Operation Access Toolkit Outline

Key Documents for the Investigation & Preparation Phases of Development:

- OA replication manual
- Development phases and core support systems summary
- Checklists for replication and implementation
- Core competencies and lessons learned

Key Documents for the Implementation & Sustainability Phases of Development:

- Stakeholder benefits summary
- Service delivery model comparison matrix
- Extensive surgery session planning timeline, with detailed outline of roles and responsibilities
- Volunteer and hospital capacity building, recruitment, and utilization worksheets and report templates

Hospitals – Legal & Financial Documents:

- Liability management practices
- Community benefit and tax law information
- Fair Labor Standards Act clarification on labor laws concerning hospital employees volunteering within their scope of work
- MOU boilerplates
    - Hospitals
    - Stand-alone surgery and endoscopy centers, including transfer agreement
    - Provider groups (anesthesia, radiology, pathology, laboratory, pharmacy, physical therapy, etc.)
- Valuation of donated care worksheets and methodology

Volunteer Documents:

- Medical volunteer policies and procedures
    - Protocol for volunteer specialists
    - Medical volunteer "job descriptions"
    - Volunteer recruitment packet
    - Volunteer management plan (guidebook of best practices around volunteer recruitment, utilization, management, recognition, retention, etc.)
    - Volunteer surgery session debrief evaluation

- o Volunteer surgery session sign-in sheet
- o Annual volunteer questionnaire
- Non-medical volunteer recruitment and utilization materials (including interpreters)
  - o Job descriptions and application
  - o Commitment letter
  - o Confidentiality agreement
  - o Release of liability
  - o Volunteer and agency agreement

Patient & Clinic Documents (all available in multiple languages):

- Patient flowcharts
- Case management guidelines, forms, and tools
  - o GI H&P/lab form
  - o Patient case management guidelines
  - o Patient eligibility requirements summary
  - o Specific patient eligibility criteria by procedure and sub-specialty
  - o Patient referral form
  - o Patient screening script
  - o Typical procedures list
  - o Protocol templates (e.g., how to handle positive biopsies)
  - o What to expect as a patient (narrative)
  - o Patient triage and scheduling tools, queries, reports, and merge forms built into a Microsoft Access database platform
- Patient authorizations (merge forms)
  - o Media release
  - o Release of medical records
- Patient letters (merge forms)
  - o Introductory letter with statement on services liability
  - o Appointment letters (consult, pre-op, surgery, post-op, etc.)
  - o Discharge letter
- Patient surveys (merge forms)
  - o Surgery questionnaire
  - o Non-surgery questionnaire

Internal Operations & HR Documents:

- HR policies and procedures
  - Employee handbook and benefits
  - Compensation policy and philosophy framework
  - Employee performance goals template
  - Employee performance review form
- Employee job descriptions
  - CEO/Executive Director
  - Program Manager
  - Program Coordinator
  - Program Assistant
  - Program & Grants Administrator
- Staff resource mapping worksheets
- Governance documents
  - Operation Access bylaws
  - Board development – member orientation materials
  - Board member areas of expertise matrix
  - Board member "job description"
  - Board survey and self-assessment

Evaluation Documents:

- Operating plans, strategic plans, and SWOT analysis templates
- Robust portfolio of program, hospital, and clinic report templates to monitor program indicators, quality assurance, capacity vs. demand, recruitment needs, utilization, etc.
- Strategic scorecards
- Logic model templates and development resources
- Patient, volunteer, clinic, hospital, Board, and staff survey templates