Mailed FIT Implementation Online Course Workbook

2022

Contents

Acknowledgments

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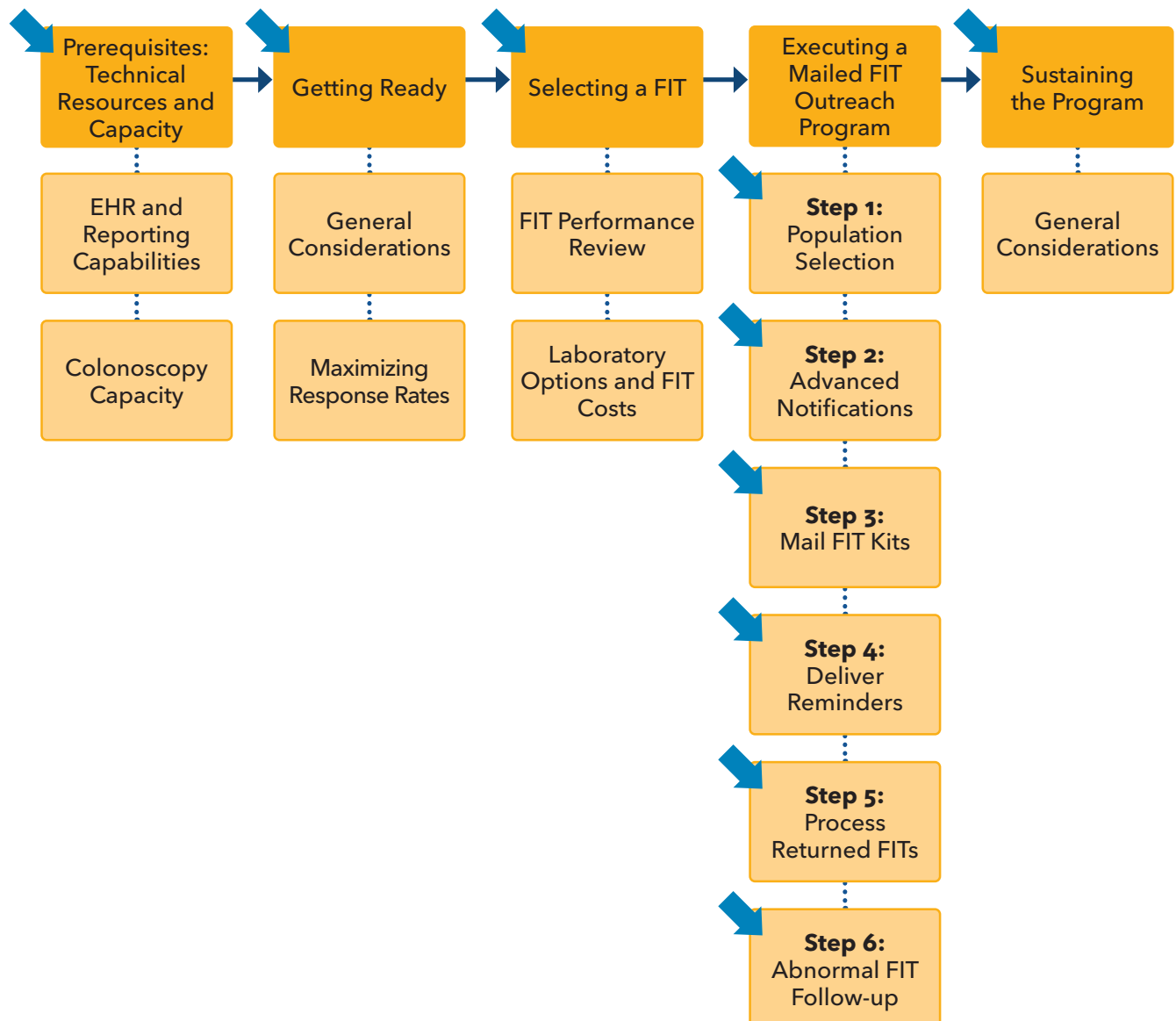The Kaiser Permanente Center for Health Research,
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Introduction

This workbook is a companion to the *Mailed FIT Implementation Online Course*. The goal of the workbook is to help readers identify and record design decisions as they implement mailed FIT outreach programs in their organizations.

The workbook mirrors the structure and decision-making process of the online course, which in turn is based on the complete Mailed FIT Implementation Guide.

For the most detailed information, refer to the Mailed FIT Implementation Guide available at **https://chronicdisease.org/wp-content/uploads/2022/06/Mailed-FIT-Guide-Revised-2022.pdf** [PDF-3MB]. Each of the ten large diagonal arrows in the graphic below indicates a training module and its corresponding section in the Implementation Guide.

Training Modules and the Corresponding Section of the Mailed FIT Outreach Program Implementation Guide

Prerequisites: Technical Resources and Capacity	Getting Ready	Selecting a FIT	Executing a Mailed FIT Outreach Program	Sustaining the Program
EHR and Reporting Capabilities	General Considerations	FIT Performance Review	**Step 1:** Population Selection	General Considerations
Colonoscopy Capacity	Maximizing Response Rates	Laboratory Options and FIT Costs	**Step 2:** Advanced Notifications	
			Step 3: Mail FIT Kits	
			Step 4: Deliver Reminders	
			Step 5: Process Returned FITs	
			Step 6: Abnormal FIT Follow-up	

Module 1 –
Prerequisites: Technical Resources and Capacity

Activity 1

Estimate the number of FIT kits that you will mail out to your patient population and enter your program estimates in boxes A through E in the table below. For example: 10,000 kits mailed out multiplied by 0.25 return rate = 2,500 kits returned. Given 2,500 kits returned multiplied by the expected 0.05 abnormal FIT result rate = an expected 125 people would need follow-up colonoscopy.

COLONOSCOPY CAPACITY REQUIRED BY RETURN RATE AND MAILING SIZE*					
	Assuming a 25% FIT return rate			Assuming a 50% FIT return rate	
Number of patients mailed FIT	Number of kits returned	Expected number of abnormal tests (5%) (maximum number needing colonoscopy)	Number of kits returned	Expected number of abnormal results (5%) (maximum number needing colonoscopy)	
10,000	2,500	125	5,000	250	
Box A	Box B	Box C	Box D	Box E	

*Assumes a 5% abnormal test result rate

What additional information is needed to complete this task?

Who else should be involved in completing this task?

What is your next step?

Module 1 –
Prerequisites: Technical Resources and Capacity

Activity 2

Do you currently have enough staff for the following mailed FIT program tasks? (List possible staff names and assignments or indicate that you do not know.)

• Preparing a list of patients eligible
for screening:

• Mailing patient letters:

• Mailing FIT kits:

• Answering questions:

• Reminding patients to return kits:

• Following up results:

• Tracking outcomes:

What additional information is
needed to complete this task?

Who else should be involved
in completing this task?

What is your next step?

Module 1 –
Prerequisites: Technical Resources and Capacity

Activity 3

How comfortable are you with promoting FIT kits?

> Notes:

Next, consider how knowledgeable different clinical staff are about mailed FIT kits.

Estimate the percent of staff and their knowledge level, where 3=high, 2=some, or 1=none. The percent values should sum to 100% across each row for each group.

	%	Level	%	Level	%	Level
• Providers:						
• Nurses:						
• Physician Assistants:						
• Patient Navigators:						
• Other clinic staff:						

> What additional information is
> needed to complete this task?
>
>
> Who else should be involved
> in completing this task?
>
>
> What is your next step?

Module 1 –
Prerequisites: Technical Resources and Capacity

Activity 4

Do you have an internal laboratory that could process your FIT kits, or do you need to establish a relationship with an external laboratory?

Notes:

What additional information is needed to complete this task?

Who else should be involved in completing this task?

What is your next step?

Module 2 –
Getting Ready

Activity 1

Assess the big picture for your mailed FIT program by listing:

- Program Goals:

  _____

- Potential Partners:

  _____

- Current Resources:

  _____

- Needed Resources:

  _____

What additional information is
needed to complete this task?

Who else should be involved
in completing this task?

What is your next step?

Module 2 –
Getting Ready

Activity 2

Do you think a centralized or distributed staffing model would work best for implementing your mailed FIT program?

☐ A single centralized team that handles all reporting, mailing, and receipt of FIT kits.

☐ A distributed staffing model of smaller groups at each clinic that handle these elements individually for their patient populations.

- Most STOP CRC clinics found that a centralized approach worked best because it freed frontline clinic staff from the burden of mailing FIT kits in addition to delivering direct patient care.
- Many clinic systems used their EHR system or data specialists to run patient reports and generate patient communications.
- Some groups had medical assistants place laboratory orders for the technical support team.
- Others used standing orders in the EHR to accomplish this. In some cases, physician panels reviewed lists of patients due for screening and returned the lists to a centralized administrative team or health plan that conducted the mailing.

What additional information is
needed to complete this task?

Who else should be involved
in completing this task?

What is your next step?

Module 2 –
Getting Ready

Activity 3

Create a draft list of staff roles and responsibilities.

RESPONSIBILITIES	Executive Leaders	Champion	Operations/ Q.I. Lead	EHR Expert	Frontline Staff	Lab Personnel
Project vision, prioritization, communication, resources, staffing	✓					
Intervention workflow design, assigning roles	✓	✓	✓	✓	✓	✓
EHR functionality, tracking reports		✓	✓	✓		
Training, elbow support			✓	✓	✓	
Oversight, performance management			✓			
Processing returned FITs or designing workflow with an external laboratory			✓			✓

- Executive Leaders: _____
- Champion(s): _____
- Operations: _____
- EHR Expert: _____
- Frontline Staff: _____
- Lab Personnel: _____

What additional information is
needed to complete this task?

Who else should be involved
in completing this task?

What is your next step?

Module 2 –
Getting Ready

Activity 4

Suggest 2 or 3 ways to educate patients about FIT kits based on the list of options found on Kaiser Permanente's Mailed FIT Materials webpage: **https://research.kpchr.org/mailed-fit/Materials**

Option 1:

_____

Option 2:

_____

Option 3:

_____

What additional information is
needed to complete this task?

Who else should be involved
in completing this task?

What is your next step?

Module 2 –
Getting Ready

Activity 5

Review the scrub training materials, list your questions below, and discuss them with your team and the decision-makers in your clinic. **https://research.kpchr.org/mailed-fit/Materials**

Question 1:

_____

Question 2:

_____

Question 3:

_____

What additional information is
needed to complete this task?

Who else should be involved
in completing this task?

What is your next step?

Module 3 –
Selecting a FIT Kit

Activity 1

Review the National Colorectal Cancer Roundtable's Clinician's Reference: Stool-Based Tests for Colorectal Cancer Screening at **https://nccrt.org/resource/fobt-clinicians-reference-resource/** about selecting a FIT kit, list your questions below, and discuss them with your team or share them with the decision-makers in your clinic.

Question 1:

_____

Question 2:

_____

Question 3:

_____

What additional information is
needed to complete this task?

Who else should be involved
in completing this task?

What is your next step?

Module 3 –
Selecting a FIT Kit

Activity 2

Estimate the possible profit and loss for a FIT mailing program by entering your program estimates in Boxes A through D in a sample calculation table like the one shown below.

MAILING PROGRAM VARIABLE	COST EACH	TOTAL
Number of kits to mail		Box A – 2000
Cost of kits to clinic*	Box B – $3.00	A x B = $6,000
Postage to mail kits out**	Box C – $2.65	A x C = $5,300
Return postage (based on a 30% return rate)	Box D – $2.65	A x .30 x D = $1,590
Total initial investment		$12,890
Expected return rate*	30%	A x .30 = 600
Expected insured	90%	A x .90 = 540
Expected return on insured	$25.00	540 x 25 = $13,500
Total Profit for Laboratory		**$13,500 - $12,890 = $610**

*Based on kits used in the STOP CRC study, kits are most often offered at no charge when an external laboratory is processing the kits and receiving the reimbursement. Reference: National Association of Chronic Disease Directors, Kaiser Permanente Center for Health Research, The Centers for Disease Control and Prevention. Mailed FIT Implementation Guide. 2022. **https://research.kpchr.org/Portals/5/documents/Mailed-FIT-Implementation-Guide.pdf**.

**Postage based on 2016 rates to mail O.C. Auto Kits. NOTE: Clinics typically pay for the outbound postage, so this might be free for the laboratory.

What additional information is needed to complete this task?

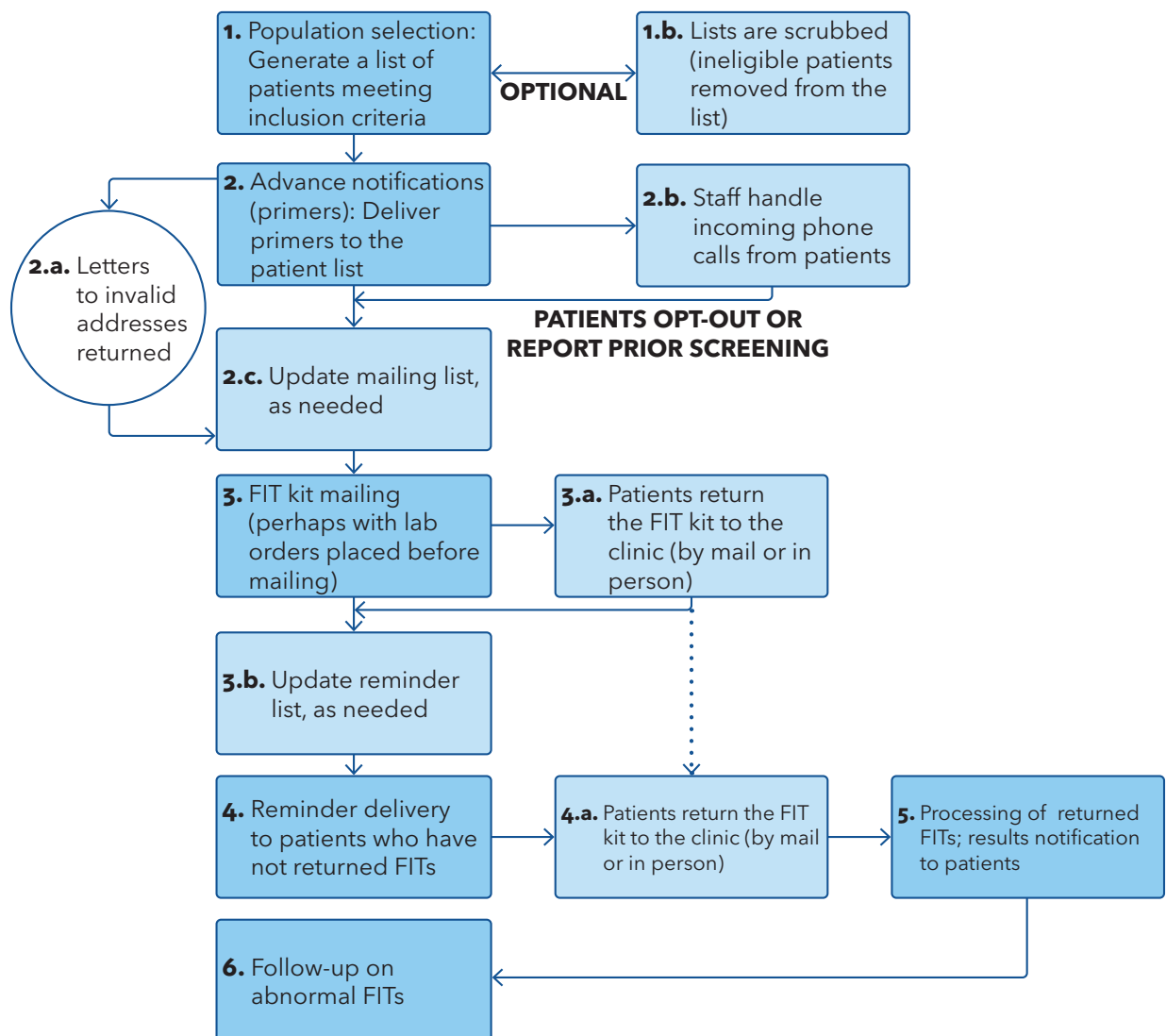Who else should be involved in completing this task?

What is your next step?

Module 4 –
Overview of the Execution Phase

Activity 1

Consider the clinic workflow that follows. Would you change, add, or delete any steps to customize the workflow for your clinic?

Notes:

1. Population selection: Generate a list of patients meeting inclusion criteria

OPTIONAL

1.b. Lists are scrubbed (ineligible patients removed from the list)

2. Advance notifications (primers): Deliver primers to the patient list

2.a. Letters to invalid addresses returned

2.b. Staff handle incoming phone calls from patients

PATIENTS OPT-OUT OR REPORT PRIOR SCREENING

2.c. Update mailing list, as needed

3. FIT kit mailing (perhaps with lab orders placed before mailing)

3.a. Patients return the FIT kit to the clinic (by mail or in person)

3.b. Update reminder list, as needed

4. Reminder delivery to patients who have not returned FITs

4.a. Patients return the FIT kit to the clinic (by mail or in person)

5. Processing of returned FITs; results notification to patients

6. Follow-up on abnormal FITs

Module 4 –
Execution Phase Step 1: Population Selection

Activity 2

Do you think it is feasible to mail FIT kits to your clinic's entire eligible population, or would it be advisable to choose a smaller target population? How would you suggest limiting the program to a priority population or a smaller population?

Notes:

What additional information is
needed to complete this task?

Who else should be involved
in completing this task?

What is your next step?

Module 5 –
Execution Phase Step 2: Advanced Notifications

Activity 1

For your clinic and patients, do you think it is better to mail the introductory letter to patients separately or with the FIT kits? Why? Consider making a pro/con table for each option to help you decide which is best for you.

See page 23 of the Mailed FIT Implementation Guide (Including introductory letter with kit vs. separately) for more information on this topic. **https://research.kpchr.org/Portals/5/ documents/Mailed-FIT-Implementation-Guide.pdf**

Notes:

What additional information is needed to complete this task?

Who else should be involved in completing this task?

What is your next step?

Module 5 –
Execution Phase Step 2: Advanced Notifications

Activity 2

Draft a brief introductory letter to a patient based on the examples provided on Kaiser Permanente's Mailed FIT Materials webpage: **https://research.kpchr.org/mailed-fit/Materials**.

Draft Letter:

What additional information is
needed to complete this task?

Who else should be involved
in completing this task?

What is your next step?

Module 5 –
Execution Phase Step 2: Advanced Notifications

Activity 3

What communication methods (letter, email, text, live phone call) would work well for messages delivered to your patient population before the FIT kits are received? See examples provided on Kaiser Permanente's Mailed FIT Materials webpage: **https://research.kpchr.org/mailed-fit/Materials**.

Method 1:

_____

Method 2:

_____

Method 3:

_____

What additional information is
needed to complete this task?

Who else should be involved
in completing this task?

What is your next step?

Module 6 –
Execution Phase Step 3: Mail FIT Kits

Activity 1

What type of FIT kit instructions (simply worded instructions, picture-only wordless instructions, or videos) and what languages would work well for your patient population? Why?

See page 39 of the Mailed FIT Implementation Guide for links to several examples of FIT kit instructions. **https://research.kpchr.org/Portals/5/documents/Mailed-FIT-Implementation-Guide.pdf**

Notes:

What additional information is
needed to complete this task?

Who else should be involved
in completing this task?

What is your next step?

Module 6 –
Execution Phase Step 3: Mail FIT Kits

Activity 2

Do you think it would be better for your clinic to mail FIT kits once or twice a year or multiple times a year (staggered, in smaller batches)? Consider making a pro/con table for each option to help you decide which is best for you.

Notes:

What additional information is
needed to complete this task?

Who else should be involved
in completing this task?

What is your next step?

Module 6 –
Execution Phase Step 3: Mail FIT Kits

Activity 3

For your clinic and patients, do you think it is better to have patients mail their FIT kits or return them in person? Why?

Notes:

What additional information is
needed to complete this task?

Who else should be involved
in completing this task?

What is your next step?

Module 7 –
Execution Phase Step 4: Deliver Reminders

Activity 1

For your patient population, is it better to send patient reminders by mail, text, email, phone calls, or a combination of methods? See examples provided on Kaiser Permanente's Mailed FIT Materials webpage: **https://research.kpchr.org/mailed-fit/Materials**.

Notes:

What additional information is
needed to complete this task?

Who else should be involved
in completing this task?

What is your next step?

Module 8 –
Execution Phase Step 5: Process Returned Kits

Activity 1

Do you plan to mail FITs to patients who have no insurance? Does your clinic offer a sliding fee scale? Does your clinic have up-to-date insurance status information or federal poverty level (FPL) information for patients? If not, who would you ask to find out?

Notes:

What additional information is
needed to complete this task?

Who else should be involved
in completing this task?

What is your next step?

Module 9 –
Execution Phase Step 6: Follow Up Abnormal FIT Results

Activity 1

Draft a protocol for following up on abnormal FIT results.

The protocol should clearly include when and how the following four steps should happen:

1 ➡ Informing patients about their FIT results.

2 ➡ Scheduling and completing a colonoscopy.

3 ➡ Informing patients of their colonoscopy results.

4 ➡ Scheduling a treatment consultation if cancer is found.

Notes:

Module 9 –
Execution Phase Step 6: Follow Up Abnormal FIT Results

Activity 2

Which staff should notify patients of normal or abnormal FIT results? Depending on your clinic, you might consider assigning the responsibility to a registered nurse, an LPN, a primary care provider, or someone from a specialist office.

How should patients be notified about their FIT results? For example, should they be notified by phone, letter, or through the patient portal?

Where should staff document their attempts to notify patients of their results?

Which staff should schedule a follow-up colonoscopy when needed?

- Who notifies patients?

- Notification methods?

- Where to document notification attempts?

- Who schedules colonoscopy?

What additional information is needed to complete this task?

Who else should be involved in completing this task?

What is your next step?

Module 10 –
Sustaining the Program

Activity 1

List 3 to 5 strategies that you think would help to sustain your mailed FIT program.

Some examples that can help to ensure sustainability include having engaged leaders and dedicated staff, strong partnerships, well-documented policies and workflows, a dedicated quality assurance team, and a documented oversight process.

Strategy 1:

_____

Strategy 2:

_____

Strategy 3:

_____

Strategy 4:

_____

Strategy 5:

_____

What additional information is
needed to complete this task?

Who else should be involved
in completing this task?

What is your next step?

Since 1988, the National Association of Chronic Disease Directors and its more than 7,000 Members have worked to strengthen state-based leadership and expertise for chronic disease prevention and control in all states, territories, and nationally. Learn more at **chronicdisease.org**.

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