Fannie Mae Innovation Challenge
Virtual Home Visit Protocol

Recruitment
1. Asthma Educator identifies potential recruit during an IMPACT DC Asthma Clinic initial Visit through intake process
   a. Qualifying criteria:
      i. D.C. resident
      ii. One major housing trigger
         1. Major housing trigger: Extremely old carpeting, pests, mold, active leak, structural damage, vents with replacement need, etc.
      iii. Self-identified remediation need
     iv. High priority:
        1. Patient age 4-17
        2. Patient diagnosis of persistent asthma
        3. More than one major housing trigger
        4. Southeast D.C. resident
        5. Resident/owner of single family home
        6. Home built pre-1978 with 6 year old child resident
   b. Disqualifying criteria:
      i. Non-D.C. resident
      ii. Resident in public housing
      iii. Housing trigger with no remediation need
         1. I.e. Carpeting with no vacuum, environmental tobacco smoke, pets, general dustiness, need for trigger assessment only

2. Asthma Educator completes a Breathe Easy referral form and explains option to complete home visit virtually as both a medical and housing follow up
   a. Asthma Educator confirms that parent/guardian signing Breathe Easy referral is the primary name on property lease or property owner
      i. If parent/guardian agrees, check off “Yes” next to “Interested in virtual home visit” on Breathe Easy referral form
      ii. If parent/guardian agrees but is not primary lease holder or property owner, complete a Breathe Easy referral form and check off “Yes” “Interested in virtual home visit,” but indicate the name and contact information of the primary lease holder or property owner
      iii. If parent/guardian does not consent, check off “No” next to “Interested in Virtual Home Visit” and list brief reason for refusal. Follow procedures for traditional Breathe Easy in-person home visit.

3. (If parent/guardian agrees to participating in virtual home visit and is primary lease holder or property owner) Asthma Educator completes Breathe Easy and Yachad consent form with signature from parent/guardian
   a. Only completed Yachad consent form if parent/guardian is a property owner

   *IMPACT DC Clinic Lead or Asthma Educator should call Nikita if available to complete rest of recruitment*

4. Asthma Educator (or Nikita) guides parent/guardian in downloading Zoom application on their mobile device and explains that a series of call, email and text reminders will be completed to further explain the telehealth platform and test audio/video
   a. If Nikita is present (and as time permits) will:
      i. Collect full patient recruitment demographic information and record on REDCap
      ii. Enter scheduling information on REDCap
      iii. Explain the virtual visit process and Zoom application further
iv. Test video/audio

5. **If Nikita is present:** Schedule appointment in person with family and send email invite to parent/guardian, healthcare provider and housing specialist with Zoom information
   a. **If Nikita not present:** Asthma Educator emails Nikita with name, date of birth and medical record number for any patient approached OR recruited for virtual home visit (VHV)

**After each clinic shift:**

6. Clinic Lead reports if a patient was approached OR recruited for a virtual home visit on the IMPACT DC REDCap and to Nikita
   a. **On REDCap:**
      i. Information recorded under Visit Information > Breathe DC (yes/no/not interested) > Virtual Home Visit (yes/no/not interested)
   b. **To Nikita:**
      i. Send Breathe Easy referrals (including Breathe Easy and Yachad consents) for any patients approached OR recruited in person or via email by end of clinic day

**Pre-Visit**

1. (if not completed already) Nikita enters patient information and scheduling information into REDCap

2. Nikita calls parent/guardian to schedule or confirm VHV appointment (3 attempts max)
   a. Ensure full recruitment demographic information and scheduling information is collected on REDCap
   b. Complete phone encounters information on REDCap
      i. Check off “All calls complete” under Confirmation/Scheduling Calling List

1. Indicate whether VHV walk through was complete
2. Enter encounter date and time
3. Enter encounter notes

3. (If not completed already) Nikita sends VHV email invite to parent/guardian, healthcare provider and housing specialist

4. Nikita sends text message appointment confirmation to parent/guardian with video visit link

**5-7 days before VHV**

5. Nikita calls parent/guardian as a VHV appointment reminder (3 attempts max)
   a. (if not completed already) Explain VHV process and completes video/audio test
   b. Complete phone encounters information on REDCap
      i. Check off “All calls complete” under Reminder Calling List

1. Indicate whether video/audio test and VHV walk through is complete
2. Enter encounter date and time
3. Enter encounter notes

**Morning of VHV**

6. Nikita sends final text message appointment reminder to parent/guardian with video visit link

**Virtual Home Visit (~2 weeks after IMPACT DC Initial Visit)**

1. Nikita begins Zoom virtual home visit

2. All parties (healthcare provider, housing specialist, parent/guardian) join virtual home visit

3. Virtual home visit begins
   a. Medical Assessment
      i. 10-15 minutes
ii. Led by Clinician
iii. Charted by Nikita on eClinicalWorks (Children’s National Electronic Medical Record system)

b. Housing Assessment
   i. 30-40 minutes
   ii. Led by housing specialist
   iii. Charted by housing specialist on REDCap

c. Wrap-Up
   i. 5-10 minutes
   ii. Led by housing specialist and Nikita
   iii. Charted by housing specialist and Nikita on REDCap and eClinicalWorks

**IF patient no-shows or cancels the VHV:**
1. Nikita makes two attempts to call parent/guardian to reschedule the appointment and repeat Pre-Visit protocol (listed above)

**Post-Virtual Home Visit**

*Immediately post VHV*
1. Nikita enters data into REDCap – Visit Status

*48 hours post VHV*
1. Nikita completes clinical data, clinical assessment and follow up assessment portion of visit assessment page on REDCap
2. Nikita charts VHV housing information from REDCap to eClinicalWorks
3. Nikita sends follow up email to parent/guardian including brief medical assessment and identified housing needs

*72 hours post VHV*
3. Nikita calls parent/guardian to complete patient level of satisfaction survey (2 attempts)
   a. Enter data in REDCap – Patient Satisfaction Survey

*1 week post VHV*
4. Housing specialists develop scope of work and share with Nikita and parent/guardian
   a. Nikita attaches scope of work to eClinicalWorks chart
5. Nikita enters data on REDCap and attaches Yachad SOW to REDCap – Visit Assessment
6. Housing specialists work with community partners and communicate with parent/guardian to carry out individualized housing plan
   a. May include: follow up in person visit, communication with landlord, and/or coordination of home repairs

*1 month post VHV*
7. Nikita completes 1-month follow up assessment through call to parent/guardian
   a. Enter data in REDCap – 1 Month Assessment

*6 months post VHV*
8. Nikita completes 6-month follow up assessment through data analysis and call to parent/guardian
   a. Enter data in REDCap – 6 Month Assessment