**OCHIN PEP Utilization Request**

Please complete the below PEP Utilization Request in its entirety and submit to PEP@ochin.org. PEP Coordinators will respond within 5 business days.

|  |  |
| --- | --- |
| **Information Request** | **Response** |
| Contact information:* Your name
* Your organization
* E-mail
* Phone
* Name of your proposal/project
 |  |
| Proposed location of engagement opportunity (i.e. your office, OCHIN, remotely, electronic communication) |  |
| Have you engaged with the PEP before? If yes, please give a brief overview of the engagement interaction.  |  |
| What is your objective in engaging with the PEP? |  |
| At what phase of your proposal project do you plan to engage with the PEP? (i.e. proposal development, intervention planning, data collection, dissemination, etc.) |  |
| What is the time frame (please be as specific as possible) in which this engagement work needs to be completed?  |  |
| Are you wanting to recruit the entire PEP workgroup to participate or is there a specific number of participants you need?  |  |
| Is there specific criteria (i.e. medical condition/knowledge, education level, medical provider, MyChart member) that is needed from a PEP member in order to participate? |  |

**OCHIN PEP Engagement Opportunity Guide**

**Optimal Ways to Engage the PEP**

PEP members are available to meet in-person, remotely (i.e. WebEx/GoToMeeting), and through electronic participation.

If you would like to meet in-person or remotely with the PEP, we recommend scheduling a meeting during the lunch hour (you will need to provide a catered lunch for those attending in-person) or after work hours (you will need to provide a catered dinner for those attending in-person) during the work week. We understand these time periods may not be compatible with your team’s needs and other arrangements can be made as necessary.

If you do not need to meet with the PEP directly we can collaborate on an e-mail communication or online survey to engage the PEP.

**OCHIN PEP Coordinator Support and Study Team Responsibilities**

PEP Coordinators will be your main contacts throughout the engagement process and are able to lend support in various ways. Your study team will be responsible for:

* Creating content for the outreach activity (invitation content, proposal overview, discussion guide, interview or focus group guides, etc.)
* Submitting content to PEP Coordinators with ample time (dependent on activity, at least 5 business days) for review and revision prior to the outreach activities
* Managing all catering, budgeting, and invoicing

Details are outlined below:

|  |  |  |
| --- | --- | --- |
| **Task** | **OCHIN** | **Partner Organization** |
| Once a PEP Utilization Request has been submitted, PEP Coordinators will review the form. Once reviewed, PEP Coordinators will reach out to you to go over the details and determine a date, time, compensation, and location to engage the PEP. | X |  |
| Once a date and time have been finalized, an e-mail communication to the PEP must be drafted. Please be sure to include the following information:* A brief overview of your proposal/project
* What you hope to gain by utilizing the PEP
* Specific questions for the PEP and/or the type of feedback you are looking for
* Event logistics (location, time, date, etc.)
* Compensation and/or catering (if providing catering please ask for any dietary concerns)

Once done, please send to PEP@ochin.org for review.  |  | X |
| When the e-mail communication to the PEP is finalized, PEP Coordinators will send this to the PEP members directly. PEP Coordinators will collect the RSVPs from the PEP. Once the final day of registration has passed, PEP Coordinators will reach back out to you and confirm the number of attendees and any catering notes if applicable. | X |  |
| Submit all materials (slides, handouts, activities, etc.) for PEP engagement or consultation to PEP@ochin.org for PEP Coordinators to review no less than 5 business days before planned event.  |  | X |
| If you will be providing catering, please make and confirm all arrangements yourself and then please notify PEP Coordinators who the catering organization will be and the scheduled time of delivery. (*Please see additional support materials for catering guides*). |  | X |
| Please print the slides and any other materials for those attending in-person.  |  | X |
| PEP Coordinators will attend the engagement opportunity in-person/over the phone to provide support as needed and confirm attendance. | X |  |
| PEP Coordinators will e-mail you a final attendee count, both in person and/or remote, and the corresponding engagement compensation fee.  | X |  |
| Once you have received the e-mail from PEP Coordinators please be sure submit payment no later than two-weeks after the engagement opportunity. PEP Coordinators will then work with OCHIN’s Finance Department to pay PEP attendees directly. |  | X |
| PEP Coordinators will e-mail you 4-6 weeks after the event with a request to complete a survey regarding your PEP consultation. This survey is a critical tool we use to maintain accountability, demonstrate value, and keep PEP members engaged. We ask that you please complete this as soon as possible.  |  | X |

**Compensation Guidelines:**

Funded projects and partner organizations will typically be responsible for compensating all PEP member engagement/attendance funding engagement opportunities (catering, travel, etc.) as well as (*Please see table below for compensation rates*). After the engagement opportunity, PEP Coordinators will e-mail final engagement fee cost, which includes attendee participation count and any related reimbursement costs, to the partner organization with a request to submit payment to OCHIN within two-week’s time. PEP Coordinators will then work with OCHIN’s Finance Department to pay PEP attendees directly.

Typical PEP member compensation rates:

|  |  |
| --- | --- |
| **\*Time Frame** | **Compensation Amount** |
| 1 – 3 hours | $25 |
| 4 – 6 hours | $50 |
| 7 – 9 hours | $75 |
| 10 – 12 hours | $100 |
| 13 – 15+ hours | $150 |

We understand that the majority of proposals that are being developed will not have available funds to compensate PEP members for their participation. PEP Coordinators will determine if there are OCHIN funds available to support this request during the review phase.

**Additional Support Materials:**

PEP Coordinators are happy to provide the following pieces of support if requested:

* **OCHIN commuting and parking guides** – If this engagement opportunity will be taking place at OCHIN we can provide a Commuting Guide and Parking Instructions/Diagram. There are three Visitor Parking spaces at OCHIN that can be utilized on a first come, first served basis. Once those are being used all other guests will need to find off-site parking arrangements as the remaining parking lot spaces are reserved for OCHIN staff.
* **Catering** – We have several caterers that we work with, but some of the more cost effect and versatile ones are [Elephants Delicatessen](https://www.elephantsdeli.com/catering/) and [Cheryl’s on 12th](http://www.cherylson12th.com/catering). We are happy to pass on our catering e-mail template for Cheryl’s if that would be helpful.