
**WEST VIRGINIA
CLINICAL & TRANSLATIONAL SCIENCE INSTITUTE**

**(5.4) Project ECHO
Session Preparation & Facilitation**

Overview

The West Virginia Project ECHO program of the West Virginia Clinical and Translational Science Institute (WVCTSI) involves multiple project areas at any given time, each requiring detailed planning and preparation. Clear delineation of Project ECHO coordinator roles and duties pertaining to each ECHO session will facilitate increased efficiency and effectiveness in completing necessary tasks associated with each project area.

Purpose

Biweekly sessions are conducted for each of the WV Project ECHO Program project areas. This policy and the following procedures detail the responsibilities of Project ECHO coordinators in preparation for these sessions along with facilitation management guidelines.

Scope

This document outlines the necessary steps for session preparation and facilitation for West Virginia Project ECHO sessions, as coordinated by the program's coordinators.

Definitions

ECHO – Extension for Community Healthcare Outcomes

Hub – Group of specialists in a specific area (such as Hepatitis C) that review and provide recommendations for all ECHO case presentations.

Spoke - Health care organizations and primary care providers that present ECHO case presentations and receive educational materials from the Hub.

Oracle – Online database and platform for ECHO case presentations

Zoom – Web conferencing platform used for Project ECHO

Policy

The Project ECHO coordinators will meet monthly to discuss the upcoming sessions. Coordinators will divide planning and facilitation of sessions on a rotating schedule to accommodate scheduling needs for the Community Engagement and Outreach Core, WVCTSI, and partners.

Once the sessions are assigned, the coordinator will be responsible for all communication to hub and spoke members and will plan (and send) reminders and recap emails to appropriately highlight the case, didactic presentations, and discussions conducted in each session.

Procedures

1. Once per month, ECHO coordinators will meet to plan the facilitation schedule.
2. The assigned ECHO coordinator will send a reminder email at least one week prior to session date to both the Hub and Spoke members associated with the particular ECHO Project.
3. Assigned coordinator will contact designated speaker and confirm their presentation and attendance at the designated session. The coordinator will request that presentation materials if applicable be provided at least 1 day in advance of the session date.
4. ECHO coordinator(s) will be responsible for all cases scheduled for presentation. This is done by reviewing and pulling the cases from the Oracle database.
5. ECHO coordinator(s) will facilitate their designated ECHO sessions. Responsibilities of the assigned coordinator include setting up and opening the Zoom video conference connection, taking attendance, documenting case notes, moderating discussion, and ensuring time management.
6. Assigned coordinator will send recap email within 1 day after the session.
7. Assigned coordinator will upload session recording to YouTube.
8. Assigned coordinator will log session attendance and session information into iECHO and iLab,
9. Assigned coordinator will compile all required CME information and submit to West Virginia University Health Sciences Office of Continuing Education within 1 day of session.

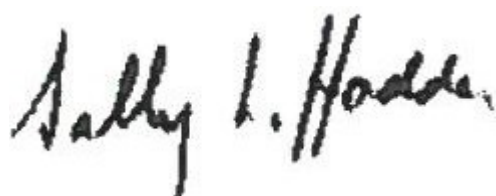
Roles and Responsibilities

It is the responsibility of the ECHO coordinators to meet monthly to discuss the upcoming month's sessions. Each coordinator should understand the procedures in place and the tasks required from each designated project.

Approval and Authority to Proceed

I approve the project as described above, and authorize to proceed.

Name	Title	Date
Sally L. Hodder, MD	Director, West Virginia Clinical and Translational Science Institute	



Approved By

11/01/2020
Date