

# ECHO Participant Guide

*Welcome to the ECHO*

“ Providing the Right Care,  
at the Right Place, at the Right Time ”





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# Overview

## Sponsorship

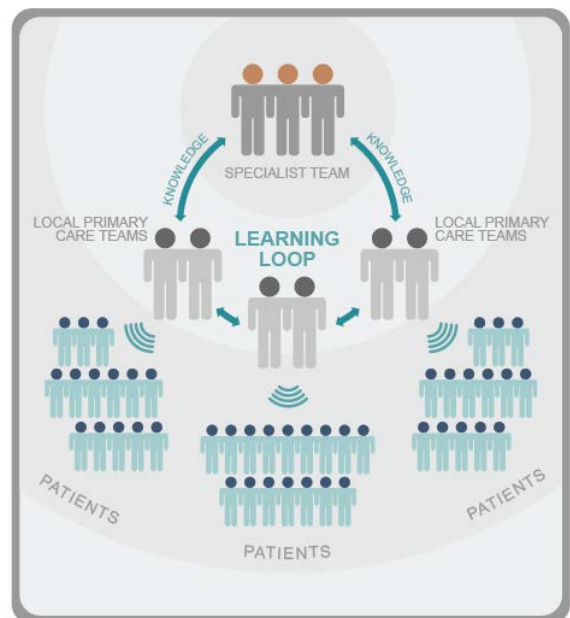
The LGBTQ+ ECHO TeleECHO™ Clinic hosted by the IU ECHO Center at the Richard M. Fairbanks School of Public Health at IUPUI has been made possible by funding from the [IU Grand Challenges for Addiction](#). The Center is supported by a partnership between the Richard M. Fairbanks School of Public Health at IUPUI, the Indiana University School of Medicine (IUSM), IUSM Division for Continuing Medical Education, IU-Health, and Project ECHO® at the University of New Mexico. **Participation is free and is open to all healthcare providers in the state of Indiana.**

## What is Project ECHO?

[Project ECHO](#) (Extension for Community Healthcare Outcomes) is a guided-practice model that aims to increase workforce capacity by sharing knowledge. Specialists at the “hub” site meet regularly with primary care providers in local communities via videoconferencing to train primary care providers in the delivery of specialty care services.

The ECHO model™, developed at the University of New Mexico Health Sciences Center, does not provide care directly to patients. Instead, it provides front-line clinicians with the knowledge and support they need to manage patients with complex conditions in the patients’ own communities. This dramatically increases access to specialty treatment, particularly in rural and underserved areas.

Since the start of Project ECHO in 2003, the model has greatly expanded and has been implemented by over 200 partners – both in the U.S. and internationally – covering more than 100 complex conditions and problems.



## The IU ECHO Center at the Richard M. Fairbanks School of Public Health at IUPUI

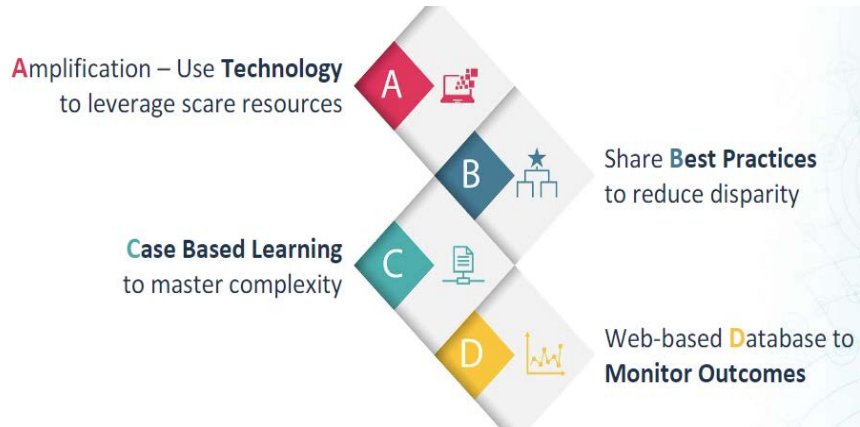
The IU ECHO Center is an initiative of the [Center for Public Health Practice \(CPHP\)](#) at the Richard M. Fairbanks School of Public Health. Established in 2014 and located on the IUPUI campus in Indianapolis, the CPHP’s mission is to support excellence in public health practice in communities to afford people the opportunity for health where they live, work, study, play, and pray. The Center for Public Health Practice helps practitioners by increasing local public health value in Indiana, providing technical assistance to local health departments around community-identified public health needs, and enhancing workforce capacity through authentic, community-centered learning opportunities.

The CPHP is pleased to officially partner with Project ECHO to improve care for complex conditions in Indiana and across the nation.

## Core Principles of Project ECHO

The ECHO model develops knowledge and capacity among community clinicians through ongoing telementoring and education. Its core principles are:

- A. Use technology to leverage scarce resources
- B. Share “best practices” to reduce disparities
- C. Use case-based learning to master complexity
- D. Monitor outcomes using a web-based database

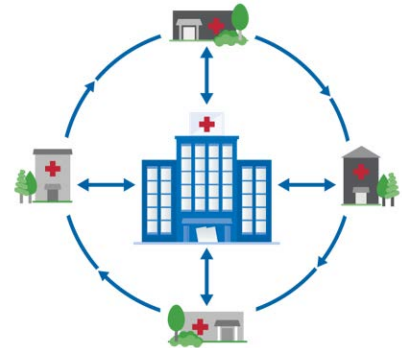


## How Does an ECHO Clinic Work?

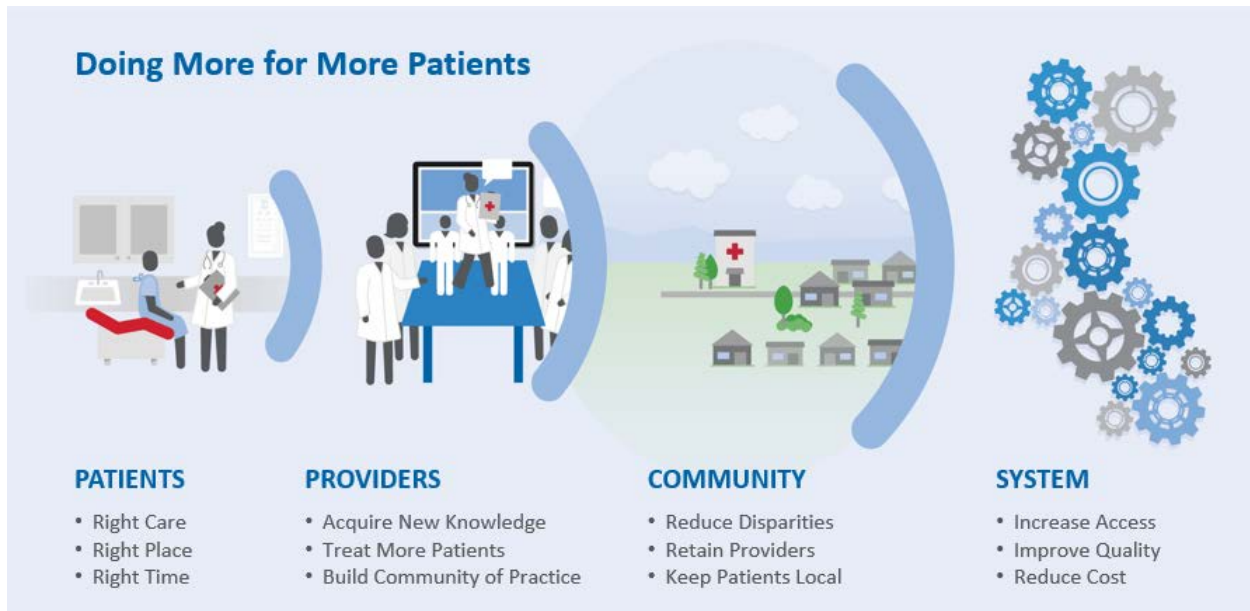
A teleECHO clinic is essentially virtual chart rounds. Primary care providers from multiple locations connect at regularly scheduled times with a specialist or team of specialists through videoconferencing. During teleECHO clinics, providers present de-identified patient cases to specialists or expert teams who then mentor the providers as they learn to manage patients with complex conditions. These case-based discussions are supplemented with short didactic presentations to improve content knowledge and share evidence-based practices.

As a participating healthcare provider in the IU ECHO Center program, you can:

- Present and discuss your challenging cases
- Enhance your ability to extend specialty care to your patients
- Reduce your patients’ travel time and wait time for specialty care



All levels of Indiana providers are welcome to participate in teleECHO clinics at no cost. Participants may include, but are not limited to physicians, physician assistants, nurse practitioners, registered nurses, psychiatrists, psychologists, social workers, community health workers, pharmacists, and emergency medical technicians.



ECHO participation benefits Indiana healthcare providers and institutions by:

- Enabling providers to practice at the top of their licenses, confidently treating patients with common complex conditions
- Allowing patients to stay in their local communities and receive treatment from their primary care providers
- Empowering primary care providers to acquire new skills and competencies
- Increasing professional satisfaction as rural providers become part of a community of practice and learning. This allows providers to be more productive and often motivates them to stay in rural communities longer.

### LGBTQ+ TeleECHO Clinics: Empowering Primary Care Professionals

Many of us recognize the diversity of sexual and gender identity of our communities, and we are seeking ways to support that diversity among our patients. The need for affirming and knowledgeable care of sexual and gender minority patients is clear: one most common barriers to care reported by sexual and gender minority people is absence of knowledgeable and skilled providers. In fact, medical school, residency, and fellowship training has long underemphasized the importance of gender identity and sexuality in our patients' lives and health.

With the goal of improving your knowledge, skills and comfort with sexual and gender minorities, we invite you and your teams to participate in the **LGBTQ+ ECHO Clinic**. We are pleased to announce the launch of this new program through the IU ECHO Center at the Richard M. Fairbanks School of Public Health in partnership with clinicians from Eskenazi Health, IU Health, and the IU School of Medicine aimed to increase health and alleviate health disparities affecting sexual and gender minorities in our state.



## Structure of a Typical teleECHO Clinic

- TeleECHO clinic sessions take place via real-time, interactive videoconferencing, using a PC/Mac, laptop, tablet, or smart phone equipped with a webcam, and a versatile, user-friendly, HIPAA- compliant, cloud-based software application called Zoom. Zoom is available at no cost to participants.
- The expert team will include specialists in LGBTQ care from the Eskenazi Transgender Health and Wellness Program, the Riley Gender Health Program, the IU School of Medicine.
- All members of the medical staff are encouraged to participate on a regular basis throughout the course of the program including physicians, mental health providers, physician assistants, advanced practice nurses, nurses, case managers, social workers, etc.
- **LGBTQ+ ECHO teleclinics are held on every second and fourth Wednesday, from 2:30 PM – 4:00 PM ET.**
- Each session begins with participant introductions, followed by a brief didactic presentation with Q&A on a topic related to the care of patients who identify as a sexual minority.
- Each ECHO clinic includes case-based discussion to ensure mastery of the content and skills. Participating providers spend approximately five minutes presenting a de-identified case for a patient they are currently seeing. The cohort and hub team will then engage in thorough discussion of how to address each case including treatment plans and options for social services. In order to protect patient confidentiality, PHI SHOULD NEVER BE USED DURING ECHO CLINICS. Instead, an assigned, confidential ECHO ID# is used to identify and refer to a patient. Pertinent medical information for each patient is entered by the provider to a REDCap [Case Form](#). The hub team will generate a case presentation page which is screen-shared during the ECHO clinic. All participants are encouraged to contribute actively to the case discussion.
- Recommendations are summarized verbally at the conclusion of each case presentation, and forwarded in writing to the healthcare provider whose case was discussed.
- Sessions for the Indiana LGBTQ+ ECHO Clinic begin on September 12, 2018, and run through September 2019.





## Continuing Medical Education Credits

No cost CME will be provided to all members for each clinic they attend. This activity has been approved for *AMA PRA Category 1.5 Credit(s)*<sup>™</sup> by Indiana University School of Medicine. For each session attended, providers will receive 1.5 hour of CME credit. In 2018, 25 hours of credit will be available. Completion of a short post-session evaluation is required following each clinic.



## Curriculum

The didactic curriculum for the session in this program were developed by the hub team using guidance from the inaugural LGBTQ+ ECHO at Fenway Health in Boston, Massachusetts. Sample topics include primary care, mental health, surgical care, hormone therapies, etc.

Participants will be able to view the PowerPoint slides on screen during the didactic presentation. Additionally, the ECHO Center will maintain an online resource library using Box, a no-cost, cloud storage and collaboration system. All didactic presentations, clinic recordings, and other helpful resources will be housed in the LGBTQ+ Box file. Instructions for how to create a Box account as listed in the Appendix of this guide.

*\* Please note that teleECHO clinics will be recorded for educational and quality improvement purposes. All participants are required to complete the Media Release form included in this guide. By participating in a clinic session, you are consenting to be recorded.*

## Evaluation Process

It is critically important for us to evaluate the effectiveness of our curriculum and program; thus, we ask ECHO participants complete a short pre- and post-skills assessment survey before and after completion of the series as well as periodic program evaluations throughout the year.

# Case Presentations

## What Cases Should I Present?

You do not need to present a case during every session in order to participate in the ECHO clinic; however, case-based discussions are a key component in the Project ECHO model and critically important for knowledge building and sharing. Therefore, it is required that each provider present at minimum three cases per year. We welcome cases that involve common clinical scenarios related to LGBTQ+ care as well as difficult, complex, or challenging presentations and patient management scenarios.

## What Information Should Be Included in a Case Presentation?

- Providers will enter patient data on the [Case Form](#) via an online survey tool called REDCap. The form will solicit demographic and relevant clinical information about the patient, including medical history, physical exam findings, and laboratory/imaging test results. The form includes a section for listing the main questions you have concerning the case.

- It is absolutely critical to preserve patient confidentiality at all times during case presentations. NO Identifiable Information should BE MENTIONED OR SHOWN DURING CASE PRESENTATIONS. In addition, please be aware that presenting certain information, even if deidentified, may be enough to identify individuals, particularly within small social circles or rural communities. Please do not discuss case presentations outside of ECHO sessions except when clinically necessary.
- You may not have all the information requested on the Case Presentation Form, but please include as much information as you can. This will help the HCV ECHO participants address your concerns and questions.



### How to Present a Case

- Email the Program Coordinator and submit a case via the [REDCap link](#).
- An ECHO ID# will be assigned to your case, and this ID#, as well as the date of your scheduled case presentation, will be confirmed with you via email.
- During the teleECHO session, the Facilitator will call on you to present your case. The Program Coordinator will scroll through your case presentation page on screen as you present your case. All videoconferencing participants will be able to see the de-identified portion of the form. Please verbally summarize your case in five minutes' time or less.
- The Facilitator will then promote discussion among all participants, starting with clarifying questions for the case presenter. At the conclusion of the discussion, the Facilitator will summarize recommendations from all participants.
- UNM's Project ECHO has created the following short videos on The Correct and Incorrect Ways to Conduct an ECHO Patient Presentation. Please take a few minutes to view these.



- [The Correct Way to Conduct an ECHO Patient Presentation:](#)
- [The Incorrect Way to Conduct an ECHO Patient Presentation:](#)





## Logistics

### How Do I Get Zoom?

- You may download the free version of the Zoom client for PC or Mac by [clicking here](#) and selecting “Zoom Client for Meetings”.
- If your computer does not have a built-in video camera and microphone, a simple USB webcam, such as a Logitech HD Pro Webcam C920, will fulfill this purpose if one is available. **A camera is not required for participation, however it is strongly encouraged to build an engaging community of practice.**
- You may also consider the use of a headset or headphones instead of your device’s speakers and/or microphone. A headset may improve your overall audio experience, particularly if there are background noises in your local environment.
- Instructions for downloading and the basic operation of Zoom are also included in the appendix. To avoid delays and other technical issues on the day of the clinic session, we advise that you attend one of the IT Office Hours prior to beginning ECHO clinics or schedule a time to perform a connectivity test with our ECHO IT Specialists.

### Connecting to a TeleECHO Clinic Session

- You will regularly receive email notifications from the ECHO Program Coordinator prior to the upcoming clinic announcing the didactic topic. The email will include a link to join the ECHO clinic via Zoom. Additionally, the Zoom link is always included in the calendar invite.
- On the day of the clinic, please join the session a few minutes prior to the scheduled start time. This will give you sufficient time to confirm you have a stable Internet connection, test your audio and video, and get comfortably situated at your site location. The hub team will open the Zoom meeting room approximately 15-20 minutes prior to the clinic start time.

### How Can I Receive Technical Support?

For questions about Zoom or preparing for a teleECHO clinic session, or to schedule a time for testing, please contact our ECHO Program Coordinator who will connect you with our IT support.

## IU ECHO Center Contact Information

- Dr. Joan Duwve, ECHO Director, [jduwve@iu.edu](mailto:jduwve@iu.edu), 317-278-0754
- Andrea Janota, ECHO Program Coordinator, [ajanota@iu.edu](mailto:ajanota@iu.edu), 317-274-178



## Appendix

# RESOURCE INFORMATION AND MATERIALS

1. Zoom Instructions and Videoconferencing Etiquette
2. Agreement Letter\*
3. Confidentiality Statement\*
4. HIPAA Identifiers Sheet (Project ECHO)
5. Release Form\*
6. ECHO FAQs
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9. ECHO Terms Glossary
10. Fairbanks School of Public Health & Project ECHO Logo

*\*Requires signature and return*



*\* With regard to the general format and partial content of this guide, we wish to acknowledge the University of Rochester Project ECHO, its CEI STD TeleECHO Welcome Packet, as well as the Arizona Telemedicine Program and its Rheumatology TeleECHO Clinic Participant Welcome Guide.*