

Patient Engagement Panel (PEP) Handbook

Version 7, January 2026

This handbook describes the 2026 policies, procedures, benefits, and practices of PEP membership and engagement opportunities.

PEP OVERVIEW

Patients and caregivers bring important perspectives and insight to health care and health care research. The OCHIN-ADVANCE Patient Engagement Panel (PEP) is a group of patients and caregivers that works with researchers, policymakers, and care providers to make sure patient and caregiver voices are heard and included in the design, conduct, and sharing of OCHIN and ADVANCE primary care research in community health center settings.

PEP FACILITATION TEAM

The PEP is coordinated and facilitated by a team of OCHIN research staff. We are available for any questions, feedback, or other PEP related input. PEP Facilitators: Laken Harrel, harrell@ochin.org & Anna Templeton templetona@ochin.org as back-up contact.

PEP PARTICIPATION

• Attend PEP meetings regularly

- The PEP meets six times a year (February, April, June, August, October, and December) from 12:00-1:30 pm Pacific Time/3:00-4:30 pm Eastern Time over Teams.
- The PEP team will send any meeting materials (agenda, slides, consultation materials) to you one week before the meeting whenever possible (electronic and/or hard copy).
- If a meeting needs to be canceled for any reason, the PEP team will do their best to notify you at least 48 hours in advance.
- All meetings are recorded. If you are unable to attend a meeting, please let us know and we will provide the recorded version for your review. You will be compensated for your time.

• Attend annual check-in meeting with facilitator(s)

- Scheduled at the end of each calendar year
- These provide the opportunity to connect on an individual level with the PEP team and allow us to gain insights and thoughts directly from you about the PEP over the course of the year.

- **Additional OPTIONAL PEP engagement opportunities**

- Additional opportunities including proposal or project roles are optional (more details below).
- There is a 30-minute optional debrief time after each PEP meeting for questions, additional comments, or time to connect.

PEP ENGAGEMENT OPPORTUNITIES

Proposal or project teams may seek PEP consultation outside of regularly scheduled meetings. These additional engagement opportunities may be similar to PEP meetings or vary in format (e.g., Letters of Support for research proposals, email consultation, focus group, or individual interviews).

- We will send out additional engagement opportunities as our research partners request them.
- The PEP team will send consultation materials to you one week before the meeting when possible (electronic and/or hard copy).
- All members may decide to take part as available and interested.
- The PEP team will do our best to ensure engagement opportunities are compensated at our PEP rate of \$90/hour. We will specify the amount of compensation available when sharing any additional opportunities. Uncompensated opportunities or activities will be clearly identified in any communications.

MEETING NORMS

Most of our meetings have a full agenda. To make sure we can all make the most of every PEP meeting and engagement opportunity, PEP members and the PEP team have developed a shared list of meeting norms:

- **Speak one at a time** – Multiple conversations make it hard for others to hear. Use Team’s raise hand feature when able.
- **Turn on your mic only when speaking** – Turn off your phone, computer, or device mic when you’re not speaking.
- **Say your name** – Before you speak each time, announce your name, so everyone knows who is speaking.
- **Use the chat box** – The chat box is available and monitored throughout the meeting for questions, input, or other feedback.
- **Raise your hand** – Use the “raise hand” feature in Teams to speak next.

As a PEP community, we work together to maintain the PEP as a place where all can:

- Be curious
- Learn and unlearn through PEP meetings, one-on-ones, and wider life experiences

- Hold space for multiple perspectives and opinions at the same time

Take time to reflect and think about PEP meetings, including what we discuss and how we discuss it

- If you want to follow up on something from the meeting:
 - With your colleagues – understand they may respond in different ways or not at all
 - With the facilitator team or meeting presenters – you are always welcome to do so in whatever way is best for you (email, phone, Teams, call)

NON-DISCLOSURE AGREEMENT

PEP meetings and engagement opportunities often include content that should not be shared outside the PEP for reasons of confidentiality, intellectual property, or proprietary agreements (such as OCHIN’s Epic electronic health record). For this reason, we ask all PEP members to sign a non-disclosure agreement, or NDA, with OCHIN. The NDA needs to be signed and submitted to OCHIN’s legal team to keep on record. The NDA that PEP members sign uses standardized language from the OCHIN legal team stating that you agree to protect information shared during PEP activities or as part of PEP communications. PEP members review and sign the NDA when they join the PEP.

If you have questions about the NDA requirement or process, please reach out to the PEP team.

MEMBER SUPPORT

We value the unique perspectives, skills, expertise, and passion of each PEP member and want to do all that we can to support your PEP participation. We encourage members to share their ideas, priority topics, or special interests with our PEP team to work together to identify ways we can help develop your research interests and skills in the PEP or beyond. We also welcome member feedback on any aspect of the PEP and are open to ways we can continue to improve and innovate as a PEP team.

We encourage you to reach out to us at any time by email, text message, phone, Teams call, or any other format you’d prefer!

- PEP Team phone number: (971) 357-2020

MEMBER COACHING

As part of our shared commitment to ensure PEP members, the PEP team, and research partners can work together at their full potential, we have developed a coaching process to support PEP members through any areas of difficulty. Coaching is available either by member request or if the facilitation team determines a member would benefit from extra support in

fulfilling their PEP role. The PEP facilitators will work closely with any member through coaching to assess the issue and plan steps toward a solution.

The overall process is:

- PEP member request for support: You are welcome to reach out to a PEP facilitator to request additional support at any time. We will meet with you individually to develop a plan, action items, and a timeline.
- PEP team request for coaching plan: PEP facilitator(s) may recommend a coaching plan if they think it would benefit your ability to take part in the PEP. We will reach out to you individually by email to set up a meeting time and initiate the coaching process as needed. We will identify any shared concerns or barriers to taking part and develop a plan with action items and a timeline to address them.
- Issues not resolved with a coaching plan: If you or the PEP facilitators do not resolve issues or barriers through a coaching plan, we will:
 - a. Repeat the coaching process to identify and eliminate any barriers so that no further action/intervention is needed.
 - b. If we have gone through coaching twice on the same issue, then PEP facilitators will meet with you individually to discuss whether the PEP is still a good fit. If needed, we can develop a third coaching plan.
 - c. If we have been through three coaching plans for the same issue, the PEP team will determine how best to proceed and whether we should continue our partnership.

COMPENSATION

Our goal is to provide fair and consistent compensation while maintaining compliance with Internal Revenue Service laws and grant funding regulations. Our standard rate for PEP activities is \$90/hour.

Compensation is delivered through Electronic Funds Transfer (EFT), a direct deposit from OCHIN to your bank. As part of PEP onboarding, we send members instructions and the forms to sign up for EFT. OCHIN processes payments using a payment request form which will be sent for you to sign after each meeting or engagement opportunity. Payments should be posted to your bank account within six weeks of your request form signature. If your payment does not arrive in that time period, please reach out to the PEP team.

If EFT does not work for you, we can instead provide your compensation via Amazon gift cards. Gift cards will be delivered electronically to your email.

Compensation as either EFT or gift card payments can add up to \$600 a year which is income that has to be reported to the IRS. To track this, OCHIN requests you complete a W-9 IRS form

when we set up your payments. If your compensation adds up to more than \$600 in a year (January-December), you will receive a 1099-NEC IRS tax form, and your total compensation will be reported as taxable income. If you would like your compensation to end before reaching the \$600 threshold, please let the PEP facilitators know. We will notify you if you are nearing the threshold and will stop your payments at \$590. At that point, you can continue to take part in PEP activities as a volunteer or wait to take part again in the next calendar year.

Note: If you are receiving any other payment from OCHIN projects, please note those payments also count towards the \$600 threshold. If you have any questions or concerns about PEP compensation, your total payments, or your situation changes at any time, please let us know.

ACKNOWLEDGEMENT

This handbook has been created in collaboration with PEP members and the PEP team to assist with the mutual understanding of the group's policies, procedures, benefits, and practices that guide engagement matters.

I have read and understand the content and expectations, and that if I have questions at any time, I can contact the PEP team.

PEP Member first and last name: _____

Signature: _____

Date: _____