Project ECHO® (Extension for Community Healthcare Outcomes)

Immersion Learner's Guide

## 1 | Before Immersion

What is Immersion?
Immersion is a 2.5 day virtual training via Zoom video conferencing that is geared to support organizations in designing and launching TeleECHO programs. During these learning sessions, you will have access to the ECHO Institute team and global experts from the ECHO network.

Who should attend Immersion?
- Those who are familiar with Project ECHO and the ECHO Model (see 30-minute Introduction Video and Overview PowerPoint), and whose organizations are interested in designing and launching ECHO programs.
- We recommend that two members of your team (e.g. facilitators, content experts, program support staff) attend the full training before launching your TeleECHO program. To manage capacity, we have a three person limit per partnering organization for Immersion sessions.
- Members of organizations that are already running TeleECHO programs that are newly hired and / or just starting to work on ECHO programs within their organizations.

How should I prepare for Immersion?
- Gain familiarity with the ECHO Model.
- Attend an ECHO session to observe the All Teach, All Learn principle. Browse our website to sign up to observe ECHO Institute TeleECHO Programs on a variety of topics.
- Refer to the Planning Worksheet prior to attending Immersion to help think through what is required to start TeleECHO programs.
- Review this Learner's Guide. Depending on which SuperHub will ultimately support your ECHO, the specific terminology, links, and steps outlined in this document may vary. You will receive clarifying information during your Immersion with the ECHO Institute, ECHO India, or other SuperHub.
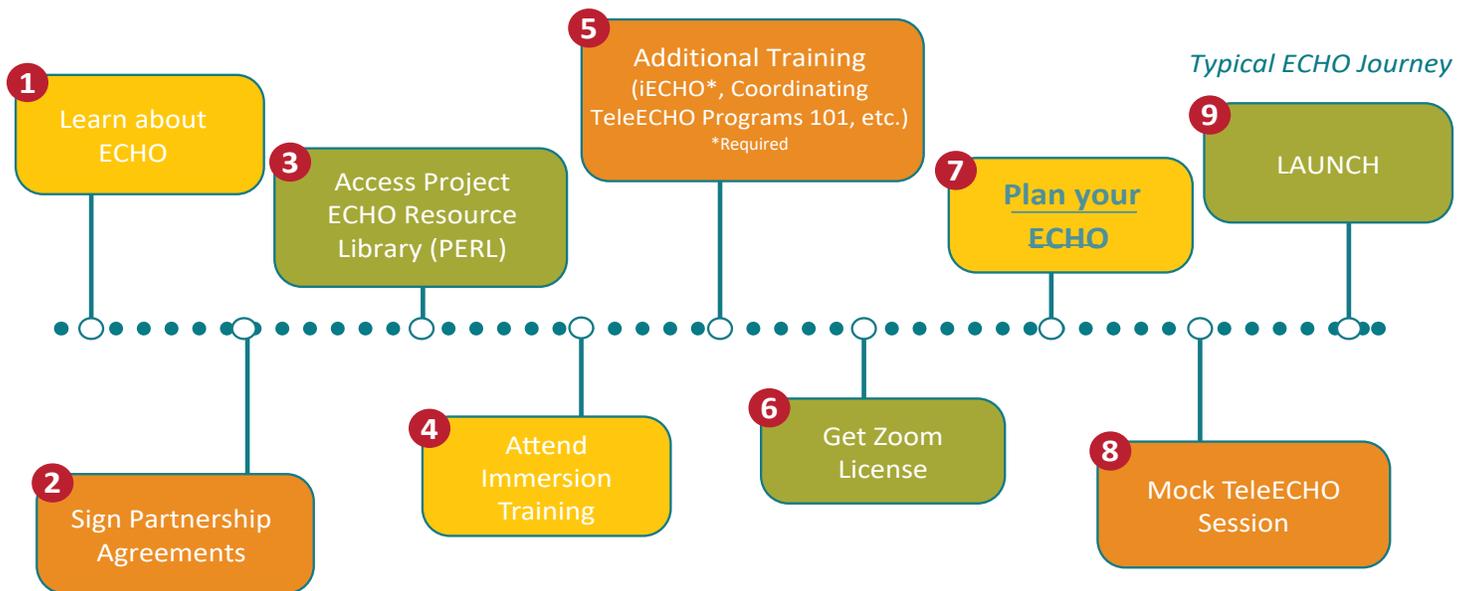

The ECHO Model
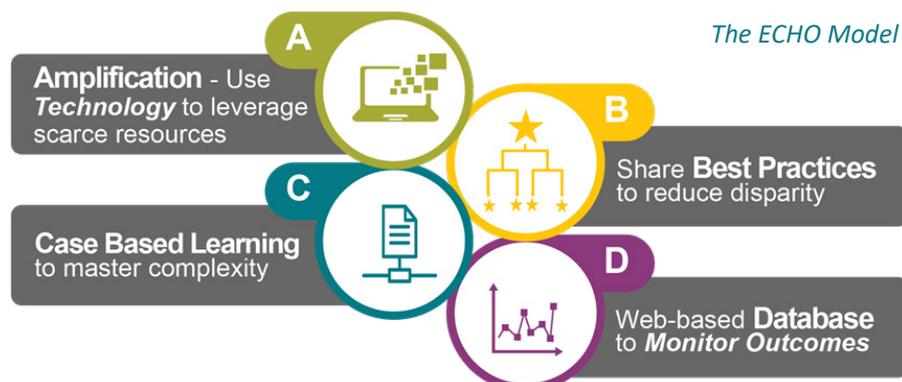
What will I learn?

The learning objective of Immersion training is **to prepare individuals and/or organizations to launch and maintain TeleECHO programs**. This learning experience will introduce a wide-ranging network of ECHO partners, global experts, and ECHO Institute staff. Topics include:

- Planning your TeleECHO program
- The roles needed to support TeleECHO programs
- An overview of the typical ECHO journey and the steps you'll take to launch your TeleECHO program

Typical ECHO Journey

1 Learn about ECHO

2 Sign Partnership Agreements

3 Access Project ECHO Resource Library (PERL)

4 Attend Immersion Training

5 Additional Training (iECHO*, Coordinating TeleECHO Programs 101, etc.) *Required

6 Get Zoom License

7 Plan your ECHO

8 Mock TeleECHO Session

9 LAUNCH

How should I expect to engage during Immersion?

Immersion takes place over 2.5 days in Zoom video conference. In order to best learn and connect with one another, we encourage you to be prepared to use audio, video and chat functions during the sessions. While these are full workdays of learning, there will be scheduled breaks throughout the agenda and a sense of comfortable community while we're together.

What materials are referenced during Immersion?

All session materials (slides, etc.) will be located in the Project ECHO Resource Library (PERL) in Box. Whether or not you have access to PERL, you might find the following resources useful to reference during the sessions:

- ECHO Glossary: Quick reference on terminology – e.g., what is a Hub, Spoke, Mock, or TeleECHO?

- A Beginner's Guide to the TeleECHO Session: An overview of the typical 'flow' for an ECHO session – e.g., what actually hap-pens during a TeleECHO session? It is a great recipe to follow as is and / or a good starting point to adapt to your specific context and needs.

- Strategic Planning Guiding Questions: A set of questions that prompt you to apply Immersion learning to your own program plans.

What is the "Hub Team" referenced during Immersion?

The "Hub Team" term captures the functions and roles that support TeleECHO programs. The ECHO Hub Team is responsible for developing and carrying out the vision of the TeleECHO program. During Immersion, you will learn more about the four roles and general functions that are essential to keeping your TeleECHO program running smoothly:

Hub Team Roles

TeleECHO Facilitator

- Welcome participants
- Review agenda for the session
- Lead introductions
- Facilitate patient case presentation(s) by the spoke

IT Support Staff

- Announce to participants at the beginning how to use key functions such as mute / unmute
- Provide IT support to hub team and spokes
- Monitor chat for technical questions

Program Support Staff

- Set up session and coordinate with IT support staff ahead of time
- Initial and wrap-up announcements
- Assist with facilitation as needed
- Monitor chat
- Take attendance
- Data entry in iECHO

Subject Matter Expert (SME)

- Member of the multidisciplinary specialty consultant team
- Ask clarifying questions and provide recommendations after spoke participation
- Highlight teachable moment
- Assist facilitator as needed

Frequently Asked Questions during Immersion

Topic	Question	Answer
Box / PERL	How do I access Box / PERL?	We offer access to the Project ECHO Resource Library (PERL) in Box.com once organizations sign their partnership documents.
Branding	What are the branding guidelines?	We will briefly go over Branding Guidelines during Immersion. A Project ECHO Logo Usage Guide is included in PERL.
Continuing Education Credits	Will the ECHO institute help my program apply for Continuing Education Credits?	Yes, we can offer assistance with Continuing Education / Continuing Medical Education (CME) Credits. After you have signed your partnership agreements and are planning the launch of your TeleECHO program, please contact ECHOCME@salud.unm.edu for more details.
Case Presentations	I have many questions about case presentations. Are there are any general best practices or rules to follow?	We will discuss case presentations and provide examples during Immersion. The only rule for case presentations is that there should be no Protected Health Information or Personal Identifiable Information shared. We recommend using a template that is easy to read and easy to use, but otherwise there are multiple ways to conduct case presentations depending on your topic and audience.
Evaluation	Where can I find more resources on evaluating my TeleECHO program?	Evaluation is an important topic that will be covered during Immersion sessions. Further evaluation resources can be found in PERL for you to explore after Immersion.
Funding	Where can I get more information about funding my TeleECHO program?	Funding is another important topic that we will address during Immersion. Information regarding funding your TeleECHO program can be found in PERL.
iECHO	Where can I get more information and training on iECHO, the tracking tool to help track and manage ECHO programs ?	Sign up to join us for an upcoming iECHO training session on our website.
IT / Technology Needs	Which equipment and software do you recommend we use in our TeleECHO program? Is there any training for our IT support staff?	A member of our IT staff will present on this topic during Immersion. In general, to run your program, you will need a stable internet, a video conferencing platform (we offer Zoom free of charge to our partners), and a laptop / computer with webcam and microphone. Contact ECHOIT@salud.unm.edu for any technical questions.
Planning a TeleECHO Session	I still have questions about planning my TeleECHO session. Who can I talk to including time allocation and other best practices?	Leverage the Account Reps team. They can be reached at ECHOAccountRep@salud.unm.edu and can guide you in setting up your initial sessions, attend a 'mock' session and/or your first session and provide valuable feedback. Learn from other TeleECHO programs through observation, or by researching in PERL. See more info under the next section After Immersion.

After Immersion

What do I need to do after Immersion?

Depending on where you are in the process of designing, launching and maintaining your program, you may need to take the following steps immediately following Immersion:

• Provide feedback on the Immersion experience – **required** evaluation form via email.

• Attend an iECHO Training session – **required** for at least one individual on your Hub team; sign-up for monthly occurrences via the ECHO website.

• Attend a Coordinating TeleECHO Programs 101 Training session – optional resource for Hub team members; sign-up for monthly occurrences via the ECHO website.

What are the next steps to design and launch my TeleECHO program?

Check out the ECHO Road Map for a quick overview as you plan to launch your program. As you move forward with more detailed program planning, also consider the generic timeline and steps outlined below:

Design and Launch Your TeleECHO Program: Timeline Example								
Tasks	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8 & Beyond
Team Planning Meetings	■	■	■	■	■	■	■	■
Identify your Hub Team	■							
Hub Team Members Attend Immersion		■						
Hub Team Members Attend Additional Trainings			■					
Review Box / PERL documents			■	■				
Curriculum Development			■	■				
Case Presentation Development				■				
Determine Research / Evaluation / IRB				■	■			
Apply for Continuing Education					■	■		
Develop Marketing Material				■	■	■		
Outreach: Recruit					■	■	■	
Hold Dry Run TeleECHO Session						■		
Debrief							■	
Official Launch of TeleECHO Program								■

What if I need more support?

The learning does not stop after Immersion! If you want to connect with experienced ECHO Hubs or network with other Immersion participants; if you'd like to have a follow-up chat with that one fantastic facilitator; or if you need specific support at various stages of your program's life cycle – the ECHO movement is here to support you. Reach out to the ECHO Institute staff any time so we can help continue to make connections to change the world.