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2026 SEE, TEST & TREAT STANDARD OPERATING PROCEDURE (SOP) MANUAL

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FOREWORD AND PURPOSE OF STANDARD OPERATING PROCEDURES

The CAP Foundation's See, Test & Treat Standard Operating Procedures (SOPs) provide direction to individuals and organizations involved in the planning and execution of a See, Test & Treat program. This document is not intended to address all possible variations that may arise in the planning and execution of See, Test & Treat programs. More detailed and specific resources are available to complement these SOPs in the appendices, or by contacting the CAP Foundation at capfdn@cap.org. Additional resources are available in the See, Test & Treat Toolkit for grantees, who will be given access to the folder upon request.

This SOP Manual applies to all See, Test & Treat programs and is intended to be a living document that may be adapted when needed, but it may not be altered without the approval of the CAP Foundation staff.

The purpose of the SOPs is as follows:

- Provide a baseline standard for planning, execution, and follow-up that is applicable to any See, Test & Treat program.
- Ensure all participants focus on their specific tasks while being knowledgeable of all other areas to ensure a smooth and successful program.
- Create continuity around the knowledge of how See, Test & Treat programs are intended to function.
- Ensure consistent quality experience for patients, clinicians, volunteers, health care systems, and the community.
- Offer guidance and approaches to ensure repeatable and scalable programs.

BACKGROUND: THE CAP FOUNDATION

The College of American Pathologists (CAP) Foundation, a 501(c)(3), is the philanthropic arm of the CAP, the world's largest organization of board-certified pathologists and leading provider of laboratory accreditation and proficiency testing programs. Our mission is to improve people's health by:

- Developing tomorrow's pathology leaders through awards for advanced training, research, and education.
- Mobilizing pathologists to expand health equity in medically underserved communities within the U.S. and globally.

Our vision is that pathologists are equipped to bridge health disparities and enhance outcomes globally.

Our flagship initiative, See, Test & Treat ®, which was pioneered by the late pathologist Eugene Herbek, MD, FCAP in 2001, and adopted by the CAP Foundation in 2011, provides institutions across the US with funding to host programs that provide free preventative health screenings for medically underserved individuals

It is a one-day, pathologist-led screening and health education program that brings the power of diagnostic medicine to medically underserved populations with the goals of:

- Addressing health disparities by reducing barriers to care for medically underserved people through health care system partnerships.
- Empowering prevention by delivering dignified screenings with prompt results and health education.
- Connecting patients and their families to a medical home and resources within their own communities.

From 2011–2025, more than 9,200 medically underserved individuals in 20 different states have been screened, many of which have been connected to life saving follow up care.

Beginning in 2026, See, Test & Treat evolved to better meet the needs of medically underserved populations, offering greater flexibility for grantees to screen for additional diseases that can be cured or controlled more effectively if caught early, such as colon cancer, lung cancer, sexually transmitted infections, HIV, iron-deficiency anemia, diabetes, and cardiovascular disease.

These updates expand pathologists' abilities to lead initiatives that make a positive impact around their communities, help institutions foster stronger community partnerships and interdepartmental relationships, and connect more individuals to community resources resulting in healthier lives for patients and their families.

See, Test & Treat meets the highest standards of quality and has been recognized by the American Society of Association Executives (ASAE) for its impact on communities across the US.

See, Test & Treat programs are typically a yearly event, often held on a Saturday. Each program reaches between 50 and 150 patients and families, making it large enough to deliver real impact and efficiency, yet small enough to ensure a high-quality, dignified experience. The one-day approach effectively addresses barriers encountered by medically underserved women facing health disparities—those who have little to no access to preventative care—and also connects women with a medical home for the future.

ELIGIBILITY

Only institutions receiving See, Test & Treat grant funding from the CAP Foundation and pre-selected non-grantee institutions are allowed to utilize See, Test & Treat branding and materials. Any US Based, board-certified pathologist in partnership with a 501(c)3 non-profit organization(s) can apply for a grant to support programs taking place in the US. All applicants will be considered regardless of age, race, gender, national origin or religion.

APPLYING FOR A GRANT

The See, Test & Treat Request for Applications (RFA) process occurs annually during the summer. Applications are submitted through the CAP Foundation's grant portal, https://capfoundation.smapply.io/.

The CAP Foundation evaluates applicants on their ability to deliver the core components, a demonstrable community need, and, if applicable, performance in past See, Test & Treat programs, including success in reaching at least 50 women per program.

All See, Test & Treat Grantees agree to provide the following core components, breaking down barriers such as lack of insurance, transportation, language, childcare issues and more:

1) Free cervical cancer screenings and at least one other health screening from a list of Supported Screenings* that addresses a need in the grantee's priority medically underserved population.

2) Screening results to patients within 5 business days through a health professional, either in person or by phone

3) Culturally and language-appropriate health education regarding the importance of the screenings provided and what to expect; the role that pathologists play in these screenings; What an abnormal result means; and follow-up steps for abnormal results

4) Attendee education about health insurance, financial assistance, and where to access future preventative care, as well as connect patients with abnormal results to necessary follow-up care.

5) Pathologists must engage with the public and program attendees through one or more activities such as providing results, health education, collaborating with local partners, and participating in media interviews to enhance the specialty's visibility.

All applicants are requested to provide a budget for their grant. The CAP Foundation offers grants of up to $20,000 to support See, Test & Treat program expenses that other grants and in-kind donations do not cover. This grant typically pays for items such as exam and laboratory supplies, equipment rental, promotional materials, educational aids, interpreters, translation of materials, patient transportation, and meals. Note that the grant application process is competitive- grant funding is not guaranteed and should not be considered ongoing. Furthermore, successful repeat grantees should expect to receive progressively less (approximately

10% less) each year. Repeat grant recipients should expect to receive less funding (approximately 10% reduction) each year.

The CAP Foundation encourages volunteerism whenever feasible and supports See, Test & Treat programs by procuring in-kind donations of testing kits and supplies, loaner equipment whenever possible, as well as knowledge sharing in terms of running effective programs. As See, Test & Treat continues to expand, we look to programs to become more self-sustaining and actively pursue other sources of funding in addition to securing in-kind donations in the areas of refreshments/food, supplies, promotion, and publicity. Please see Appendix 1 for a description of items eligible for funding. Note that patient incentives should amount to no more than $10/patient.

All applicants are required to identify a date for their application as well. Applicants should consider potential conflicts, holidays and other major events when identifying a date for their program.

Selected applicants are awarded up to $20,000 in grant funding, permission to use the See, Test & Treat® brand, program management tools such as the See, Test & Treat® toolkit, and program management support to implement the program in their community. Applicants are notified regarding the status of their application by the 2nd week of December via email. Note, award funding will only be made to a 501(c)(3) organization and is not guaranteed for all applicants.

AWARDS DISBURSEMENT

The grant recipient will receive 50% of the award upon official approval of the application by the CAP Foundation Grants Committee no later than 6 weeks prior to the program date and the remaining 50% will be awarded after a program outcomes report, a budget reconciliation form and supporting receipts have been turned in. Each program is required to submit the See, Test & Treat outcomes data worksheet 30 days following the program along with documented program costs to receive the balance of the funds. This aggregate program data will be used to develop a formal research protocol to track and monitor the impact of See, Test & Treat and to improve the program design.

The CAP Foundation will not provide See, Test & Treat grants to the following entities:

- Individuals
- Social organizations
- Trade or business associations

- Memorials, such as cultural exchange programs or programs to benefit any particular individual, including individual travel and/ or study

All organizations applying for See, Test & Treat program grants from the CAP Foundation must demonstrate solid financial and program management.

LIABILITY

The CAP Foundation assumes no, and hereby disclaims all, liability for the testing, diagnosis, or treatment of women participating in the See, Test & Treat program (see Rider 1). Participating sites should engage their Compliance and/or Risk Management Department to gain an understanding of and address any liability issues. It is expected that the care, testing, and treatment to be provided in the See, Test & Treat protocol by the participating clinicians shall be consistent with the standards of care applicable to such specialties.

TRADEMARK

See, Test & Treat® is a registered trademark of the CAP Foundation. Prior to public use of the name and trademark, permission must be granted by the CAP Foundation. All intellectual property relating to See, Test & Treat® is owned exclusively by the CAP Foundation and shall remain the sole property of that party unless otherwise agreed in writing. Intellectual property arising out of collaborative activities will be determined in definitive agreements.

STEPS TO PLANNING A SEE, TEST & TREAT PROGRAM

Step 1: Identify a Patient Population

See, Test & Treat serves women residing in medically underserved populations (MUPs) OR patients who live in medically underserved areas (MUAs).

- MUAs are areas having a shortage of primary care health services for a specific population subset within an established geographic area. These groups may face economic, cultural, or linguistic barriers to health care.
- MUAs are areas that have a shortage of primary care health services for residents within a geographic area as established by the Health Resources and Services Administration (HRSA) through the following website: https://data.hrsa.gov/tools/shortage-area/mua-find

Utilize the following resources for identifying local patient population with limited access to health care and to find statistics to support the need for a See, Test & Treat program in your identified community:

- Your local/county public health department
- State public health departments
- Your hospital's community outreach/population health department
- US Census data
- HRSA website: https://data.hrsa.gov/tools/shortage-area/mua-find
- Centers for Disease Control and Prevention
- National Cancer Institute (NCI) Fact sheet

Step 2: Determine which screenings you will be offering, secure a Host Hospital or Clinic and get buy-in from institutions who will provide follow-up care for patients.

Your program should provide free cervical cancer screenings and at least one other health screening from the following list of Supported Screenings that addresses a need in the grantee's priority medically underserved population. In your application you should be able to demonstrate the need for these screenings with data, as well as demonstrate a capacity for offering these screenings and connecting patients with follow-up care if needed.

SCREENINGS	METHODS
Breast Cancer	Screening Mammograms
Cervical Cancer	Cotesting, Primary HPV, HPV Self Collection, Reflex testing
Colon Cancer	Stool based Tests ONLY (gFOBT, FIT, sDNAFIT)
Lung Cancer	Low Dose CT
Infectious Disease-Chlamydia/Gonorrhea; Hepatitis; HIV and/or Syphilis	Blood test; Urine test; Swab
Chronic Disease-Iron Deficiency Anemia; Diabetes; and/or Lipid screenings	Blood test

- Confirm support of the host site institution/organization and commitment from the following areas:
  - Hospital/Clinic administration
  - Laboratory Medical director
  - Pathology department/chair
  - Gynecologist/gynecology department
  - Cytology Laboratory director/chair
  - Other departments involved in Supported screenings
  - Marketing/Communications/Public Relations department(s)

  - Patient advocate/community outreach
  - Interpreter Services
  - Registration
  - Financial aid department
  - Community Outreach department (if available)
  - Health insurance marketplace provider (to provide enrollment information)
  - Facility Department (security, event set-up, parking/traffic control)
  - Schedule a program date approved by the host organization and the CAP Foundation.

Confirm institutions that will see patients for follow-up care and ensure that there will be communication lines for referrals and patient information sharing.

Step 3: Identify a Program Coordinator and Recruit a Workgroup to Plan and Implement the Program (refer to See, Test & Treat Toolkit for a Workplan Template)

It is recommended that all See, Test & Treat programs identify a program coordinator to assist with planning/organizing/coordinating all program logistics such as scheduling planning group meetings, taking meeting minutes, and coordination of follow-up assignments; ideally this person has project management skills. Consider reaching out to a part-time staff person or a retired clinician who may be interested in taking on a temporary assignment; those in administrative fellowships or graduate students may value the experience in serving as a program coordinator.

For optimal outcomes, your workgroup should consist of a combination of the following:

- Program Coordinator/Organizer
- Pathologists
- Cytotechnologists
- Gynecologists
- Oncologists
- Nurses
- Radiologists
- Mammography Technicians
- Registration
- Financial aid/insurance marketplace navigators
- Public Relations, Marketing or Communications Representative
- Administrative staff
- Patient advocates
- Community outreach
- Interpreters (any interpreters involved in translation of test results, medical procedures, follow-up care, etc. must be medically certified)
- Building/Facilities representation

Step 4: Estimate Patient Volume and Confirm Date for program
Programs should aim to serve at least 50 patients. Use the following planning guidelines to estimate number of patients that can receive screenings:

- Establish the number of private examination rooms available for screening.
- Determine the number of clinicians needed to provide patient exams and screenings.
- Estimate the amount of time needed for patients to change into and out of a hospital gown.
- Allow ample time for the appointment and clinician questions.
- Determine the amount of time necessary to transition between screenings.
- Determine the amount of time for patients to undress.
- Determine time needed to perform each of the screenings
- Estimate the amount of time needed to process, read, interpret, and deliver results.
- Set the program hours of operation to achieve goals.
- IMPORTANT : FOR PATIENT RECRUITMENT, think about your typical clinic no show rate and consider registering additional patients to mitigate this- the typical See, Test &Treat program has about a 25% no show rate

Confirm a date for the program/programs.

- Avoid scheduling programs that conflict with hospital, community events, or holidays.
- Consider factors that could be impacted by weather, especially if any part of the program will be held outdoors
- Consider whether the program would be more successful held as multiple smaller events or one larger program
- Ensure the availability of any vital community partners needed to support screenings (e.g., off-site laboratories, mobile mammography vans, supporting external laboratories)
- Ensure sufficient space is available for at least 50 patients, accompanying family members or friends, clinical services, education and food.

Step 5: Adhere to Established Guidelines to ensure Patient Eligibility
The following are guidelines recommended by the CAP Foundation. If your institution plans on adhering to guidelines not mentioned below, please reach out to the CAP Foundation to provide additional information.

COLLEGE of AMERICAN PATHOLOGISTS FOUNDATION | SEE TEST & TREAT

"SUPPORTED" SEE, TEST & TREAT® SCREENINGS

SCREENING	GUIDELINES	METHODS
Breast Cancer	USPSTF, ACS, ACR	Screening Mammograms
Cervical Cancer	ACS, ACOG, USPSTF, ASCCP	Cotesting, Primary HPV, HPV Self Collection, Reflex testing
Colon Cancer	USPSTF, ACS, ACG	Stool based Tests ONLY (gFOBT, FIT, sDNAFIT)
Lung Cancer	USPSTF, ACS	Low Dose CT
Infectious Disease-Chlamydia/Gonorrhea; Hepatitis; HIV and/or Syphilis	CDC	Blood test; Urine test; Swab
Chronic Disease-Iron Deficiency Anemia; Diabetes; and/or Lipid screenings	USPSTF	Blood test

Step 6: Devise Patient Recruitment Materials

- Create Media and Marketing Plan (refer to See, Test & Treat Toolkit)
- Engage marketing, communications and/or public relations personnel at the beginning of the planning stages to develop a program outreach and/or promotional strategy. Programs should focus on conducting outreach to patients that are not connected with your health care institution already and do not have a medical home
- Please do not abbreviate "See, Test & Treat"- use the full name in all your marketing materials
- Ensure that you have language-appropriate marketing materials for your target populations.
- Distributing information via word of mouth is still an effective tactic as majority of people still receive information in this manner. Engage community leaders (faith leaders, governmental officials, school officials, friends and family) and community stakeholders (small business owners and employees, librarians, local health care systems) and ensure that that these people/organizations are aware of your program and can promote See, Test & Treat on your behalf.
- Distribute promotion/patient recruitment materials a minimum of 6 weeks in advance of the program date (templates found in See, Test & Treat Toolkit)
- Work with community outreach experts within your institution and/or within the community to reach target populations.
- Provide/include talking points for consistent messaging by outreach personnel or if material is provided as a leave behind.
- Employ community advocates to visit and recruit patients from the community or local to the area.
- Post multilingual flyers in locations frequented by the target audience such: as beauty salons, women's shelters, churches, libraries, community centers, grocery and other stores, laundromats, ESL classes, local workplaces, fast food restaurants, and currency exchanges.
- Post multilingual flyers in your clinic or hospital.
- Cross-promote your See, Test & Treat program at other community events; look for speaking

engagements.

- Consider use of social media including Instagram, Facebook, Event Brite sign-up portal, Constant Contact to gather names and generate email notifications. Tag the CAP Foundation in all posts about See, Test & Treat.
- Contact local radio to conduct free public service announcements, community calendar announcements.
- Contact local cable TV hosts to interview members of the planning team.
- Advertise in newspapers, community calendars.
- Post on hospital website, Facebook, and Twitter. (See Facebook/Twitter Instructions in the Media Kit)
- Create tactics to remind patients of their appointment times and any last-minute instructions (help mitigate the no show rate).
  - Reminder Phone Calls
  - Text Messages
  - Postcards
  - Magnet (with appointment information)
- Conduct pre-program workshops for resistant populations or community leaders/stakeholders that may require additional information before participating.
- Create cultural awareness and sensitivity by holding a simple event to explain to women and their families what happens at a See, Test & Treat program.
- Have interpreters, volunteers, and clinicians available to field questions.
- Familiarize community influencers with the program and key messages about the importance of cervical and other screenings.
- Include diagrams and education about the procedures that will take place during the program.

Step 7: Seek Outside Funding

If awarded funding, a repeat grantee should expect to receive reduced funding each year. To work towards achieving sustainability, sites are encouraged to seek in-kind and local financial donations. Keep in mind that not everyone you ask to donate knows about your See, Test & Treat program. Clearly state why you are seeking donations, how it will directly support your program/the patients being screened; and how the donor will be acknowledged for their contribution.

Identifying additional funding opportunities

Seek local funding opportunities, donations and partnerships (explore See, Test & Treat Toolkit for ideas). Get in touch with your program manager for help, guidance, and suggestions as to how to approach funders.

1. Research local foundations, local businesses, community groups (i.e. Exchange Clubs, Rotary clubs, women's clubs, etc.) and institutions that would be interested in providing funding to local programs. Be mindful of grant application deadlines and funding cycles.

2. Connect with businesses and organizations in the community who might be interested in donating food, transportation, or items for the program. Additionally, utilize these connections as a means to promote the program and recruit participants.
3. Work with your institution's grant writer or outreach staff to identify key community groups or businesses that have a relationship with your institution.
4. Talk with board members and key stakeholders at your institution to determine if they are connected with any organizations, clubs or businesses that would be interested in supporting See, Test & Treat.

Simple tips to follow when reaching out and asking for a donation (refer to See , Test & Treat Toolkit for template)

1. Use simple and direct language: Be clear on the goals of the program, the number of people it will benefit and who will be at the program. Consider telling a story to explain your See, Test & Treat program, its impact on the community and why you are asking for a donation. If you have hosted a See, Test & Treat program before, use patient stories of patients from past programs to illustrate the impact on the women serve through the event.
2. Tailor your message: Determine how you will make "the ask" (phone call, casual email note or formal letter); think about appealing to each person's individual or business interests to make a correlation with See, Test & Treat.
3. Know what you're asking for: It's important to clearly outline your request.
4. Know who you're asking: Make sure you know who your audience is when you ask for donations.
5. Don't be scared of rejection: You will not get a donation from every person you ask, and that's okay.
6. Have a positive attitude: Stay positive, let people know the impact their donations will have on the success of your See, Test & Treat program and why it's important.
7. Think outside the box: Get creative when you ask for donations for your See, Test & Treat program, and experiment with connecting with others via email, social media, in person, or better still, all three!

Step 8: Create Pre-registration Process Prior to Patient Recruitment (refer to See , Test & Treat Toolkit for guidance)

1. Work with your Billing/Finance department to set up a special code/guarantor account to use for See, Test & Treat patients so they will not receive a bill for screening services provided at the event. Make sure this account code is shared will all relevant departments. This is a way to mark your See, Test & Treat participants so that you are able to easily run reports on them for data/outcomes reporting.
2. Determine whether registration will be conducted by phone, or online.
3. Devise a prescreening form to gather patient contact information, demographic information, health insurance status patient/family history, and eligibility for screening based on age and screening

guidelines. Ensure that the forms collect data that needs to be reported to the CAP Foundation. Have the patients indicate if they need an interpreter during the program.

4. Create a script in which to train registration staff so all are asking potential patients the same questions as well as giving correct event details. In addition, staff need to understand and answer questions regarding the circumstances under which a patient would or would not receive one of the offered screenings.
5. Begin a patient tracking spreadsheet to keep track of # of patients being registered. (See , Test & Treat Toolkit for guidance)
6. Permit registration staff to access appropriate databases to look up dates of previous screenings to confirm eligibility.
7. Advise patients that the name on their photo ID should be the name used when pre-registering and completing all forms for See, Test & Treat and future medical visits. Include this information and procedures in patient outreach and recruitment activities.
8. Mitigate the patient no-show rate – overbook or double book appointments based on your institution's typical no-show rate.
9. Utilize a waitlist, with a plan to contact patients to fill spots for no shows/cancellation. These patients can still attend educational segments.
10. Plan for interpreters to meet population needs (any interpreters involved in translation of test results, medical procedures, follow-up care, etc. must be medically certified).
11. Assign volunteers to place reminder phone calls/text messages to registered participants two to three days prior to event to confirm appointments.

Step 9: Patient Management and Flow

1. Determine the supplies, people, logistics and equipment needed to execute the screenings
2. Map out your See, Test & Treat program to determine the best use of available space, patient flow and interaction among departments. Create workflows (refer to Appendix 2 for examples) for your program, patient registration (pre-registration and on-site registration) mammography, pap test processing and children's activities
3. Determine location of check-in areas for patients and volunteers.
4. Determine location for on-site registration of See, Test & Treat patients.
5. Ensure patient forms are completed and collected during the on-site registration process, including:
    a. Host site registration forms.
    b. Patient consent to health screening and waiver of liability (refer to the See, Test & Treat Toolkit for example)

   c. HIPAA compliance and patients to be offered the opportunity to receive a copy of the "Notice of Privacy Practices."
   d. CAP Foundation media release form (refer to sample in See, Test & Treat Toolkit)
   e. For patients who do not wish to be photographed, establish a visible way to identify them to the photographer (e.g., no photo sticker, colored beads, etc.).
6. Consider having patients go to a check-in station either before or after on-site registration; use this station to orient patients to the program. This area can provide additional information/handouts such as their appointment times, a program map to help patients find various program locations, health ticket/activity card so patients know what is happening throughout the day (have patients check off each activity as an incentive to participate and complete their card.) Volunteers can view patient health ticket/activity cards to help direct individuals throughout the program. (sample in See, Test & Treat Toolkit)
7. Determine need for interpreters or patient escort; assign as needed to help guide patient to screening appointments and/or activities to assure timeliness and engagement.
8. Show patients where the restrooms and refreshments are kept.
9. Station volunteers in corridors and main areas to help guide patients and answer questions. Consider providing patient guides/interpreters and/or station volunteers throughout the main program areas to assist patients with questions or to help them determine where they should go next (Note: Interpreters should be clearly marked so that patients can recognize them when needed. A badge indicating the language they speak is a good way to make them recognizable as interpreters)
10. Consider color coding key areas using balloons and/or signage.
11. Ensure appropriate signage throughout site to guide the women to registration, screening, education, and check-out areas. Create multilingual signage as needed to support your patient audience.
12. Determine location of check-out areas for patients and volunteers.
13. Ensure volunteers are available to See, Test & Treat patients to answer questions or collect any forms prior to leaving event.
14. Determine with your planning team how patients with abnormal results will be connected with the additional screenings and care that are needed, ensuring that medically underserved patients are connected with affordable care.

Step 10: Determine Volunteers Needed

It is recommended that programs limit the number of volunteers. Each volunteer should have a specific assigned role/responsibility. Too many volunteers/workers may result in the reduction of satisfaction of the volunteer experience, as it has been shared that volunteers like to be active throughout their shifts and not spend a lot of time waiting.

Create a contact sheet for all volunteers to include their full name, role, responsibility, and contact information (phone/email). All volunteers should be familiar with HIPAA Guidelines specific to patient Protected Health Information (PHI).

Using the information to estimate the number of patients to be screened in Step 5, determine the number of volunteers and clinicians (who are licensed, credentialed, or granted privileges) to provide services at the program. While program planning, also consider the role of pathologists- the See, Test & Treat Toolkit has a document summarizing possible roles filled by residents, fellows and attending pathologists.
(See Appendix 3 – Guide for Determining Volunteer Need).
These are some positions that will need to be filled:

Program Logistical Support:

- Program Coordinator
- Pathology residents/ medical students
- Volunteer Coordinator
- Education Coordinator
- Health Fair Coordinator
- Children's Activity Coordinator
- Food Coordinator
- Greeters
- Interpreters (medically certified)
- Additional Interpreters (not medically certified)
- Patient Escorts
- Specimen Couriers
- Exam Room Attendants
- "Float" volunteers
- Photographer
- Security
- Parking Attendants
- Check-In Station (patients and volunteers)
- Onsite Patient Registration
- Patient Navigators
- Check-Out Station (patients and volunteers)

Patient Screening Support

- Conduct exams and screenings
- Process and read specimens
- Discuss results with patients

Here are some best practices for Volunteer Recruitment and Volunteer Management

- Begin volunteer recruitment early within your own specialty. This is a great opportunity to get pathology residents and medical students involved with a community event.
- Advertise in institutional newsletter, website, bulletin
- Enlist other specialties and community advocates to announce opportunity in staff and group meetings

- Circulate/post a volunteer announcement and sign-up sheet, website, etc.
- Create a volunteer contact sheet to include name, contact information, role, responsibility, and time commitment; circulate among volunteers.
- Create job descriptions and expectations for each volunteer role (refer to See, Test & Treat Toolkit for examples).
- Develop a process/procedure for each area so volunteers understand what is happening and what they need to do.

Volunteer Orientation (refer to See, Test & Treat Toolkit for examples)

- Define the expectations of your volunteer team; provide a written orientation packet if needed to include event logistics (volunteer roles, dress code, start/stop times, patient screening, education and food areas, volunteer areas, key contacts), along with any last-minute instructions
- Develop a program map so volunteers can familiarize themselves with the activities and locations throughout the building so they will know where to find things and what is happening at various times throughout the day.
- Assign key leaders to manage each volunteer group.
- Make sure all volunteers are wearing their name tags.
- Schedule a walk-through before your See, Test & Treat event to allow volunteers to become oriented with the program and ask questions.
- Hold a 5 to 10-minute huddle the day of your See, Test & Treat program to orient volunteers and to answer any last-minute questions. Conduct a walk-thru with volunteers if time allows.
- Make sure volunteers know what is happening in their area specific to patient and clinician interactions.
- Share key documents (e.g., patient registration lists, volunteer contact sheet), program map, pager numbers, phone, and fax numbers with volunteers as feasible.
- Consider appointing someone to monitor and manage volunteer staffing at each station/location throughout the day of the event. This will prevent understaffing and volunteers not having the opportunity to take a break or get food. Make sure food is available to all volunteers throughout your See, Test & Treat program.
- Confirm volunteer role, responsibility, and hours of participation.
- Remind volunteers to check-in and check-out when arriving/departing the program.
- Instruct volunteers to communicate with their colleagues – share information about what is happening during the day.
- Discussing patient information or programmatic issues in public spaces is never a good idea;

remind volunteers to seek out assistance and a private area to discuss and get guidance.

- Remind volunteers that they could be asked to pitch in as needed and may be asked to do something outside of their assigned role.

Step 11: Create Day-of-Program Registration Process (Also reference Step 9: Patient Management and Flow)

- Utilize electronic health records whenever possible to accurately capture patient contact information, demographic information, screening eligibility, patient/family history, and follow-up information.
- Work with all departments to consolidate the gathering of patient information (avoid the need for patients to provide duplicate information at different stations).
- Verify information gathered from preregistered patients. Reminder: patients should use the same name that is on their photo ID.
- Have patients communicate how they would like to be contacted. This may include postcards, phone call/text, email, or mail. Try to get any secondary phone numbers that can be used to get a hold of the patients.
- Have the patients indicate if they need an interpreter during the program. If they do, then connect them with one or let them know how to identify an interpreter at the program (interpreters that are walking around the health fair should be clearly marked with a nametag indicating what language they speak).
- Have patients complete registration forms, HIPAA forms, media releases and waivers, as necessary.
- Create a program agenda listing locations and times of other activities, education and screenings taking place during your See, Test & Treat program that women can participate in while waiting for test results. Provide this information as a handout or poster or both. Orient volunteers prior to the event; make sure to explain this to patients when they are checking in.
- Provide a pre-made folder with all patient documents needed for program participation will need for participating in the program, including an activity card so patients can check off when they complete an activity or receive a screening, appointment times, media releases, and patient evaluations.
- Remind women about the importance of completing a post-program questionnaire (utilize an incentive if needed) and also the importance of follow-up care.
- If a paper-based patient registration system is used, ensure there are multiple copies so that departments have necessary information for initial testing and follow-up procedures.
- Have a system for ensuring that patient contact information has been captured, should paper forms be lost or misplaced
- Develop a patient identification system so that results can be readily and correctly matched.
- Follow all HIPAA guidelines specific to patient Protected Health Information (PHI).

Step 12: Patient Education

Health Education is critical to the success of the program. Health education sessions must be culturally and linguistically appropriate for the priority community and should involve active participation by pathologists. Topics addressed should include

- The importance of the screenings provided and what to expect
- The role that pathologists play in these screenings
- What an abnormal result means; and
- Follow-up steps for abnormal results

The CAP Foundation has developed some patient education materials for use at See, Test & Treat programs. Other organizations, such as the CDC and American Cancer Society also provide educational materials. These educational materials can be found in our online See, Test & Treat Toolkit. Ideally these materials would be handed to your patients at check-in or registration or at a health education table so that a health professional can walk them through the information and answer any questions

Ideas for education include:
Education through games at the health fair (incorporate health facts into games such as Wheel of Fortune, Jeopardy, and Bingo)
Health Education done by providers during medical appointments.
Health education conducted while patients are in waiting room.
Ask a Doctor/ Pathologist table- where patients can look through a microscope to see what normal vs. cancerous cells look like. Patients interact with pathologists and other physicians along with having the opportunity to ask them questions- this is a good way to demystify the process of what happens after you get your pap test and mammogram.
Health fair featuring vendors and community resources that your target population could benefit from
Presentations during lunch
Looping videos or slide shows with educational content in waiting areas (A playlist is provided on the See, Test & Treat Toolkit under “Education Materials”)

Patient Program Evaluations: (refer to See, Test & Treat Toolkit for examples)
In addition to a See, Test & Treat Activity Checklist, programs should provide patient evaluation forms to gather information about patient experience, knowledge/attitude changes and satisfaction. Collect forms from patients at the check-out station.

Step 13: Healthy Meals

Volunteers and some patients will be at your See, Test & Treat program site anywhere between 3 to 6 hours whether receiving screenings, participating in the health fair, or waiting for results. Providing a healthy breakfast, lunch or snack provides the opportunity to introduce patients to nutritious and healthy food options along with fueling your volunteer team.

Consider the following:
Approach local restaurants and grocery stores to donate food for the program
Setting up a table in a main area with a volunteer assigned to manage the food station.
Offering pre-packaged, grab and go food choices; provide culturally appropriate food based on the patient population being served

Conducting a lunch and learn session
Having a separate food area for volunteers

Step 14: Addressing Barriers to Care
See, Test & Treat recognizes that medically underserved women face several barriers to accessing health care, including transportation, lack of childcare, and being unaware of resources available to them. While planning your program, consider addressing some of these barriers by offering:

Language:
Ensure that you are collecting information on patients' preferred language for communication, which should be taken into account when marketing, pre-registering, sending reminders, and on the day of the program. Involve your institutions' or health departments' community health workers, who could help with building trust and understanding amongst hard-to-reach programs that are low English proficiency.

Children's Activities:
One barrier to care faced by women is the availability of childcare. When planning your program consider a space and process for offering children's activities during the program. These can include coloring books, crafts, games, reading materials along with other activities.

Consider the following:
Offering age-appropriate activities, such as coloring, crafts, a balloon artist, and games
Establishing an identification/matching system for each child/parent
Determining the age range/limit for participation
Securing volunteers who have experience working with children
Checking with your Risk/Compliance department for guidance
Assigning one volunteer per patient and child to sit and color with the child in the waiting room while the patient is at their appointment

Transportation:
Many women lack access to transportation or the ability to pay for transportation to get to their doctor's appointments. Consider assisting your target population by:
Providing gift cards for Uber or Lyft
Providing tokens for your local public transportation system
Waiving the parking fee at your hospital's parking lot
Providing a shuttle for your patients

Lack of Awareness Regarding Local Resources Available:
Due to several factors many medically underserved women are unaware of local resources available to them to support their health. In addition to the health education efforts mentioned in Step 13, also consider inviting patient navigators and local FQHCs to your health fair in order to help your patients enroll in programs that will allow them to establish a primary medical home.

Step 15: Laboratory, Laboratory Personnel and Specimen Management
Space and personnel must meet all state/local requirements for performing screenings.
Ensure program has licensed/certified personnel to conduct all exams, obtain and process specimens, and take and review images.
Follow the rules governing your organization regarding credentialing for personnel.
Ensure your program utilizes a CLIA-certified laboratory to perform specimen testing.
Determine the laboratory setup that works best while remaining compliant with state and federal regulations.

Specimen Management

Establish a protocol for specimen labeling.
Identify a system to process specimens in the order in which they were collected.
Establish a protocol for batching and delivering specimens to the appropriate staff for processing and interpretation.
Avoid excessive batching of specimens, as that may result in processing delays that can impact the delivery of results to patients.
Arrange for volunteer couriers, if necessary.

Step 16: Deliver Patient Results (refer to See, Test & Treat Toolkit for more information)

Determine how the results will be collected and provided to the clinician, and who will be communicating these results to the patient.
Explain abnormal results and further testing or procedures required
Triage patients to receive any further required testing available that day.
Provide a take-away card with contact information so patients can call post-program with any questions.
For further testing or treatment that is not available that day, connect patients with hospital or clinic personnel who can arrange and communicate next steps to patient (provide a take-away sheet with contact information).

Step 17: Follow-up Testing and Treatment

In cases where further treatment is needed that cannot be performed onsite, program hosts/clinicians are required to:
Arrange follow-up, including locations, providers, and financial arrangements for women with abnormal results requiring further care (provide a take-away sheet with contact information).
Explain the follow-up plan to patients both orally and in writing before they leave the See, Test & Treat program.
Provide patients with a card listing resources and contact information if they have any questions after leaving the See, Test & Treat event.

Models for Follow-Up Care
See, Test & Treat host sites have employed various methods for connecting patients with abnormal Pap and Screening Mammogram results to further care. Tactics used include:

> Working with your state Breast and Cervical Cancer Program to assist with covering cost of screenings and follow-up care.
> Collaborating with hospital affiliates and Federally Qualified Health Centers committing to patient follow-up for abnormalities.
> Partner practice committing to patient follow-up for Pap and Screening Mammogram abnormalities.
> Triage with patient navigators and physicians working in area clinics/imaging centers that have committed to patient follow- up for abnormalities.
> Volunteer physicians accepting patients into their private practice.
> Referral to County medical center.
> Enrolling patients in a state/federally funded women's cancer screening program, applying for Medicaid, or in a health insurance marketplace plan.

Step 18: Debrief and Celebrate
After your See, Test & Treat program, it's important to conduct a debrief session within a week of your event with CAP Foundation staff, all supporting staff and volunteers. The purpose is to gain input,

determine what worked well and if any changes need to be made to your program for next year
Celebrate your success! Host a thank you lunch the week after the event and invite the Hospital Administrators, C-Suite, and Volunteers.
Recognize volunteers internally on message boards, flat screens, newsletters, intranet, institution website, press releases, etc.
Leverage internal awards available within your institution for See, Test & Treat volunteers
Consider sending out handwritten thank you notes.

Step 19: Complete and Report Patient Outcomes and Patient Survey Results
Within 30 days post program, submit your one-month outcomes data and a budget reconciliation form (with supporting documents) via Survey Monkey Apply in order to receive the balance of your CAP Foundation grant.
With 90 days post program submit your 3-month outcomes data and within 120 days submit your 6-month outcomes data.
These reports ensure that CAP Foundation staff is kept up to date on the outcomes of any patients that need additional diagnostics or treatment. We ideally would like to follow the patients until they are connected with the information they need.
Multiyear Funding Grantees: After one year, look through medical records to see the number of See, Test & Treat patients that have visited your institution since attending See, Test &Treat, which is an indicator for the program's success in connecting the patients to a medical home. Please submit this information through the data outcomes form provided to you by the CAP Foundation.

Rider
The CAP member pathologists are not employees, agents, or representatives of the CAP Foundation, and have no affiliation with the CAP Foundation other than the CAP member pathologists' professional membership with the College of American Pathologists. The CAP Foundation is not responsible for the actions or inactions of the CAP member pathologists. The participating sites and clinicians are at all times solely responsible for their own conduct and should not rely on these Standard Operating Procedures in determining whether they have complied with their applicable professional standards of care.

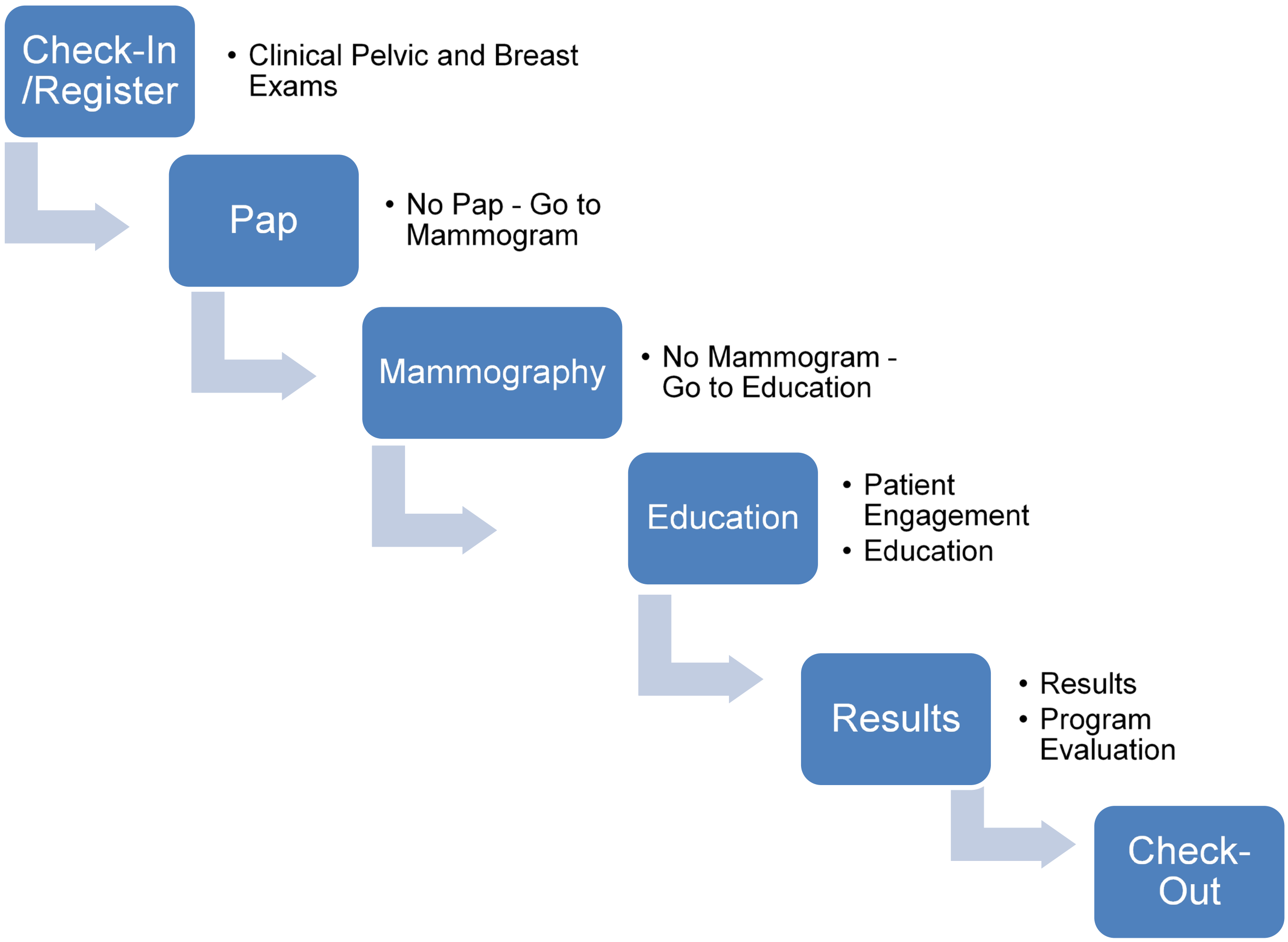
The CAP Foundation offers competitive grants of up to $20,000 to support See, Test & Treat program expenses that other grants and in-kind donations do not cover. The following table provides a description of program expenses that are eligible for funding.:

Type of Expense	Description
Medical Equipment	Costs associated with transport or rental of equipment to perform screenings.
Testing Supplies	Testing collection supplies needed to perform the following screenings/diagnostic procedures during your See, Test & Treat program: NOTE: The cost to perform the test is not eligible for grant funding and should not be included in your See, Test & Treat budget. This funding may be reduced if an in-kind donation of any supplies is received.
Project Coordinator	An individual who will assist in planning/organizing all program logistics. Consider reaching out to a part-time staff person or a retired clinician who may be interested in taking on a temporary assignment; those in administrative fellowships or graduate students may value the experience in serving as a program coordinator.
Support Personnel	Hourly personnel who cannot volunteer their time to perform their normal job in support of the See, Test & Treat program. Examples of non-exempt staff include registration staff, techs, housekeeping, etc. It is expected that exempt staff volunteer their time in support of the planning and execution of See, Test & Treat. Institutions to follow their labor laws/ policy/ procedures specific to compensation of hourly staff supporting a humanitarian program providing a service/benefit to the community.
Marketing and Promotion	Expenses related to marketing and promoting your See, Test & Treat event to a target audience of medically underserved women residing in the community which the institution normally services.
Translation/Interpretation	Expenses associated with translation of educational and promotional materials or interpreters on the day of the event
Transportation	Funding support for the transportation of women to and from your See, Test & Treat event.

Children’s activities	Funding support for the purchase of supplies to support the children's activities that will be taking place at your See, Test & Treat program. Examples include games, coloring books, Legos/building block sets, stickers, art supplies, books, etc.
Meals	Healthy meal and snack options for both patients (and their families) attending and volunteers supporting your See, Test & Treat program.
Other	Other supplies and services needed to support your See, Test & Treat program (Office supplies, cleaning services, security, etc.,). Patient giveaways (except for gift cards, which are not fundable) are allowable expenses.

APPENDIX 2 – SAMPLE PATIENT FLOW CHARTS

SAMPLE Patient Flow Chart



APPENDIX 3: Guide for Determining Volunteer Need

Category (Personnel)	Number of Suggested Volunteers		Notes
	Screening 50 Women	Screening 100 Women	
Patient On-Site Registration (Check In / Out)	4	4	
Patient Navigators	3	6	
Patient Greeters	5	10	
Staff Project Manager	1	1	
On-Site Coordinator	1	1	
Children's Activity Coordinator	1 to 2	1 to 2	Based on need
Food Coordinator	1	1	
Supply Coordinator	1	1	
Cytotechnologist and Cyto Prep Tech	4	6	
Cytopathologist	2	2	
Pathologist	2	2	
Pathology Residents	6	6	Assist with education; engage patients in viewing healthy and unhealthy cells via two-headed microscope
Specimen Runners/Couriers	2	3	
Pathology/Laboratory Volunteers	3	6	
OB/GYN Administration	4	6	
OB/GYN	6 attending physicians	10 attending physicians	Perform exams and provide patient results
OB/GYN Residents	6	6	Assist with patient prep/exam, taking patient history
Nurse (NA/RN/MA)	6	10	
Colposcopy/LEEP (Provider)	TBD	TBD	Based on need
Colposcopy/LEEP (Nurse)	TBD	TBD	Based on need

Mammography Registration	1	3	
Radiologist	1	1	
Radiology Technician	2	3	
Phlebotomist	1	1	
Financial Aid	2	3	
Insurance Navigators	1 to 2	1 to 2	
Education	TBD	TBD	Based on education offered
Interpreters	TBD	TBD	Based on need
Total	58	82	