standardized forms and processes for managing teleECHO clinics and patient cases**
- 2. Have ECHO IT team create iECHO and ECHO Health “instances” for your organization** – These are the confidential, HIPAA compliant tools used to manage and report outcomes for teleECHO clinics (iECHO) and to facilitate patient case presentations, management and outcomes evaluation (ECHO Health). We will create your own data archive on our server, and make sure that all your hub and spoke staff and providers know how to use it.
- 3. Practice teleECHO™ clinics** – Do 1-3 “dry runs” to work out problems with IT and connectivity, clinic protocols, videoconferencing etiquette, etc.