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
• Volunteer surgery session sign-in sheet
• Annual volunteer questionnaire

• Non-medical volunteer recruitment and utilization materials (including interpreters)
  • Job descriptions and application
  • Commitment letter
  • Confidentiality agreement
  • Release of liability
  • Volunteer and agency agreement

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

• Patient flowcharts

• Case management guidelines, forms, and tools
  • GI H&P/lab form
  • Patient case management guidelines
  • Patient eligibility requirements summary
  • Specific patient eligibility criteria by procedure and sub-specialty
  • Patient referral form
  • Patient screening script
  • Typical procedures list
  • Protocol templates (e.g., how to handle positive biopsies)
  • What to expect as a patient (narrative)
  • Patient triage and scheduling tools, queries, reports, and merge forms built into a Microsoft Access database platform

• Patient authorizations (merge forms)
  • Media release
  • Release of medical records

• Patient letters (merge forms)
  • Introductory letter with statement on services liability
  • Appointment letters (consult, pre-op, surgery, post-op, etc.)
  • Discharge letter

• Patient surveys (merge forms)
  • Surgery questionnaire
  • 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