



STATE OPIOID RESPONSE

# Salesforce Manual

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Updated on 1/25/2023



The Evaluation Center

UNIVERSITY OF COLORADO  
DENVER | **ANSCHUTZ MEDICAL CAMPUS**



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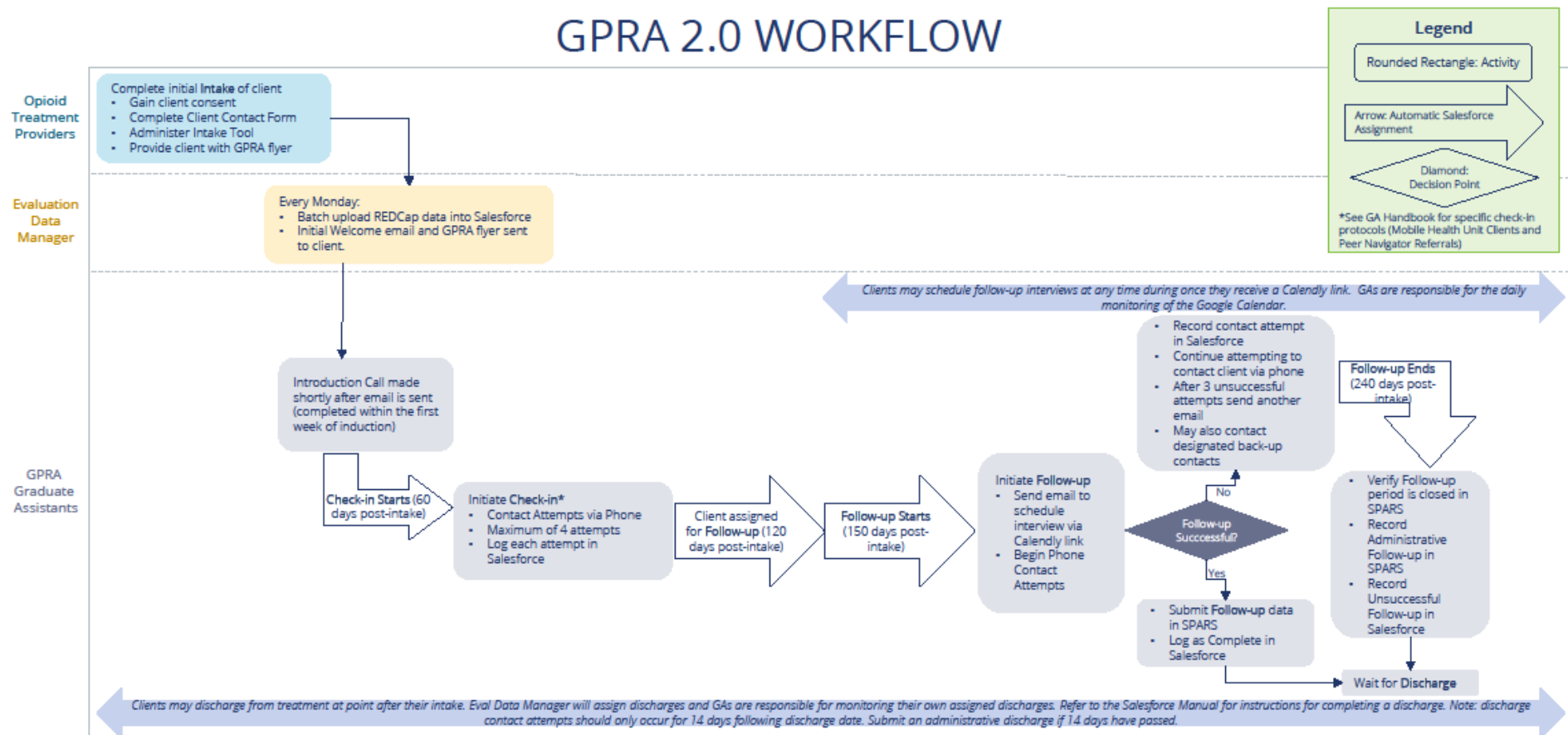
## ADD LANGUAGE ABOUT CLIENT INTAKE PROCESS

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When a client is inducted into SOR funded treatment, the GPRA data collection process begins with the provider at the treatment site completing several steps. They will first explain the SOR grant and review the informed consent documents with the client. If the client does not consent to being a part of the data collection, they are still able to receive SOR funded services, however they will not be contacted by the GPRA GA's at any time. After the informed consent is received, the providers will then submit client contact information and complete the initial GPRA survey with the client. This initial survey is the same survey that GA's complete at follow up/discharge. Clients are then provided with the SOR GPRA Flyer and are informed that the Evaluation Center will be following up with them to complete the check-in and follow up survey.

After the provider has completed the consent, contact information, and initial GPRA survey, Allyssa will upload the client information into Salesforce, as well as the contact information into RedCap. 60 days after the client has been inducted into the SOR data collection through the initial provider-given GPRA survey, GA's initiate contact with the client through the Check-In call. The purpose of this call is to remind the clients of the data collection, ensure that the contact information that was submitted by providers is still accurate, and once again inform the client that we will be contacting them to complete the Follow Up survey sometime during the 150 to 240 days after the client completed the initial GPRA survey. Salesforce is used throughout this process by the GA's to log check in and follow up attempts.

# GPRA 2.0 WORKFLOW



## STEPS TO LOG CLIENT CONTACTS IN SALESFORCE

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Once an intake has been completed, and the client information has been uploaded, GAs will initiate client contact attempts for check in, and follow up. Salesforce is the system we use to record all contact attempts throughout the client's journey. Client contacts can happen through a variety of methods, including:

- Phone call
- Text message
- Email
- Back up contact outreach

Contact attempts can be either successful, or unsuccessful. A **successful attempt** is defined as, the client answered the call, and completed the necessary data collection for the interval you are calling about. An **unsuccessful** attempt is defined as, an attempt in which you were unable to complete the appropriate data collection due to client availability (i.e. phone number is disconnected, client hung up or asked you to call at another time, you left a voicemail, etc.). All text message and email attempts will, by default, be classified as unsuccessful when logging them in Salesforce. The remainder of this chapter outlines how to record contact attempts in Salesforce.

### 1. CREATE A MASTER CONTACT RECORD

All **contact attempts** (unsuccessful and successful alike) should be recorded in Salesforce. Each contact attempt will be recorded within the **client record** by clicking "Contact Attempt." This will create the **master contact** record for the given stage that the client is in (i.e. check-in, follow-up, or discharge). A master contact record will be created for each of outreach stages as a client progresses through the system.

<u>STAGE</u>	<u>TIMELINES</u>
Check in	60-120 days since intake
Follow up	150-240 days since intake
Discharge	Can occur at any point

The following image is an example of how to create a master contact record from the client record.

Contact  
**15970610701**

GPRA Intake Date: 7/1/2020    Stage: Intake    Status: Active

Details		Chatter	
Client ID	15970610701	Stage	Intake
GPRA Intake Date	7/1/2020	Status	Active
Days Since Intake	8	Substatus	
Client Identifier	15970610701		
Notes			
Site Information Primary Business Organization: <a href="#">VCPHCS XIII LLC, BHG Centennial</a> Site ID: 159706			
Check-In Information			

Contact Attempts (0)

Discharge Forms (0)

Contact History (1)

Date: 7/6/2020 11:44 AM  
 Field: Created  
 User: Allyssa Mastroni  
 Original Value:  
 New Value:

[View All](#)

After selecting the “contact attempt” button, a pop-up will appear for you to enter additional data. Fill out the fields in the pop-up based on the stage for which you are attempting to contact the client for.

Only one master contact record should be created per stage/interval. Each individual contact attempt made within the given stage will be recorded within the master contact record for that appropriate interval. Each master contact record will be visible on the client record and the maximum number of master contact records should be three for any given client.

Contractor

Search Contacts...

Client  
15970610701

\* Interval

- ✓ --None--
- Check-In
- Follow-up
- Discharge

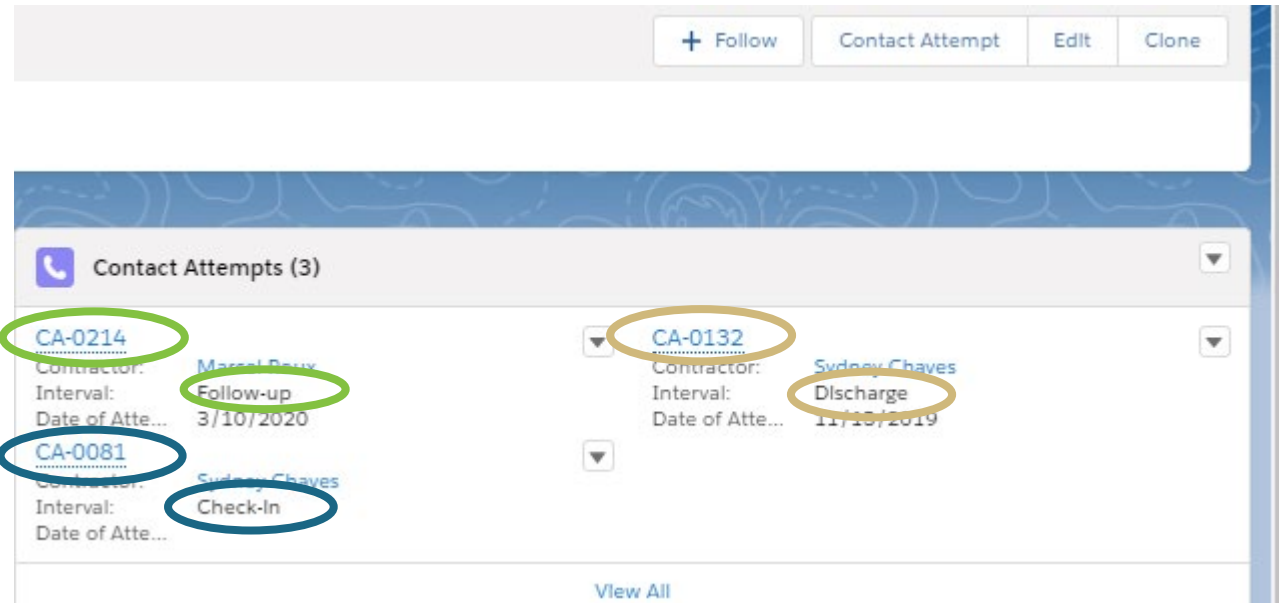
Cancel Save

## 2. RECORD A CONTACT ATTEMPT

Once the master contact record is created, it will appear on the client's contact record and will be titled "CA-###". You are now ready to log individual contact attempts. Select the record that corresponds with the stage for which you are contacting a client.

The image to the right displays each of the three possible master contact records (check in, follow up, and discharge) for a single client. From here you can also see who created each master contact record, and when.

Individual contact attempt made for the given stage/interval can be recorded by clicking on the master contact record (CA-###) and then selecting either "successful attempt" or "unsuccessful attempt." The method of contact attempts should be "phone" unless recording an administrative entry.

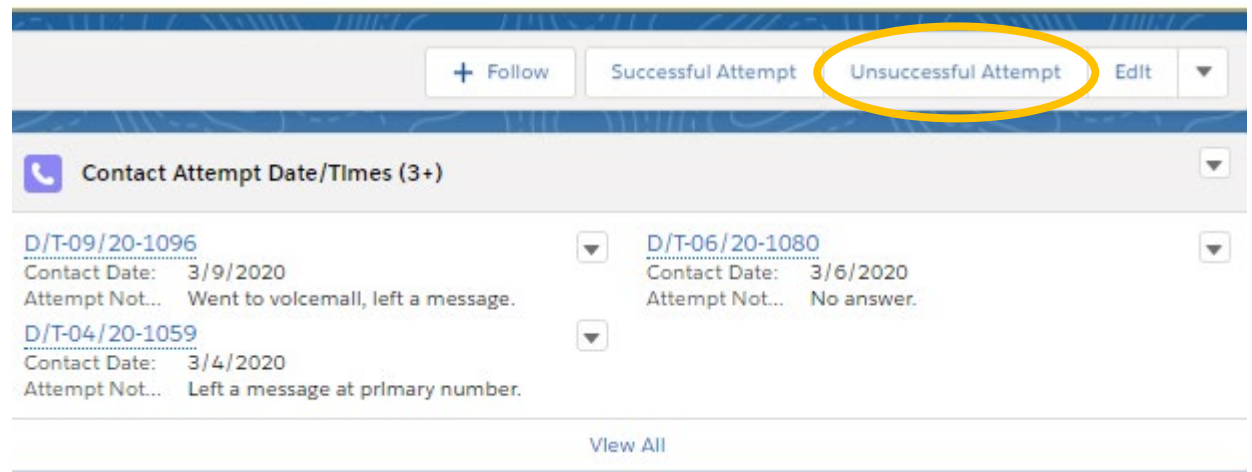




## PHONE CONTACT ATTEMPTS

Now that you are in the master contact record for the appropriate interval, select the type of attempt you wish to record, either “successful attempt” or “unsuccessful attempt.” Generally, most attempts you log will be considered unsuccessful.

This image displays the history of contact attempts within this contact attempt record.



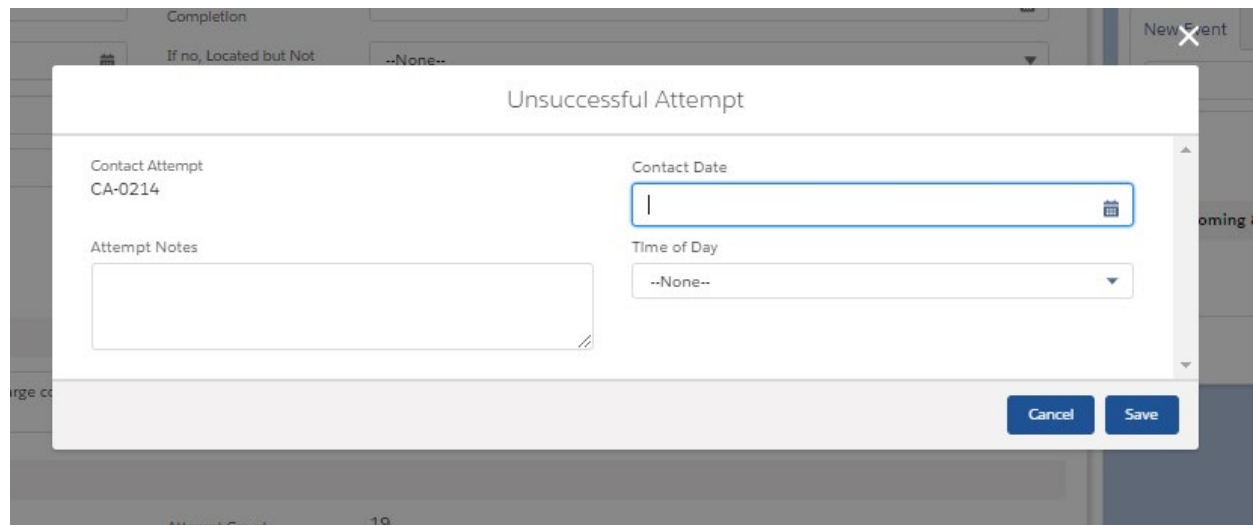
The screenshot shows the 'Contact Attempt' history in Salesforce. At the top, there are buttons for '+ Follow', 'Successful Attempt', 'Unsuccessful Attempt' (highlighted with a yellow circle), and 'Edit'. Below these buttons is a section titled 'Contact Attempt Date/Times (3+)' with a dropdown arrow. The history lists three attempts:

Contact Date	Attempt Notes
D/T-09/20-1096	Went to voicemail, left a message.
D/T-06/20-1080	No answer.
D/T-04/20-1059	Left a message at primary number.

At the bottom, there is a 'View All' link.

After selecting the “unsuccessful attempt” button, a pop-up will appear. Fill the fields with the requested information. For “attempt notes” fields, please indicate why this attempt was considered unsuccessful. For example, “voicemail box is not set up yet” followed by your initials. After saving your entry, you will be able to view that specific attempt from the contact record, as displayed above.

These same steps should be followed when entering a contact attempt via text message or email.



The screenshot shows the 'Unsuccessful Attempt' pop-up form. The form has the following fields:

- Contact Attempt:** CA-0214
- Contact Date:** A date picker field.
- Attempt Notes:** A text area for notes.
- Time of Day:** A dropdown menu with '--None--' selected.

At the bottom right, there are 'Cancel' and 'Save' buttons.

## SHORTHAND NOTES AND INSTRUCTIONS

Because GAs make numerous contact attempts each day, the following table outlines some shorthand that has been used by current and past GAs to increase notetaking efficiencies. If you have additional shorthand suggestions, please bring them to the weekly GPRA team meeting. Additionally, each contact attempt note should include your initials at the end.

SHORTHAND	MEANING	EXAMPLE
LMTCB	Left Message to Call Back	"LMTCB x1"
VM	Voicemail	"VM full"
CB	Call Back	"CB after 5 pm"
FU	Follow Up	"FU completed"
BU	Back Up (contact)	"Spoke w/ BU"
W/	With	"Spoke w/ client"
OCS	Outdated Contact Sheet	"OCS updated"

Taking thorough and accurate notes for each contact attempt allows for more streamlined data reporting. Additionally, it allows other team members to understand the contact history should they need to work your client load for any given reason. The following image is an example of these notes in several contact attempts.

The screenshot shows the Salesforce Eval Center interface. The top navigation bar includes 'Eval Center', 'Dashboards', 'Contacts', 'Contact Attempts', 'Accounts', 'Gift Cards', 'Reports', and 'Disc'. The main content area is titled 'Contact Attempt CA-1271'. Below this, there are two tabs: 'Related' and 'Details'. The 'Related' tab is active, showing a table of contact attempt dates and times. The table has three columns: 'Contact Attempt Date/Time Name', 'Contact Date', and 'Attempt Notes'. There are five rows of data, each with a dropdown arrow on the right. A 'View All' link is at the bottom right of the table.

Contact Attempt Date/Time Name	Contact Date	Attempt Notes
D/T-13/21-5137	5/13/2021	Spoke w/ BU contact EO
D/T-13/21-5138	5/13/2021	FU scheduled for 5/20 EO
D/T-13/21-5139	5/13/2021	Wrong #. OCS updated EO
D/T-13/21-5134	5/12/2021	Calendly sent x1 EO
D/T-13/21-5135	5/12/2021	Calendly sent x2 EO

## DATA ENTRY INSTRUCTIONS

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The instructions in the following sections provide direction for recording individual contact attempts in Salesforce as well as in [SPARS](#), if applicable, for the following scenarios:

- Introductory Call (see appendix)
- Check in calls
- Follow-up Calendly Emails
- Follow-up Interview (Successful Attempt)
- Administrative Follow-up
- Discharge Interview (Successful Attempt)
- Administrative Discharge

## INTRODUCTORY CALL

Introductory calls are a strategy that the GPRA team has used previously to increase rapport between us and clients. Currently, [introductory calls](#) are not part of the GPRA workflow, but can potentially be reinstated in the future. Please see the introductory call appendix for additional instructions.

## CHECK IN CALLS

Check in calls are completed during the 60-120 days since intake window. There are no SPARS data entry requirements for a check in call, however SPARS is used during these contact attempts to verify the client's identity using their date of birth information. The purpose of these calls is to verify the client's contact information and provide a reminder that we will be reaching out to complete a follow-up survey in the following months. These calls can also be used to build rapport and answer any questions the client may have at this time. Some GAs have used this phone call to actually schedule the client's follow-up call several months in advanced. Should you choose to use this strategy, please indicate so in the attempt notes, and create a new event on the [Google Calendar](#). All check in attempts should be logged in the clients Salesforce contact record as outlined in previous section.

## FOLLOW-UP EMAILS – CALENDLY

When a client becomes eligible for follow up, GPRA GAs will send one email to the client's email address (if provided). Email addresses can be found in REDCap. The email will include a reintroduction to the GPRA health study, The Evaluation Center, and reminder of the \$30 incentive for participating in the follow-up. A Calendly link is also included in the email so that the client may schedule their follow up during a time that works best for them. The email should always be sent from the GPRA Health Study Scheduler Gmail account and should never be sent from individual email accounts.

If the first email is sent and multiple subsequent unsuccessful phone calls are made, GAs can send a second email.

Use the template below to draft the follow-up emails (this template is also saved as a draft in the GPRA Health Study Gmail). Be sure to add the client's name and intake dates to the email (bracketed text).

Dear [Insert First Name] [Insert Last Name],

The University of Colorado Denver is reaching out to you regarding the GPRA health study you agreed to participate in at your appointment on [insert intake date]. As a part of the study, we would like to conduct an over-the-phone interview with you, which will take about 20-25 minutes. This interview will be the same interview that you completed on [insert intake date]. We appreciate you taking the time to participate and will send you a \$30 grocery gift card upon completion of the interview.

Please use the following link to schedule a date and time that work best for you to complete the GPRA interview:  
<https://calendly.com/healthstudyscheduler>. You may expect a call from us at the time of your scheduled interview.

We thank you in advance for taking the time to speak with us. The information you provide in the interview will be completely confidential and your responses will help to improve the health program you've been a part of over the last several months.

If you have any questions and/or concerns, please do not hesitate to email us at [healthstudyscheduler@gmail.com](mailto:healthstudyscheduler@gmail.com) or give us a call at 720-476-6248.


We look forward to hearing from you!

## SALESFORCE ENTRY










Once an email is sent, it should be logged in Salesforce because it will count towards the total number of contact attempts made during the follow-up interval. In order to record the email, you must create a follow-up master contact attempt if no previous attempts have been made. If a contact record already exists for that interval, you may add this attempt to that record (see instructions in the "Follow-up Interview" section below).

Within the follow-up master contact attempt record, enter the date that the first or second email was sent. The following image displays the Calendly email date fields that should be populated. You can edit them by clicking on the pencil icon at the end of each row.

Finally, record an “unsuccessful attempt” as outlined previously. Within the attempt note, include “Calendly email sent.”

Contact Attempt  
**CA-0742**

### Details

Client	MU0005126673	
Contractor	Greta Moser	
Interval	Follow-up	
Date of Attempt		
Time of Day		
Method	Telephone	
First Calendly Email Sent		
Second Calendly Email Sent		

## FOLLOW-UP INTERVIEW

A follow-up interview is considered successful if the following criteria is met:

- ✓ The client was contacted during the follow up window (official follow-up window may be found in the SPARS “6-Month Follow-up Notification” Report which may differ slightly from the follow-up window in Salesforce. The official follow-up window in SPARS ranges in between five and eight months post intake, whereas the follow-up window in Salesforce ranges in between 150 and 240 days post intake, which may account for a slight discrepancy between the two windows.)
- ✓ The entire follow-up survey was administered and completed.

If the follow-up interview was successful, data entry in both SPARS and Salesforce is required.

## SPARS ENTRY

To enter the follow-up into SPARS, search for the client and add a six-month record.

Client ID	Intake Date	Status	Intake(104)	3 Month(0)	6 Month(2)	12 Month(0)	Discharge(5)
1035001398121	9/3/2019	Active	<a href="#">View   Edit</a>	N/A	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>

Proceed with administering the entire GPRA survey (sections A – G). The data entry must be completed in one session as SPARS will not save partially entered records. The answer to “Did you conduct a follow-up/discharge interview?” must be “Yes” and, at the end of the GPRA survey, the follow-up status should be “Completed interview within specified window.” **All other responses to the follow-up status question will not count towards the required target follow-up rate for this grant.**

### I. FOLLOW-UP STATUS

1. What is the follow-up status of the client? **Completed interview within specified window**

If "Unable to locate, other", (Specify) **Not Applicable**

2. Is the client still receiving services from your program? **Yes**

If the client has a discharge form attached to their record in Salesforce, you will indicate “no” for question 2.

Be sure to select “**Finish**” at the end of the survey, otherwise the responses will not be saved.

## SALESFORCE ENTRY

Once the follow-up is complete and entered into SPARS, this successful attempt should also be recorded in Salesforce. Additionally, the stage and status should be manually changed to “Follow-up – Follow-up Successful” on the client record.

Contact  
109417B101

GPRA Intake Date: 7/11/2019    Stage: Follow-up    Status: Follow-up Successful

**Details**    Chatter

Client ID	109417B101	Stage	Follow-up
GPRA Intake Date	7/11/2019	Status	Follow-up Successful
Days Since Intake	194	Substatus	
Client Identifier	109417B101		

Notes

Site Information

Primary Business Organization: [Addiction Research & Treatment Services \(ARTS\) - Potomac Street Center](#)    Site ID: 109417

Record a successful attempt by selecting “successful attempt” within the master contact record. A pop-up will appear for your data entry. Complete the fields as displayed in the adjacent picture, or as is applicable to your interaction.

It is important that the completed follow-up is recorded correctly in Salesforce for the weekly report to determine which client’s incentives need to be distributed. **Be sure to ask what type of gift card the client wants and confirm their email address/ mailing address accordingly.**

Successful Attempt

Completed By: Taylor Vaughan    Survey Completed? Yes

Date of Attempt: 5/13/2022    If yes, Date of Completion: 5/13/2022

Time of Day: 12:30 PM

Method: Telephone

Type of Gift Card: Electronic

Attempt Notes: Called client at designated time. Completed survey up to section F, then client asked me to call them back. Called client back and they hung up. Missing data was inserted for section F and G. - TV

Cancel    Save



## ADMINISTRATIVE FOLLOW-UP

Administrative follow-ups do not count towards the follow-up rate required by the grant. Administrative follow-ups should be entered into SPARS for the following reasons.

- The client was contacted (at check-in or at follow-up) and refuses to participate.
- The client was not able to be reached within their follow-up window and a survey was not completed.\*
- The client is incarcerated and unable to complete the follow-up survey.
- The client died and is unable to complete the follow-up survey.

**Note:** If you are completing an administrative follow-up for a client that has reached the end of their follow-up window, be sure to compare the intake date in both SPARS and Salesforce. In Salesforce, client follow-up windows will appear to have ended when they reach 241 days since intake. However, the official follow-up window in SPARS closes 8 **months** post intake. Therefore, there may be a slight discrepancy between both systems depending on the month that the client completed the intake. The clients' true follow-up window is based on what is reported in the SPARS portal. For example, a client with a January 1 intake date will have a true follow-up window of May 1 to September 1, however Salesforce will reflect the end of their window as August 30. This mismatch in dates creates a two-day gap where the client is still eligible for follow-up. Thus, it is important to wait until the true follow-up window in SPARS has truly closed before entering an administrative follow-up survey. If the client is nearing the end of their follow-up window, view the "6 Month Follow-up Notification" in SPARS if to verify their true end date

## SPARS ENTRY

To enter the administrative follow-up into SPARS, search for the client and add a six-month record. An administrative follow-up would be entered as a six-month record regardless of when the administrative follow-up is entered. For example, an administrative follow-up can be entered during the check-in window if the client refused to participate and was not in their follow-up window yet.

Only entries with "Completed interview within specified window" will satisfy the grant follow-up target. All other submissions will be considered an administrative follow-up. Therefore, the answer to "Did you conduct a follow-up/discharge interview?" must be "No" and the follow-up status should be "Located, but refused, unspecified" if the client refuses to participate in the GPRA data collection. Alternatively, "unable to locate, other" should be selected if the client's follow-up window has closed and a survey has not been conducted. The following options may also be selected for the follow-up status within section I of an administrative follow-up survey:

- Deceased at time of due date
- *Completed interview within specified window (will never be selected for an administrative follow-up)*
- Completed interview outside specified window

- Located, but refused, unspecified
- Located, but otherwise unable to gain access (usually selected if client has become incarcerated, or began treatment in a residential setting before or during their follow-up window)
- Located, but withdrawn from project
- Unable to locate, moved
- Unable to locate, other (specify)

Similar to a regular follow-up, you will select “add” under the six-month data entry section in SPARS. Section A is completed the same way for all administrative follow-up surveys.

Client ID	Intake Date	Status	Intake(104)	3 Month(0)	6 Month(2)	12 Month(0)	Discharge(5)
1035001398121	9/3/2019	Active	<a href="#">View</a>   <a href="#">Edit</a>	N/A	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>

Data entry for section I will differ based on the situation. The first example below reflects a client who **withdrew consent** to participate in the study.

**I. FOLLOW-UP STATUS**

1. What is the follow-up status of the client? Located, but refused, unspecified

If "Unable to locate, other", (Specify) Not Applicable

2. Is the client still receiving services from your program? Yes

**A. RECORD MANAGEMENT**

Client ID T10817021606

Contract/Grant ID T1081702

Client Type Treatment Client

Interview Type 6-Month Follow Up

Did you conduct a follow-up/  
discharge interview? No

Interview Date mm/dd/yyyy

The second example reflects a client who we were **unable to contacted before their follow-up window closed**.

**I. FOLLOW-UP STATUS**

1. What is the follow-up status of the client? Unable to locate, other

If "Unable to locate, other", (Specify) Could not be reached within follow up window.

2. Is the client still receiving services from your program? Yes

## SALESFORCE ENTRY

Once the administrative follow-up is entered into SPARS, this should also be recorded in Salesforce. You will record the administrative follow-up differently depending on the reason why it was completed, see the sections below for further instruction.

### Client Refusing to Participate

Although clients consent to participating in the GPRA health study during their intake appointment, they may revoke consent at any point during their recovery journey. If a client chooses to withdraw, complete an administrative follow-up in SPARS.

In addition, this refusal needs to be recorded within Salesforce. To do so, navigate to the clients' record (profile page) and record the date that the client withdrew consent. This will populate the red "X" in the header, which designates that the client should no longer be contacted.

The stage and status should then be manually changed to "Discharge – Terminated."

Finally, within the individual contact attempt notes, note that an administrative follow-up was entered into SPARS and describe why it was entered.

**Contact**  
109405K106

GPRA Intake Date: 2/12/2020  
Stage: Discharge  
Status: Terminated  
**Do Not Contact** (Red X)

**Details** | Chatter

Client ID	109405K106	Stage	Discharge
GPRA Intake Date	2/12/2020	Status	Terminated
Days Since Intake	246	Substatus	
Client Identifier	109405K106	Outdated Contact Information	<input type="checkbox"/>
Introductory Call Date		Refused to Participate	8/13/2020
Introductory Call Successful?	<input type="checkbox"/>		

**Related** | **Details**

Contact Attempt	CA-0098	Contact Date	11/4/2019
Type of Attempt		Time of Day	10:00 AM

**Notes**

Attempt Notes: Client answered and stated that they are no longer Interested In participating In the study. Entered administrative follow-up Into SPARS.

Created By: Sydney Chaves, 11/4/2019 10:00 AM  
Last Modified By: Alyssa Mastroni, 11/6/2019 1:44 PM

## Clients Unable to be Contacted During the Follow-up Window

When recording an administrative follow-up in Salesforce for a client that was unable to be reached during their follow-up window, navigate to the client's follow-up contact attempt and select "successful attempt" button in the upper right corner.

Then, complete each field as shown in the example to the right.

Once the successful attempt has been recorded in Salesforce, manually change the client's stage/status to Discharge-Discharge Pending-Pending-Follow Up Unsuccessful as shown below.

Contact  
MU0005136044

GPRA Intake Date 6/2/2020 Stage Discharge Status Discharge Pending Do Not Contact Grant SOR I

Details Chatter

Client ID	MU0005136044	Stage	Discharge
GPRA Intake Date	6/2/2020	Status	Discharge Pending
Days Since Intake	246	Substatus	Follow-up Unsuccessful
Client Identifier	MU0005136044	Outdated Contact Information	<input type="checkbox"/>
Introductory Call Date		Refused to Participate	<input type="checkbox"/>
Introductory Call Successful?	<input type="checkbox"/>	Grant	SOR I
Notes			

Successful Attempt

Completed By: Sydney Chaves

Survey Completed? Yes

Date of Attempt 2/3/2021

If yes, Date of Completion 2/3/2021

Time of Day 1:30 PM

Method Administrative

Attempt Notes  
Admin FU complete 2/3/20

Cancel Save

## DISCHARGE INTERVIEW

Discharge interviews can occur at any point throughout a client's recovery journey, and do not impact their eligibility for a follow-up interview and incentive. Discharges are considered successful if they meet the following criteria:

- ✓ The client discharged from treatment (a discharge form was submitted), and
- ✓ The discharge interview was administered and completed within 14 days of their discharge date.

We are required to attempt to complete a follow-up with clients who were discharged (administrative or interview) prior to their follow-up window. Therefore, it is extremely important that the stage and status are updated and recorded properly in SPARS and Salesforce.

## SPARS ENTRY

To enter a discharge interview, search for the client and add a discharge record.

Client ID	Intake Date	Status	Intake(104)	3 Month(0)	6 Month(2)	12 Month(0)	Discharge(5)
1035001398121	9/3/2019	Active	<a href="#">View   Edit</a>	N/A	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>

Enter the following into section A of the tool:

1. In the past 30 days, was this client diagnosed with an opioid use disorder? DON'T KNOW

a. In the past 30 days, which FDA-approved medication did the client receive for the treatment of an opioid use disorder?  
(Select all that apply)

	Received	# of Days
Methadone	<span>DON'T KNOW</span>	<input type="text"/>
Buprenorphine	<span>DON'T KNOW</span>	<input type="text"/>
Naltrexone	<span>DON'T KNOW</span>	<input type="text"/>
Extended-release Naltrexone	<span>DON'T KNOW</span>	<input type="text"/>
Client was diagnosed with an opioid use disorder, but did not receive an FDA-approved medication for an opioid use disorder	<span>DON'T KNOW</span>	<input type="text"/>
Client was not diagnosed with an opioid use disorder and did not receive an FDA-approved medication for an opioid use disorder	<span>DON'T KNOW</span>	<input type="text"/>

2. In the past 30 days, was this client diagnosed with an alcohol use disorder? DON'T KNOW

a. In the past 30 days, which FDA-approved medication did the client receive for the treatment of an alcohol use disorder?  
(Select all that apply)

	Received	# of Days
Naltrexone	<span>DON'T KNOW</span>	<input type="text"/>
Extended-release Naltrexone	<span>DON'T KNOW</span>	<input type="text"/>
Disulfiram	<span>DON'T KNOW</span>	<input type="text"/>
Acamprosate	<span>DON'T KNOW</span>	<input type="text"/>
Client was diagnosed with an alcohol use disorder, but did not receive an FDA-approved medication for an alcohol use disorder	<span>DON'T KNOW</span>	<input type="text"/>
Client was not diagnosed with an alcohol use disorder and did not receive an FDA-approved medication for an alcohol use disorder	<span>DON'T KNOW</span>	<input type="text"/>

### A. RECORD MANAGEMENT

Client ID 1035001398121

Contract/Grant ID TI081702

Client Type Treatment Client

Interview Type Discharge

Did you conduct a follow-up/  
discharge interview? Yes

Interview Date 01/21/2020 mm/dd/yyyy

Administer the GPRA survey – once you complete section G, end the call with the client. Then proceed to section J.

Navigate to Salesforce and find the client's discharge form within the client record. Use this form to populate section J of the tool. You will then enter zeros for section K. You will be required to enter at least one modality and one treatment service to proceed. Enter "1" for other in both subsections and specify as "N/A."

**K. SERVICES RECEIVED**

Identify the number of DAYS of services provided to the client during the client's course of treatment/recovery.  
[ENTER ZERO IF NO SERVICES PROVIDED.]

Modality	Days	Modality	Days
1. Case Management	0	9. Detoxification (Select Only One)	
2. Day Treatment	0	A. Hospital Inpatient	0
3. Inpatient/Hospital (Other Than Detox)	0	B. Free Standing Residential	0
4. Outpatient	0	C. Ambulatory Detoxification	0
5. Outreach	0	10. After Care	0
6. Intensive Outpatient	0	11. Recovery Support	0
7. Methadone	0	12. Other (Specify)	1
8. Residential/Rehabilitation	0	N/A	

**K. SERVICES RECEIVED**

Identify the number of SESSIONS provided to the client during the client's course of treatment/recovery.  
[ENTER ZERO IF NO SERVICES PROVIDED. YOU SHOULD HAVE AT LEAST ONE SESSION OF TREATMENT PROVIDED.]  
[SBI/RT GRANTS: YOU MUST HAVE AT LEAST ONE SESSION FOR ONE OF THE TREATMENT SERVICES NUMBERED 1 THROUGH 4.]

Treatment Services	Sessions	Treatment Services	Sessions
1. Screening	0	8. Group Counseling	0
2. Brief Intervention	0	9. Family/Marriage Counseling	0
3. Brief Treatment	0	10. Co-Occurring Treatment/ Recovery Services	0
4. Referral to Treatment	0	11. Pharmacological Interventions	0
5. Assessment	0	12. HIV/AIDS Counseling	0
6. Treatment/Recovery Planning	0	13. Other Clinical Services (Specify)	1
7. Individual Counseling	0	N/A	

## SALESFORCE ENTRY

Once the discharge interview is entered into SPARS, this should also be recorded as a successful attempt in Salesforce under the discharge master attempt. The stage and status should also be manually changed depending on the number of days since the clients' intake date.

- Discharge interview completed between 1 – 60 days – “Discharge – Complete”
- Discharge interview completed between 61 – 120 days – “Discharge – Complete” (clients discharge prior to follow-up will not be contacted for a check-in)
- Discharge interview completed between 121 – 150 days – “Discharge – Complete”
- Discharge interview completed between 150 – 240 days – “Follow-up – Follow-up Pending” if the following up interview has not been completed, if the follow-up interview has been completed “Discharge – Complete”
  - If a client completes a discharge survey during this period, the data can and should be used for their follow up GPRA survey as well if not previously completed.
- Discharge interview completed after 240 days – “Discharge – Complete”

## ADMINISTRATIVE DISCHARGE

An administrative discharge should be entered into SPARS for the following reasons:

- The client discharged from treatment (a discharge form was submitted); however, we were not able to contact the client within 14 days of their discharge date.

- The client did not have a successful follow-up and was discharged from treatment (a discharge form was submitted).

We are required to attempt to complete a follow-up with clients who were administratively discharged prior to their follow-up window. Therefore, it is extremely important that the stage and status are recorded properly in Salesforce.

## SPARS ENTRY

To enter an administrative discharge search for the client and add a discharge record.

Client ID	Intake Date	Status	Intake(104)	3 Month(0)	6 Month(2)	12 Month(0)	Discharge(5)
1035001398121	9/3/2019	Active	<a href="#">View   Edit</a>	N/A	<a href="#">Add</a>	<a href="#">Add</a>	<a href="#">Add</a>

In section A, select "no" in question 1, an interview was not conducted.

Navigate to Salesforce and find the discharge form within the client's record. Use this form to populate section J of the tool. You will then enter zeros for section K. You will be required to enter at least one modality and one treatment service to proceed. Enter "1" for other in both subsections and specify as "N/A."

### K. SERVICES RECEIVED

Identify the number of DAYS of services provided to the client during the client's course of treatment/recovery.  
[ENTER ZERO IF NO SERVICES PROVIDED.]

Modality	Days	Modality	Days
1. Case Management	0	9. Detoxification (Select Only One)	
2. Day Treatment	0	A. Hospital Inpatient	0
3. Inpatient/Hospital (Other Than Detox)	0	B. Free Standing Residential	0
4. Outpatient	0	C. Ambulatory Detoxification	0
5. Outreach	0	10. After Care	0
6. Intensive Outpatient	0	11. Recovery Support	0
7. Methadone	0	12. Other (Specify)	1
8. Residential/Rehabilitation	0	N/A	

### K. SERVICES RECEIVED

Identify the number of DAYS of services provided to the client during the client's course of treatment/recovery.  
[ENTER ZERO IF NO SERVICES PROVIDED.]

Modality	Days	Modality	Days
1. Case Management	0	9. Detoxification (Select Only One)	
2. Day Treatment	0	A. Hospital Inpatient	0
3. Inpatient/Hospital (Other Than Detox)	0	B. Free Standing Residential	0
4. Outpatient	0	C. Ambulatory Detoxification	0
5. Outreach	0	10. After Care	0
6. Intensive Outpatient	0	11. Recovery Support	0
7. Methadone	0	12. Other (Specify)	1
8. Residential/Rehabilitation	0	N/A	

## SALESFORCE ENTRY

Once the administrative discharge is entered into SPARS, this should also be recorded in Salesforce. The stage and status should be manually changed to "Discharge – Complete" on the contact record.

Contact 99999915804	
GPRA Intake Date	10/7/2019
Stage	Discharge
Status	Complete

Details	
Client ID	99999915804
GPRA Intake Date	10/7/2019
Days Since Intake	32
Client Identifier	99999915804

Notes

Site Information

Primary Business Organization	Unassigned Treatment Site
Site ID	999999

Record the following in the master contact attempt record:

Contact Attempt CA-0127	
Client	99999915804
Contractor	Sydney Chaves
Interval	Discharge
Appt Reminder	
Date of Attempt	11/6/2019
Time of Day	2:30 PM
Method	Administrative

Details	
Survey Completed?	Yes
If yes, Date of Completion	11/6/2019
If no, Located but Not Interviewed?	No
Completed By:	Sydney Chaves
Data Entered Into SPARS?	Yes
If yes, Date of Entry	11/6/2019

Notes

Attempt Notes: Client does not have any contact information. We reached out to the treatment facility, and never received information. After 14 days, an administrative discharge was completed and recorded in SPARS.



## OUTDATED CONTACT INFORMATION

There may instances when a client's contact information becomes outdated or otherwise invalid. Examples of this include disconnected or out-of-service phone numbers or numbers that no longer belong to the client. If this is the case, check the "Outdated Contact Information" box in Salesforce and record the client in the [Outdated Client Contact Info](#) tracking spreadsheet on the Q drive. The Evaluation Data Manager monitors the spreadsheet and contacts clinicians/treatment site staff on a weekly basis. If the clinician provides updated contact information, the Evaluation Data Manager will mark the record as resolved in the tracker, uncheck the box in Salesforce, and enter the updated contact information into the client's REDCap record.


Contact

109405K106

GPRA Intake Date  
2/12/2020

Stage  
Discharge

Status  
Terminated

Do Not Contact  


Details

Chatter

Client ID	109405K106		Stage	Discharge
GPRA Intake Date	2/12/2020		Status	Terminated
Days Since Intake	246		Substatus	
Client Identifier	109405K106		Outdated Contact Information	<input type="checkbox"/>
Introductory Call Date			Refused to Participate	8/13/2020
Introductory Call Successful?	<input type="checkbox"/>			
Notes	Admin follow-up on 8/13 [terminated].			

Site Information

Primary Business Organization	Addiction Research & Treatment Services (ARTS) - Parkside Clinic	Site ID	109405
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GAs should continue making contact attempts to the clients' designated back-up contacts even when the client's primary contact information is outdated.

## STAGE/STATUS/SUB-STATUS AUTOMATION AND WORKFLOW

The Salesforce Org is built to move contact records through a series of stages (intake, check-in, follow-up, and discharge) depending on the number of days since intake and the type of communication that has occurred (i.e. successful follow-up vs. unsuccessful follow-up). There is some automation built into Salesforce to initiate these changes, however, some changes must be made manually based on the client interaction. The table in the next section outlines which stage/status changes are automation/manual and provides a definition for what each stage/status/sub-status combination mean.

### STAGE/STATUS/SUB-STATUS DEPENDENCIES

The table below outlines the combination of stages/statuses/sub-statuses that are possible in Salesforce. It also defines who is responsible for the contact record at each stage, what actions are necessary, and how the assigned individual is notified.

Stage/ Interval	Status	Sub-status	Assignment	Actions/Tasks	Notifications
Intake	Active	–	Allyssa	Contact record is imported into Salesforce	All Contacts List View
Check-in	Check-in Pending	–	GA	At 60 days post intake, the client will be assigned to a GA (via round robin assignment). The GA will attempt to contact the client to check-in and verify contact information (possibly ask additional questions to inform the peer or mobile health unit evaluation, if applicable). This is automatically recorded.	Check In Due List View
Check-in	Check-in Complete	–	GA	This is manually recorded when the GA has completed the check-in call.	Check In Completed List View
Check-in	Check-in Incomplete	–	GA	This is automatically updated when there have been four unsuccessful contact attempts recorded.	Check In Completed List View
Follow-up	Assigned to Contractor	–	GA	At 120 days post-intake, clients will be re-assigned, this may or may not be the same GA they were previously assigned to. At this point the follow-up window has not opened yet; however, GAs should use the next thirty days to assess	My Contacts List View

				capacity for completing follow-ups. This is automatically recorded.	
Follow-up	Follow-up Pending	–	GA	At 150 days post-intake, the follow-up window opens. The GA will begin attempting to contact the client to complete the follow-up interview. This includes sending a Calendly link via email and beginning phone calls. This is automatically recorded.	Follow Up Due List View
Follow-up	Follow-up Pending	Survey Discharge Pending	GA	If the client is discharged during their follow-up window, you may combine the follow-up and discharge interview. (See GPRA GA Handbook for instructions.) This is manually recorded by Allyssa whenever a discharge form is submitted.	Combined Follow up/ Discharge List View
Follow-up	Follow-up Successful	–	GA	This is manually recorded by the GA when the follow up is completed. <i>If the follow-up and discharge both have been completed, change the stage = Discharge, status = Complete.</i>	My Contacts List View
Follow-up	Follow-up Unsuccessful	–	N/A	If follow-up successful is not recorded as a status by 241 days, the status will automatically change to Follow-up Unsuccessful. When discharges are submitted for follow up unsuccessful clients, the assigned GA should enter an administrative discharge and the stage and status will remain “Follow-up – Follow-up Unsuccessful.”	My Contacts List View
Discharge	Discharge Pending	Follow-up Successful	GA	This change is manually made by Allyssa and denotes that the follow-up interview was completed and the client is awaiting discharge. If the discharge date is within the past 14 days, the discharge survey will be attempted.	Assigned Discharges List View
Discharge	Discharge Pending	Follow-up Unsuccessful	GA	This change is manually made by Allyssa and denotes that the follow-up interview was unsuccessful and the client is awaiting discharge. An administrative discharge should be entered into SPARS within 14 days of discharge date.	Assigned Discharges List View

				Discharge interviews do not have to be attempted for clients that were follow-up unsuccessful.	
Discharge	Discharge Pending	Administrative	GA	The Discharge Form was submitted over 14 days after the discharge date. The discharge interview does not need to be attempted. Instead, an administration discharge should be completed.	Assigned Discharges List View
Discharge	Survey Discharge Pending	–	GA	This change is manually made and denotes that the client was discharged prior to completing a follow-up interview. The GA will attempt to complete a discharge interview.	Assigned Discharges List View
Discharge	Complete	–	GA	This status will be manually recorded by the GA when both the follow-up and discharge interviews have been completed or if an administrative discharge has been completed and a follow-up interview still needs to occur.	My Contacts List View
Discharge	Terminated	–	GA	If an administrative follow up is completed because the client withdrew consent, the GA will manually change the stage and status discharge terminated. Check-ins/follow-up interviews will not be completed for clients noted as terminated and the stage/status will not automatically change for “discharge terminated” clients.	My Contacts List View

**Discharges:** The Evaluation Data Manager will manually make all status/sub-status changes when discharge forms are submitted. Once the appropriate discharge is completed for the client, the GA will evaluate the number of days since intake and change the stage/status accordingly if appropriate.

## APPENDIX: INTRODUCTORY CALLS

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An introductory phone call should be made to every client within a week of their induction. There may be times when providers submit GPRA intakes late (more than three days after their clients' actual intake date). If this is the case, the introductory phone call should be made within a week of The Evaluation Center receiving the GPRA intake submission.

GPRA Graduate Assistants will be able to determine which clients are new and due for an introductory call by viewing the Introductory Calls List View in Salesforce. Based on a rotating assignment, every Tuesday the assigned GA will make the introductory calls for the week. The assignment schedule will live with the GPRA Health Study Scheduler Google Calendar. In addition to accessing the Google Calendar assignment schedule, all GAs will receive an email with the list of the new GPRA clients for that week. Salesforce will automatically generate the email every Tuesday morning. The email will serve as a reminder that introductory phone calls need be made that day; however, it is the responsibility of all GAs to check the Google Calendar to determine if they are assigned to make the introductory calls for the week.

### CONTACT ATTEMPT PROCEDURE

Only one contact attempt will be made per new client for the introductory phone call. Voicemails can be left on the clients' phone if permitted (check permissions in REDCap) and back-up contacts will not be contacted. The purpose of the call is to remind the client of the GPRA Health Study that they agreed to participate in during their induction to treatment, as well as our role with the GPRA data collection, while the GPRA Health Study is still fresh in their minds. The introductory phone calls should be very short, less than 2 – 3 minutes and should follow the procedure and script below.

If a GA is assigned to complete the introductory calls:

1. View Introductory Calls List View in Salesforce – this is the list of clients that need to be contacted.
2. Open REDCap and SPARS
  - a. Using the list of client IDs from Salesforce, look up the client's contact information in REDCap (for contact information) and Salesforce (for birthdate to verify identity).
3. Attempt to contact client
  - a. Introduce yourself and verify the client's identity:

*"Hi, there. Is [client name] available? This is [your name] from The Evaluation Center at the University of Colorado Denver. I am calling in regard to a health study that you agreed to participate in last week. Does that sound familiar?"*

Client responds: Yes

Client responds: No

<p><i>Wonderful. I am just calling to introduce us at CU Denver. We will be contacting you over the next few months to remind you about your follow-up interview for this health study. We hope to schedule this interview in about five months.</i></p> <p><i>[If client has email address...]</i></p> <p><i>We will also be emailing you so that you can schedule your follow-up interview for whenever works best for you. The email will come from GPRA Health Study Scheduler at gmail.com.</i></p>	<p><i>Okay, I would love to refresh your memory. Can I just start by verifying your birthday so I am not disclosing any information to the wrong person?</i></p> <p><i>(Find client DOB in SPARS (Section A – Demographics) to verify.)</i></p>
<p><i>Just as a reminder, after completing the follow-up survey, we will mail you a \$30 grocery card.</i></p>	<p><i>Thank you for that information. It looks like you would have agreed to participate in this study on (intake date) at (clinic name). Is that somewhere you recall receiving services from?</i></p>
<p><i>Thank you for participating in this health study, your time and effort will help improve health care across the state!</i></p>	<p><i>Okay, we are partnering with them to collect data regarding treatment outcomes. I am just calling today introduce us at CU Denver and let you know that we will be contacting you over the next few months to remind you about your follow-up interview for this health study. We hope to schedule this interview in about five months.</i></p> <p><i>[If client has email address...]</i></p> <p><i>We can also email you so that you can schedule your follow-up interview for whenever works best for you. The email will come from GPRA Health Study Scheduler at gmail.com.</i></p>
	<p><i>Just as a reminder, after completing the follow-up survey, we will mail you a \$30 grocery card.</i></p> <p><i>Thank you for participating in this health study, your time and effort will help improve health care across the state!</i></p>

## SALESFORCE ENTRY

Although only one attempt is required to complete the intro call, it should still be recorded in Salesforce. The intro call is not recorded as its own contact attempt similar to check-in, follow-up, and discharge contact attempts. Instead the intro call is recorded on the clients' main client record (profile page).

To record the intro call attempt, enter the date that the call was made and check the box if the call was successful. The intro call is considered successful if the client answered the phone and the GA spoke with them.

Contact

MU000524227

GPRA Intake Date

7/1/2020

Stage

Check-In

Status

Check-In Pending

Do Not Contact

Details

Chatter

Client ID	MU000524227	Stage	Check-In
GPRA Intake Date	7/1/2020	Status	Check-In Pending
Days Since Intake	106	Substatus	
Client Identifier	MU000524227	Outdated Contact Information	<input type="checkbox"/>
Introductory Call Date		Refused to Participate	<input type="checkbox"/>
Introductory Call Successful?	<input type="checkbox"/>		
Notes	SPARS: MU00524227		



## MISSION

We strive to make evaluation a valued and widely accepted practice by increasing the use and understanding of evaluation. We collaborate with our clients to support evidence-informed programs, practices, and policies in schools, institutions of higher education, governmental agencies, and nonprofit organizations.



The Evaluation Center

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