Welcome to the OCHIN collaborative! We are a non-profit health information technology company serving over 100 health systems, from community health centers and county health departments to independent clinics, across 15 states. As a dispersed, safety-net collaborative, our members are diverse in their organizational structures, patient populations, and community resources. Members contribute to research by sharing data from our hosted Epic EHR to the OCHIN and ADVANCE research data warehouses and actively participating in practice-based research projects on a voluntary basis. We work hard to align research projects with member priorities, encourage and facilitate research participation, and demonstrate research value and impact to our members. Below is an overview of the OCHIN member recruitment and engagement processes that may be relevant in developing your proposal.

OCHIN RECRUITMENT AND MEMBER PARTICIPATION

If your research includes patients, clinic staff, care providers, or health organization leaders from OCHIN member organizations, we will need to recruit participants. Recruitment is conducted within the operational structure of OCHIN member services – beginning at the member organization (e.g. health center) level for any study with clinic, provider, or patient participation. Recruitment is facilitated by an experienced OCHIN Community Research Associate who liaises with individual study teams, member-facing OCHIN teams (e.g. Practice Facilitation, Account Management), and member organizations regarding recruitment needs. Community Research Associate effort is allocated by individual study needs and reflects the complexity and size of the project; this is typically between 15 -20% FTE for each study year that includes recruitment activity.

Recruitment for any funded study with an impact on routine clinic operations – such as qualitative work, patient recruitment, practice transformation, tool builds or implementation – follows a series of steps:

**LEVEL 1: STUDIES WITH PRACTICE IMPACT**

- Member organization approached by OCHIN research about study participation
- If interested, organization helps identify eligible clinics and recruitment contacts

**LEVEL 2: STUDIES INVOLVING PATIENTS, PRACTICE STAFF, OR PROVIDERS AS HUMAN SUBJECTS**

- Clinics advise on best strategy for OCHIN-facilitated study recruitment
- Recruit individual patient, clinic staff, and provider participants

OCHIN research engagement and recruitment activities are directed by our membership to ensure alignment with their priorities, capacity, and needs. OCHIN does not pre-recruit practices at the proposal stage per member preference as there is insufficient detail on study activities or timelines for member organizations to accurately assess feasibility or commit to participation. Recruitment activities begin after a study is funded. As proposals are operationalized post-award, recruitment strategies may be adapted based on the final number of eligible organizations, clinic sites, or any other criteria for eligibility and participation.
Recruitment time varies by study design, necessary activities, and sample size. Estimated timelines are listed below:

- Recruitment planning, material development, and IRB approval | 2-3 months
- Service area and clinic recruitment | 3-6 months
- Clinic-informed provider, staff, and patient recruitment | 2-9 months

As voluntary participants, OCHIN members’ time is acknowledged through organizationally set clinic impact fees and individual-level compensation for given project activities. Fees may be adjusted based on individual project complexity or intensity. Fees recognize the effort and contributions clinic staff put into project participation; they do not compensate the time or resources needed to participate. OCHIN sets and reviews our impact fees annually based on a percentage of average daily operating costs for community health centers. Projects with very high impact may necessitate compensation, such as coverage of some clinic staff FTE, in addition to standard impact fees.

OCHIN ENGAGEMENT WORKGROUPS AND CONSULTATIVE INPUT

OCHIN Research facilitates patient and provider input to research through the Patient Engagement Panel (PEP) and the Practice-Based Research Network (PBRN).

The PEP includes 15 patients from OCHIN member and affiliate health centers in four states. The PEP meets remotely every two months and is available for input on an ad hoc basis between meetings. PEP members have experience across many different roles and projects. In addition to the PEP, they have served as panelists or advisors on individual OCHIN research projects to make research, participation in research, and dissemination accessible and relevant to patients and caregivers. To facilitate effective input, PEP members receive ongoing training and support through OCHIN Research.

The PBRN Community Meeting is a quarterly opportunity for PBRN member clinicians and study teams to present and discuss clinic-based research questions, evaluations, and findings. Between meetings, routine PBRN input is available through three OCHIN workgroups: provider input through the Clinical Operations Review Committees (CORCs), medical director and health system input through the Clinical Operations Group (COG), executive and board level input to research strategy and priorities through the Health Information and Research Operations Committee (HIROC). Workgroup participation is voluntary; members take part as interested and available.

The type and frequency of PEP and PBRN input to proposals and projects depends on many factors, including study topic, funder requirements, and study design. The PEP and PBRN workgroups can provide input on study impact and value, anticipate feasibility issues and provide solutions, maximize participation, prioritize dissemination activities, tailor communications, and identify implementation strategies with high likelihood of success. Development of your proposal is informed by, but not contingent upon, PEP and PBRN feedback.

If your proposal or study would benefit from PEP or PBRN input, we can help identifying outreach activities and facilitate engagement opportunities. Your proposal or project team will be responsible for creating content and materials for the PEP or PBRN, managing costs and reimbursements, and providing any requested follow up. We will work with you to tailor your request, plan, and materials as needed.

FURTHER INFORMATION

For any questions or more information about our engagement workgroups and consultation, please contact Anna Templeton, Community Research Associate, at templetona@ochin.org or 503-943-2500.