



A driving force for health equity

OCHIN-ADVANCE PEP CONSULTATION GUIDE & REQUEST FORM

Last updated February 2026

ENGAGING THE PEP

The Patient Engagement Panel (PEP) is an all-remote group, and meetings are hosted through Zoom to allow for video, phone, and chat participation as best suits members' preferences and availability. We support multiple participation modalities since not all members have access to video.

Routine PEP meetings are held on the first Wednesday of every other month (*February, April, June, August, October, December*) from 12:00-1:30 pm PT/3pm-4:30pm ET. We strongly encourage teams to use these already scheduled meetings wherever possible. If necessary, we can schedule an ad hoc meeting or plan an alternate approach (e.g., email, one-on-one conversations) to consult members. Individual or smaller group feedback can also be arranged by video, phone, or email according to project needs and PEP member preference.

STUDY TEAM RESPONSIBILITIES AND PEP TEAM SUPPORT

Requestor Role and Responsibilities

Your team will be responsible for producing content, structuring your time in the meeting, obtaining feedback, and communicating impacts or outcomes of consultation back to the PEP (e.g., email, update at a subsequent meeting). Project team responsibilities include:

- 1. Create invitation content:** This information will be included in an email sent by the PEP support team.
 - Study name, a brief description of the project/proposal in non-technical language, current phase, your objectives in meeting with the PEP
 - Brief description of how the PEP will be engaged (e.g., tool review, recruitment questions, review of findings) and who will lead the activity
- 2. Develop meeting content:** Develop meeting materials and submit them to the PEP support team 3 weeks (15 business days) before the meeting to allow for final review, printing, and mailing to PEP members. Materials are typically shared as PowerPoint slides. Please be sure materials are all in lay language with acronyms limited to only those that are strictly necessary. Write out all acronyms when used for the first time. Please include:
 - Brief project overview and meeting/consultation objectives
 - Overview and instructions for meeting activities
 - 2-3 focused discussion questions (these may be the same as your objectives)
 - Please be sure to clearly number any slides and title any handouts for PEP members who may be following on paper rather than the screen share
 - Clear, non-technical language accessible for different levels of health/healthcare literacy

- Only acronyms which are strictly necessary and write them out in full when used for the first time (as a foot note or adequately visible text box at the bottom of a slide is fine)
 - Address these priority topics in your presentation:
 1. Does your research intend to address differing outcomes by race and ethnicity or any other sociodemographic factors? If so, what methods or theories (tools and approaches) will you use to help assess impacts on the outcome gaps you're including?
 2. Apart from the PEP, what other patient, caregiver, and clinic engagement does your proposal/project include?
3. **Facilitate your portion of the PEP meeting:** Members of the project team will be responsible for the facilitation, including monitoring and responding to feedback in the chat, through your designated presentation time. Key points to keep in mind:
- Take a long pause (count to 5) after asking folks if they have questions or posing a discussion question *before* you ask another question or provide clarification
 - Not all PEP members will speak; some will only provide input via the chat. We strongly recommend you have two people from your project team join to help balance audio and chat feedback
 - Remind PEP members that they can provide feedback outside the meeting via phone, email, or any other means you have available through your project
 - If there is a lot of discussion or discussion is veering off-topic, the PEP support team will step in to help get back on topic or schedule

PEP Team Role and Responsibilities

The PEP support team will assist with:

1. Meeting logistics (e.g., scheduling, sending invitations and reminders)
2. Developing and sharing hard copy meeting materials with PEP members
3. Support liaising with PEP members for follow-up (e.g., outstanding questions, clarifications, subsequent opportunities)
4. Distributing post-meeting materials as needed

The PEP support team will assist with:

1. Developing and reviewing content as needed to maintain clear, non-technical language and content accessible for different levels of health/healthcare literacy
2. Facilitating the routine portions of the meeting and providing any facilitator support during your project's consultation
3. Additional support for liaising with PEP members for follow-up

PEP MEMBER COMPENSATION AND MANAGEMENT OF PAYMENTS

PEP members are compensated at a rate of \$90 per hour. Projects are expected to cover PEP member compensation wherever possible. If this rate is higher than allocated in your budget or your project does not have any budget allocations for PEP engagement, please let us know and we will work with your team to coordinate member payment.

The PEP Coordinator will invoice your project/partner organization with a request to submit payment

to OCHIN within 2 weeks. The PEP Coordinator will work with OCHIN Finance to disburse payment to PEP members.

PEP CONSULTATION REQUEST FORM

Please complete this Request Form with whoever on your team will be engaging the PEP and submit it via email to Laken Harrel, PEP Manager at harrell@ochin.org).

We will respond within 5 business days.

Information	Response
Contact information: <ul style="list-style-type: none"> • Presenter(s) Name(s): • Project/proposal name • Your organization • Email 	
What is the purpose of this engagement opportunity? <i>Examples:</i> question development, tool refinement, recruitment material development, proposal review	
What would you like to do with the PEP? <i>Examples:</i> review or test a tool, prioritization activity, recruitment planning, review content, training	
When would you like to bring this to the PEP? <i>Note:</i> Please include any hard deadlines or relevant proposal/project timeline information.	
Do you plan to do this as part of a PEP meeting or a different format (email, individual, small group)?	
How much time will you need for PEP members to take part? <i>Note:</i> PEP meetings usually have up to 45 minutes of time	
Do you have available budget to pay PEP members taking part (\$90/hour)? <ul style="list-style-type: none"> • If so, please provide the OCHIN billing grant # (<i>this applies to OCHIN projects only</i>): 	
Please list names and email addresses of everyone from your team who should be included in the PEP meeting/opportunity .	