STATE OPIOID RESPONSE

Systems Manual

Updated on 4/10/2022

The Evaluation Center
UNIVERSITY OF COLORADO
DENVER | ANSCHUTZ MEDICAL CAMPUS

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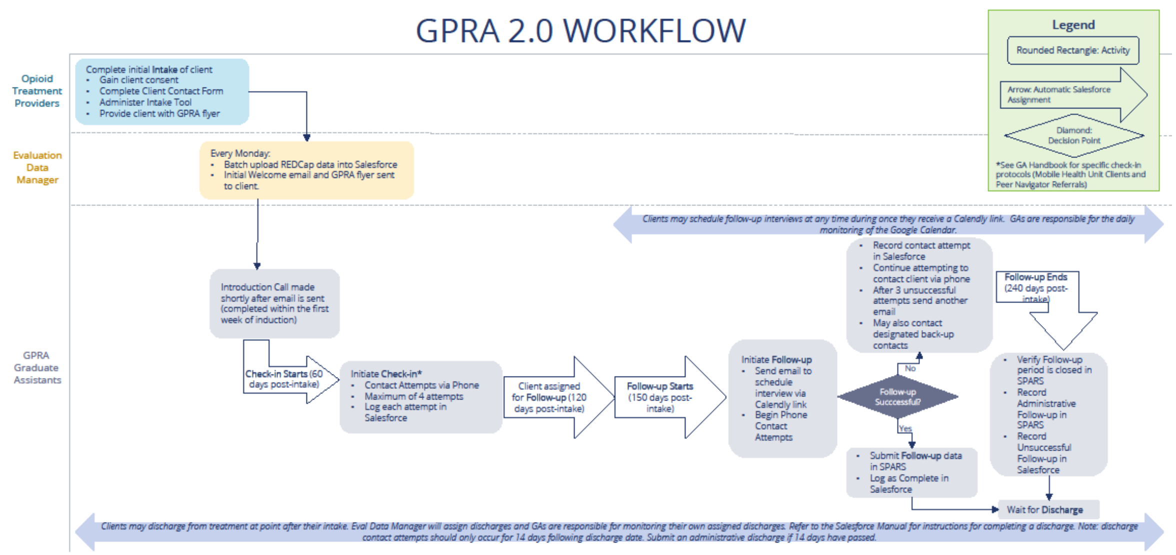
ABOUT GPRA DATA COLLECTION

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, the GPRA Data Manager 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.

To learn more, double click on the image below to view the GPRA data collection workflow.

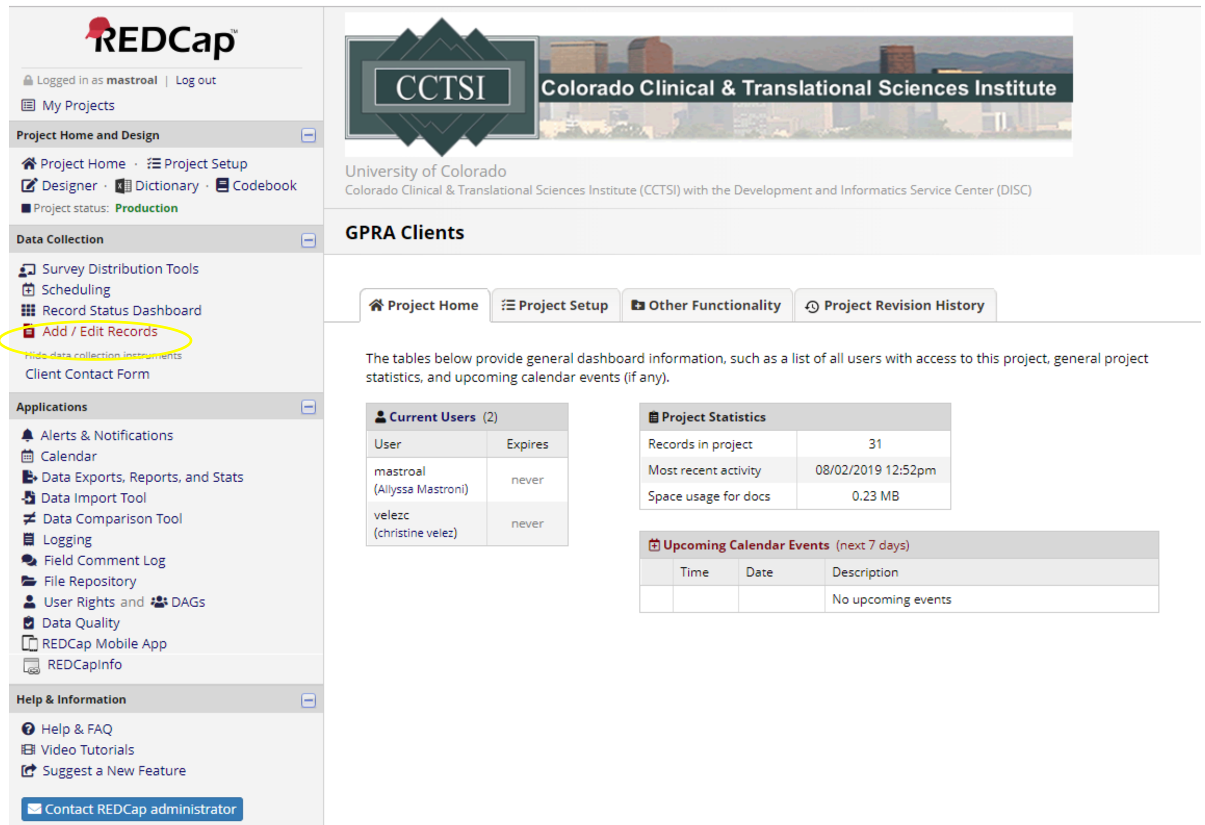


GENERAL REDCAP NAVIGATION AND USAGE

SOR Providers enter client data directly into the client contact form (GPRA Clients 3.0) and SOR III GPRA Intake Survey. You will not usually interface with the provider facing forms/surveys. Instead, you will search the REDCap databases that these forms/surveys populate in order to access the client data that you will need. Information that is collected in the client contact form includes information specific to the client, as well as designated back-up contacts, and contact information for the provider. Information collected in the GPRA Intake Survey is used to report to SAMHSA/SPARS. You will use information from both the form and the survey to complete check-in and follow-up contact attempts.

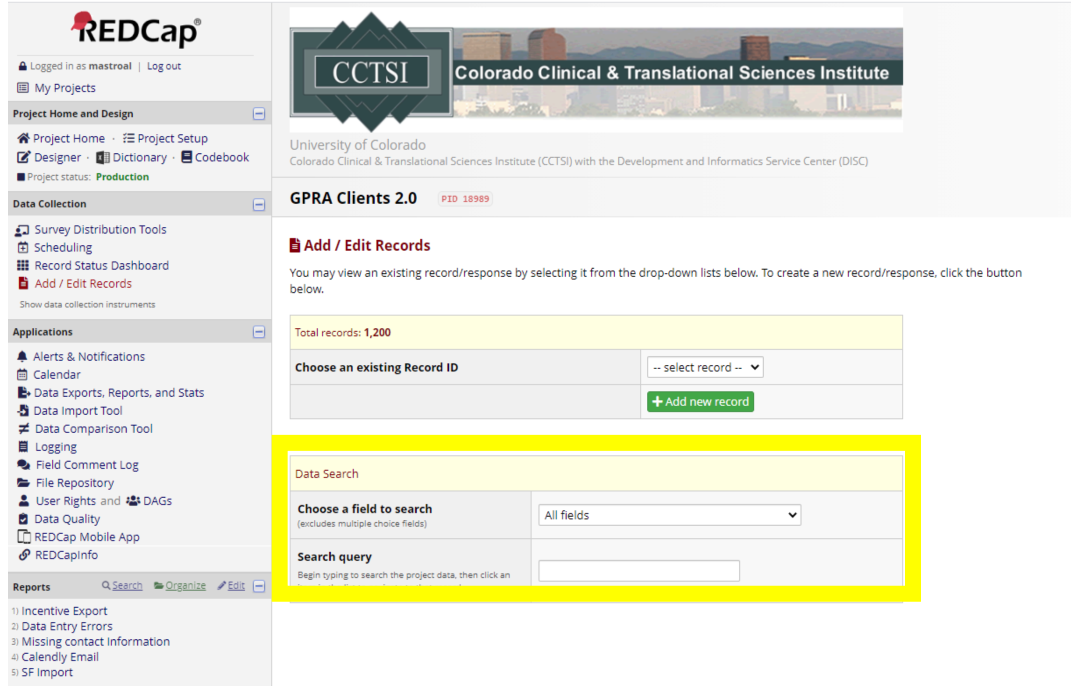
Steps for Navigating REDCap

1. When you log into your REDCap account (https://redcap.ucdenver.edu/), navigate to the "My Projects" tab at the top of the page. The GPRA Data Manager will add you to the "GPRA Clients 3.0" and "SOR III GPRA Intake Survey" projects. On the project homepage, you will be able to view how many total client records have been entered and can use the "Add/Edit Records" function to search for clients.



2. Then, in the data search table, search all fields and paste the client ID that you are searching for in the search query box. If the client ID is in REDCap, it will populate in a drop-down list below the search query box. Once you see the client ID that you are looking for, click on it to select that record.

   Note: sometimes clients have been inducted into services multiple times and thus client IDs will appear more than once in the list. Typically the largest record ID number (a different number than the client ID) corresponds to the client/instance you are looking for. However, always cross reference the intake dates. If there is a discrepancy contact the GPRA Data Manager.



This will take you to the client's REDCap record. Here you will either view their GPRA Intake Survey to access their birth month/year so you can verify their identity and/or verify/update this client's contact information (client contact form). When verifying contact information, be sure to verify the following fields:

- Client's First and Last Name
- Client's Contact Information (Primary Phone Number/Secondary Phone Number/Email Address)
- Client's Mailing Address
- Client's Designated Back-up Contacts

If any changes need to be made to the client contact form, select "edit response" at the top of the form. This will allow you to edit the necessary fields. Once complete, select "save and exit form" at the top or bottom of the page.

GENERAL SALESFORCE NAVIGATION AND USAGE

Salesforce is an extremely powerful CRM (Customer Relationship Management) software. While most typically used in sales environments, we have built out a Salesforce org for our team to help us manage the GPRA client tracking. There are several ways which Salesforce can be customized to your own experience and preferences to help you best manage your client load. This section will introduce you to the Evaluation Center Dashboard and many other tips and tricks you can use to keep yourself organized and on top of your client caseload. Note that most of these suggestions and tips are purely optional and no specific list view or report is required for you to use. Because Salesforce is so highly customizable, we recommend trying out different ways that work for you.

SALESFORCE TRAILHEAD

Salesforce Trailhead is a great resource for learning more about the ins and outs of Salesforce's use and functionality. Feel free to, at your leisure, explore the various modules. Please note that the material isn't always relevant to the way we use Salesforce at the Evaluation Center; however, it is a resource that you may find helpful tips and tricks to help you utilize Salesforce in a way most intuitive to you. When using the log-in link in the top right corner, you will want to use the "Trailblazer.me" link location under "experiences."

If you are interested, the following three basic courses may help acquaint you to Salesforce's CRM capabilities. These trainings are entirely optional and do contain information that is not always relevant to our usage of the database, however you may learn some new ways to navigate within it.

Salesforce Basics

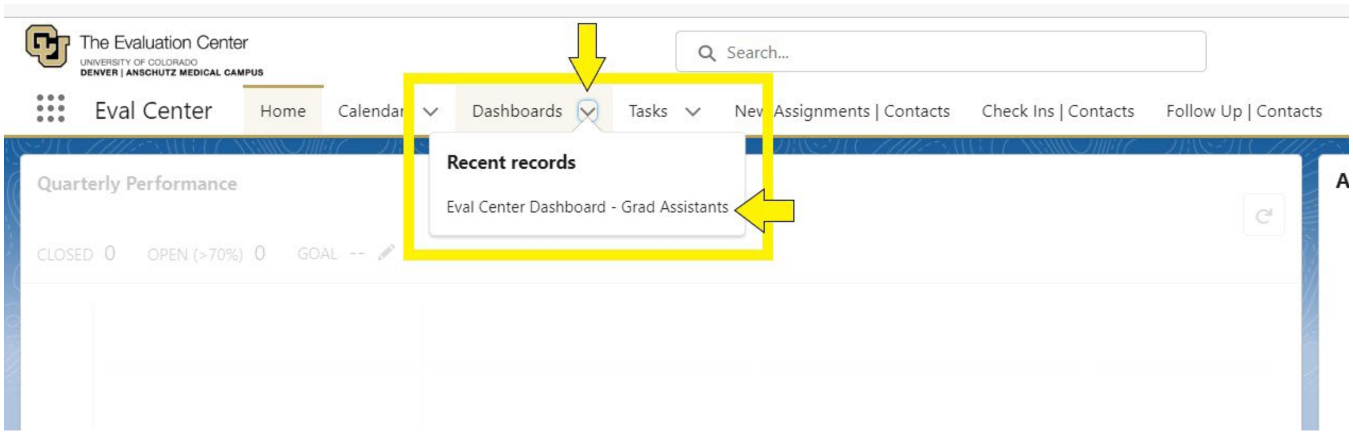
Salesforce CRM

Salesforce User Tour

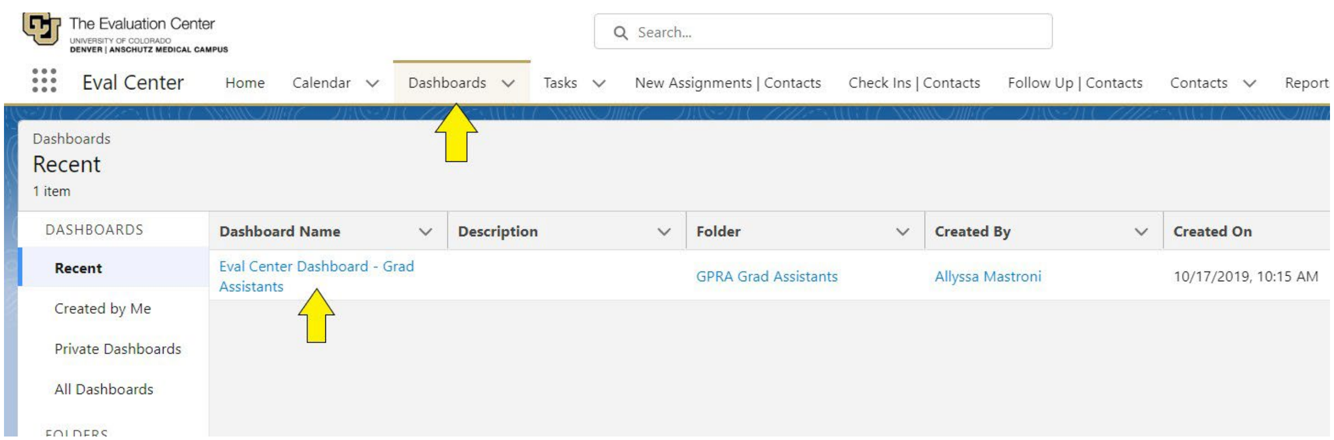
SALESFORCE DASHBOARDS

We have developed a dashboard for Graduate Assistants to use in Salesforce. This dashboard is called "The Evaluation Center – Grad Assistants" and can help you track how many clients you are managing for each specific stage (i.e. check-in, follow-up). When you click into a tile on the dashboard, you will have access to a detailed report listed all of the clients assigned to you in that stage. This dashboard can be accessed multiple ways:

1. Select the dropdown arrow next to the "Dashboard" object and then selecting "Eval Center Dashboard – Grad Assistants"

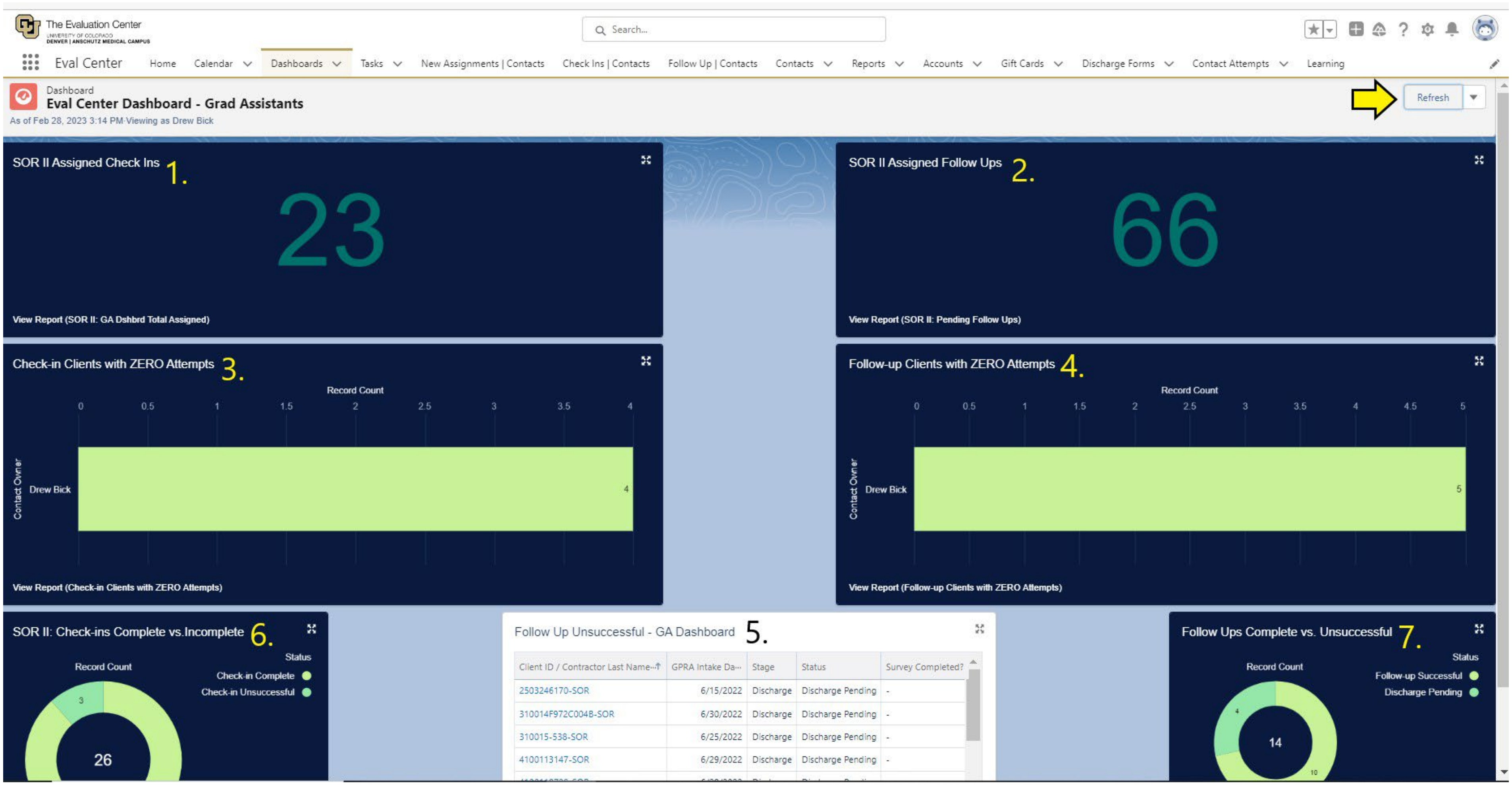


2. Click on the "Dashboard" object and then selecting "Eval Center Dashboard – Grad Assistants" on the next page.



When you access the dashboard, ALWAYS click "refresh" in the upper right hand corner to view the most updated numbers. The dashboard does not update automatically.

The dashboard is a helpful resource so that you can easily see your current client caseload broken down by check-ins (1) and follow-ups (2), your current clients with zero attempts (3 & 4), and clients that are currently due for administrative follow-up (5). You can also get a glimpse of your current success rate for check-ins and follow-ups (6 & 7).

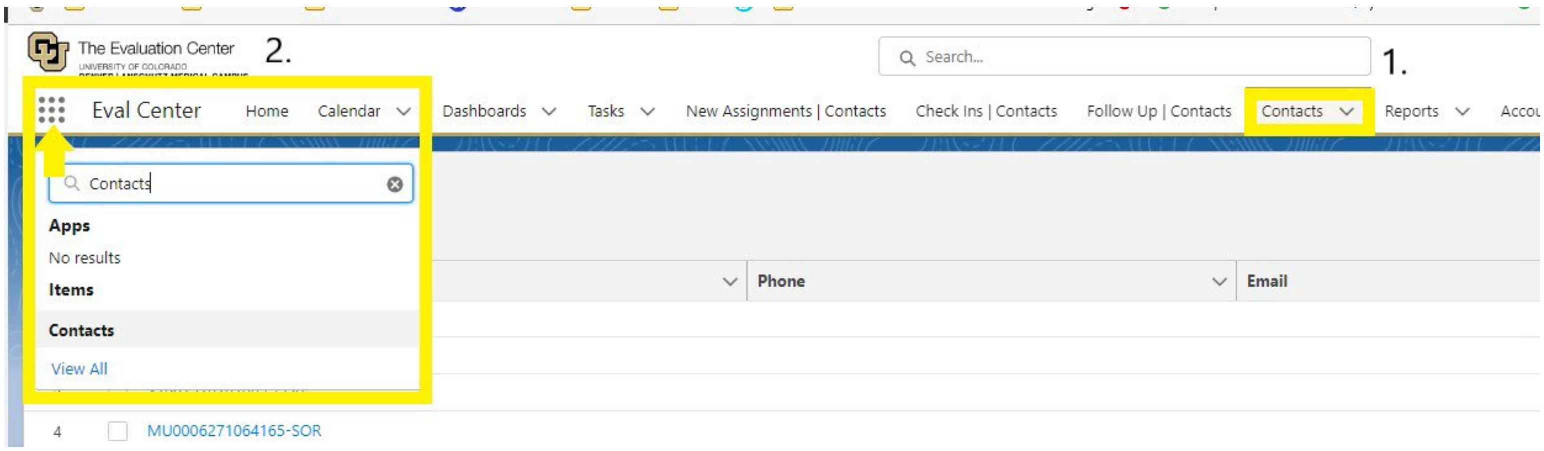


SALESFORCE CONTACT LISTS

Contact lists are also a helpful tool for you to manage your client caseload. Contact lists can display similar or different information compared to your dashboard. With contact lists, are you also able to create custom lists in order in addition to preset lists that will be available to you. While we recommend you start by exploring the existing contact lists, you may want to eventually develop your own unique contacts lists that meet your specific needs. Instructions for creating contact lists are available in the section below.

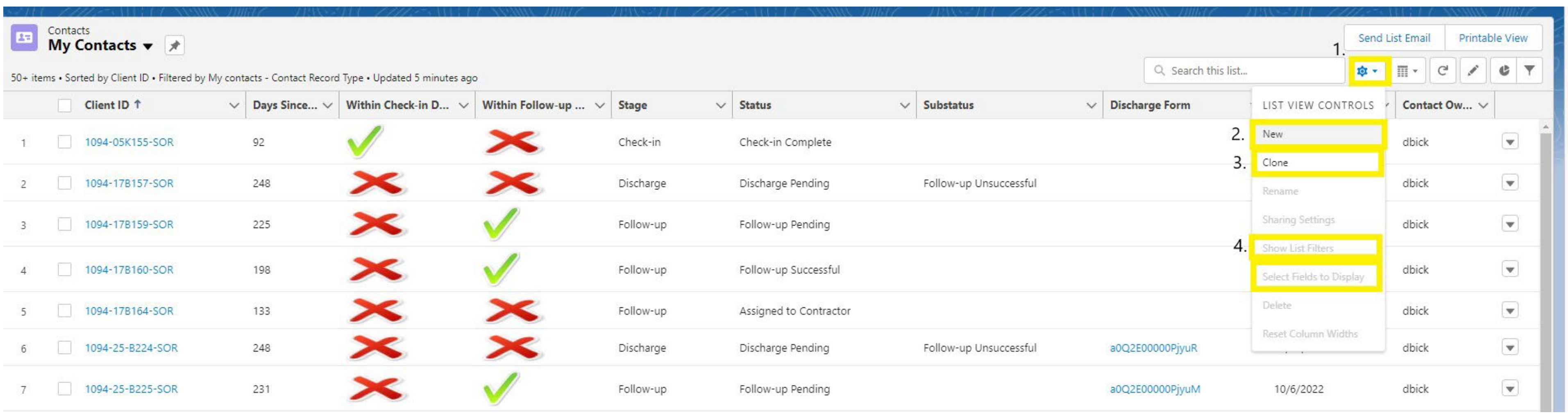
Creating New Contact Lists

To create a new contact list, first navigate to the default contact list. You can do this by selecting the "Contacts" object (1) or by searching and selecting it in the apps finder (2).



From any contact list, you can select the gear icon (1) and click "new" (2). It will open a pop-up asking you to name the list and select who can view it. Don't worry about figuring out a perfect name for the list yet, necessarily, as you can rename the list at any time.

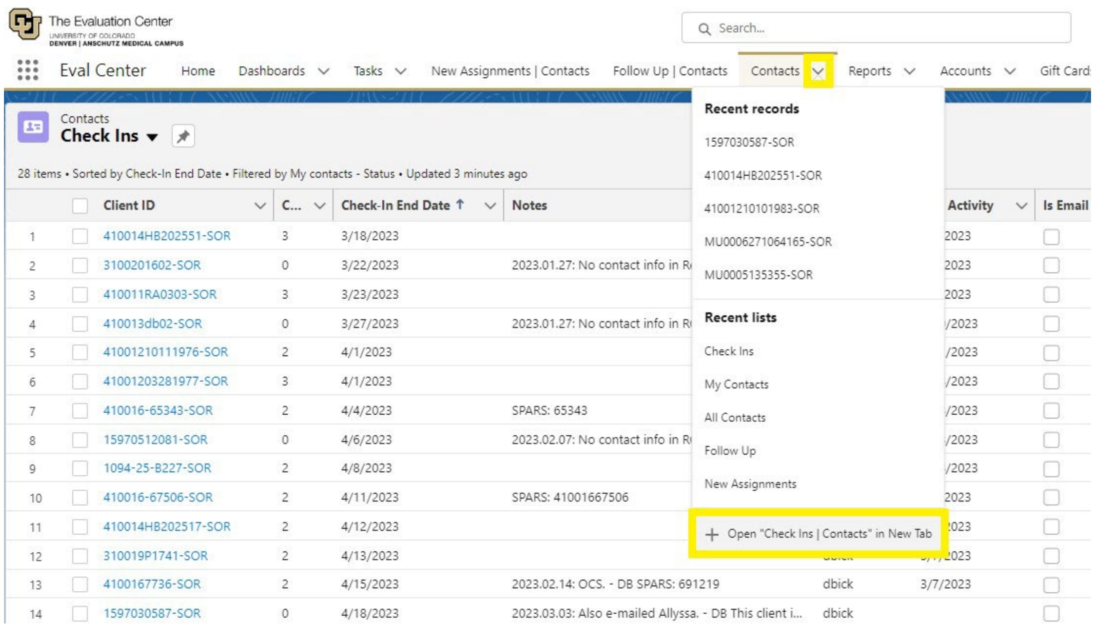
Once your new list is created you can use the gear icon again (1) to edit the list filters (4) and the fields/columns (5) which display. Certain default lists such as "all contacts" or "my contacts" cannot be edited and must instead be cloned (5) before you can edit them.

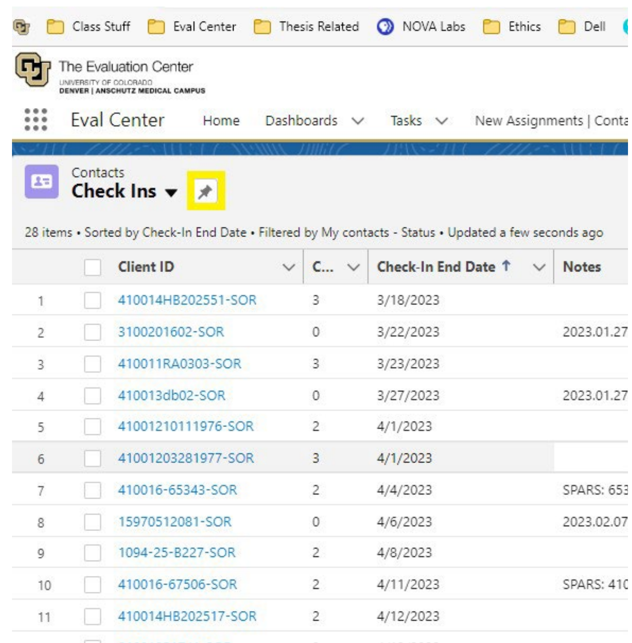


Once you have created a new contact list, you can pin it using the pin button so it is the first contact list you see when you use the contacts tab.

You can also add a tab for a particular list. When in the list, click the drop down to open the contact's tab recents list. Go to the bottom and click "open [name of current open contact list] in new tab."

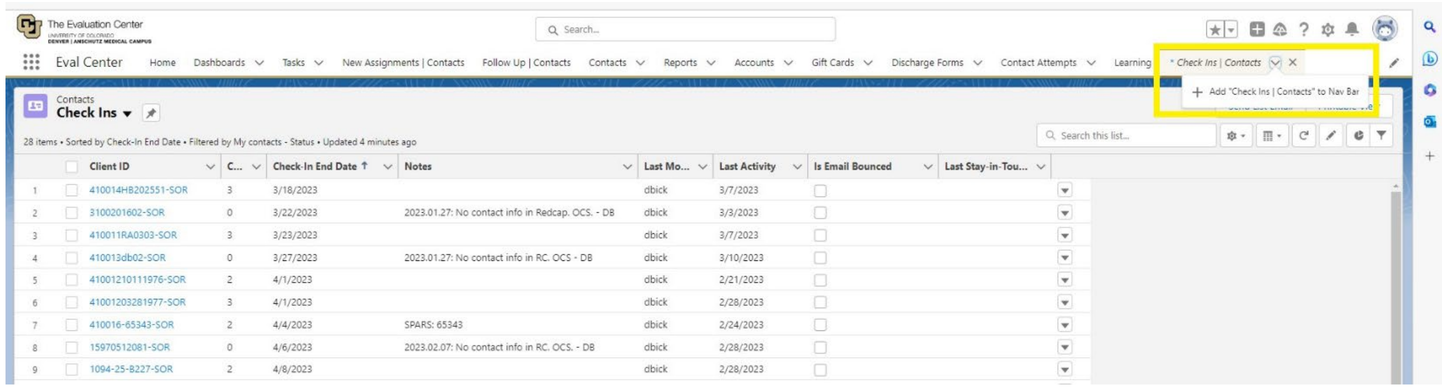
This will open this list in a new tab at the end of the navigation panel that you still need to save. Find that new tab and click the drop down menu arrow. Then, click the "add [name of contact list] to Nav Bar." You can then click and hold the tab to drag it into a different position.



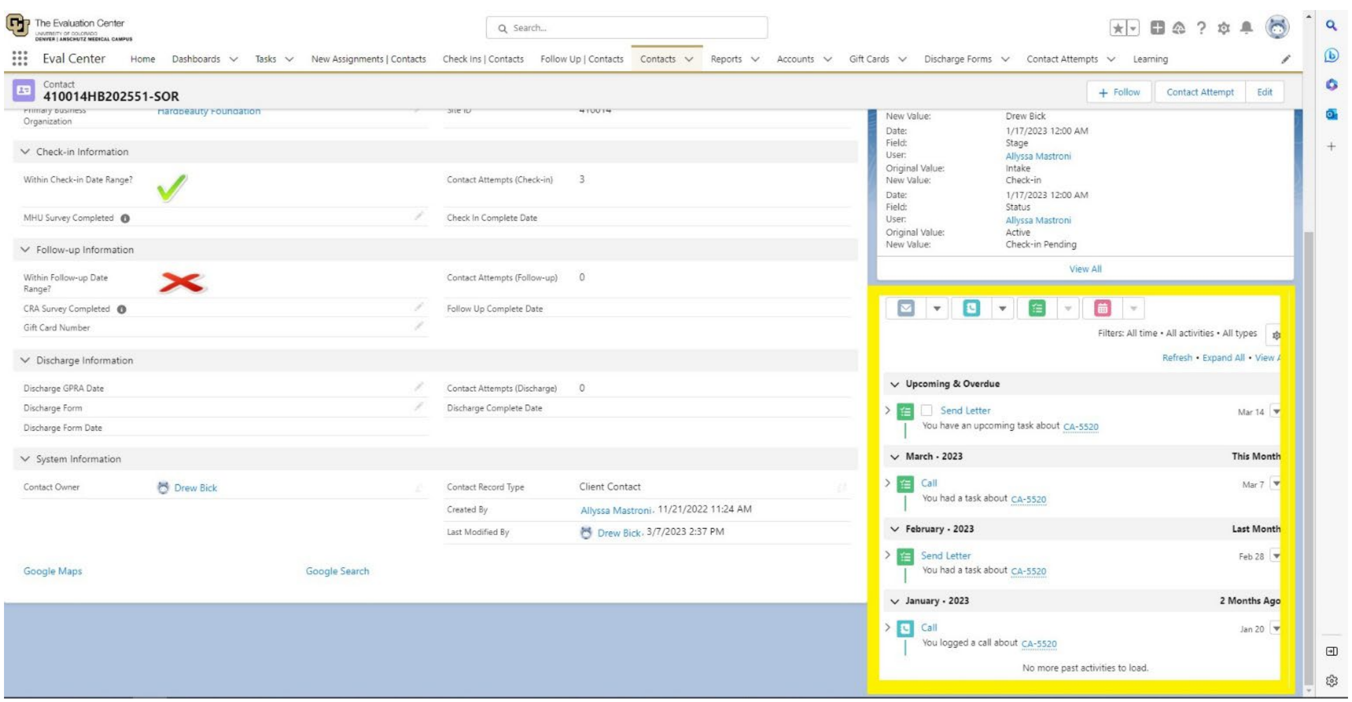


CREATING TASKS

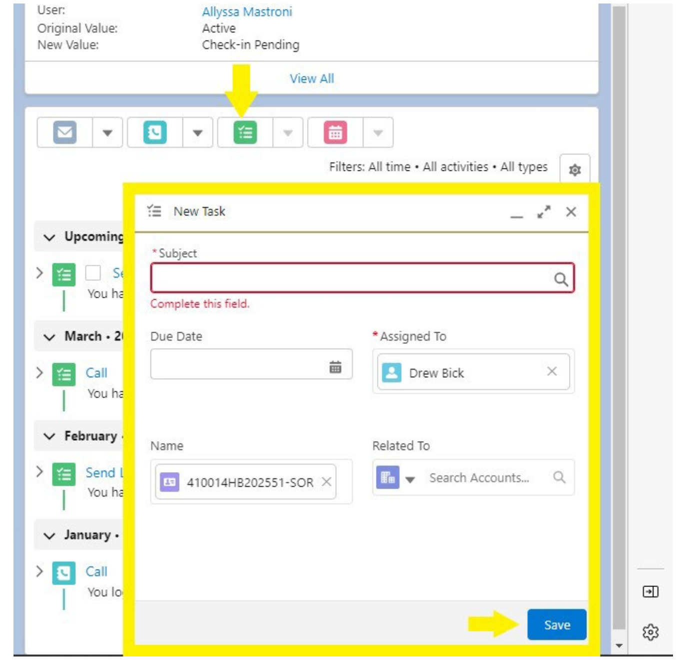
Tasks are another great way you can use Salesforce to help stay organized and on top of your client load. Salesforce already has a few great default task list; however, similar to the way you can create and manipulate contact lists, you can create different tasks lists to what suits you. You can also add specific tasks lists to your navigation bar in the same way you can do so with contact lists (see image to the right).



IMPORTANT: when utilizing tasks, it is important that you still use the “successful” and “unsuccessful” attempt buttons as outlined in the sections on these attempts. Tasks and their ensuing activities do not count toward contact attempts. While we know this does slightly duplicate work, there is no other workaround at this time. In order to utilize and create tasks, you will first need to navigate to a client contact record. You will find that tasks pane in the bottom right corner. (You may have to scroll down a bit.)



In order to create a task, you will click on the green box with the checkmark at the top. This will open a pop up which will let you quick enter the fields below. Don't forget to click save when you are done.



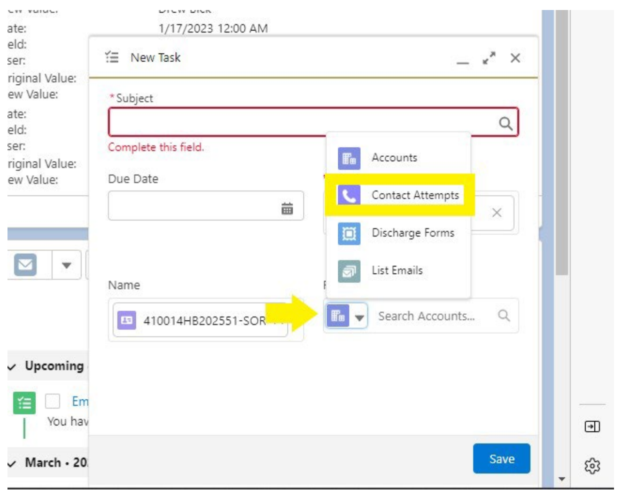
1. Subject: this can be the method of contact you'd like to use. Some defaults will drop down which you can use. They are not all currently relevant however you can also type in anything you'd like in this field.

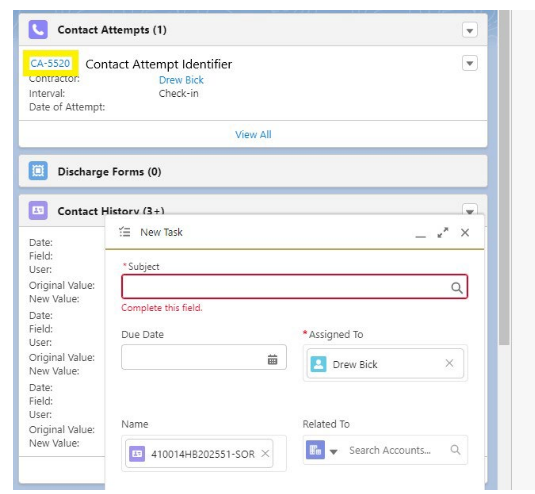
2. Due Date: this is the day the task will show up in your default "today's tasks" list. Note that if the task is overdue, it will also show up in this list.

3. Assigned to: this field must have your name in it in order to show up in your tasks list. It should have your own name by default

4. Name: this is the contact record that will show up for the task in your tasks list. If using the task from the contact record page it will default to that contact. Opening a new task from anywhere else, it will require an entry. In this instance, most of the time, the first entry in the list will be the contact you most recently visited. However, occasionally this is not the case. Be careful when entering data into this field.

5. Related to: this field can be used to enter the contact attempt to which this task is related. To do so, you must first make sure it is set to contact attempt. Click the drop down and select "contact attempts." Once you have selected this you can use the contact attempt identifier to attach this task to that contact attempt. You can also create the task from the master contact attempt record screen. When doing this, the contact attempt will auto-populate into the "related to" field.





GENERAL INSTRUCTIONS FOR LOGGING CONTACT ATTEMPTS

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

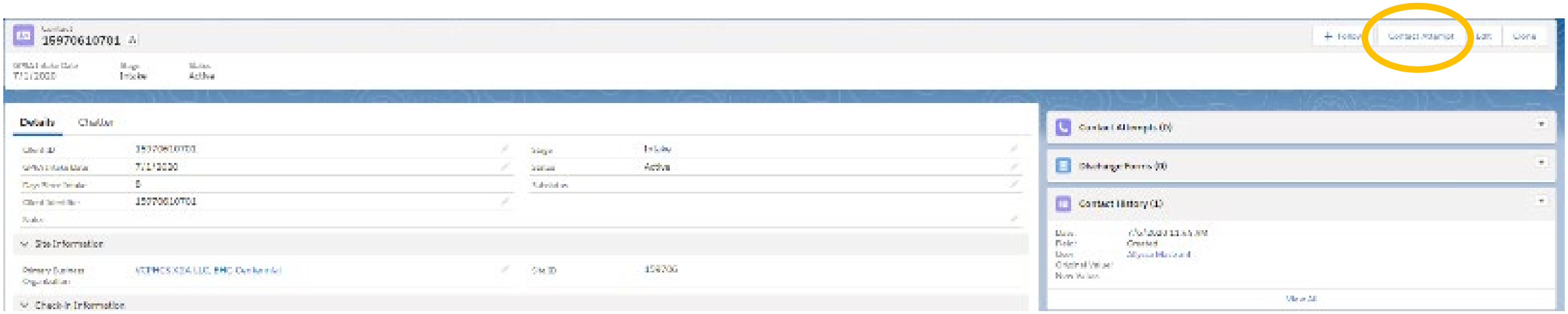
Contact attempts can be either successful, or unsuccessful. A successful attempt is defined as, the client answered the call, and completed the necessary data collection for the interval you are calling about. An unsuccessful attempt is defined as, an attempt in which you were unable to complete the 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.

CREATE A MASTER CONTACT RECORD

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

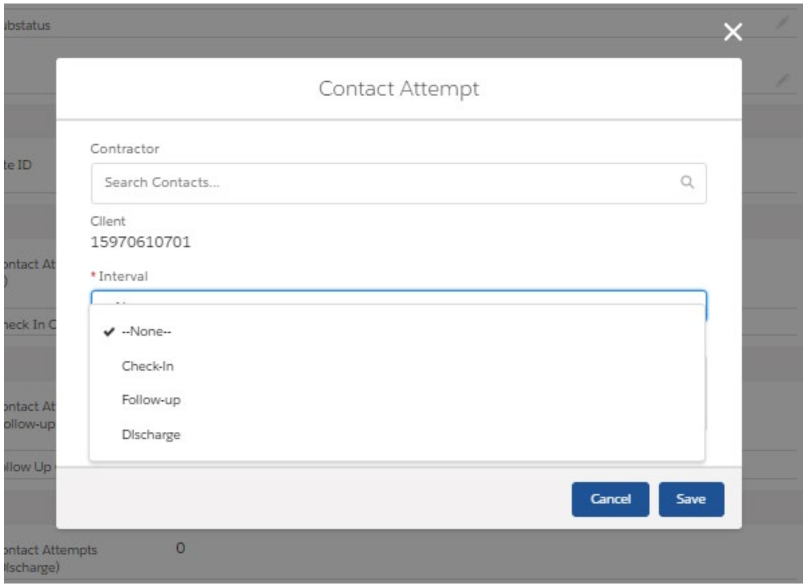
STAGE	TIMELINES
Check in	60-120 days since intake
Follow up	150-240 days since intake
Discharge	Can occur at any point

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



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.

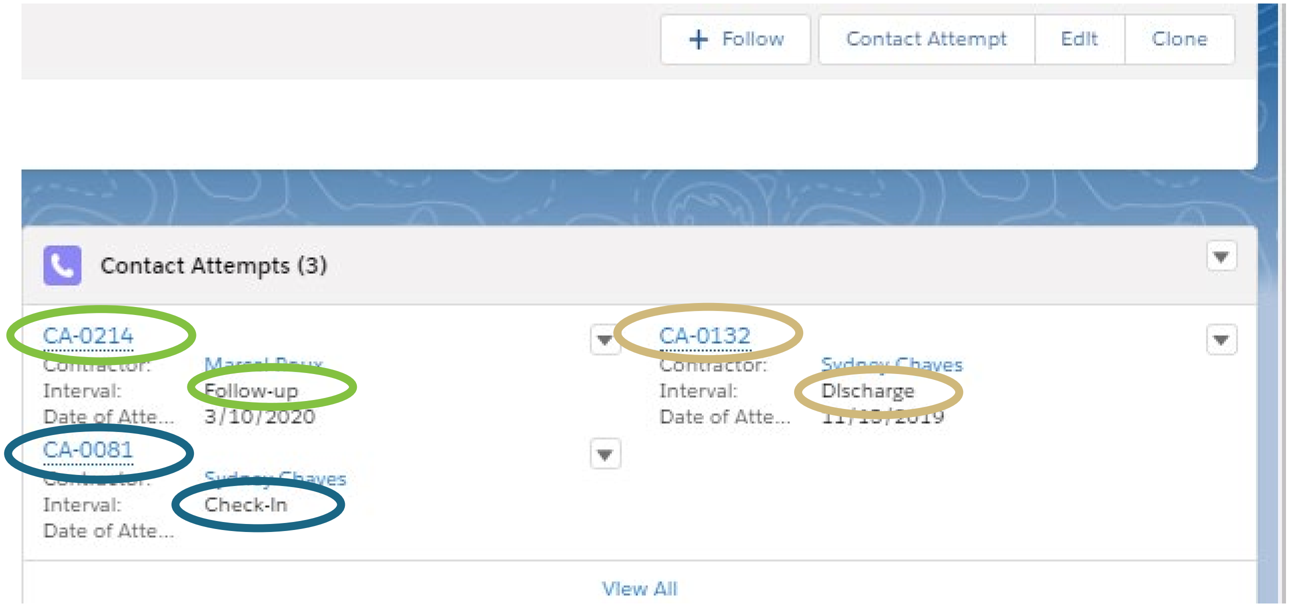


RECORD A CONTACT ATTEMPT

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.

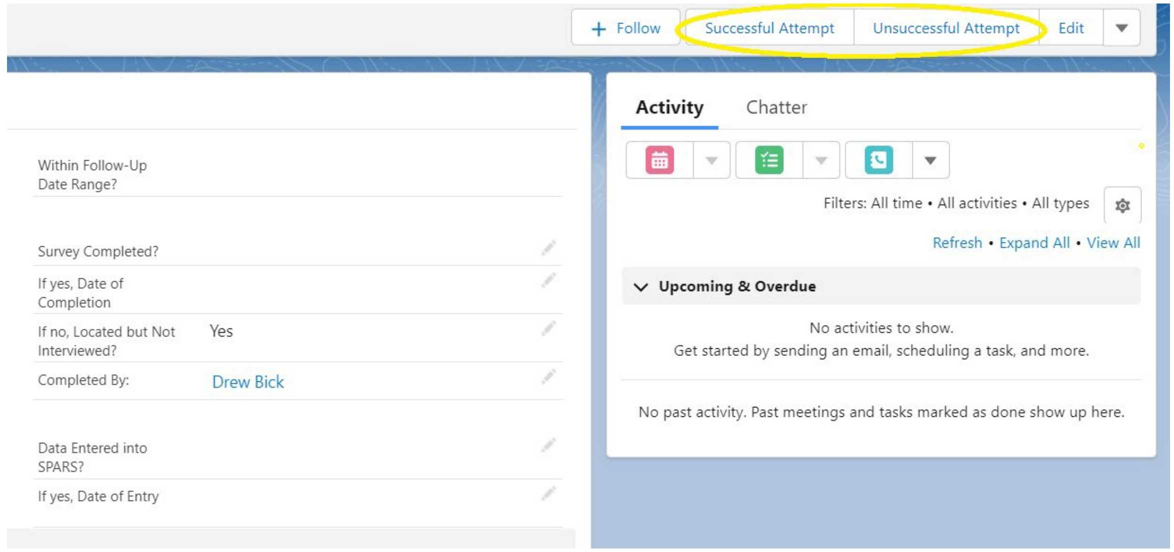
The image to the right displays each of the three possible master contact records (check in, follow up, and discharge) for a single client. From here you can also see who created each master contact record, and when.

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



Phone Contact Attempts

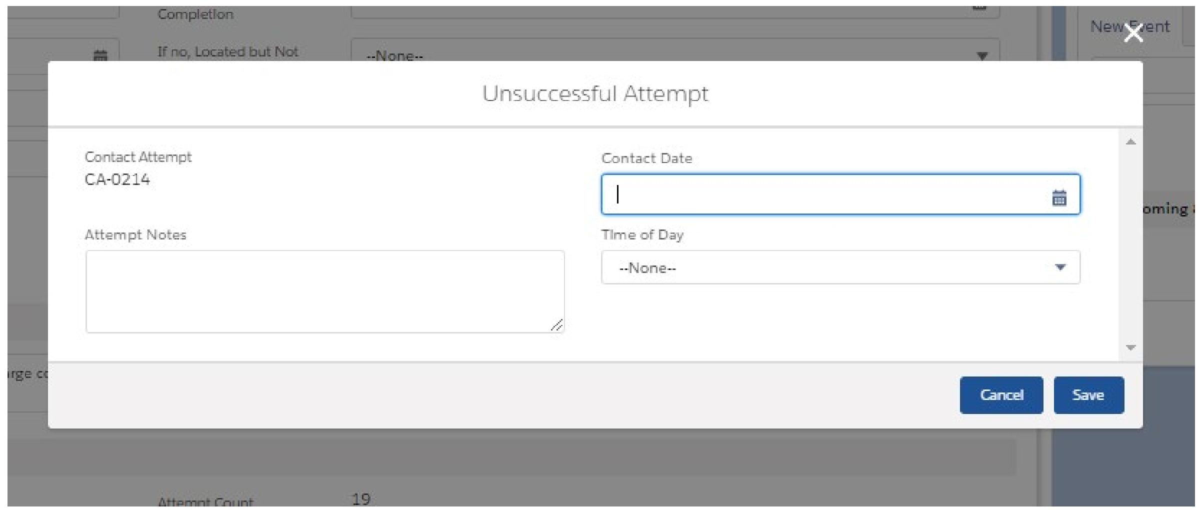
Now that you are in the master contact record for the appropriate interval, select the type of attempt you wish to record, either “successful attempt” or “unsuccessful attempt.” Generally, most attempts you log will be considered unsuccessful.



The first image to the right displays the history of contact attempts within this contact attempt record.

Unsuccessful Attempts

Unsuccessful attempts are generally logged in the same way regardless of which stage the client is in. In order to log an unsuccessful attempt, you will click “unsuccessful attempt.” Then, a pop-up will appear and you should complete the fields displayed. In the “attempt notes” field, please indicate why this attempt was unsuccessful followed by your initials. Some examples may include, “voicemail box is not set up yet - AM” or “client hung up - AM.” Do not include the client’s name or identifying information in any notes.



After saving your entry, you will be able to view that specific attempt from the contact record.

These same steps should be followed when entering a contact attempt made via text message or email. Always log an e-mail or text message attempt as unsuccessful as you will not receive an immediate response from the client.

<u>IMPORTANT</u>:

- If “okay to text message” is not selected on the contact form, do not contact the client via text message.
- If you are hung up on three times while making contact attempts during any stage, you should consider the client as refusing to participate and terminate them appropriately.
- During the check in phase, if four unsuccessful attempts are logged, Salesforce will automatically change the status to “check in unsuccessful.” No further action is required at this time.

Successful Attempts

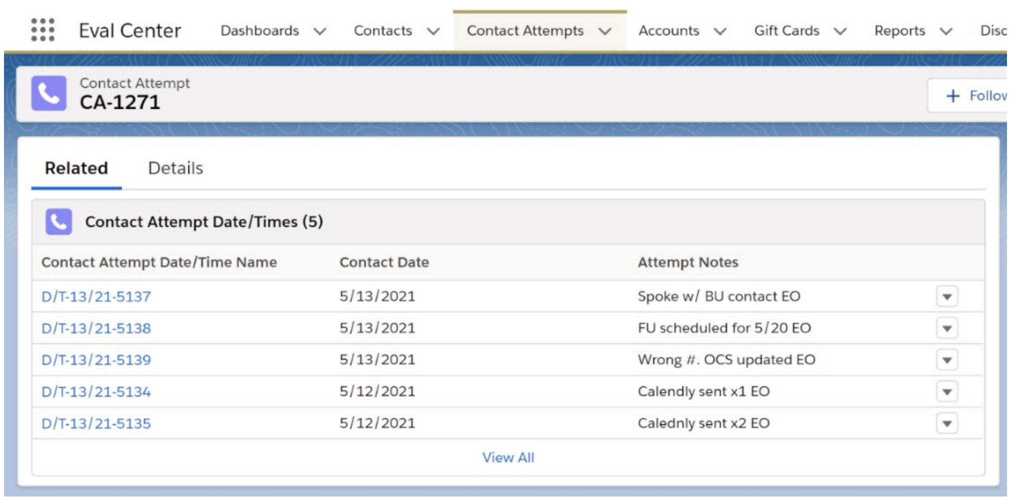
How to log successful attempts will be explained in detail in future sections of this manual.

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 efficiency. If you have additional shorthand suggestions, please bring them the weekly GPRA team meeting so that we can discuss as a team and potential add them to this manual. Keep in mind that each contact attempt note should include your initials so we are able to quickly tell who logged the note.

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"*
NIS	Not In Service	*"# NIS"*

Taking thorough and accurate notes for each contact attempt allows for efficient communication with clients and across our internal team. Notes support our team's ability to understand the clients' contact history and allows for smoother client reassignments. The image below provides an example of these notes as they would appear across several contact attempts.



DATA ENTRY INSTRUCTIONS

The following sections provide detailed instructions for logging individual contact attempts as well as how to enter the GPRA data as it is collected. Sections include guidance for the following types of contact attempts:

- Introductory Call
- 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 build rapport and increase client responsiveness. Currently, introductory calls are not part of the existing GPRA workflow, but may be reinstated in the future. For that reason, instructions on how to log an introductory have been moved to the end of this guide.

CHECK IN CALLS

The purpose check-in calls is to verify the client's date of birth (DOB), contact information (including back up contacts),1 and to provide a reminder about the upcoming follow-up survey. These calls are also an opportunity to build rapport with the client and answer any questions that they might have about the survey. Upon greeting the client over the phone, you will verify their birth month and year which is available in REDCap – SOR III GPRA Intake Survey.

When the contact attempt occurs: 60-120 days post-intake

Some GAs have used this phone call to actually schedule the client's follow-up call several months in advanced. If you use this strategy, please indicate so in the attempt notes, and create a new event in the [Google Calendar](#).

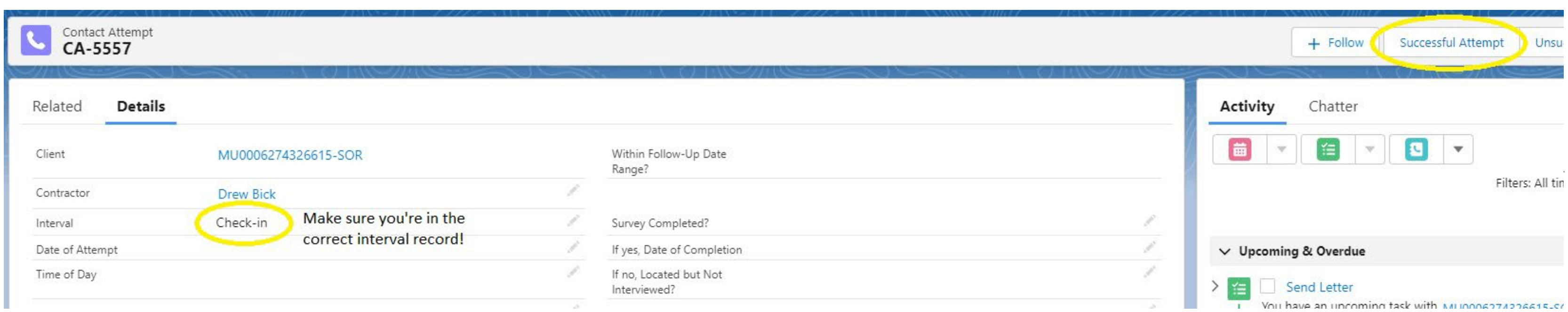
All unsuccessful check in attempts should be logged in the clients Salesforce contact record as outlined in [previous section](#).

IMPORTANT:

- If you encounter a DOB mismatch, apologize and thank the client for the time but do not share any identifying information. You will end the call and contact the GPRA Data Manager so that the discrepancy can be resolved.
- If the client reports no longer receiving services, let them know that they are still eligible for the follow-up survey and incentive. Do not change their stage/status based on this response, we only complete discharge data entry when a formal discharge form is submitted. The GPRA Data Manager will notify you when this occurs.

LOGGING A SUCCESSFUL CHECK-IN IN SALESFORCE

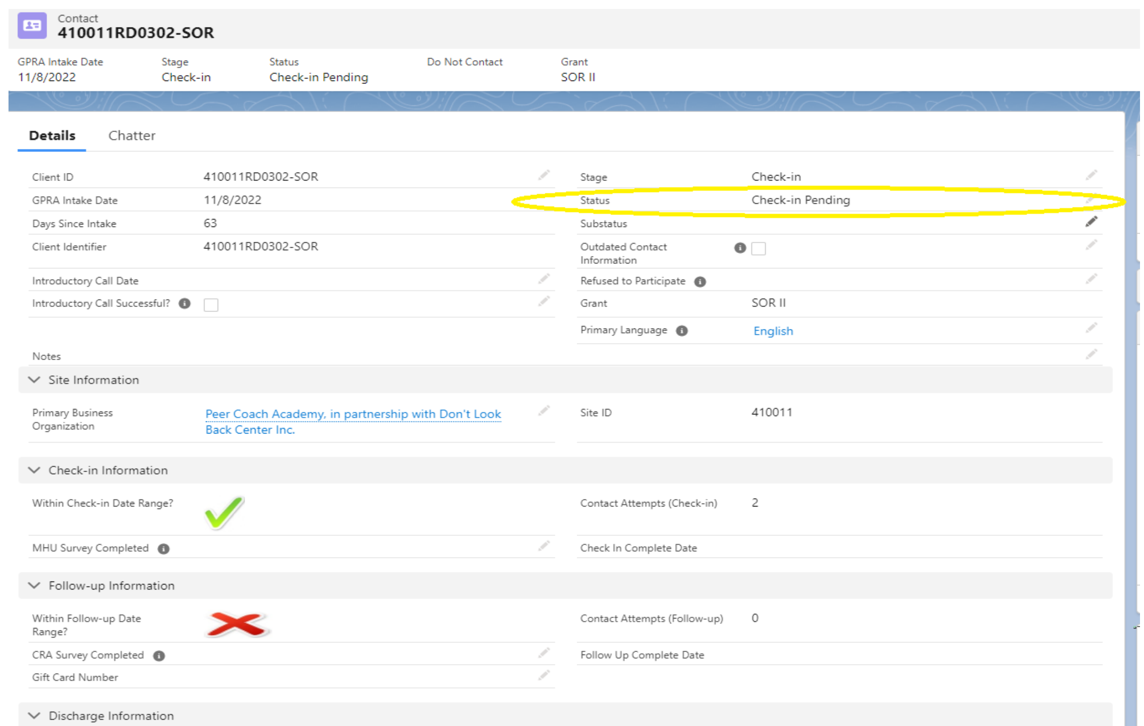
First navigate to the master check-in contact attempt record. (If a master check-in contact attempt record does not exist, you can create one using these [instructions](#).) Once in the check-in master contact attempt record, press the "Successful Attempt" button.



A pop up will appear. Fill in the fields as outlined in the image below. Fields with red X's do not need to be filled in at this stage.

Note: if your first attempt is the succesful attempt, then the "attempt count" will still display "0". This is fine.

Upon completing a successful check in call, the master contact record status will need to be manually updated to "check in-successful." Click any of the pencils to edit the field. (See image to the right.)



FOLLOW-UP EMAILS – CALENDLY

When a client becomes eligible for follow up, GPRA GAs will send an 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. Remember, if the current primary contact information is out of date you should also contact the back-up contact. If the back-up contact listed as the provider, do not contact them and add this client to the Outdated Contact Sheet (OCS). The GPRA Data Manager contacts providers for updated contact information on a monthly basis.

Use the template below to draft follow-up emails (this template is also saved as a draft in the GPRA Gmail account for easier access). Be sure to add the client's name and intake dates to the 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 or give us a call at 720-476-6248.
>
> We look forward to hearing from you!

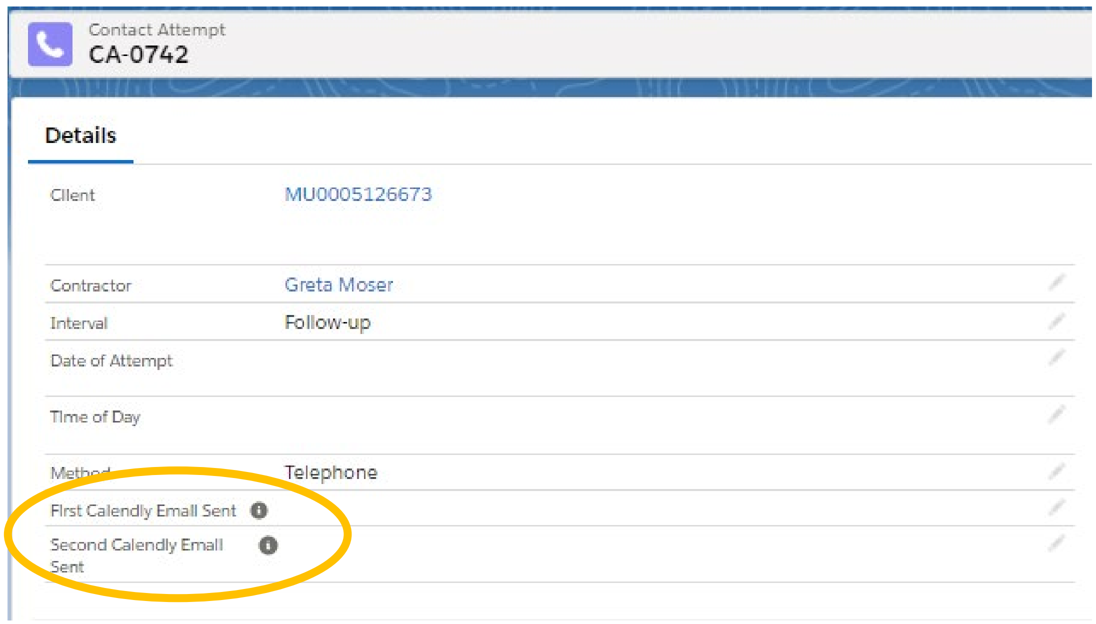
IMPORTANT:

- Do not to give out any sensitive health information to the back-up contacts.
- If at any point during follow-up contacts the client reports no longer receiving services, they are still eligible for follow-up. We will only change their stage/status to discharge when the provider submits a formal discharge form. The GPRA Data Manager will notify you if this occurs.

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 first create a follow-up master contact attempt if no previous attempts have been made. If a contact record already exists for that interval, you should add this attempt to that record (see instructions in the "Follow-up Interview" section below). Then, log an "unsuccessful attempt." Within the attempt note, include "Calendly email sent."

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



FOLLOW-UP INTERVIEW

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

- ✓ The client was contacted during the five to eight month follow up window post GPRA Intake Date. The 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, This creates a slight discrepancy between the two windows. In most cases, the follow-up start date will be the same date of the month in which the intake occurred. Eg., if intake was done on March 23rd, 2022, then the follow-up window opens on August 23rd, 2022.
- ✓ The follow-up survey was administered and completed.

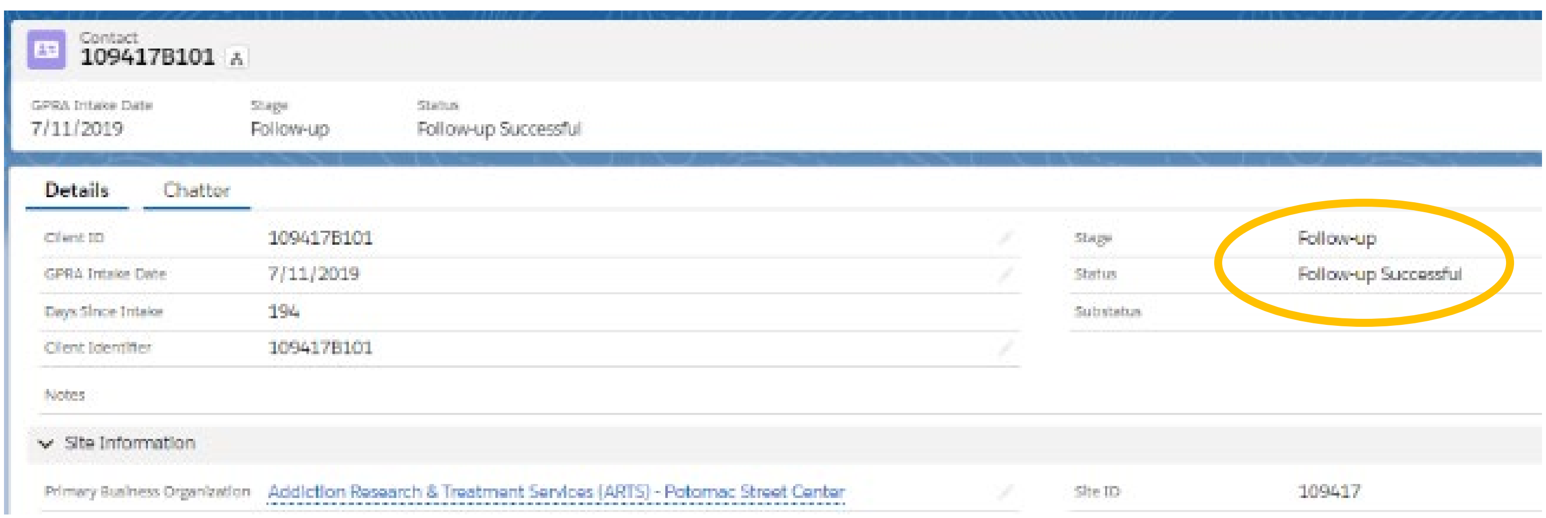
If the follow-up interview was successful, data entry in both REDCap and Salesforce is required.

REDCAP ENTRY

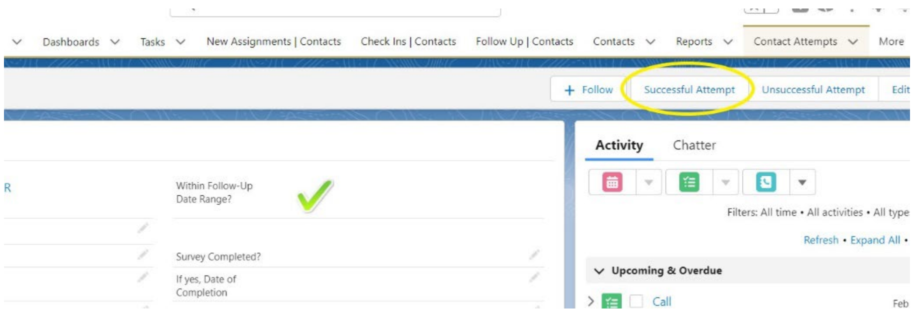
First, use the REDCap SOR III GPRA Intake Survey to look up and verify client DOB. Then navigate to the REDCAP SOR III GPRA Intake Survey to administer the follow-up survey. Navigate through the survey, asking all questions as they are written. You can always select the "refused" answer option if a client chooses not to answer. At the end of the survey don't forget to ask what type of gift card the client would like to receive (electronic or physical) and then verify their corresponding email/address in their REDCap Client Contact Form.

SALESFORCE ENTRY

Once the follow-up is complete, the successful attempt should also be recorded in Salesforce. The status should be manually changed to "Follow-up Successful" on the contact record. Select the pencil icon next to the status find the status in the corresponding drop down menu.

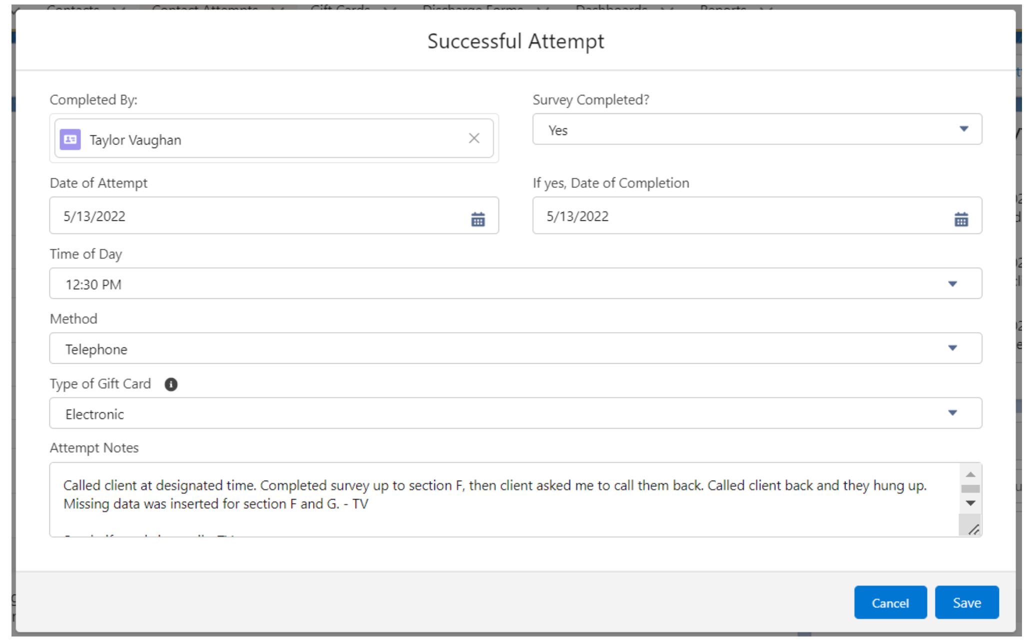


Record a successful attempt in the master follow-up contact attempt by selecting "successful attempt" within the master contact attempt record. A pop-up will appear for your data entry. Complete the fields as displayed in the adjacent picture, or as is applicable to your interaction.



Note: if your first attempt is the succesful attempt, then the "attempt count" will still display "0".

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 in REDCap.



FILLABLE PDF ENTRY

We also have a fillable PDF version of the survey that can be used in emergencies if there is a REDCap outage. There is an English and Spanish version available and should only be used as a last resort. All data collected in this form must be manually entered into our online database later.

SPARS ENTRY

At this time, due to the REDCap Survey and the SPARS batch upload process, GAs are not using SPARS to enter follow-up data. The information on how to do this has been moved to the end of this guide.

ADMINISTRATIVE FOLLOW-UP

Administrative follow-ups do not count towards the follow-up rate required by the grant and 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.

IMPORTANT: 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

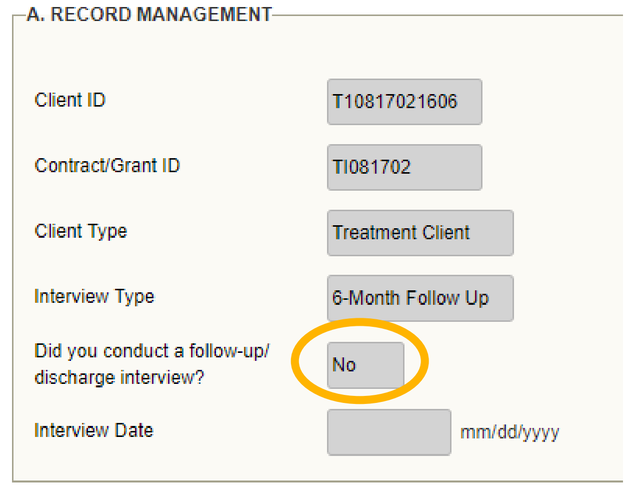
To enter the administrative follow-up into SPARS, search for the client and add a six-month record. An administrative follow-up would be entered as a six-month record regardless of when the administrative follow-up is entered. For example, an administrative follow-up can be entered during the check-in 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

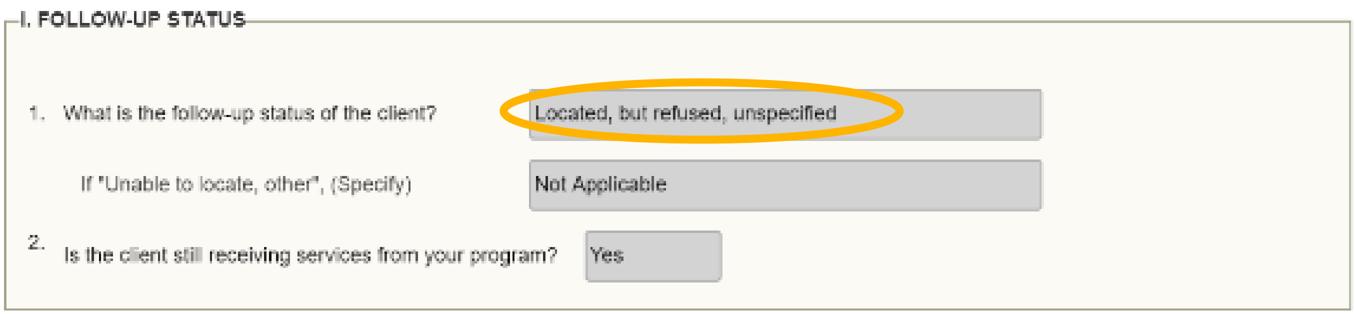
- Located, but otherwise unable to gain access (usually selected if client has become incarcerated, or began treatment in a residential setting before or during their follow-up window)
- Located, but withdrawn from project
- Unable to locate, moved
- Unable to locate, other (specify)

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.

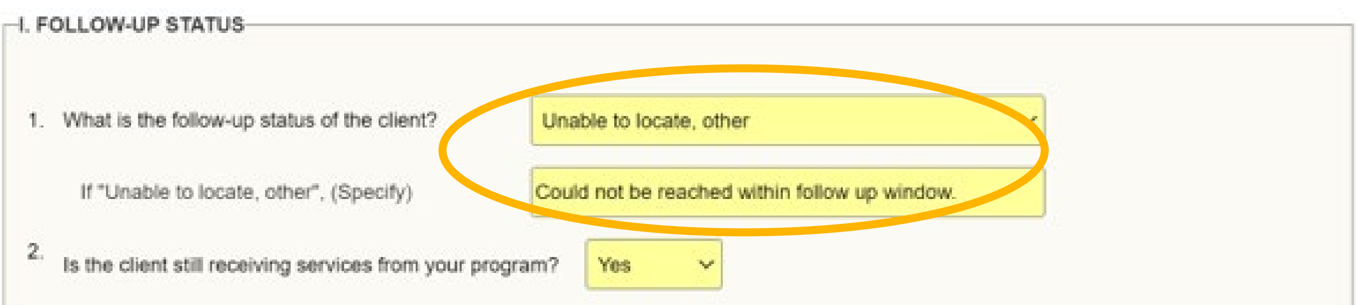

A. RECORD MANAGEMENT
Client ID T10817021606
Contract/Grant ID TI081702
Client Type Treatment Client
Interview Type 6-Month Follow Up
Did you conduct a follow-up/ discharge interview? No
Interview Date mm/dd/yyyy

Client ID	Intake Date	Status	Intake(104)	3 Month(0)	6 Month(2)	12 Month(0)	Discharge(5)
1035001398121	9/3/2019	Active	View | Edit	N/A	Add	Add	Add

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

The second example reflects a client who we were **unable to contact 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.

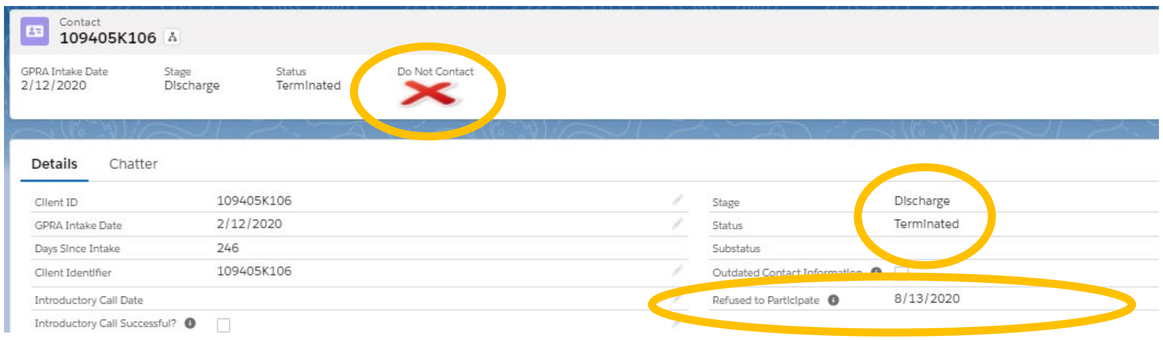
Client Refusing to Participate

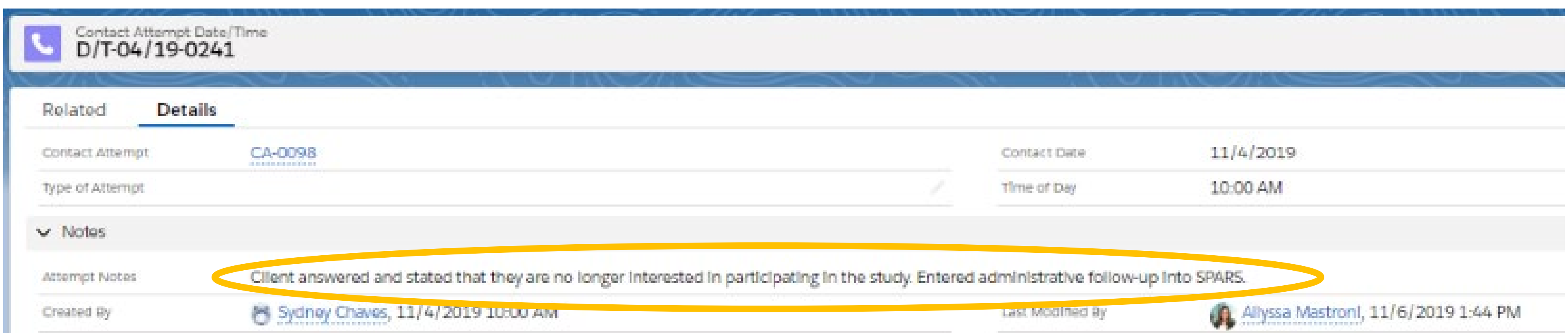
Although clients consent to participating in the GPRA health study during their intake appointment, they may revoke consent at any point during their recovery journey. If a client chooses to withdraw, complete an administrative follow-up in SPARS.

In addition, this refusal needs to be recorded within Salesforce. To do so, navigate to the clients' record (profile page) and edit the record by clicking any of the pencils. 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 follow-up master contact attempt notes, note that an administrative follow-up was entered into SPARS and describe why it was entered. If this occurs during the clients check-in window, please create a master follow-up contact attempt in which to complete the administrative follow-up.



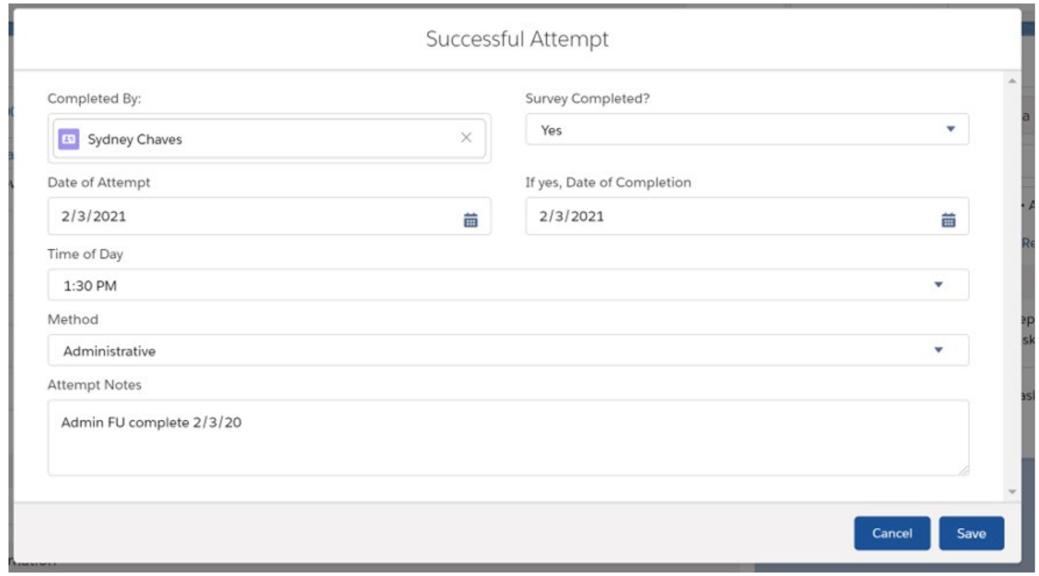


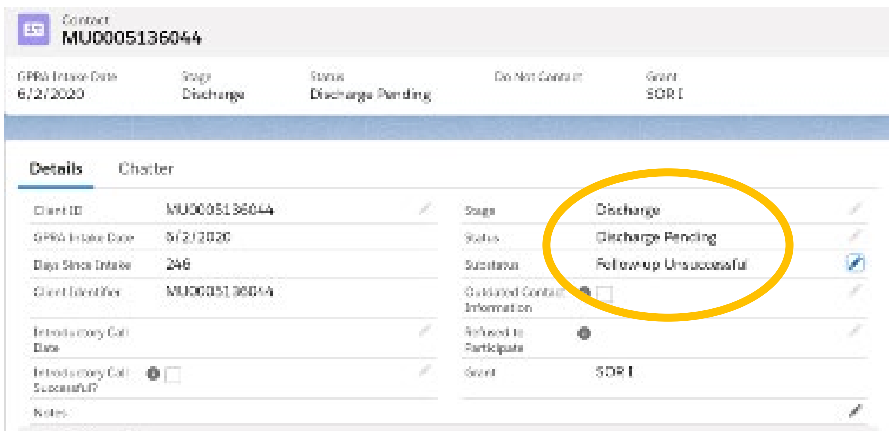
Clients Unable to be Contacted During the Follow-up Window

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-Follow Up Unsuccessful as shown below.





DISCHARGE INTERVIEW

Discharge interviews can occur at any point throughout a client's recovery journey, and do not impact their eligibility to participate in follow-ups/receive incentives. 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 still required to attempt to complete a follow-up with clients who were discharged, 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.

SALESFORCE ENTRY

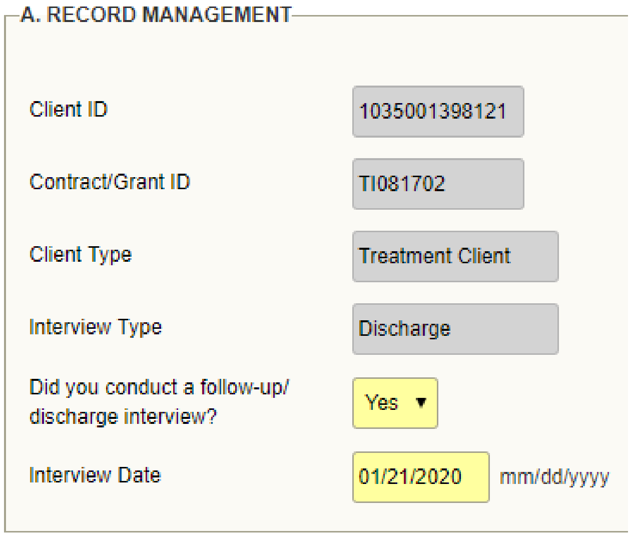
Once the discharge interview is entered into SPARS, this should also be recorded as a successful attempt in Salesforce under the discharge master attempt. The stage and status should also be manually changed depending on the number of days since the clients' intake date.

- 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"

SPARS ENTRY

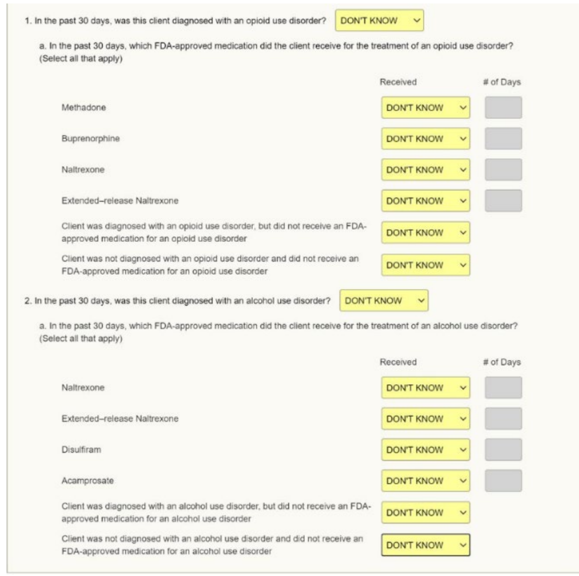
Client ID	Intake Date	Status	Intake(104)	3 Month(0)	6 Month(2)	12 Month(0)	Discharge(5)
1035001398121	9/3/2019	Active	View | Edit	N/A	Add	Add	Add

Enter the following into section A of the tool:



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



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)

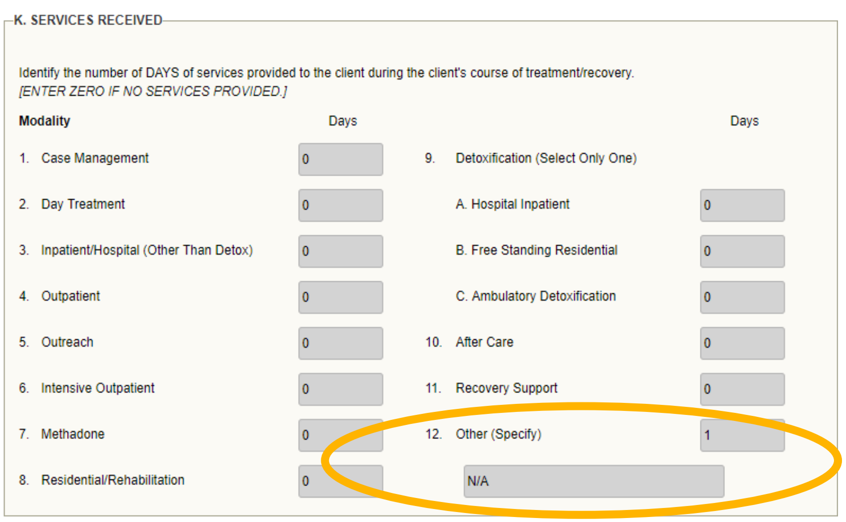
	Received	# of Days
Methadone	DON'T KNOW	
Buprenorphine	DON'T KNOW	
Naltrexone	DON'T KNOW	
Extended–release Naltrexone	DON'T KNOW	
Client was diagnosed with an opioid use disorder, but did not receive an FDA-approved medication for an opioid use disorder	DON'T KNOW	
Client was not diagnosed with an opioid use disorder and did not receive an FDA-approved medication for an opioid use disorder	DON'T KNOW	

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	DON'T KNOW	
Extended–release Naltrexone	DON'T KNOW	
Disulfiram	DON'T KNOW	
Acamprosate	DON'T KNOW	
Client was diagnosed with an alcohol use disorder, but did not receive an FDA-approved medication for an alcohol use disorder	DON'T KNOW	
Client was not diagnosed with an alcohol use disorder and did not receive an FDA-approved medication for an alcohol use disorder	DON'T KNOW	

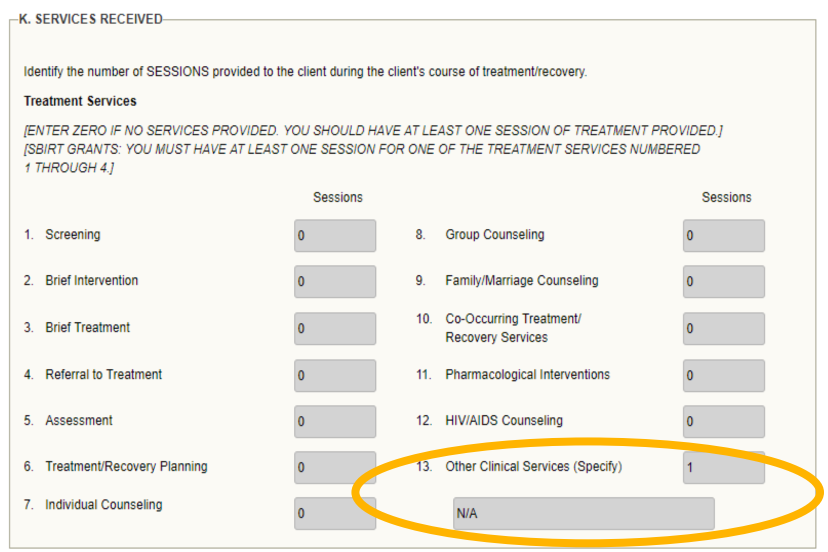
After verifying the DOB, administer the GPRA survey over the phone. Once you complete section G, end the call with the client. Then proceed to section J and use the client's discharge information collected in the discharge form (in Salesforce) to populate the remaining sections of the tool. You will 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		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.

Treatment Services

[ENTER ZERO IF NO SERVICES PROVIDED. YOU SHOULD HAVE AT LEAST ONE SESSION OF TREATMENT PROVIDED.]
[SBIRT GRANTS: YOU MUST HAVE AT LEAST ONE SESSION FOR ONE OF THE TREATMENT SERVICES NUMBERED 1 THROUGH 4.]

	Sessions		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	

ADMINISTRATIVE DISCHARGE

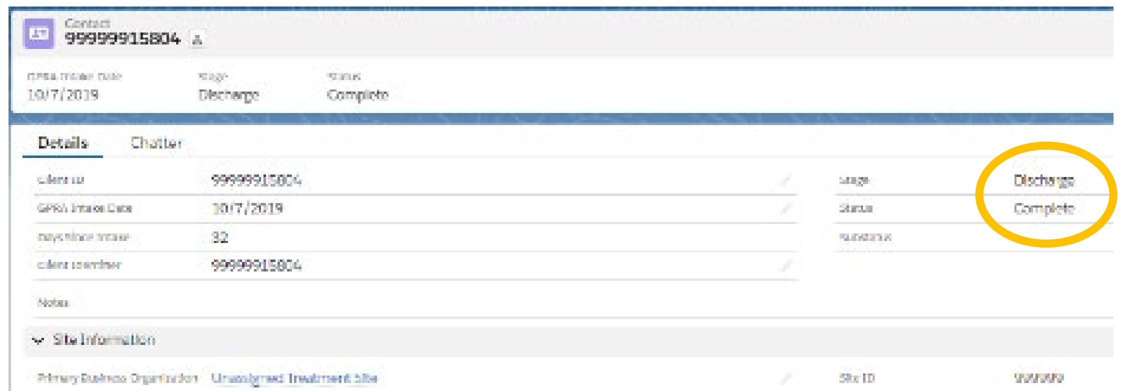
An administrative discharge should be entered into SPARS for the following reasons:

- 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).

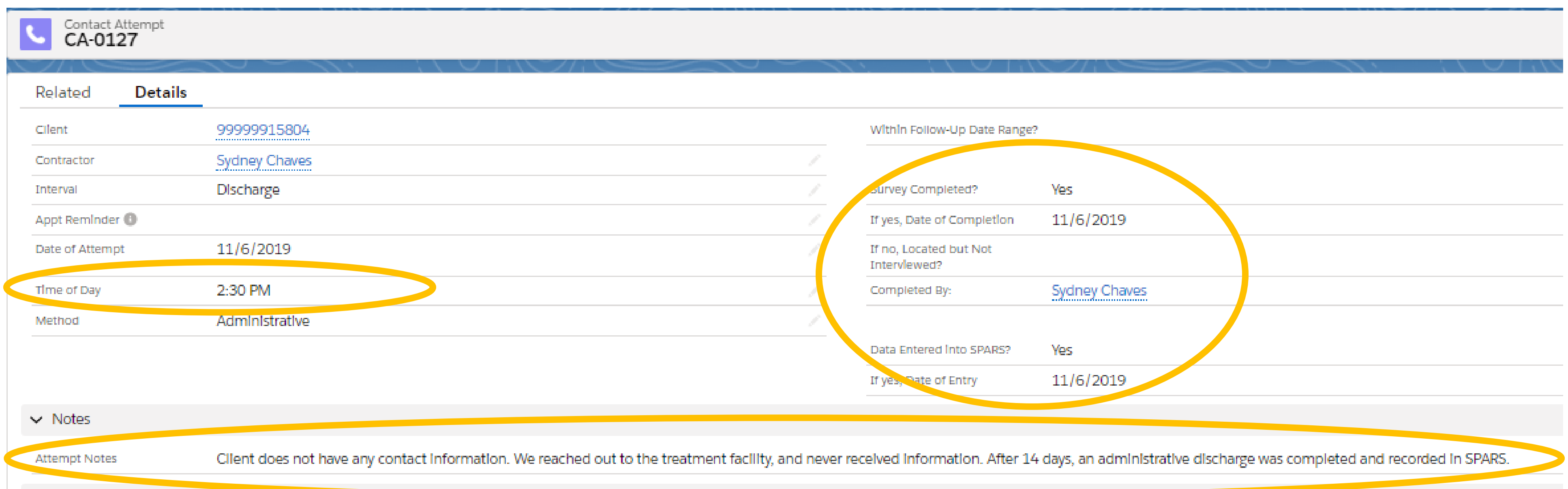
We are still required to attempt to complete a follow-up with clients who were discharged, prior to their follow-up window. Therefore, it is extremely important that the stage and status are recorded properly in Salesforce.

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.



Record the following in the master contact attempt record:

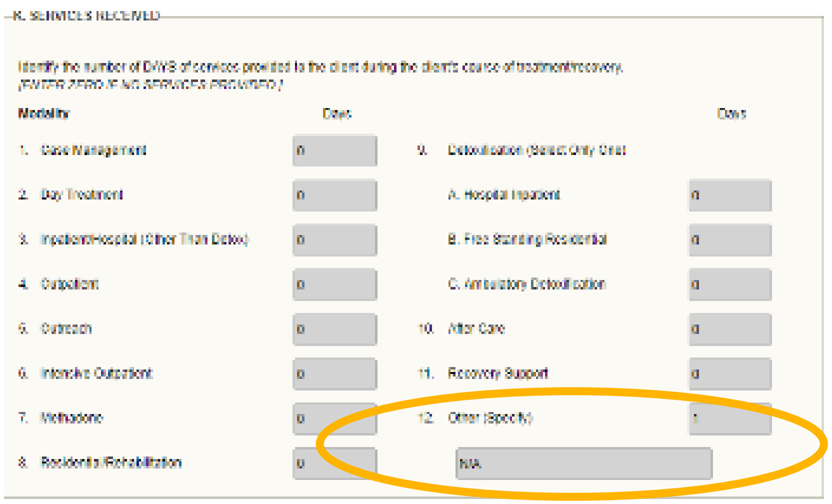


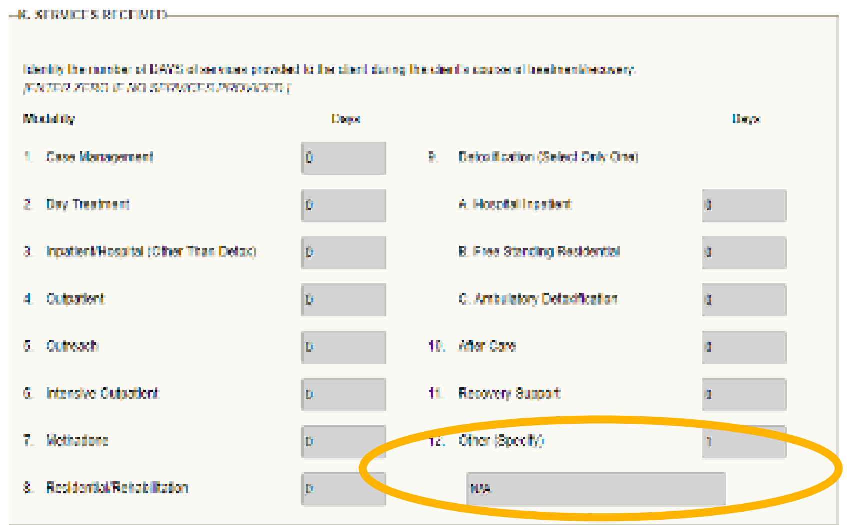
SPARS ENTRY

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	View | Edit	N/A	Add	Add	Add

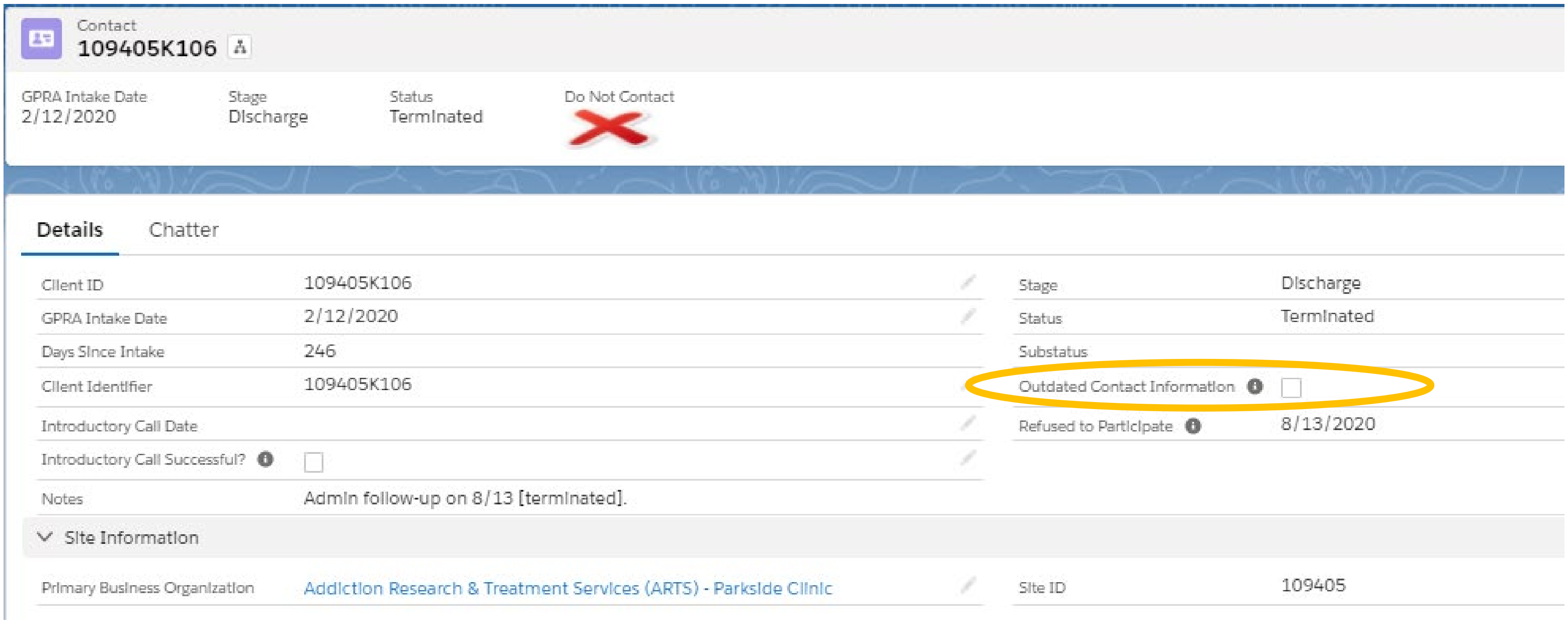
In section A, select "no" in question 1, an interview was not conducted. Navigate to Salesforce and find the discharge form within the client's record. Use this form to populate section J of the tool. You will then enter zeros for section K. You will be required to enter at least one modality and one treatment service to proceed. Enter "1" for other in both subsections and specify as "N/A."





OUTDATED CONTACT INFORAMTION

There are times 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 or e-mails that bounce back. If this is the case, check the "Outdated Contact Information" box in Salesforce and record the client in the Outdated Client Contact Info (OCS) tracking spreadsheet on the Q drive. The GPRA Data Manager monitors the spreadsheet and contacts clinicians/treatment site staff on a weekly basis. If the clinician provides updated contact information, the GPRA 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. Only add to the OCS if *all* contact methods are not working. If there are two main methods and one works, e.g., phone # doesn't work but e-mail does, then do not add to the OCS.



GAs should continue making follow-up 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	–	GPRA Data Manager	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 the GPRA Data Manager 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. *If the follow-up and discharge both have been completed, change the stage = Discharge, status = Complete.*	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 the GPRA Data Manager 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 the GPRA Data Manager 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	Assigned Discharges List View

				discharge date. 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 GPRA 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.

SALESFORCE USER LICENSES

There are seven full salesforce licenses and 15 platform licenses (used for contractors and GAs). You can view how many licenses are available and in use by searching for “company information” in Setup. (Information about users/licenses is covered in the first training video at 1:48:00 – 2:03:00.)

DEACTIVATING A USER

In order to maintain an audit log of past user activity, do not delete users. Only deactivate their account by logging into their user profile detail and unchecking the active box.

ADDING A NEW USER/LICENSE

Navigate to Setup and search users – click users and select new user. Enter the following for role, license, and profile, depending on what type of user they are:

Grad Assistants – GAs must also then be added to the GA public group (which is part of the Super Users public group) in order to be able to access all contacts, not just those assigned to them.

Role	GA Users
User License	Salesforce Platform
Profile	Eval Contractors
Active	✓

TEC Internal Users

Role	Eval Center User
User License	Salesforce
Profile	Eval Standard User
Active	✓

Contractors (Currently Not Applicable)

Role	Eval Contractors
User License	Salesforce Platform
Profile	Eval Contractors
Active	✓

System Admin (Use Sparingly)

Role	System Administrator
User License	Salesforce
Profile	System Administrator
Active	✓

CONTACT RECORD MANAGEMENT

The Evaluation Data Manger/SOR Coordinator imports new clients into Salesforce on a weekly basis. The REDCap database and SPARS are queried for new clients since the last Salesforce import and the data is downloaded, cleaned, and imported into Salesforce. For instructions on how to export and clean the REDCap/SPARS data, refer to this document: Q:\Evaluation Center\Active Eval Projects\State Opioid Response (SOR)\GPRA\6.Data + Analysis\GPRA Data Cleaning and Importing Instructions

Once the new client data is ready to be imported to Salesforce, follow the instructions below.

IMPORTING CONTACT RECORDS

1. Download the REDCap Data
    a. Log into REDCap and select the “GPRA Clients” project
    b. Navigate to the gray sidebar and select “Data Exports…” in the Applications menu
    c. Under My Reports and Exports, select “Export Data”
    d. Choose the CSV file with labels and export (in the next popup, click the Excel CSV icon to download)
2. Clean the REDCap Data
    a. Sort data by Record ID and delete all records that have previously been uploaded, duplicate records, or records that do not contain client contact information (i.e. test records, or records without client IDs)
    b. Delete all columns besides **Client ID** and **Date of GPRA Intake** (delete all hyphens or spaces in client ID, only alphanumeric characters should be used)
    c. Copy and paste client IDs/Intake dates into the Import Lookup spreadsheet – this will generate a value in the “Site ID” column as well as primary business organization record IDs (based on the VLOOKUP)
    d. Drag the account record type and contact record type for all client IDs in the list
    e. Record REDCap record IDs included in import with date of import in blue text box
    f. Save as a CSV file to Desktop
3. Import to Salesforce
    a. Log into Salesforce and navigate to the Contacts object and select “import” – this will begin the import wizard
    b. Select “Accounts and Contacts” under the standard object list
    c. “What do you want to do?” = Add new records
        i. BE SURE TO CHECK THE TRIGGER WORKFLOWS AND RULES CHECKBOX (scroll to bottom of the page)
4. Drag CSV file from desktop to upload window
5. Edit Mapping to Match the example to the right
6. Import!
7. Double check that the contact records have imported by navigating to the “Contact – New Today” list view under the Contacts Object.

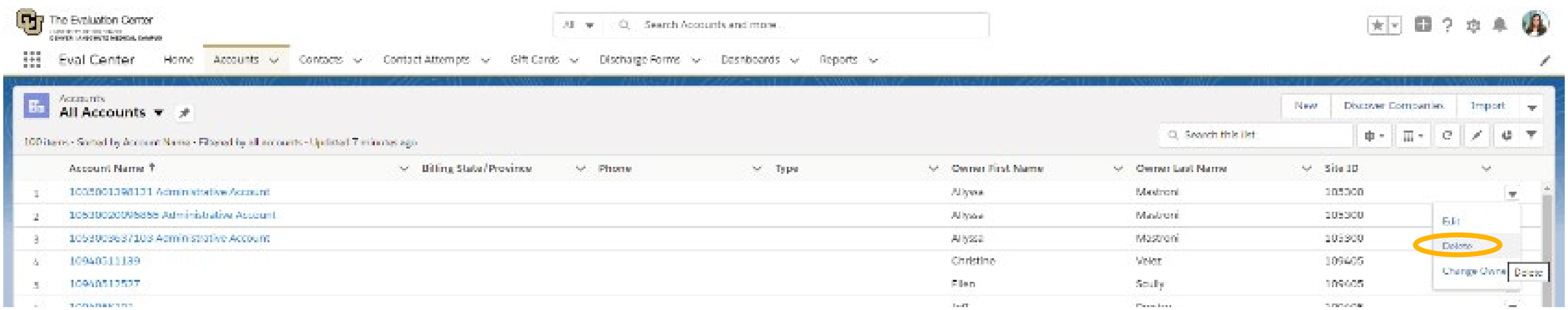
Edit Field Mapping: Accounts and Contacts

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

Edit	Mapped Salesforce Object	CSV Header
Change	Contact: Client ID, Account: Account Name	Client ID
Change	Contact: GPRA Intake Date	Date of GPRA Intake
Change	Account: Site ID	Site ID (Number)
Change	Contact: Primary Business Organization	Primary Business Organization
Change	Account: Account Record Type	Account Record Type
Change	Contact: Contact Record Type	Contact Record Type

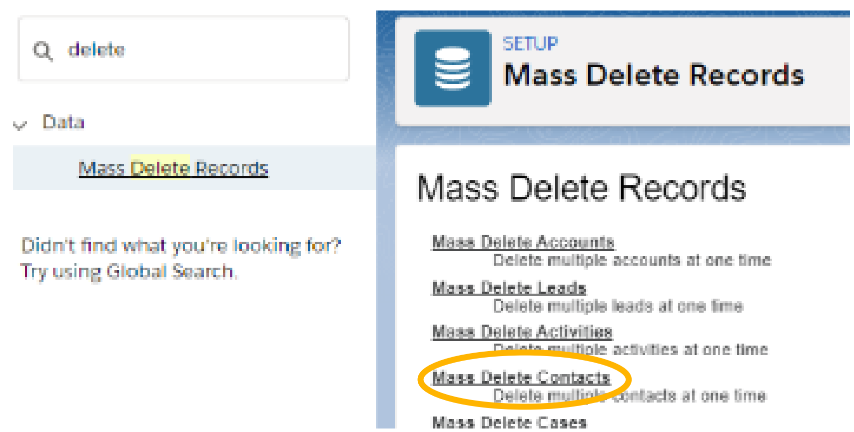
DELETING A CONTACT RECORD

When you create a contact record, Salesforce also creates an administrative account automatically. Therefore, in order to delete a contact record, the associated administrative account record must be deleted. (The administrative account record is not an object that we are using. It only exists in order for the Org to function properly.) Search for the client ID in the Accounts object. You will find the record listed by the client ID followed by “administrative account.” Click on the drop-down arrow at the far right of the row and select the “delete” option. This will delete the administrative account record and the contact record. If you try to delete the contact record, without deleting the administrative account record you will be notified that the contact record has child records that need to be deleted first. Once the administrative account has been deleted the associated contact record will also be deleted.



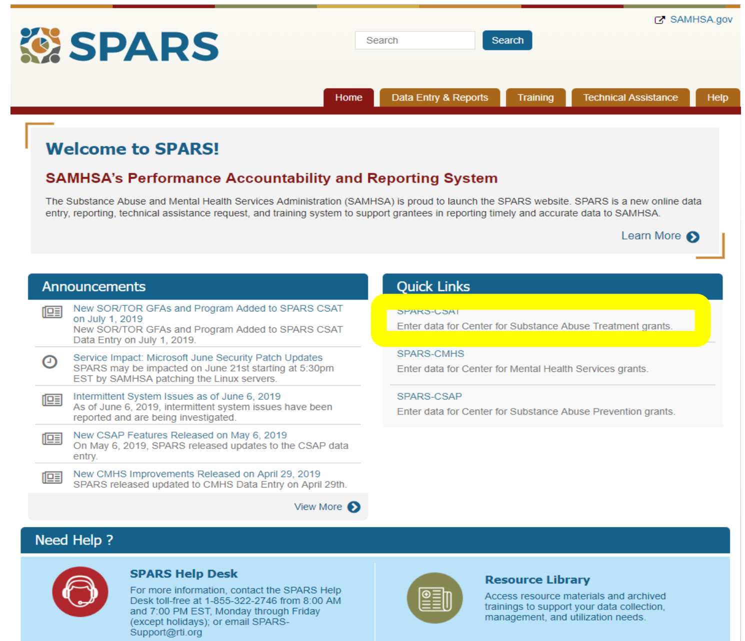
MASS DELETION

In Setup, search for delete and select “Mass Delete Records.” Most instances of using the mass delete function would be for deleted contact records, such as in the case of batch uploaded contact records in error. However, you can also mass delete account records as well. To mass delete records, search for the records by selecting criteria. There is the option to mass delete (sent to recycle bin) or permanently delete (cannot recover records).



ACCESSING SPARS AND SEARCHING FOR A CLIENT RECORD

Previously it was required for all GPRA GAs to enter GPRA data into SAMHSA's Performance Accountability and Reporting System, also known as SPARS. A direct link to SPARS is available on SOR Colorado website or here: https://spars.samhsa.gov.



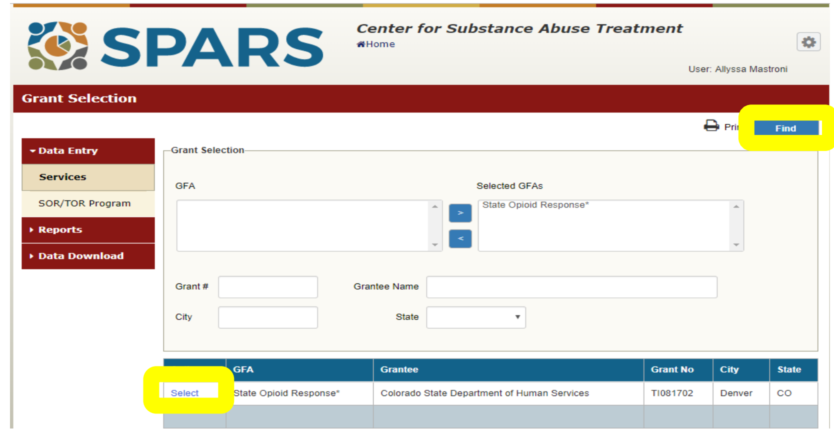
Once you reach the SPARS home page, you will be able to access various SPARS resources, including the contact information for the SPARS Help Desk. If you have trouble logging into your account or forget your password, you will contact the Help Desk directly.

To navigate to the data entry page follow these steps:

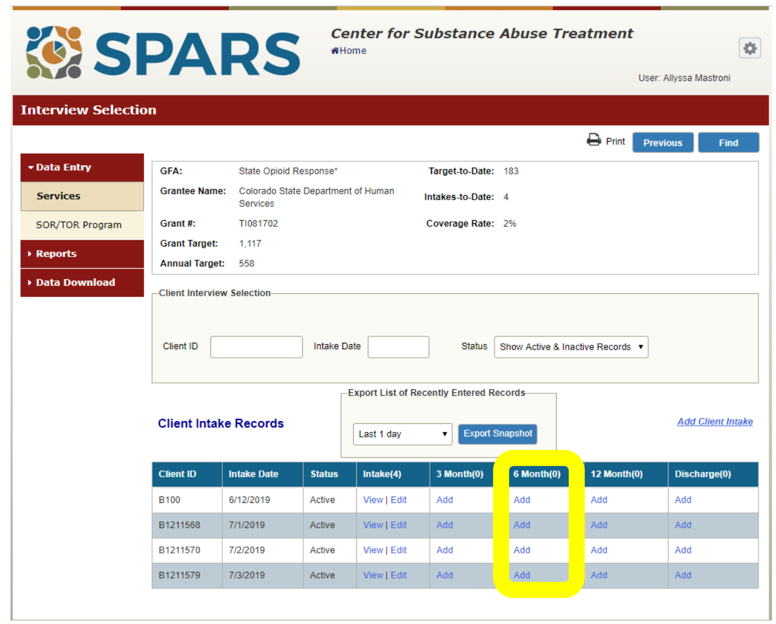
1. On the home page, you will also find the quick link for "SPARS-CSAT" data entry. After you click the SPARS-CSAT quick link, you will be directed to a login page.

2. Once you have successfully entered your login information, you will be directed to the Data Entry page. Navigate to and select the "services" tab.

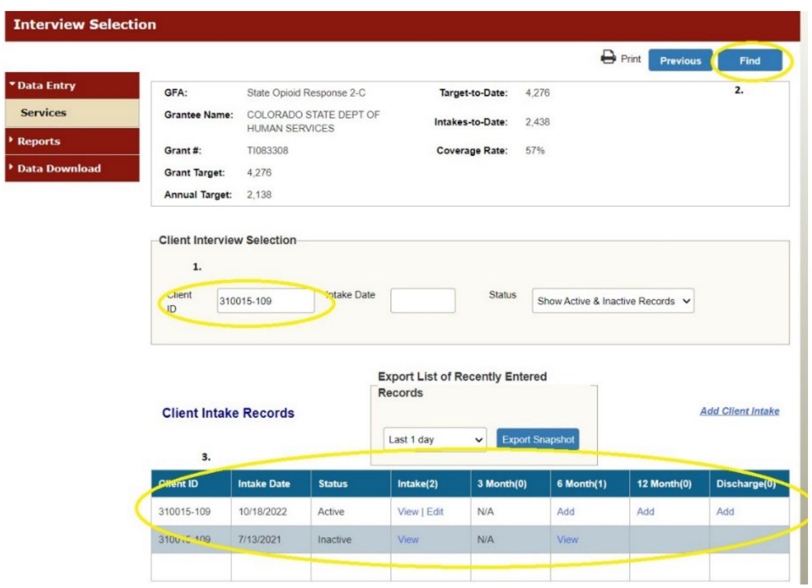
3. Then select find in the upper right hand corner – this will populate the State Opioid Response and corresponding information in the blue table below. Once this information is populated, choose the "select" action.



4. After you are on the Interview Selection page, with State Opioid Response listed as the GFA, you will be able to view the target numbers as well as the coverage rate and intakes to date. On this page you can search for client via client ID or intake date and filter the results by active or inactive status. All clients that you will search for will have had an intake completed. If you search for a client ID and it is not found, it is most likely a data entry error. You may also search for a full list of all clients by selecting "find" again in the upper right-hand corner. Once a client record is populated, you will select "add" under the 6-month column to begin the follow-up interview and enter the follow-up data. Follow the same steps but click on "add" under the discharge to complete a discharge.



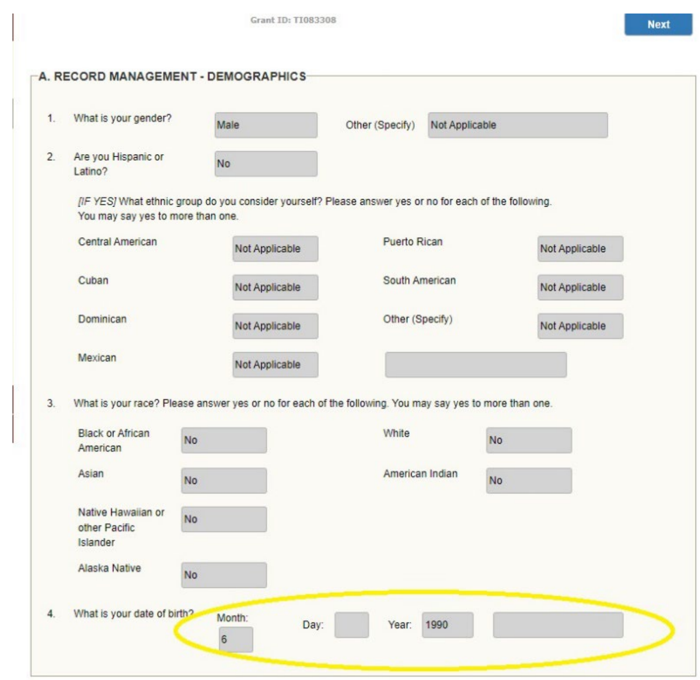
Occasionally more than one client will appear. This is most often due to the client receiving services multiple times/locations. However, on rare occasions client IDs may duplicated in error. You double-check the intake dates listed and verify them against the Salesforce record as well as looking at the records in REDCap. Please contact the GPRA Data Manager with any questions.



VERIFYING THE CLIENT IDENTITY

To verify client identities, we rely on the birth month and year that is stored in SPARS. After searching for a client record in SPARS, you can view their birth month/year by clicking on "view" under the intake column. Make sure to select the correct record by cross-referencing the intake date with the date in Salesforce.

Once in the intake record select "Demographics" from the left-hand menu. The date of birth will be listed on the bottom. Remember to always ask the client for the date. Do not give the client the date and ask them if it's correct. The date of birth will be listed on the bottom. Remember to always ask the client for the date. Do not give the client the date and ask them if it's correct.

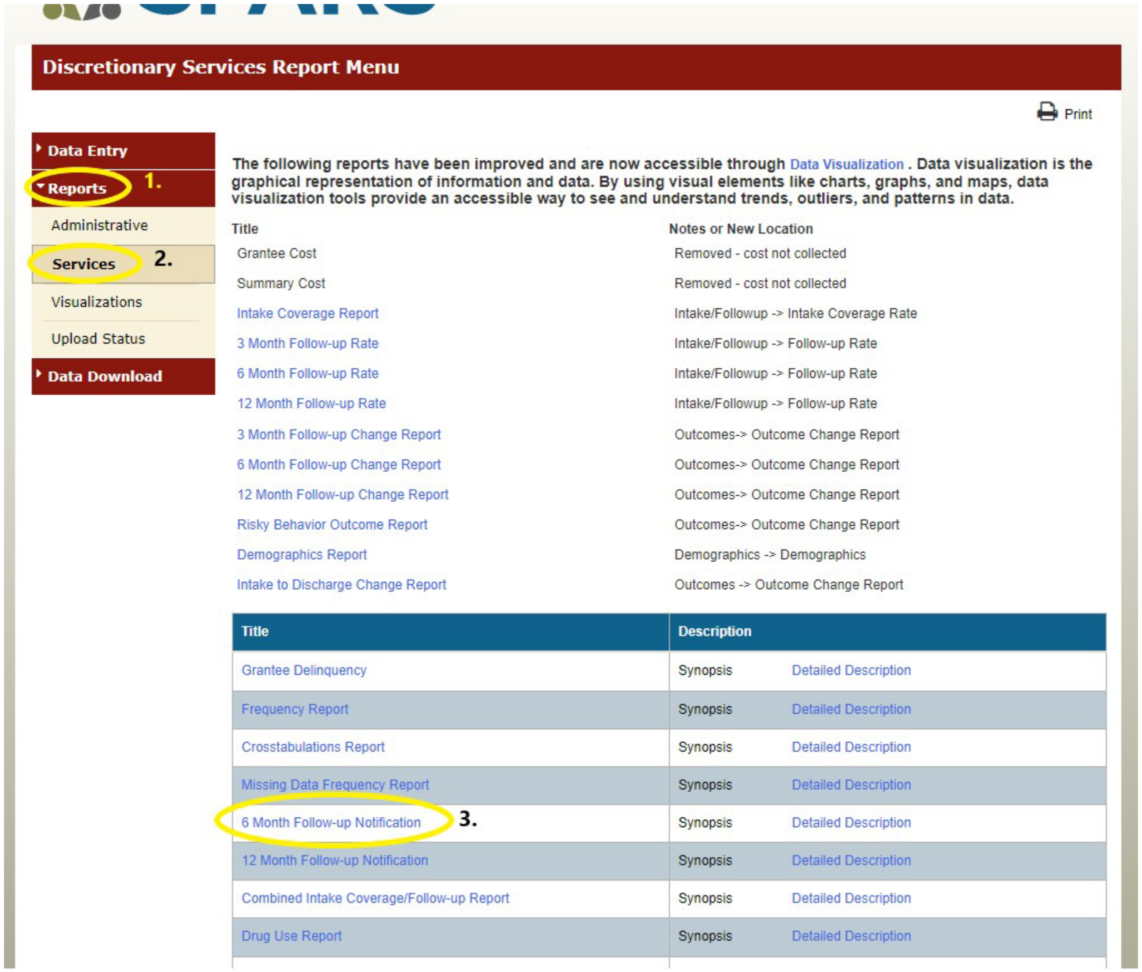



Client ID: 310015-57
Grant ID: TI083308
Data Entry
Services
A. Record Mgmt
Diagnoses
Planned Services
Service 1
Service 2
Service 3
Service 4
Demographics
Military
B. Drug/Alcohol
A. RECORD MANAGEMENT
Client ID
310015-578
Contract/Grant ID
TI083308
Client Type
Client in Recovery
Interview Type
Intake
Did you conduct a follow-up/ discharge interview?
Interview Date
11/4/2022
mm/dd/yyyy

SPARS 6-MONTH FOLLOW-UP REPORT

The 6-Month Follow-Up Report is used to determine whether a client is truly in their SPARS follow-up window. Due to the discrepancy in how Salesforce and SPARS will calculate this, this report can often be helpful.

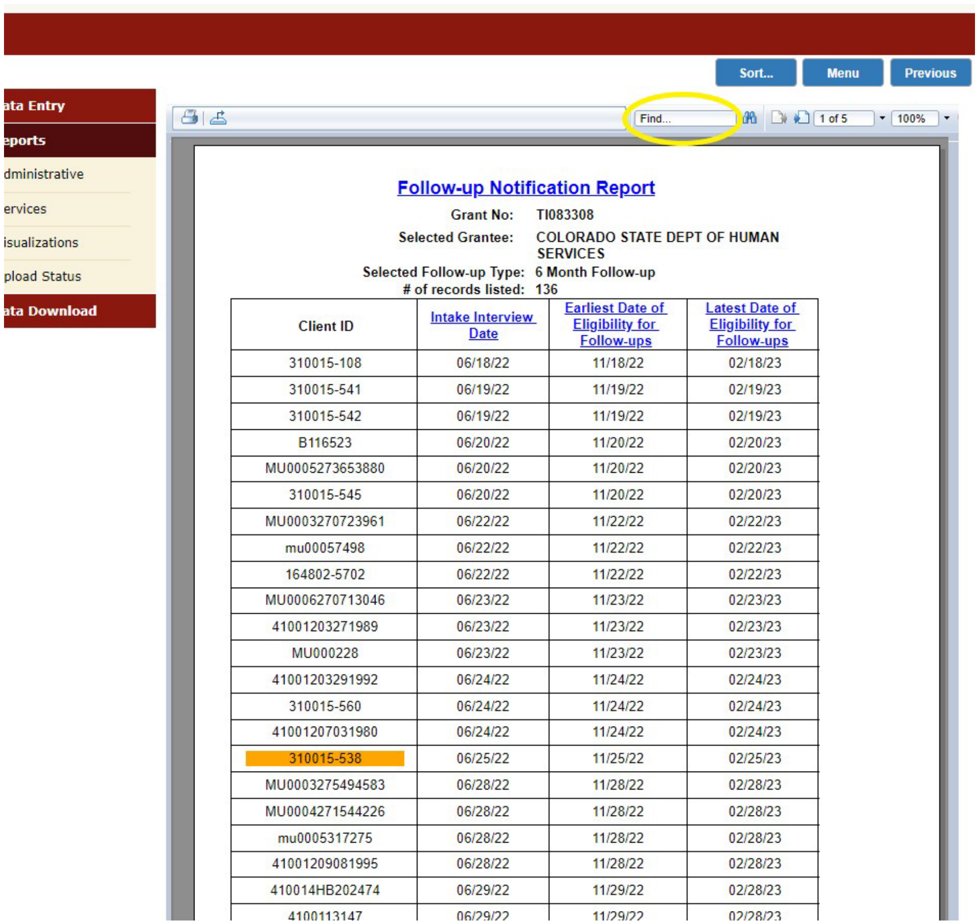
To access this report navigate to the SPARS-CSAT page as above. Instead of clicking on “Data Entry” click on “Reports” (1) and then “Services” (2) and then “6-Month Follow up Notification"



On the next page you will select the correct program. You will likely have only the one and if this is the case then just click “Next in the top right corner.

On the next page click “Run” in the top right corner.

You will now have a report of every client that is currently within their SPARS follow-up window. You can use the “Find” function in the top toolbar to search for the client’s ID. Make sure that you use what is notated as the SPARS ID if it is different from the Salesforce ID. If the client is in the list and thus in their follow up window, they will be highlighted orange in the list. If they are not within their follow-up window the “Find” text box will display “End of Search” and there will be no corresponding client IDs highlighted.



Follow-up Notification Report

Grant No: TI083308
Selected Grantee: COLORADO STATE DEPT OF HUMAN SERVICES
Selected Follow-up Type: 6 Month Follow-up
# of records listed: 136

Client ID	Intake Interview Date	Earliest Date of Eligibility for Follow-ups	Latest Date of Eligibility for Follow-ups
310015-108	06/18/22	11/18/22	02/18/23
310015-541	06/19/22	11/19/22	02/19/23
310015-542	06/19/22	11/19/22	02/19/23
B116523	06/20/22	11/20/22	02/20/23
MU0005273653880	06/20/22	11/20/22	02/20/23
310015-545	06/20/22	11/20/22	02/20/23
MU0003270723961	06/22/22	11/22/22	02/22/23
mu00057498	06/22/22	11/22/22	02/22/23
164802-5702	06/22/22	11/22/22	02/22/23
MU0006270713046	06/23/22	11/23/22	02/23/23
41001203271989	06/23/22	11/23/22	02/23/23
MU000228	06/23/22	11/23/22	02/23/23
41001203291992	06/24/22	11/24/22	02/24/23
310015-560	06/24/22	11/24/22	02/24/23
41001207031980	06/24/22	11/24/22	02/24/23
310015-538	06/25/22	11/25/22	02/25/23
MU0003275494583	06/28/22	11/28/22	02/28/23
MU0004271544226	06/28/22	11/28/22	02/28/23
mu0005317275	06/28/22	11/28/22	02/28/23
41001209081995	06/28/22	11/28/22	02/28/23
410014HB202474	06/29/22	11/29/22	02/28/23
4100113147	06/29/22	11/29/22	02/28/23

QUESTION BY QUESTION GUIDE

If you have any questions regarding the question that are asked in the GPRA Survey, you can always first refer to the Question-by-Question Guide (QxQ). This guide was developed by SAMHSA/SPARS and provides may details about the GPRA Tool. The GPRA Tool was recently redeveloped for the SOR III Grant. We are currently implementing this new survey and as with all new instruments, there are some questions that have come up that are not yet adequately answered in the current QxQ Guide. Listed below are the answers to these questions:

- Section B – Questions 2-5, pages 16, 18, 20, 22 in the REDCap version

  When answering which medication or treatment the client received, if the client mentions something not listed, select "no" for all response options and continue. Unfortunately, SPARS does not currently have a space in which to input "other."

- Section D – Question 4, page 29 in the REDCap version

  You may receive answers to these questions that is not a straightforward "yes" or "no." When unclear, please ask client to clarify "yes" or "no."

  For the questions about childcare, which may not be applicable, select "no." A "not applicable" response option will be available in the future.

- Section F – Question 2, page 31, 2nd question in REDCap

  If the client answers "0" for any of these questions you may either not check the box at all or check the box and input a "0."

ENTERING THE 6-MONTH FOLLOW-UP IN SPARS

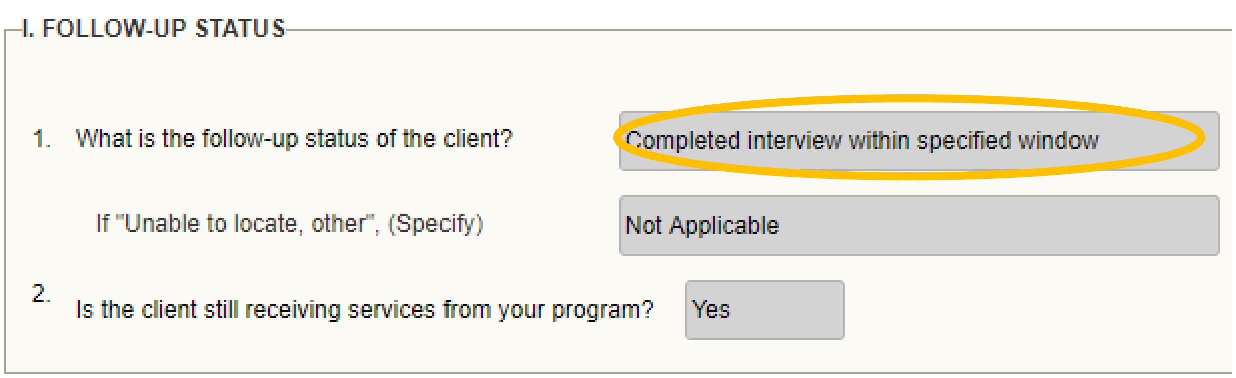
Typically, you will be entering the 6-month record in real time as you are administering the interview. Even if you are entering it after the fact for any reason, here are the instructions to do so. First, search for the client and click "add" under the "6-Month" column. The answer to "Did you conduct a follow-up/discharge interview?" must be "Yes" and then enter today's date. It is also recommended to have two separate SPARS tabs open at this time as you will want a separate tab open to verify the clients DOB..

Client ID	Intake Date	Status	Intake(104)	3 Month(0)	6 Month(2)	12 Month(0)	Discharge(5)
1035001398121	9/3/2019	Active	View | Edit	N/A	Add	Add	Add

<u>IMPORTANT:</u> If upon clicking the add button, SPARS gives you a notification about not being within the window, this is likely due to the above mentioned discrepancy in the windows between SPARS and Salesforce. If you receive this error, do not attempt to complete the survey. Wait until the follow-up window truly opens.

Be sure to verify the clients DOB by having them give it to you before administering the survey. Do not give it to them and ask if it is correct. You can access the DOB using the demographics sub-menu under record management in their intake form. If there is a DOB mismatch, apologize to the client and explain that you cannot proceed. Notify the GPRA Data Manager via e-mail with the client ID. If the DOB matches, proceed with administering the entire GPRA survey (sections B – G) and remember to ask by which method they would like to receive their gift card when completed (electronic or mail). Remember, the data entry must be completed in one session, as SPARS will not save partially entered records. Complete and save the data entry by clicking finish on the last page of the tool. You are able to edit most sections of the survey after it is submitted and should refer to the QxQ guide as needed.

At the end of the GPRA survey in section I. Follow-up Status, 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.** If the client has a discharge form attached to their record in Salesforce, you will indicate "no" for question 2.



Be sure to select <u>"Finish"</u> at the end of the survey, otherwise the responses <u>will not be saved</u>. You can double check that the interview was saved by searching the client ID again. If the interview was correctly saved, under the 6th month interview column, it should now give you options to "View | Edit" instead of "Add".

Rarely, SPARS will encounter an error and kick you out of the survey. This is okay! If this happens mid-interview, reopen your tabs and proceed to the section you left off on. Do not ask the questions of the client again, simply enter answers you recall to the questions or “missing data” to proceed to the section you left off on. Once the interview is complete you can navigate back to those sections and enter data you remember from memory. If you are unsure of any of the answers, just leave “missing data” as the answer. If this happens at the end of the interview, do not hold up the participants by conducing the survey again. Thank them for their time and gather the information for the gift card. Once you’re off the phone with the client go back through and complete what you can from memory. If you are unsure of any responses enter “missing data” for that question.

INTRODUCTORY CALLS

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?"

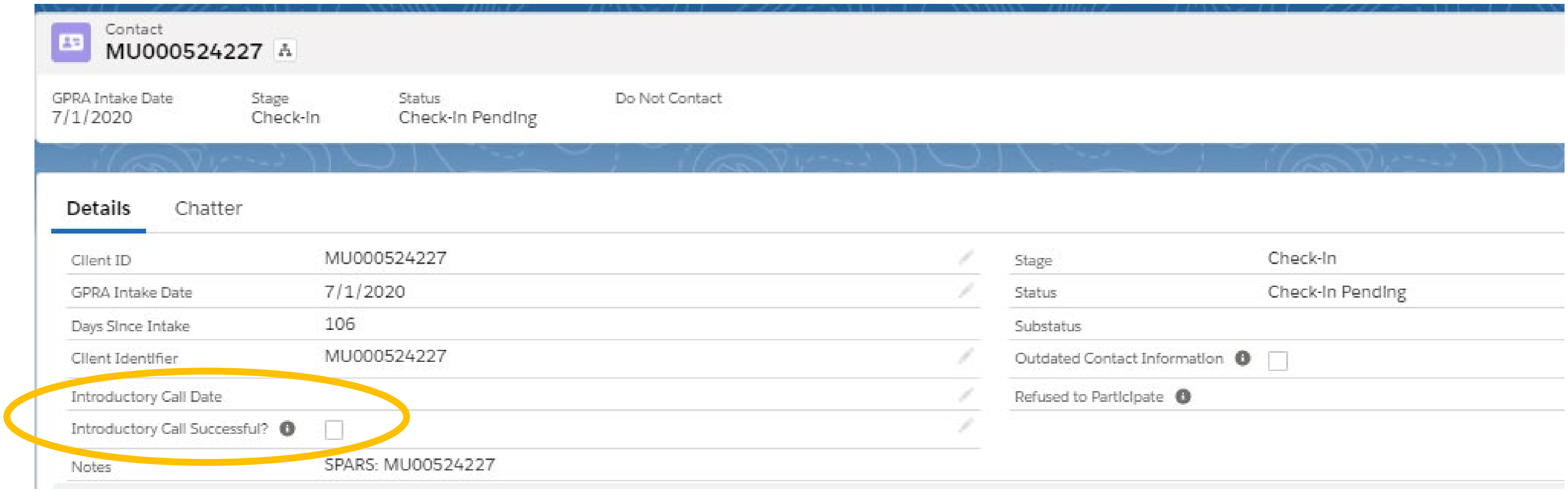
Client responds: Yes	Client responds: No

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. *[If client has email address…]* *We will also being 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.*	*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?* (Find client DOB in SPARS (Section A – Demographics) to verify.)
Just as a reminder, after completing the follow-up survey, we will mail you a $30 grocery card.	*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?*
Thank you for participating in this health study, your time and effort will help improve health care across the state!	*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.* *[If client has email address…]* *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.*
	Just as a reminder, after completing the follow-up survey, we will mail you a $30 grocery card. *Thank you for participating in this health study, your time and effort will help improve health care across the state!*

SALESFORCE ENTRY

Although only one attempt to required to complete the intro call, it should still be recorded in Salesforce. The intro call is not recorded as it's 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.



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.

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