



# LIFESTYLE COACH ECHO PARTICIPANT GUIDE



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**CASE-BASED LEARNING AND COMMUNITY OF PRACTICE  
TO SUPPORT LIFESTYLE COACHES DELIVERING THE  
NATIONAL DIABETES PREVENTION PROGRAM**

**2022**

# Lifestyle Coach ECHO Participant Guide



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# Lifestyle Coach ECHO Participant Guide



## OVERVIEW

### Sponsorship

The Lifestyle Coach ECHO (Extension for Community Healthcare Outcomes) has been made possible through a partnership between Well-Ahead Louisiana (Louisiana Department of Health) and Project ECHO® (University of New Mexico) and Diabetes Training and Technical Assistance Center (DTTAC) at Emory University. It is supported by a grant from the Centers for Disease Control and Prevention (CDC). Participation is free and is open to healthcare providers in the state of Louisiana.

### Project ECHO®

Project ECHO® is a lifelong learning and guided practice model that aims to revolutionize medical education and increase workforce capacity to provide best-practice specialty care and reduce health disparities. The ECHO model™ uses a hub-and-spoke knowledge-sharing approach, where expert teams at the “hub” lead virtual clinics with community providers—or the “spokes.” Through these virtual knowledge-sharing networks, primary care doctors, nurses, and other community participants receive training and telementoring to provide excellent specialty care to patients in their own communities.

The ECHO model™, developed at the University of New Mexico’s 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. It also helps ensure that all providers are up to date on the latest treatment and patient support options available. This dramatically increases access to high quality, specialty treatment, particularly in rural and underserved areas.

The ECHO model™ is highly replicable across geographies, cultures, and conditions, and has been successfully scaled to more than 70 specialties and 423 global hubs, with more than 250 hubs in the United States alone. For more information, please visit: <https://echo.unm.edu>.

### Well-Ahead Louisiana

Well-Ahead Louisiana is the chronic disease prevention and healthcare access arm of the state Department of Health. Well-Ahead connects communities to tools and resources that help improve the health of Louisiana’s residents where they live, work, learn, play and pray. For more information, visit [www.wellaheadla.com](http://www.wellaheadla.com).

### Core Principles of Project ECHO®

The ECHO model™ develops knowledge and capacity amongst community-based providers through:

- Using technology to leverage scarce resources
- Sharing best practices to reduce disparities
- Using case-based learning to master complexity
- Monitoring outcomes using a web-based database

### How Project ECHO® Works

Learners from multiple locations connect at regularly scheduled times with a team of specialists through videoconferencing. During ECHO sessions, spoke participants present de-identified patient cases to expert teams who mentor the learners 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. Each session includes at least one case presentation and one didactic presentation, and ample discussion.

As a participating healthcare provider in the Lifestyle Coach ECHO, you will be able to:

- Present and discuss your challenging cases
- Enhance your ability to support your diabetes prevention program participants

All lifestyle coaches in Louisiana are welcome to participate in ECHO sessions as “spokes” at no cost.

### Benefits for Partners

Benefits for coaches and organizations:

- Enables coaches to expand their knowledge and more confidently support program participants.
- Join a supportive network of your peers (or “community of practice”).
- Coaches become part of a community of practice and learning, increasing professional satisfaction, allowing them to be more productive, and motivating them to stay in rural communities longer.

### Structure of a Typical ECHO Session

- ECHO 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, cloud-based software application called Zoom. Zoom is available at no cost to participants. Appendix C contains instructions on how to download and use Zoom.
- Participants will include lifestyle coaches across Louisiana.
- Each session begins with introductions of all participants. Community coaches (spoke sites) then present pre-submitted cases for discussion by the entire group, using de-identified information only. **Use of Protected Health Information (PHI) is not permitted either verbally or in writing.** Instead, an assigned, confidential ECHO ID# is used to identify and refer to the program participant. A [Case Presentation Template](#) is used for entering pertinent information. All participants are encouraged to contribute actively to the case discussion. A [Case Presentation Sign-up Sheet](#) will be made available to all participants—all participants are encouraged to present at least one case during the course of the 12-month ECHO program.
- Recommendations are summarized verbally at the conclusion of a case presentation, transcribed, and forwarded in writing to the coach whose case was discussed.
- Following the case presentation and subsequent recommendations, there will be a formal didactic presentation presented by DTTAC on a scheduled topic related to the effective delivery and management of the National Diabetes Prevention Program (National DPP).
- Sessions for the Lifestyle Coach ECHO will be held on a monthly basis, on the second Wednesday of each month from 1:00 p.m.-2:30 p.m. CST, starting on January 12, 2022. The schedule, including didactic topic descriptions and presenters/facilitators is available [here](#) and included in Appendix E.

### Curriculum

The formal didactic curriculum for this program was developed by our hub expert team at DTTAC. Participants will be able to view the PowerPoint slides on screen during the didactic presentation. In addition, PDF copies of the PowerPoint and recordings of the presentations will be made available to participants whenever possible. Please note that the didactic portion of an ECHO session may be recorded for educational and quality improvement, however the case presentation portion of an ECHO session will never be recorded.

### Evaluation Process

It is critically important for us to evaluate the effectiveness of our curriculum and program; thus, we ask ECHO participants to complete a brief survey after each session.

In addition, upon registering for the Lifestyle Coach ECHO, we ask that every participant complete a pre- and post-assessment survey before and after completion of the series so that we can measure the overall impact. Results will help Well-Ahead to improve in future Lifestyle Coach ECHO programming. Additionally, any results shared and/or published will be de-identified.

# Lifestyle Coach ECHO Participant Guide



## CASE PRESENTATIONS

### What Cases Should I Present?

You do not need to present a case to participate in an ECHO session. However, the submission of cases for presentation and discussion is a key component in the Project ECHO model and critically important for knowledge building and sharing, and it is, therefore, strongly encouraged. We welcome cases that involve common clinical scenarios as well as difficult, complex, or challenging presentations.

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

- We will provide you with a Case Presentation Template, which will solicit demographic and relevant clinical information about the participant including medical history, social history, lifestyle information, vitals, screenings, and labs. The template includes a section for listing the main question(s) you have concerning the case. This is a fillable PDF that you can complete electronically. It can be found online on the Lifestyle Coach ECHO webpage: [www.wellaheadla.com/lifestyle-coach-echo](http://www.wellaheadla.com/lifestyle-coach-echo)
- It is absolutely critical to preserve participant confidentiality at all times during case presentations. **No HIPAA Identifiers may be mentioned or shown during case presentations.** In addition, no other information (such as, social history details) that might identify a participant residing in a small community may be mentioned. (See: Appendix D for a list of HIPAA Identifiers).
- Complete the Case Presentation Template with as much information as you can to help the hub specialists address your concerns/questions.

### How Do I Present a Case?

- Sign up for the date that you would like to present a case by entering your name and contact information in the [Lifestyle Coach ECHO Case Presentation Sign-up Sheet](#).
- Email the completed [Case Presentation Template](#) to the Lifestyle Coach ECHO Coordinator at [wellahead.projectecho@la.gov](mailto:wellahead.projectecho@la.gov) at least 11 days prior to your presentation date.
- 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 ECHO session, the session Facilitator will call on you to present your case. The Lifestyle Coach ECHO Coordinator at the hub site will display the Case Presentation Template on screen as you present your case. All videoconferencing participants will be able to see the template. Please verbally summarize your case in ten minutes' time or less.
- The Coordinator will then promote discussion among all participants, starting with clarifying questions for the case presenter, followed by recommendations. At the conclusion of the discussion, the Coordinator will summarize recommendations from all participants.
- Project ECHO® has created the following short videos on The Correct and Incorrect Ways to Conduct an ECHO Case Presentation. Please take a few minutes to view these.
  - *The Correct Way to Conduct an ECHO Patient Presentation:*  
<https://www.youtube.com/watch?v=IUKGkoevTso>
  - *The Incorrect Way to Conduct an ECHO Patient Presentation:*  
<https://www.youtube.com/watch?v=CghbvJf-JeDw>

# Lifestyle Coach ECHO Participant Guide



## LOGISTICS

### How Do I Sign Up?

To register, please visit [www.wellaheadla.com/lifestyle-coach-echo-registration](http://www.wellaheadla.com/lifestyle-coach-echo-registration) and complete all fields of the [Lifestyle Coach ECHO Registration Form](#). Each Lifestyle Coach will need to sign up individually, even if there are several people participating from your site location. The Lifestyle Coach ECHO Coordinator will contact you via email soon afterward with more information. You will be added to the email notification list and receive regular announcements about upcoming ECHO sessions.

### How Do I Get Zoom?

- You may download the free version of the Zoom client for PC or Mac by visiting <https://zoom.us/download> and selecting Zoom Client for Meetings. If your computer does not have a built-in video camera and microphone, a simple USB webcam is all you need. (You may also use a headset, if needed or preferred, 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.). (See: Appendix C for additional Zoom guidance).
- To avoid delays and other technical issues on the day of the ECHO session, one of our Lifestyle Coach ECHO Coordinators will schedule a time to conduct a brief virtual Introductory Meeting with you to ensure that all equipment is functioning properly in advance of the first session that you plan to attend. You will receive a meeting request from a Lifestyle Coach ECHO Coordinator shortly after your Registration Form is received.

### How Do I Connect to an ECHO Session?

- After your Introductory Meeting, you will receive an email calendar invitation from the Lifestyle Coach ECHO Coordinator which will include the link to join the ECHO Sessions.
- If you would like to volunteer to present a patient case, please download and complete the online [Case Presentation Template](#). You will email the completed Case Presentation Template to the Lifestyle Coach ECHO Coordinators at [wellahead.projectecho@la.gov](mailto:wellahead.projectecho@la.gov).
- One day prior to the scheduled Wednesday ECHO session, we will send another email notification as a reminder that includes the session agenda and information on how to connect to the session.
- On the day of the ECHO session. Please join the session a few minutes prior to the scheduled start time (1:00 PM CT) using the Zoom link provided. 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 site hosting the Zoom session will initiate the meeting room connection approximately 15-20 minutes prior to the start time.

### How Do I Receive CEUs for Participation?

We offer no-cost, professional CEUs to Registered Dietitians (RDs), Dietetic Technicians and Registered (DTRs). In order to obtain CEUs, we require that you attend at least 30 minutes of the 1-hour session. Add your contact information in the chat box for attendance, and complete the post-session survey within 48 hours after each session. The link for to obtain CEUs will be provided in the chat box and via email after the session.

We are able to provide CEUs through the University of New Mexico. In support of improving patient care, this activity has been planned and implemented by the Louisiana Department of Health, Bureau of Chronic Disease Prevention and Healthcare Access and Project ECHO®. Project ECHO® is jointly accredited by the Accreditation Council for Continuing Medical Education (ACCME), the Accreditation Council for Pharmacy Education (ACPE), and the American Nurses Credentialing Center (ANCC) to provide continuing education for the healthcare team.

**How Can I Receive Technical Support?**

For question about Zoom, including testing your site connection, please contact a Lifestyle Coach ECHO Coordinator at [wellahead.projectecho@la.gov](mailto:wellahead.projectecho@la.gov).

# Lifestyle Coach ECHO Participant Guide



## CONTACT INFORMATION

Below you will find the list of Lifestyle Coach ECHO Hub Team members. You can find photos and bios of our Hub Team in the Meet The Hub Team section of the [Lifestyle Coach ECHO webpage](#). You may direct all questions or concerns to the Team at [wellahead.projectecho@la.gov](mailto:wellahead.projectecho@la.gov).

Name	Role
Taunya Williams, MHA	Lifestyle Coach ECHO Program Manager
Rebecca Guidroz, RDN, LDN	Hub Team Specialist
Christiana Reese Remington, RDN, MPH	Hub Team Specialist
Rachel Marquez, MPH	Hub Team Specialist
Sarah Piper, MPH, CDCES	Hub Team Specialist



# Lifestyle Coach ECHO Participant Guide



## APPENDIX A

### Getting Set Up in Your Videoconferencing Location

- Join the video call from a quiet location with minimal background/ambient noise and little or no chance of interruption during the ECHO session.
- Position yourself and your video camera so that you are well lit. Avoid backlighting situations such as having a bright light source or window behind you.
- Keep in mind that others on the video call will be able to see everything that is in your camera's field of view. Ideally, position your camera to minimize any potential visual distractions. A solid background is optimal, though this is not always possible to achieve. Zoom also offers some virtual background options—[follow these instructions](#) to learn how to enable a virtual background in Zoom.
- Positioning your PC/Mac/Smartphone/tablet in a stationary location such as a table or desk (using props if needed) will give others the best viewing experience of you and your location, unless you specifically need to move the camera around to show something to the group. This will also generally provide better audio performance. While videoconferencing, even subtle movement generated by hand holding a smaller device—such as a smartphone or tablet—is distracting to others.
- Position your device's camera as close to eye level as possible.
- If you are videoconferencing as a solo participant, position yourself relative to your device's camera so that the camera is capturing a relatively close-up view of you. Center yourself within the camera frame so that the area from the top of your head to around mid-chest level can be seen.
- If you are videoconferencing with a group of people (e.g., sitting around a table), position as many participants within the camera frame as you comfortably can. Having people sit closer together or in a configuration that maximizes inclusion within the frame while still allowing all participants to view the screen clearly and comfortably is the goal.
  - NOTE: During the COVID-19 Public Health Emergency, please practice physical distancing and masking precautions to ensure the safety of all participants. Multiple participants at the same location/organization may join from separate devices in different rooms to allow for safe distancing. We do not recommend joining from multiple devices in the same room as this will likely cause audio feedback issues.
- If feasible, look towards the camera when speaking. This gives others on the call the best view of you while you are communicating with them and gives the appearance that you are making eye contact.
- Please fill in your name when joining the call via Zoom. You can do this by viewing the participant list at the bottom of the screen and editing your name. Your entry in the list will have a “me” next to it and options for Mute/Unmute and “Rename” will appear. You can also just right-click on your name in the box where your self-image is and edit from there. This is the name that all others on the call will see. You can also add your healthcare center or location if you wish (Ex: Jane Doe—Regional Hospital).
- Test your audio and video prior to the start of the ECHO session.

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## APPENDIX B

### Videoconferencing Etiquette

- When you're not speaking, keep your microphone muted (turned OFF). This helped cut down on extraneous background noise (e.g., paper shuffling or coughing) and also eliminates the sharing of information you'd prefer that others not hear.
- To mute your mic, click/tap on the microphone icon that appears in the lower left of the screen.
  - For PC/Mac, move the cursor within the Zoom video window and look for the controls that appear along the bottom of the window.
  - For tablet or smartphone, touch the screen to display the Zoom controls and then touch the microphone icon to mute.
  - Repeat these actions to unmute the microphone when you are speaking. Return to mute when you are done.
- Communicate clearly during the ECHO session. Identify yourself prior to making your comments so that everyone can recognize you (Ex: "This is Jane Doe...can you please repeat the patient psychological history?").
- Wait for whoever is speaking to stop talking before beginning to speak. Cross-over audio communication may result in missed points in the conversation that will need to be repeated.
- If you need to temporarily turn off your video at any point during the ECHO session, click/tap on the Stop Video icon in the lower left of your screen next to the microphone mute/unmute icon. You will remain connected to the session and your audio will not be affected. To re-enable video, simply click/tap on the Start Video icon.
- **Throughout the course of the ECHO session, remember to never disclose protected health information (PHI). If you are presenting a case, avoid all HIPAA identifiers. Use your ECHO ID# when referring to the participant.**
- If you're on camera, others can see you clearly, just as if you were all sitting in the same room together. Be aware of your body language. Express your attentiveness and professionalism at all times.
- We are working hard to change the language around diabetes by adopting person-centered, strengths-based, and empowering words and messages. Please avoid using "pre-diabetic," "adherent," or "control," when presenting people who have pre-diabetes. Instead, use "person with pre-diabetes," "diabetes-related," and "s/he takes her/his medications about half the time." We will learn and practice this together—thanks for your support!
- We are participating in an open and welcoming learning environment. Thank you for generously sharing your knowledge and experience, so that all can benefit from it!

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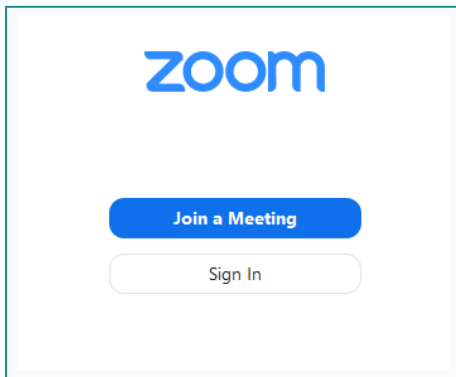
## APPENDIX C

### Joining a Meeting with Zoom

Follow the instructions below for guidance on downloading and joining a meeting on Zoom.

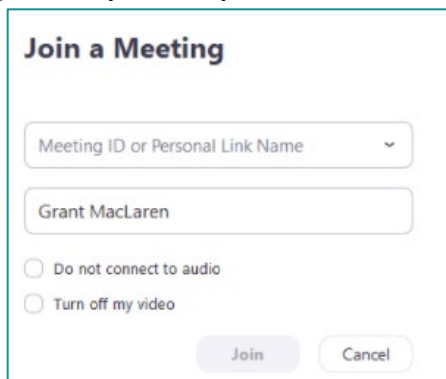
#### Downloading Zoom

You can download Zoom by going to <https://zoom.us/download> and download the Zoom Client for Meetings. Once Zoom is downloaded, please click on Join a Meeting. Once you download Zoom, you will not need to repeat this step for future meetings.



#### Joining a Meeting

You should be automatically placed in the meeting if you follow the link provided in the calendar invitation and/or emails from the Lifestyle Coach ECHO Coordinator. If Zoom requests a Meeting ID, this can be provided by the Lifestyle Coach ECHO Coordinator. Enter the Meeting ID provided and click Join.



#### Password

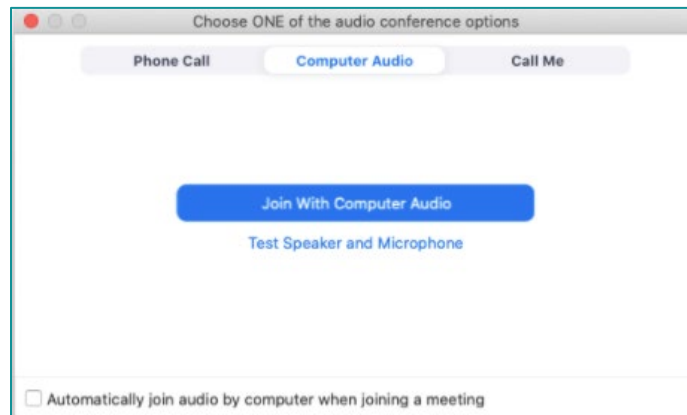
If the Meeting or ECHO session is password protected, Zoom will ask you for a password. If you're asked for a password, enter the password (included in the calendar invitation from the Lifestyle Coach ECHO Coordinator) and click Join.

#### Connecting Audio

Once you join the meeting, a window will appear asking you to **Join Audio by Computer**.

- Check the box for **Automatically Join audio by Computer when joining a meeting** in the bottom left corner of the Audio window.

- Please note: **Automatically Join audio by Computer when joining a meeting** allows your audio connection to be automatically established the next time you join a Zoom meeting from your computer.



- After clicking on **Join Audio by Computer**, you will see a message confirming that you're using the audio connection on your computer.

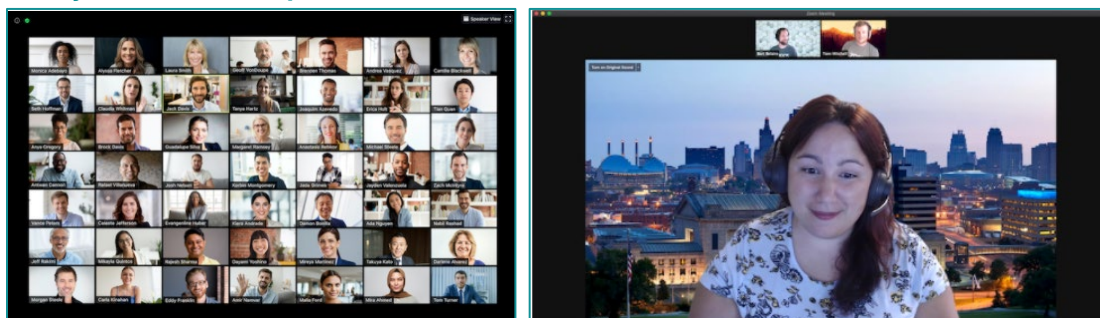
### Testing Audio

- Before the ECHO session begins, please test your microphone and speakers by clicking on the arrow pointing upward to the right of the microphone and selecting **Audio Options**.
- Click on **Test Computer Audio** on the next screen.
- The **Test Speaker** button plays a sound to let you know the speaker is working. If you do not hear anything, make sure your speakers are turned on. You can also select different speakers by clicking on the field next to the **Test Speaker** button.
- The **Test Mic** button starts recording once you click it. It records a few seconds of audio and will play back the recording to let you know the mic is working. If you don't hear anything, try selecting a different mic by clicking on the field next to the **Test Mic** button.

### General Reminders

- Remember to mute your microphone when you're not speaking. You can mute yourself by clicking on the microphone icon in the bottom left corner of the screen.
- Adjust your camera accordingly
  - Make sure your face is visible
  - Use front lighting instead of backlighting to prevent appearing as a shadow.
- Zoom has two viewing options that can be toggled in the top right corner
  - Speaker view allows you to view only the person that is speaking
  - Gallery view allows you to see all participants in the meeting

### Gallery View vs. Active Speaker View



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## APPENDIX D

### HIPAA (Health Insurance Portability and Accountability Act) Identifiers

Regarding the safeguarding of protected health information (PHI) whether written, orally stated, or in electronic format, ECHO complies with state and federal guidelines.

When presenting your program participant, please use the ECHO ID# and refrain from providing information containing names, initials, living location, place of work, birth date, or any specific information about the patient that helps identify them as this is considered “protected health information.” It is our responsibility to ensure that the privacy of protected health information is not disclosed.

### HIPAA Protected Health Information (PHI): List of 17 Identifiers and Definition of PHI

1. Names;
2. All geographical subdivisions smaller than a State, including street address, city, county, precinct, zip code, and their equivalent geocodes, except for the initial three digits of a zip code, if according to the current publicly available data from the Bureau of the Census:
  - a. The geographic unit formed by combining all zip codes with the same three initial digits contains more than 20,000 people; and
  - b. The initial three digits of a zip code for all such geographic units containing 20,000 or fewer people is changed to 00.
3. All elements of dates (except year) for dates directly related to an individual, including birth date, admission date, discharge date, date of birth, admission date, discharge date, date of death; and all ages over 89 and all elements of dates (including year) indicative of such age, except that such ages and elements may be aggregated into a single category of age 90 or older;
4. Phone numbers;
5. Fax numbers;
6. Electronic email addresses;
7. Social Security numbers;
8. Medical record numbers;
9. Health plan beneficiary numbers;
10. Account numbers;
11. Certificate/license numbers, including license plate numbers;
12. Device identifiers and serial numbers;
13. Web Universal Resource Locaters (URL);
14. Internet Protocol (IP) address numbers;
15. Biometric identifiers, including finger and voice prints;
16. Full face photographic images and any comparable images; and
17. Any other unique identifying number, characteristic, or code (note this does not mean the unique code assigned by an investigator to code the data).

There are also additional standards and criteria to protect an individual's privacy from re-identification. Any code used to replace the identifiers in data sets cannot be derived from any information related to the individual and the master codes, nor can the method to derive the codes be disclosed. For example, a subject's initials cannot be used to code their data because the initials are derived from their name. Additionally, the researcher must not have actual knowledge that the research subject could be re-identified from the remaining identifiers in the PHI used in the research study. In other words, the information would still be considered identifiable if there were a way to identify the individual even though all of the 18 identifiers were removed.

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## APPENDIX E

### Curriculum

See below for the full Lifestyle Coach ECHO schedule.

*Please note that this schedule may be subject to change.*

Date (2022)	Didactic Presentation Topic	Title/Affiliation
Jan 12	Planning for Prevention	Program Implementation
Feb 9	Brilliant Beginnings: Making the Most of Sessions 0-5!	Program Implementation
Mar	Prevent T2 Refresh	Program Implementation
Apr 13	All Foods Can Fit ( <i>new</i> )/Understanding the Nutrition Approach of DPP	Nutrition
May 11	Distance Delivery	Program Implementation
Jun 8	Raising Referrals, Lowering Risk	Diversity, Equity, & Inclusion
Jul 13	Habit Formation	The Science of Change or Health & Wellness
Aug 10	Addressing Participant Barrier /Cultural Humility	Diversity, Equity, & Inclusion
Sep 14	Retention	Program Implementation
Oct 12	Understanding Readiness	Program Implementation
Nov 9	Trouble with Tracking	Health & Wellness
Dec 14	Flexibility within Fidelity	Diversity, Equity, & Inclusion

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## APPENDIX F

### Continuing Education Units (CEUs)

Providers who wish to receive CEUs will need to enter attendance and complete the post-session survey within 48 hours of the session to obtain credit for each session. Attendance will be collected via the Zoom chat feature during the sessions. The links for the post-session surveys will be sent via the Zoom chat feature at the end of the session and sent via email to confirmed attendees the day following the session.

### Accreditation

In support of improving patient care, this activity has been planned and implemented by Louisiana Department of Health Bureau of Chronic Disease Prevention and Healthcare Access and Project ECHO®. Project ECHO® is jointly accredited by the Accreditation Council for Continuing Medical Education (ACCME), the Accreditation Council for Pharmacy Education (ACPE), and the American Nurses Credentialing Center (ANCC), to provide continuing education for the healthcare team.

### Commission on Dietetic Registration

This activity is approved for 1.5 CPEUs for Registered Dietitians (RDs) and Dietetic Technicians, Registered (DTRs). Completion of this RD/DTR profession-specific or IPCE activity awards CPEUs (One IPCE credit=One CPEU). If the activity is dietetics-related but not targeted to RDs or DTRs, CPEUs may be claimed which are commensurate with participation in contact hours (One 50 minute hour=1 CPEU). RDs and DTRs are to select activity type 201 in their Activity Log. Sphere and Competency selection is at the learner's discretion.

### Disclosure Statement

Project ECHO®, in compliance with the ACCME Standards for Integrity and Independence in Accredited Continuing Education, requires that anyone who is in a position to control the content of an educational activity disclose all relevant financial relationships they have had within the last 24 months with an ineligible company.

None of the planners and presenters for this educational activity have relevant financial relationship(s) to disclose with ineligible companies whose primary business is producing, marketing, selling, re-selling, or distributing healthcare products used by or on patients.

- Taunya Williams, MHA
- Rebecca Guidroz, RD, LDN
- Christiana Reene, RDN, MPH
- Sarah Piper, MPH, CDCES
- Rachel Marquez, MPH



**WELL-AHEAD**



WELLAHEADLA.COM