

## Project ECHO® (Extension for Community Healthcare Outcomes)

### Working Document - Virtual ECHO Planning Guide: Checklist for Remotely Run ECHO Sessions

#### Pre-Session:

##### Logistics:

1. Assign and define team member roles and responsibilities:
  - a. **ECHO IT contact:** who will communicate with ECHO IT via Slack during session.
  - b. **Session co-hosts and back-up support:** who will step in if there are technical issues or if the session drops.
    - i. Add co-hosts and back-up support to MailChimp announcements for said program.
  - c. **Screen Sharer:** who will be sharing and navigating didactic presentation and case forms
  - d. **Chat monitor:**
  - e. **Attendance-taker:**
  - f. **Muter:**
  - g. **Scribe (notes and recommendations):**
2. Consider reaching out to colleagues to find a buddy to support you during the session (attendance, sharing screen, renaming people etc.)
3. Share cell phone numbers with Hub members and other support staff.
4. Conduct mock/dry runs with your hub team as able to test the remote meeting facilitation.

##### Technology

1. ECHO IT support roles remain the same.
2. Ensure that Slack is downloaded on your phone.
3. Save ECHO IT Help Line to your phone and shared with other team members.
4. Create a Box folder and share with hub team for files that are actively needed.
  - a. Ensure non-PHI session files for upcoming sessions only are saved to Box for all team members to access.
5. Plan for poor Pulse connection.

##### Participant Communication

1. Communicate with spokes that case forms can no longer be accepted via fax and identify an alternate method for submission (include verbiage in red in MailChimp by link to case form).
2. Notify participants that all TeleECHO sessions are currently being held remotely, ECHO staff are remote in different locations, and to be patient as the ECHO Institute works through the transition.

##### Home Environment

1. Test that the bandwidth of your home network is sufficient for videoconferencing. Alternatively, disable video or use phone audio as back up. (Note: If you plan on calling into a session someone else on the team will need to take attendance, monitor chat and share/navigate didactic and case forms.)
2. Identify a location in your home with reliable connection (i.e. near the modem) that is free of noise and distraction.
  - a. Examine the background and remove anything that may be inappropriate or overly personal.
  - b. Keep pets, children, and other house members in a separate room, if at all possible.
3. Test the audio quality in your selected location. Use headphones with a microphone if possible and always speak into the microphone. You can use phone audio with video if you are worried about the bandwidth for connection.

## In-Session:

1. ECHO Staff log on at least 15 minutes early. Encourage presenters and hub team to sign on at least 10 minutes before start time.

## Contingency Plans and Troubleshooting

Discuss a plan with your team to address the following scenarios on the fly:

1. Facilitators not showing up (make sure to get cell phone numbers for hub team and presenters)
2. Zoom goes down (please share ideas on Slack and Box, it would be great to document this!)
3. Internet goes down (please share ideas on Slack and Box, it would be great to document this!)
4. Hub members with low-tech access/comfort (please share ideas on Slack and Box, it would be great to document this!)
5. Schedule modifications or cancellations due to availability of hub/directors, low attendance, logistics, etc.
6. Draft a MailChimp program cancellation message to go out to participants in case of a UNM shut-down
  - a. Suggested language: "ECHO Programs are on hiatus due to COVID-19 UNM closures. We will not hold \_\_\_\_\_ teleECHO session until further notice. Thank you for your understanding and patience, we will keep you updated."