



SPRING 2024

GPRA GRADUATE ASSISTANT HANDBOOK



The Evaluation Center

UNIVERSITY OF COLORADO
DENVER | ANSCHUTZ MEDICAL CAMPUS



Page left intentionally blank.

Table of Contents

<i>Evaluation Center Mission and Vision</i>	1
Vision	1
Mission	1
Guiding Principles.....	1
<i>The Evaluation Center History</i>	2
Equity Work.....	3
Evaluation Center Contacts.....	6
Graduate Assistant Supervision	6
Frequently Asked Questions.....	6
How to manage your GA experience.....	9
<i>State Opioid Response Grant</i>	10
GPRA Graduate Assistant Responsibilities	10
Evaluation Center Contacts.....	11
Current GPRA Team	12
<i>Information Technology (IT)</i>	13
IT Troubleshoot Guide	13
<i>Training Instructions</i>	19
Required Trainings/Forms.....	19
Other Helpful Resources	25
<i>Scheduling And Timekeeping</i>	26
General Schedules.....	26
Planned and Unplanned Leave	26
My Leave in UCD Access.....	27
Time IQ	30
<i>GPRA Client Contact Overview</i>	31
Client Communication Guidelines.....	32
Staying in Touch With Clients.....	34

Outdated Contact Information	34
Making the Introduction Call.....	35
Introducing the Check-in	38
Introducing the Follow-up	42
<i>Red Flag Situations</i>	47
Threat to Self	47
<i>Important Resources</i>	48
Other Useful Links	48
Other Frequently Used Software Applications.....	48
<i>Appendix A</i>	49
<i>Appendix B</i>	50
<i>Appendix C</i>	51
<i>Appendix D</i>	52
<i>Appendix E</i>	53
<i>Appendix F</i>	56
<i>Appendix G</i>	57

EVALUATION CENTER MISSION AND VISION

VISION

Improved lives and communities through high quality evaluation.

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.

GUIDING PRINCIPLES

1. We value high quality, ethically defensible, culturally responsive evaluation practices.
2. We strive to understand the context and communities in which we work.
3. We use rigorous and innovative quantitative and qualitative evaluation methods.
4. We help clients obtain and use information to make informed decisions about the implementation and effectiveness of their programs and policies.
5. We make evaluation meaningful and accessible to multiple audiences.
6. We support the development of evaluation capacity and its use within institutions and organizations.
7. We provide real world evaluation opportunities for graduate students to apply coursework and gain evaluation expertise.
8. We advocate for the value and use of evaluation by a wide range of stakeholders.
9. Our work advances the field of evaluation.

THE EVALUATION CENTER HISTORY

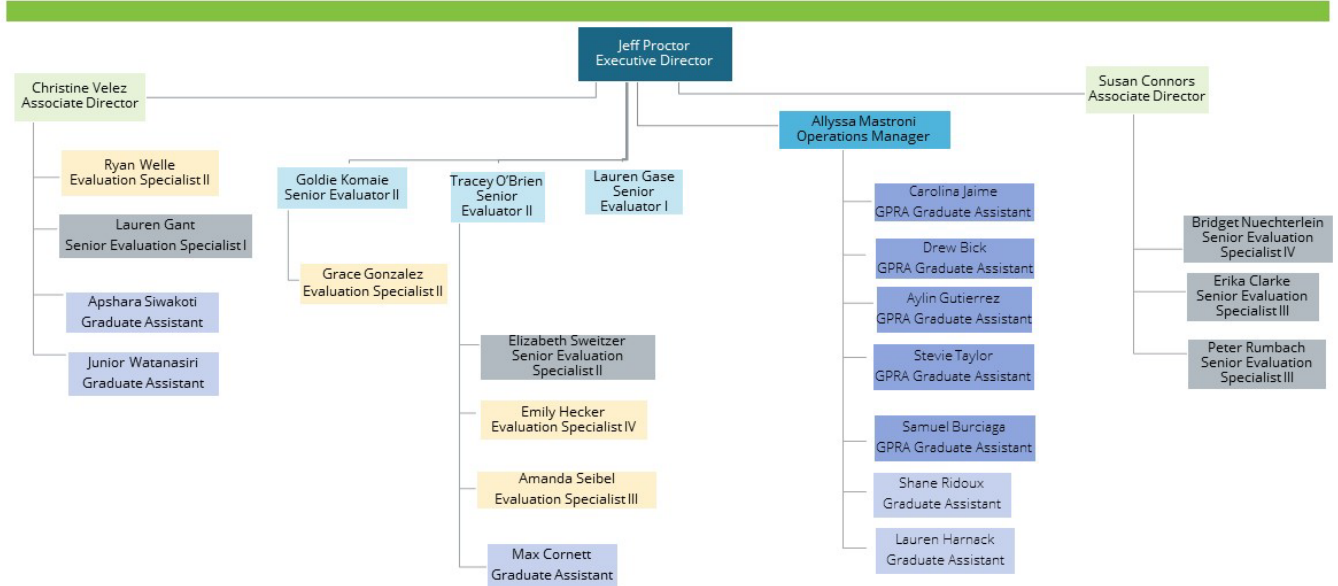
The Evaluation Center (TEC) is situated within the School of Education and Human Development (SEHD) at the University of Colorado Denver; we operate as an affiliate entity within a major research university. This unique situation allows the Center to operate autonomously, providing evaluation services to clients both inside and outside of the University. While we are formally part of the SEHD, we often do not participate in their standing meetings and other activities given how much our work differs from the core education mission of the school.

Founded on November 4, 2004, the Evaluation Center has 19 years of experience providing evaluation services to clients in public sectors (education, housing, public health) from non-profit organizations and state and federally funded programs. We are proud that a majority of our current clients came to us through word-of-mouth referrals from past clients. We believe this is evidence of our reputation in the field of evaluation.

Currently, we have a staff of 16 evaluators and 7 graduate students. As an organization we abide by the [American Evaluation Association's Guiding Principles for Evaluators](#) and are certified through the [Collaborative Institutional Training Initiative](#) to conduct human subjects research. Every project is staffed with a lead evaluator and support staff who work closely with stakeholders to create strong working relationships necessary to produce rigorous program evaluation. Staff members represent a variety of academic fields (public health, business, anthropology, counseling, public policy, sociology, and psychology). Our team is strong in quantitative, qualitative, and mixed methodologies and have experience implementing a diverse range of evaluation theories, approaches, and data technologies such as social network analysis and geographic mapping.

The Evaluation Center strives to create a supportive and empowering evaluation process for our clients. To do this, we emphasize collaborative processes and learning opportunities with clients throughout the evaluation; we maintain flexibility to help meet the specific needs of our clients as their programs evolve; and we foster evaluative thinking and skill building through training, coaching, and mentoring. In all of our evaluation work, we believe that our role is to support organizations to reach their full potential and meet their goals through a supported, data-driven process.

ORGANIZATIONAL CHART

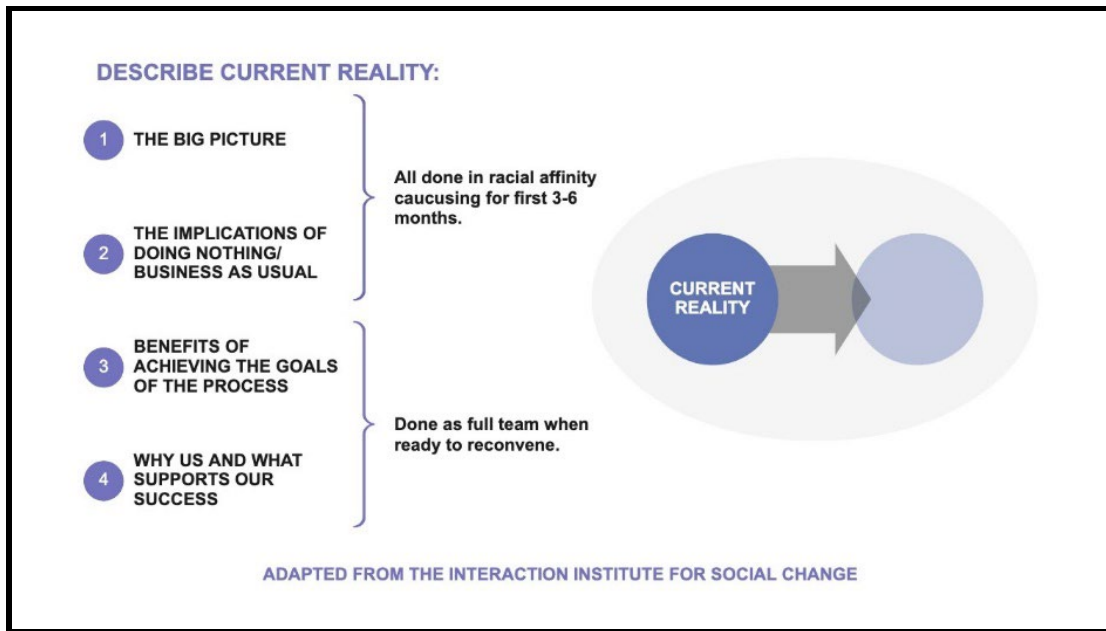


EQUITY WORK

We believe that as evaluators we have a responsibility to conduct evaluation that is in service of equity. Equity is the absence of unfair, avoidable, or repairable differences among different groups of people. Equity can only be achieved when individuals and organizations take action toward eliminating barriers such as poverty and repairing injustices in systems such as education, housing, judicial, and public health. [Our efforts related to equity](#) are guided by three principles:

- We utilize and implement culturally responsive and appropriate evaluation practices in our work.
- We are committed to supporting projects that work to advance equity within communities.
- We strive to create and foster a diverse and inclusive workspace.

These approaches are central to our vision of improving lives and communities through evaluation. The goal of achieving equity in our organization and our work is ongoing; we work together, with an external consultant (when needed), and individually to continue our growth and education.



In support of building our shared understanding of the current reality at TEC, we have:

- Formed and aligned a racial equity design team
- Conduct monthly racial affinity meetings (also referred to as racial caucus groups)
- Hold monthly design team check-ins on progress and growth in caucuses and addressing opportunities for growth/healing/learning as they arise.

EQUITY DESIGN TEAM

The Equity Design Team meets once a month to practice and remain connected to: staff wellness; sense and pace of growth and progress within affinity caucuses; modeling values and principles; and building shared leadership of the change work. The team is comprised of 2 BIPOC and 4 white equity leaders & learners in TEC.



Allyssa Mastroni (she/her)



Christine Velez (she/ella)



Emily Hecker (she/her)



Jeff Proctor (he/him)



Liz Sweitzer (she/her)

RACIAL CAUCUS GROUPS

Racial affinity caucus groups meet once a month. We want to move forward together as a team and strongly encourage all members of our team to participate in our racial affinity caucuses. We are hoping our new team members are excited to join this journey with us. Participation in racial affinity caucuses is completely optional. TEC has embedded protected time to do this work. During onboarding, you will meet with someone from the Equity Design team who can talk more in depth about our process and answer any questions you may have. If you would like to talk more at any time, you can contact a member of the Equity Design Team. You can join racial caucusing at any time; there is no pressure to make a decision right away.

For more information on joining the White affinity caucus, please email Erica Clarke (Erica.Clarke@ucdenver.edu).

For more information on joining the BIPOC affinity caucus, please email Christine Velez (Christine.Velez@ucdenver.edu) or Allyssa Mastroni (Allyssa.Mastroni@ucdenver.edu).

ONGOING OPPORTUNITIES

The entire team deeply cares about working with clients that do valuable work in communities. Areas for growth in our team is largely centered around deconstructing deeply imbedded white supremacy within ourselves, our values, and how we interact with our work (and white supremacy values embedded into the entire concept and field of evaluation.) Throughout our work, there are opportunities for discussion and action around equity and equitable evaluation. Some examples are workgroups, professional development, and memberships to EE organizations.

Use of Pronouns

The Equity Design group encourages everyone to read up on the importance of pronouns. Here are a couple good starter pages.

- <https://www.mypronouns.org/>
- <https://www.colorado.edu/cisc/resources/trans-queer/pronouns>

There are tons of resources on this topic, and we encourage everyone to be knowledgeable and up to date on using inclusive terms and behaviors.

Here are [instructions on how to update your zoom name and email signatures](#) if you want to include your pronouns – note: this IS NOT a requirement. For anyone who wants to and is comfortable sharing their

pronouns in written form (zoom and email signatures) and with clients and staff members verbally, we encourage you to do so.

A few members of the team already include pronouns in their email signatures if you want to see different examples. Some people also include a hyperlink next to their pronouns stating “why this matters” that links to websites like the two above.

The Evaluation Center expects all staff to use the pronouns that staff and clients have specified for themselves. This is essential to practice our organizational value of honoring and respecting each other and our community and creates a comfortable working environment.

EVALUATION CENTER CONTACTS

A list of TEC staff home addresses is [online](#). We also have an work anniversary buddy calendar, [please add your start date at TEC!](#)

GRADUATE ASSISTANT SUPERVISION

SUPERVISOR

Your supervisor is Allyssa Mastroni. Allyssa will approve time sheets, vacation, and sick time; and review your submissions in TIMEIQ. Allyssa will support you in your work and make your experience working at The Evaluation Center (TEC) worthwhile. We value your professional goals and, to the extent possible, hope to align your work to achieve your goals. In addition, your supervisor will help you make sure that your workload is balanced and that you’re not overstretched. If you plan to be out of the office, you should notify your supervisor and the Executive Director, Jeff Proctor. GAs meet with their supervisors regularly to check-in and more formally on a quarterly basis to discuss current progress, successes, challenges, next steps, feedback from the project teams they support. At the end of each semester, supervisors will also conduct a more formal evaluation with each GA. This is meant to be a learning experience and provide an opportunity to discuss areas of improvement and planning for the next semester. Beginning in January 2023, new graduate student hires will be required to work from the office more often for a minimum of six months.

PROJECT LEADS

Project leads will also provide feedback on work that you are working on or have completed. They are another source of coaching and mentorship as you navigate different projects and new learnings.

FREQUENTLY ASKED QUESTIONS

How do lunch breaks work?

While GAs have the option to take a designated lunch break, this time is expected to be made up. As such, many GAs eat at their desks and continue working.

How do I handle school-related responsibilities and appointments? (I.e. - meeting with your advisor during scheduled hours at TEC)

If you have a school-related responsibility or appointment, let your peer mentor and supervisor know ahead of time how long you will be gone and when you anticipate returning to the office. In general, these types of events are understood and not an issue.

How do travel reimbursements work?

For in-state, automobile travel outside of your daily commute, follow the directions outlined for completing a request in the Concur section of UCDAccess. For out-of-state, airline travel follow the directions outlined for obtaining the office purchasing card, travel card, or contact your supervisor for specific instructions. If given a travel card for the later, GAs should not use this for food, but rather create an itinerary that calculates a per diem to be used for food expenses.

What are the office dress code expectations?

GAs are expected to dress in business casual attire when meeting with clients.

What do I do when there is a lull in work?

GAs should send a message in TEAMS that they have availability. Also, they should let their supervisor know. If the GA has gone around the office or sent out an email indicating availability and there is still a lull in work, the GA can use this time to work on professional development opportunities, workgroup tasks, homework, or clock out early.

What do I do if I am overwhelmed with my workload?

If you do not think you will be able to make a deadline, contact your team or the individual who gave you the task early on to discuss this and arrange to push back the deadline or switch tasks with another team member with more time. It is important to prioritize tasks based on upcoming deadlines and the amount of hours anticipated to complete each task.

How does the office library work?

GAs who wish to use a book located on the shelves need only sign the book out in the log located on the bookshelf facing the main door.

Am I in the weekly rotation for office kitchen duty?

No, full-time, salaried employees do the weekly kitchen duty. However, we do ask all staff to clean up after themselves and put dirty dishes in the dishwasher.

Where can I find office supplies and tissues?

Office supplies are located in the cabinets in the back of the office.

What are the expectations after I attend a conference sponsored by TEC?

If a conference was paid for by TEC and the GA attended during normally scheduled work hours, the GA is expected to bring something back from the conference to share with the office during a designated staff meeting. This can include helpful information from sessions attended, a handout, book, video, or another piece of information worth sharing.

May I listen to music?

Yes, you may listen to music through headphones at your desk while you work, as long as it does not distract or impeded your ability to complete a task.

What do I do if I am confused about a task or project?

If you need further clarification, context, or have questions feel free to ask your team or the individual who assigned this to you. In the interest of time this should be done sooner rather than later as to not waste time.

Is there a social media policy?

Beyond professional research, GAs should not spend time at their computer on social media.

May I work from home?

Under general circumstances, working from home is permitted. It should be discussed with your supervisor first.

What if there is a specific area I am looking to improve during my time with TEC?

TEC is focused largely on creating an environment of learning, and as such GAs are encouraged to outline specific areas, tasks, projects, or professional development opportunities they want to improve on during their assistantship and share these with their peer mentor. An example of this is to publish more or wanting to learn how to facilitate client meetings.

Do GAs get paid for university holidays?

No, because GAs are hourly workers, they are not paid for university holidays like Christmas. GAs are expected to arrange their schedules accordingly if they still want to fit in their weekly hours around these days off as to not affect anticipated biweekly pay.

Do GAs get sick time

As of January 1, 2021, Student positions will accrue sick leave at a rate of 0.034 hours per hour worked with a maximum accrual of 48 hours per fiscal year (July 1 – June 30).

Can GAs contribute to a retirement plan?

Yes, GAs can contribute to the [Student Retirement Plan](#). However, there is no employer matching.

HOW TO MANAGE YOUR GA EXPERIENCE

Welcome again to The Evaluation Center! We are so excited to have you on our team. As part of your Graduate Assistant (GA) position here, we hope to be able to give you hands-on professional development in many of the skills. We want you to leave here equipped with the skills needed to provide high quality, professional work in your career.

GAs usually get out of this position what they put in. If you are interested in a particular project, method, or skill – let us know! We may not always be able to accommodate everything due to project timelines and budgets, but we will do our best to tailor your experience to your interests and your professional development needs. Here is some information to help you manage your experience as a GA.

What if I don't know how to do what I am asked?

We plan to incorporate you into projects in meaningful ways. Some of these tasks may be completely new for you. Because of this, we plan to support your development by providing resources, support, and constructive feedback about the work that you do with us.

Who can I ask for help?

You can ask anyone for help, a good first step is to ask the person who gave you the task for additional support. If they are not in the office or unavailable, you can ask your supervisor for support. Please feel free to always ask questions at any time during your experience. Your experience here is designed for your benefit, so if something does not make sense or you need additional support in any way, let us know! Your supervisor will have regular check-ins with you, but you can also ask anyone on the team questions. All of us have different areas of expertise and work on different projects.

How do I ask for feedback?

As mentioned previously, we want you to learn and develop new skills while working at TEC. As a team, we review and revise each other's work as a part of our process. Feel free to discuss your work with your supervisor. If someone does not give you feedback on your work, you can remind your supervisor and they can help you reach out to get feedback.

Questions to facilitate growth could include:

- If my work was for a final deliverable, did it require many edits? What was changed and why?
- What did I do well?
- Did I do anything differently that you wouldn't have thought of doing?
- What could I improve or change?
- How was my work utilized for the overall project?

We value **your** input and expertise. We welcome you to share your views and approaches that you are learning in school or have learned in your other experiences. This allows us to learn from you as well!

STATE OPIOID RESPONSE GRANT

In September 2018, the Office of Behavioral Health (now the Behavioral Health Administration (BHA) received federal funding from the Substance Abuse and Mental Health Services Administration (SAMHSA). This funding was renewed in October 2020 and again in October 2022. This grant has and continues to improve access to treatment and services related to opioid use disorder (OUD) and stimulant use disorder for individuals across the state of Colorado. Similar efforts first began in May 2017, with the State Targeted Response (STR) to the Opioid Crisis Grant, which have now continued through the first, second, and now third round of the State Opioid Response (SOR) Grant.

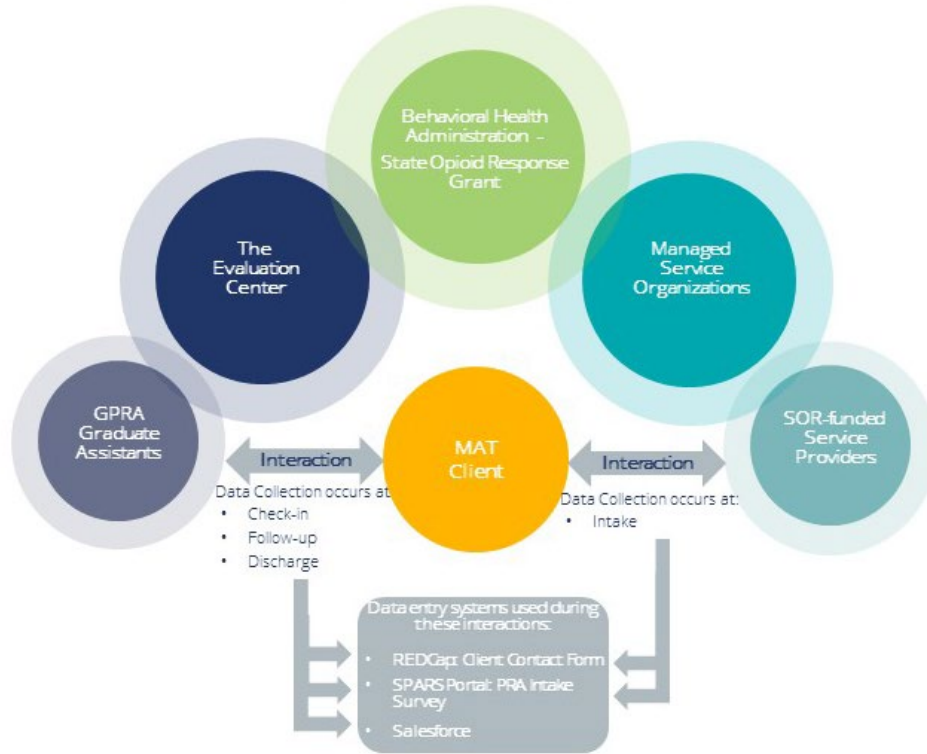
The BHA has contracted with The Evaluation Center to evaluate SOR-funded programs as well as manage the federally mandated data collection as outlined by the Government Performance and Results Modernization Act of 2010 (GPRA). This act requires all federal agencies to set and track program goals and objectives. Therefore, SAMHSA grantees (BHA) receiving SOR funding are required to collect and report performance data using the designated CSAT GPRA Client Outcomes Measures for Discretionary Programs Tool. This tool is used to survey clients seeking OUD treatment or stimulant use disorder related services. SOR-funded clients participating in the GPRA Survey are contacted at multiple points in time during their recovery journey, including at intake, follow-up (approximately five to eight months post-intake) and if/when they discharge from treatment. TEC submits all GPRA data collected to SAMHSA via SAMHSA's Performance Accountability and Reporting System (SPARS).

GPRA GRADUATE ASSISTANT RESPONSIBILITIES

In addition to contacting GPRA clients for their required GPRA follow-up and discharge surveys, GPRA Graduate Assistants (GAs) will contact all clients for a “check-in” call at approximately three months from the clients’ intake date. The purpose of the check-in call is to build rapport, verify client contact information, and remind the client of their upcoming follow-up interview. GA responsibilities also include completing the grant required follow up surveys and discharge interviews as needed. When GAs are unable to contact clients for their follow-up/discharge surveys, they will also complete administrative follow-up and discharge data entry. View [Appendix D](#) for an overview of the data collection process. When time allows, GAs may also support other areas of the SOR evaluation and other non-SOR work.

It is possible that other points of client contact will be integrated to the data collection process throughout the grant period. In the past, an “introduction” call occurred shortly after intake submission. The purpose of this call was to provide a brief introduction of The Evaluation Center, and the data collection process for the grant. The introduction call is not required at this time but may be reintroduced to the GPRA data collection process in the future.

SOR Organization Chart



EVALUATION CENTER CONTACTS

Allyssa will be your main contact for all questions related to the GPRA data collection. She is available via email or phone as outlined below. Please contact Allyssa first and she will respond to you within a timely manner. However, if Allyssa is unavailable and the question is urgent you may contact Christine Velez or Jeff Proctor.

If Allyssa is out of the office, she will notify you with who to contact in her place.

Evaluation Center Staff	Phone	Email
Allyssa Mastroni, Operations Manager	720-576-8385 (O) 303-325-1263 (C)	Allyssa.Mastroni@ucdenver.edu
Christine Velez, Associate Director	720-584-7002 (O)	Christine.Velez@ucdenver.edu
Jeff Proctor, Executive Director	720-576-9310 (O)	Jeffrey.Proctor@ucdenver.edu

CURRENT GPRA TEAM

Name	Role	Phone	Email	Graduate Program
Carolina Jaime	GPRA GA	720-514-0654	Carolina.jaime@ucdenver.edu	Doctorate student Dept. of Health and Behavioral Sciences
Drew Bick	GPRA GA	720-260-3301	Drew.Bick@ucdenver.edu	Master of Arts – Medical Anthropology
Aylin Gutierrez Ruiz	GPRA GA	TBD	AYLIN.GUTIERREZRUIZ@UCDENVER.EDU	Master of Public Health - Community and Behavioral Health
Stevie Taylor	GPRA GA	TBD	STEVIE.TAYLOR@UCDENVER.EDU	Master of Arts - Sociology
Samuel Burciaga	GPRA GA	TBD	SAMUEL.BURCIAGA@CUANSCHUTZ.EDU	Immunology, PhD

INFORMATION TECHNOLOGY (IT)

It is important to understand that you will be in constant contact with confidential client information. Per the University, all IT resource users shall adequately protect all confidential information stored on a workstation or mobile computing device including all confidential information transmitted to an external network or organization from disclosure. Ensure that you are appropriately securing the data used with all applications and software. For more information, please review the following University Policy:

<https://www.cu.edu/ope/aps/6005>.

The Evaluation Center will check out cell phones and computers to all GPRA GAs. It is expected that the TEC devices are only used for work purposes. Likewise, all GPRA-related work is expected to be conducted on TEC devices and not on personal devices.

When you set up your employee GPRA phone, please use the healthstudyscheduler@gmail.com account.

IT TROUBLESHOOT GUIDE

The Evaluation Center is located off-campus; therefore, we handle IT/computer related issues differently than departments that are on-campus. This is particularly true for any remote work environment whether it be our offices or at your home. At any remote (off-campus) location you will not be connected directly to the University network (including the University domain). Instead, you will connect via a Virtual Private Network (VPN). The following guide is a resource to determine who should be contacted to help troubleshoot various IT issues as well as a guide describing the purpose of the various data systems used in this role.

INTERNET CONNECTIVITY

Our internet and phone provider is Century Link. Therefore, the University cannot offer any assistance in diagnosing or troubleshooting internet connectivity issues. The first step to diagnosing internet connectivity issues is to make sure your computer is connected to either the local area network through the wall or is connected to the "TEC" Wi-Fi network. If issues persist after this has been checked, the issue may be caused by the router. This can usually be remedied by letting Allyssa know and having her reset the router. If issues persist beyond this, Allyssa will help troubleshoot.

For remote working circumstances, we are limited in the support we can provide for your home internet connection. However, if you are experiencing internet difficulties or outages during your normal work hours, please let Allyssa know. Your schedule can be shifted or if it is an ongoing issue, you are always welcome to work in the office as well. Please coordinate with Allyssa if you are interested.

Who to contact first: Allyssa

UNIVERSITY PASSWORD

A University log-in is required to connect to VPN, access Webmail, connect to the CU Denver Portal, connect to the Q, and all other university networks. This log-in is also used to connect to your REDCap account and is

administered by CU Denver OIT. Please contact CU Denver OIT with any issues related to your University password.

Who to contact first: OIT Helpdesk (M-F 7:30am-5:00pm; 303-724-4357; UCD-OIT-HELPDESK@ucdenver.edu)

CONNECTING TO VPN AND MAPPING DRIVES

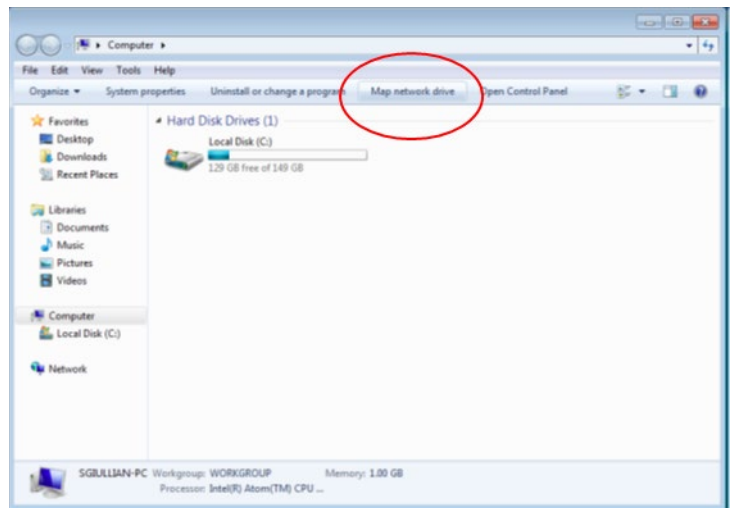
When you receive your TEC computer, use the following instructions to download and connect to the GlobalProtect VPN:

https://www1.ucdenver.edu/docs/default-source/offices-oit-documents/vpn-client-software/setting-up-cu-secure-and-vpn-services.pdf?sfvrsn=9fd990b8_2

Once you connect to the VPN, you will be able to access the Q drive, or shared drive. This is the network drive where TEC stores all organization related files. The Q drive should be mapped for you when you receive your computer, but if you ever have difficulties accessing the Q drive, you may need to remap it. The following instructions describe how to do so:

1. Connect to CU Denver network (VPN)
2. Open File Explorer
3. Right click on "This PC" and click "Map network drive..."
4. Type the following into the Q:
<\\data.ucdenver.pvt\dept\sehd\rhino\queue>
5. Select "finish"

Who to contact first: Allyssa



MICROSOFT SUITE

MICROSOFT TEAMS

Microsoft Teams is used to communicate with the SOR and GPRA team, as well as with the rest of the staff at The Evaluation Center. You will be added to the "TEC Group" and "SOR Evaluation" teams when you start working and may be added to other teams during your time with us at TEC. Within the SOR Evaluation team, you will notice channels regarding each program evaluation, as well as GPRA. You can post publicly within these channels and send a private chat to anyone/groups. If you have a question about a specific client, please send Allyssa an email with the client ID and the question you have, do not send it through Teams and never send client identifying information (i.e. names) through unencrypted messaging.

All staff should have Teams open and be available to respond during work hours. You are not responsible for responding to messages/posts when you are not working. However, you are responsible to monitor and respond to applicable Teams correspondence when you return to work.

MICROSOFT OUTLOOK

You will use Outlook frequently when working at TEC. All client-related questions should be communicated via email referring only to the client ID. If you must send identifying client information via email, encrypt the message by typing “[encrypt]” in the subject line. Although you should do your best to keep your Outlook calendar up to date, please note that the Google Calendar is the most important because it is the shared calendar used by our entire team to schedule client contacts.

All staff should have Outlook open and available to respond during work hours. You are not responsible for responding to emails when you are not working. However, you are responsible for monitoring and replying to emails when you return to work.

ZOOM

Zoom is a video communications software that the University uses for conference calls/meetings. This software also has screen sharing capabilities and allows you to schedule or join calls using your phone or computer. There will be times when you will use Zoom internally; however, Zoom is not an approved method for communicating with GPRA clients.

We highly recommend using the Zoom plug in that you can download directly to your outlook for easy meeting scheduling. This will allow you to add meeting invites directly to calendar invites.

<https://support.zoom.us/hc/en-us/articles/200881399-Microsoft-Outlook-plugin-desktop->

You can also access your Zoom account through <https://ucdenver.zoom.us> and log in using your university username and password.

CLIENT SCHEDULING TOOLS

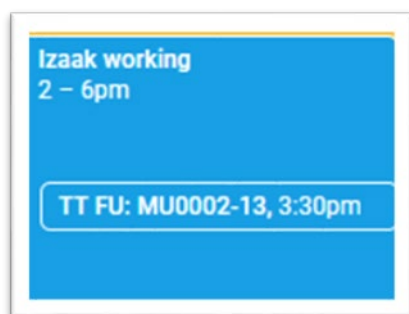
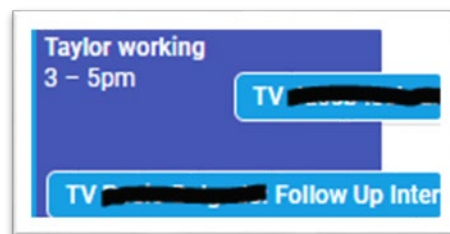
CALENDLY

Calendly is a scheduling software that allows clients to schedule their own follow-ups. The available time slots populated in Calendly are based on the GA schedules that are entered into the Google Calendar. Therefore, it is important to keep your schedule updated in the Google Calendar (see more information below) so that Calendly reflects accurate availability to clients looking to schedule their follow-up. When a client schedules a follow-up in Calendly, it will be populated on the Google Calendar automatically.

GOOGLE CALENDAR AND GMAIL ACCOUNT

The GPRA Team uses the “Health Study Scheduler” Gmail Account/Calendar to email clients and coordinate GA schedules. GPRA GAs should never use their own email accounts to contact clients. Instead use the healthstudyscheduler@gmail.com account to email clients. In addition to privacy concerns, the shared Health Study Scheduler account allows anyone on the team to view current and past client correspondence. This account is used by all GAs and is monitored by the GPRA Data Manager. GPRA GAs are responsible for responding to client emails as they are received. Refer to the [Systems Manual](#) for information on how/when to email clients.

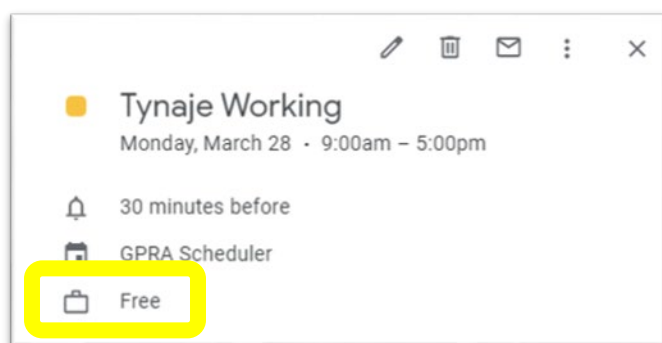
You should check the Google Calendar and Gmail account every day as you start your shift to see if there are any scheduled clients during the hours that you work or any clients that have responded to emails. All client emails should ideally be responded to within 24 hours of their receipt. If there are clients scheduled during your shift and you have the capacity to take the call, add your initials to the scheduled event so your colleagues know that you will take the call (see example to the right). If you notice that a client is scheduled and you are not able to take the call or if it falls outside of your shift, post in Teams so that others are aware and can offer support. It is a **TEAM** effort to monitor the scheduled calls that appear on the Google Calendar.



Additionally, you should use Calendly when possible to schedule any calls that you personally schedule with a client in advance (either via phone, text, or e-mail). This way, the client can get a confirmation e-mail from Calendly that they can use to reschedule or cancel their call outside of business hours. Remember to add your initials to the corresponding Google calendar event if you are available. If the client does not have an e-mail or phone number (Calendly requires both), the Google calendar can be used to record calls instead. You will also

need to use this if you are too close to the time the call is scheduled e.g., later that same day. These calls should be recorded using your initials and the GPRA Client ID (see example to the left). If you speak to a client and they state that they are available during hours that you are not working, record the call on the calendar and reach out to the GPRA Team to ask for support from someone working during the specified time frame. Let the client know that a team member will call from a different phone number.

Since Calendly populates scheduled calls on the Google Calendar, it is very important that you mark your time as “free” when you add or update your own work schedule. If your hours are added as “busy,” Calendly will think that we are unavailable during the hours that you are working.



DATABASES

SPARS

SAMHSA’s Performance Accountability and Reporting System (SPARS) is the online reporting system that stores all SOR GPRA Survey data. When applicable, you will receive your own SPARS Center for Substance Abuse Treatment (CSAT) user login for the SOR III Grant. Within SPARS, you will primarily utilize the CSAT

Data Entry and Reports part of the portal. There are additional resources for navigating SPARS in the [Systems Manual](#).

If applicable, you will receive a verification email from SPARS with your account login information during your onboarding process. If you do not receive an email, please first check your spam folder as the email is sent from donotreply@samhsa.hhs.gov.

If you forget your password or become locked out of your SPARS account, you will have to contact the SPARS Help Desk: at (800)-685-7623 or SPARSHelpDesk@mathematica-mpr.com. The SPARS Help Desk is available Monday-Friday, 8:00 am - 7:00 pm EST.

For any other questions regarding SPARS, contact Allyssa.

SALESFORCE

Salesforce is the Customer (or for our purposes “Client”) Relationship Management (CRM) system that tracks all clients assigned to GAs. Salesforce tracks clients throughout their treatment and recovery journey and will notify GAs when to contact clients. Salesforce will track clients through each contact attempt stage: check-in, follow-up, and discharge using the client stages/statuses.

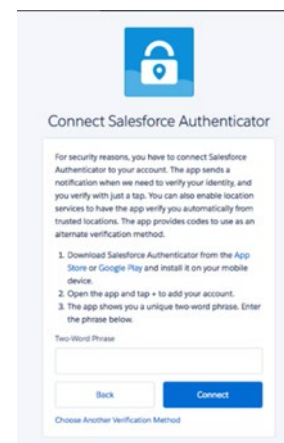
You will be assigned clients and will receive notifications about upcoming client contacts. All client contact attempts will be logged within Salesforce no matter if they are “successful” or “unsuccessful” (“successful” and “unsuccessful” will be defined later in this handbook as well as in the [Systems Manual](#)). You will also record when check-in, follow-up, and discharge data entry has been completed.

It is very important that Salesforce data entry is kept up to date. At any given point, anyone on the SOR team that are not familiar with your specific clients should be able to identify the next step in tracking or following up with your clients based on the information that is entered into Salesforce. Although you should use the notes field often, client identifying information should never be entered into the Salesforce platform.

In order to log into Salesforce, navigate to: <https://cueval.lightning.force.com/lightning/page/home>.

Multifactor Authentication

The first time you log into Salesforce, you will need to set up your multifactor authentication (MFA) which provides an added layer of security. Navigate to Salesforce using the link above and login with your university credentials. Then you should see the message pictured to the right. You will then be required to download the Salesforce Authenticator app, which you can do on your GPRA phone (or personal phone if you prefer). Follow the prompts listed within the app to complete the MFA setup. Set up will require you to enter a two-word phrase that the app gives you, have you connect to your account, and confirm your account (the app will walk you through this). Once you complete the initial setup, you will always log into your Salesforce account using your username and password and then you will receive a push notification through the MFA app. It is suggested that before making a login attempt to Salesforce that you open the authenticator app and let it log itself in. It may appear as though it is not. Just give it a minute!



Who to contact first: Allyssa

REDCAP

All identifying client information such as client names, contact information, and back-up contact information is stored in REDCap, which is a secure web platform used throughout the CU System. The GPRA Client ID will be used to link information from the REDCap database to information stored in Salesforce and SPARS. When you are attempting to contact clients, you will use REDCap to look up client contact information and will update client contact information as needed.

You will use your university credentials (username and password) to log into REDCap.

Who to contact first: Allyssa

GPRA TELECOMMUNICATIONS

GPRA MOBILE PHONES

The Evaluation Center will issue all GPRA GAs a mobile phone. The mobile phone will use a monthly/multi-month phone plan. You are responsible for notifying the GPRA Data Manager when your phone plan is set to expire and they will send you a new pin number to extend your plan. The TEC GA phone plan tracker is saved here: [Q:\Evaluation Center\Active Eval Projects\State Opioid Response \(SOR\)\GPRA\10. Graduate Assistants](Q:\Evaluation Center\Active Eval Projects\State Opioid Response (SOR)\GPRA\10. Graduate Assistants). Remember, you must be logged into the VPN (Globe Protect) in order to access this. We recommend pinning this to your Excel [quick access](#) – click the hyperlink for instructions.

Your GPRA mobile phone will be used to make all GPRA related calls. Clients are to only be contacted using the GPRA phones, never on personal devices. Likewise, the GPRA phone should not be used for personal communications. Be aware that The Evaluation Center reserves the right to monitor all communication conducted on the GPRA phone.

When leaving a message for a client, you will ask them to return your call to your TEC-assigned GPRA GA phone number. If a client calls you back and the call goes to voicemail, it is important that you have a voicemail greeting that informs the client of the following:

“Hi there, this is (Your Name) with the Evaluation Center at the University of Colorado Denver. I am sorry to miss your call, but if you leave your name, phone number, and a good time to reach you, your call will be returned shortly. Thank you.”

We also suggest, though this is not required, using [Messages for Web](#) or Phone Link (found in the Microsoft Store) for texting clients. Each will have instructions on how to connect your phone to your laptop. Just note that both apps use “press enter to send” so be careful!

Although it is your responsibility to contact the clients when you are working, you are not responsible for answering client calls when you are not working. In fact, it is recommended that you power the GPRA phone off when you are done with your shift in order to promote a healthy work/life balance. Then, when you return to work, you can respond to and log all missed calls that you received. Our goal is to be as responsive as possible to all clients and respond to any missed calls as soon as possible.

SOR COLORADO WEBSITE

The www.SORColorado.org website provides information about the SOR evaluations, houses resources for SOR-funded providers, and is a resource that you will use on a daily basis. Visit and bookmark [GA Page | SOR Colorado – Evaluation](#) to find resources unique to your position including quick links to the most important databases listed in the guide above. This includes links to SPARS, Salesforce, REDCap, as well as helpful training videos and a resource document library that you will become very familiar with during your time as a GPRA GA. Please do not share this link with anyone outside TEC.

The SOR website also houses a client-facing webpage: <https://www.sorcolorado.org/gpra-clients/>. Once you verify client identities, this webpage is a resource that you can provide to clients should they have questions about the GPRA Survey. The client-facing webpage also provides additional resources to clients, such as contact information for the Colorado Crisis Line, access to Colorado's Mental Wellness and Addiction Recovery Guide, and links they can use to schedule their own follow-up survey (using Calendly) or to update their own contact information.

TRAINING INSTRUCTIONS

This position requires you to interact with a particularly vulnerable population and collect protected health data that is vital to continued SOR funding. Therefore, it is essential that you are aware of health privacy laws, GPRA data collection/entry best practices and requirements, and are well prepared to administer the GPRA Survey prior to contacting clients. The list below outlines the online trainings that you will be required to complete prior to contacting your first GPRA client. Detailed instructions for registering and completing the required trainings are available in subsequent sections. Upon completion of the required trainings, please promptly email Allyssa to notify her of your progress and include any certificates of completion, if applicable. If certificates of completion are not available, follow the instructions outlined in the sections below.

REQUIRED TRAININGS/FORMS

- CU Denver Conflict of Interest Form
- CITI Health Information (HIPAA) Training + Social and Behavioral Responsible Conduct of Research Course
- CSAT GPRA On-Demand Course
- GPRA Tool Data Collection Refresher For CSAT Grantees
- GPRA Intake Training
- REDCap Basic Account
- Salesforce Training
- Trauma Informed Interviewing
- CSAT GPRA Mock Interview

CU DENVER CONFLICT OF INTEREST FORM

All new CU Denver employees have to complete a COI within 60 days of their start date. Here is the link to complete it: <https://research.cuanschutz.edu/regulatory-compliance/home/conflict-of-interest/coi-home>.

1. Scroll down to the grey button labeled “InfoEd eRA Login” and enter your UC Denver credentials
2. On the left-hand side click on “Conflict of Interest”
3. Complete all the pages and submit (note there is a little bit of reading and quiz)
4. This has to be completed annually as well – we will remind you to complete it in September of each year.

Let us know if you have any questions!

CITI TRAININGS

Your position requires to uphold health privacy and confidentiality laws as outlined in the CITI Health Information (HIPPA) and Social and Behavioral Responsible Conduct of Research Training. If you have recently completed the CITI Health Privacy (HIPAA) and Social and Behavioral Responsible Conduct of Research Training through another university/position, you will not need to complete them again. Please email Allyssa your certificates of completion and review the statement below on the privacy requirements of 42 C.F.R Part 2.

Otherwise, here is the link to access and complete the CITI training: <https://www.citiprogram.org/>.

1. Click “register” on the right side
2. Enter University of Colorado Denver in the organization affiliation field
3. Register for your account by entering your information (through step 6)
 - Use your university email address as your primary email address
 - Step 6:
 - Department: SEHD
 - What is your role in research?: Interviewer
 - Address: 1391 Speer Blvd., Suite 340, Denver CO 80204
 - Office phone (required): Personal Phone Number or work cell phone
 - Step 7 you’ll want to enter the following information:
 - Question 1 – Group 2: Social and Behavioral Research
 - Question 2 – not at this time

- Question 3 – CITI Health Information Privacy and Security (HIPS) for Students and Instructors
 - Question 4 – IRB Chair course – not at this time
 - Question 5 - Social and Behavioral Responsible Conduct of Research Course
 - Question 6 – Conflict of Interest Mini Course: No
 - Question 7 – leave blank
 - Question 8 – not at this time
 - Question 9 – not at this time
4. Complete the courses:
- CITI Health Information Privacy and Security (HIPS) for Students and Instructors
 - Group 2 Social and Behavioral Research
 - Social and Behavioral Responsible Conduct of Research
5. Post-Course Completion Options: Access your Completion Records
- Save a PDF of the completion certificate (not the completion report) and send to Allyssa. We will keep the certificates on file.

Let us know if you have any questions!

Please note, 42 Code of Federal Regulations Part 2 (2010) governs confidentiality particular to substance abuse treatment information by prohibiting the disclosure of patient identifying information including any information that indicates an individual has applied for or received substance use disorder services. In conjunction with HIPAA, it is your legal obligation to uphold client confidentiality under all circumstances. However, there are “Red Flag” situations that require breaking client confidentiality (see the Red Flag Situations section for more information). Please refer to the protocols for contacting clients to schedule and complete GPRA Surveys or Check-ins (see the Follow-up Techniques section within this handbook).

GPRA INTAKE TRAINING

This training was developed by The Evaluation Center for SOR Providers that are administering the GPRA Intake Survey. However, this training will also be helpful for you to understand the GPRA intake process, including explaining how the GPRA data collection is initiated at intake, who qualifies for SOR-funded services and thus the GPRA Surveys, and it will help develop your understanding of the entire data collection process from start to finish. To view the training use the following link:

<https://redcap.ucdenver.edu/surveys/?s=NAAL9A9ANM>.

There are four modules in this training and each module contains one training video and one to two practice questions. After completing each of the four training modules, you will be required to pass a final 15-

question quiz. You will have three attempts to pass this quiz with a score of 80% or better. If the quiz is passed on any attempt, you will be redirected to a “Training Complete” message where you will need to click “Submit” in order to confirm their completion of the training.

Note: Keep in mind that this training’s main audience is SOR Providers. However, the information you learn during it will be very helpful to your position. **In the “Provider Information” section that requires you to select a SOR-funded service and treatment site name, pick any service and name and do not worry about the site ID that you are assigned.** This is only important for SOR providers. Likewise, once you pass the training, you will receive a confirmation email that contains instructions for next steps/SPARS. This information is not applicable to your position and you can disregard it.

REDCAP BASIC ACCOUNT

In order to view and enter client contact information in REDCap, you must complete the REDCap Basic Account training. This training includes four videos and a quiz that should take approximately 45 minutes to complete. The training does not have to be completed during one session and you may leave and return to the training later using the “save and return later” button. Once you complete the training and quiz, you will receive instructions on creating a REDCap account – you must use your university email to create a REDCap account. Use the following link to complete the Basic Account training:

<https://redcap.ucdenver.edu/surveys/?s=wclYV5ajVM>.

- On the demographics page enter:
 - First and Last Name
 - Department: SEHD – The Evaluation Center
 - University email address
 - Position: GPRA Data Collection Contractor
 - Project Manager: Allyssa Mastroni
 - Are you a CCTSI Member: No
- Proceed to watching all training videos and completing the quiz

Once you create your REDCap account, please send your username to Allyssa and she will add you to the REDCap GPRA Client Contact Form.

SALESFORCE

Allyssa will schedule a live training on Salesforce. Salesforce is the system used to track clients throughout their recovery journey and record contact attempts. As you begin to navigate Salesforce, you may find referring to the Systems Manual helpful; however, please do not hesitate to ask Allyssa or others on the GPRA team any additional questions that you may have.

It is very important that you review the Systems Manual linked here: [GA Page | SOR Colorado - Evaluation](#). Scroll to the filterable resource library. This manual will become your best friend and you will refer to it often as you begin to log contact attempts.

TRAUMA INFORMED INTERVIEWING

When an individual experiences an event or series of events that they perceive as harmful to their well-being, they may experience trauma or lasting adverse effects on their day-to-day functioning.¹ Individuals who have experienced trauma may have symptoms that include extreme anxiety, depression, anger, dissociation, and traumatic stress.² Trauma can overwhelm the individual's ability to cope with everyday stressors or signs of threatening situations.

The majority of people have experienced some type of trauma throughout their lifetime. It is important to understand that trauma can affect anyone, particularly those who are experiencing substance use disorders. The individuals who you will be working with to collect the GPRA data have all been admitted to opioid or stimulant use disorder treatment/services; therefore, it is best practice to assume they have survived past trauma and to avoid inadvertently or unnecessarily re-traumatizing them.³

Experiencing everyday stressors are enough to reactivate or re-traumatize an individual. Considering the GPRA Survey specifically asks the clients to recall and discuss potentially traumatic topics, such as substance use, suicidality, and involvement in the criminal legal system, Graduate Assistants should be particularly sensitive asking such questions in order to avoid reactivating past traumas. Please review the material and watch the following SAMHSA recorded webinar on trauma informed data collection linked below:

- [Trauma-Informed Interviewing Training](#)

Additionally, Graduate Assistants should be prepared to respond to clients who express symptoms of trauma during the interview. Please watch the following video on how to respond to trauma reactivation:

- [Why a Trauma-Informed Approach to Data Collection?](#)
- [First Impressions: Setting up the Interview](#)
- [The Art of the Trauma-Informed Interview](#)
- [Responding to Trauma Reactivation](#)

After completing the trauma informed interviewing training videos, you will meet with your supervisor to discuss any thoughts or questions you may have had while watching. Please note that Trauma Informed Trainings will be ongoing throughout your role as a GPRA GA. This is a topic of conversation that is revisited at GPRA team meetings and you are always encouraged to bring new Trauma Informed Interviewing and other Trauma Informed resources to the team!

¹ Concept of Trauma and Guidance for a Trauma-informed Approach, SAMHSA, 2014b

² System of Care Trauma-Informed Agency Assessment (Tiaa)© Overview

³ SAMHSA Staying in Touch: A Fieldwork Manual of Tracking Procedures, 3rd Edition.

Vicarious Traumatization and Compassion Fatigue

The questions asked in the GPRA interview may elicit client responses that include accounts of past traumas. Listening to client accounts of traumatic experiences, combined with your own past and current life experiences may be stressful. There is a possibility that you may experience vicarious or secondary trauma, which is the indirect exposure to trauma through other's experiences or stories. It is important to be aware of vicarious trauma and the negative responses to it. Negative responses include vicarious traumatization and **compassion fatigue**. Vicarious traumatization can include feelings of excessive worry, stress, fatigue, distraction, and avoidance⁴. Compassion Fatigue is another negative response to vicarious trauma and describes feelings of physical, emotional, and spiritual depletion when working with others who have experienced trauma⁵. It is possible that you may experience either or both of these negative responses to vicarious trauma because of the nature of the interviews. Therefore, it is important that you are aware of vicarious trauma and its side effects and as a team we will consistently check-in on your experiences completing client contacts.

Self-care is extremely important in order to combat the negative reactions to indirect trauma. *You cannot pour from an empty cup*. It is helpful to share experiences during team meetings, individual check-ins with your supervisor, or to take breaks after difficult phone calls. During team meetings, we also continue to learn about trauma informed practices and share resources related to self-care and vicarious trauma.

If you feel the need talk to a mental health professional, please note that [CU Denver's Counseling Center](#) provides free mental health services to all students. For students attending a program at Anschutz Medical Campus, [Campus Mental Health Resources](#) are also available free of charge. Services offered include individual counseling, walk-in crisis support, and after-hours crisis support in addition to providing other services and resources.

Other Helpful Resources:

- [Avoiding Compassion Fatigue](#)
- [What is Self-Care – and What It Isn't](#)
- [Developing a Self-Care Plan](#)

CSAT GPRA MOCK INTERVIEW

This fictional GPRA Intake interview demonstrates effective interviewing techniques for accurate and uniform data collection. Note that the tool used in this video is not the exact tool you will be using; however, the techniques the interviewer uses are still applicable to your experience.

To view the interview, click here: <https://www.youtube.com/watch?v=PCForBr6isc>.

Once you watch this video, contact your supervisor and they will address any questions that might arise.

⁴ The Vicarious Trauma Toolkit, Office for Victims of Crime

⁵ The Vicarious Trauma Toolkit, Office for Victims of Crime

OTHER HELPFUL RESOURCES

After completing the trainings listed above, please review the following resources. We have found them to be particularly helpful for your position. We strongly encourage you to explore these resources as you prepare for the GPRA data collection process and refer to them throughout your time in this role:

- [Words Matter – Terms to Use and Avoid When Talking About Addiction](#): As you communicate with the clients receiving SUD treatment, it is very important to keep in mind the language that you are using. Substance use disorders, treatments, and even medications are highly stigmatized topics; therefore, it is important that person-centered language is used when communicating with clients. This helpful resource discusses the stigma around addiction as well as recommended language to use.
- [Pronunciation Guide](#): this guide provides a list of substances that are asked about in the tool as well as their phonetic pronunciations. This guide is available in [Appendix B](#).
- [OpiRescue](#) is a free overdose support app that provides resources about Medication Assisted Treatment, locations for pharmacies that provide naloxone, and steps to respond to an opioid overdose. This might not be a resource that you use in your everyday experiences; however, it is helpful to know this resource exists.
- [Colorado LADDERS](#) is a BHA sponsored referral resource. Clients have been known to ask for additional treatment resources and the LADDERS website provides information and services for prevention, treatment and recovery from substance use and mental health conditions.
- [SAMHSA Opioid Overdose Prevention Toolkit](#) is also a helpful resource with general information about opioids, opioid use disorder, naloxone, and steps to respond to an overdose.
- [Suicide Safe by SAMHSA](#) is an app that helps address suicide risk using SAMHSA's Suicide Assessment Five-Step Evaluation and Triage or SAFE-T card. Keep in mind, we are not clinicians at The Evaluation Center; however, this can be a helpful resource to review if you have limited experience or are new to asking questions about self-harm and suicide. Please let Allyssa know if you have any questions or concerns about asking questions related to this topic!
- [SPARS CSAT Technical Assistance Guide](#): Improving client participation in the GPRA follow-up surveys is our goal. Part three of this guide provides an overview of the Elicit-Provide-Elicit (EPE) interviewing framework that can help us reach this goal. The EPE framework and general guidelines for interacting with clients is available in [Appendix A](#) of this handbook
- Past GPRA GA Resources: In the past, GPRA Gas have shared the following topical resources: [Q:\Evaluation Center\Active Eval Projects\State Opioid Response \(SOR\)\GPRA\10. Graduate Assistants\On Boarding\Topical Learnings_GPRA](#)

If you have questions or are interested in additional training or resources, please contact Allyssa.

SCHEDULING AND TIMEKEEPING

The effective functioning of our team is dependent on our ability to work together and coordinate schedules. We aim to maintain coverage throughout every weekday and evenings (Monday – Friday). If our team does not have evening coverage, GPRA Graduate Assistants may be asked to work at least one evening shift per week. Evening hours range from 4 – 7 pm and this will be coordinated with Allyssa.

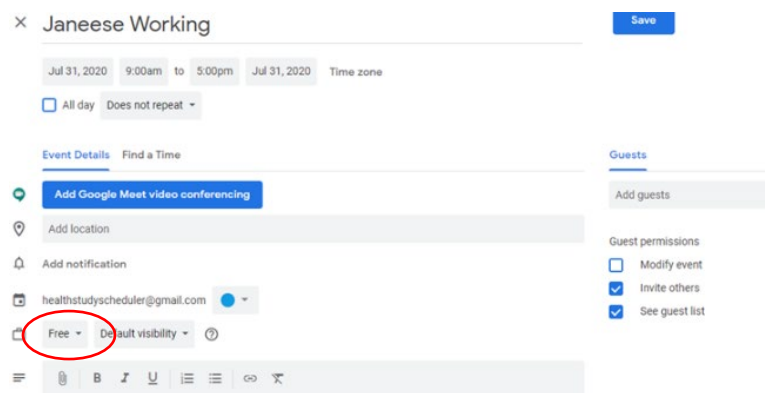
GENERAL SCHEDULES

At the beginning of the semester, please submit your general work availability to Allyssa. She will compare your schedule request to that of the other GPRA Graduate Assistants and determine a general GPRA Team schedule. Although we are able to be flexible and understand that schedule conflicts arise, it is important that at least one graduate assistant is working every day of the work week, including mornings and evenings to increase capacity to contact clients.

GOOGLE CALENDAR

Once your schedule is approved, GPRA Graduate assistants will enter their office hours in the GPRA Scheduler Google Calendar using the following Gmail account: healthstudyscheduler@gmail.com. This account is integrated with our Calendly account that is used to email and schedule follow-up interviews. Therefore, clients are able to schedule follow-up interviews depending on the Graduate Assistant availability in this calendar. Thus, it is very important that this calendar is kept up-to-date and accurately reflects GA working hours.

During weekly GPRA Team Meetings, we will review the next week's schedule. Please try to enter your schedule for at least a month in advance. When entering your schedule, note that the color "grape" is used as our default and thus that color should not be used for your own schedule. You will also want to indicate in the location field if you are working from home or the office on that day. Last, your work hours should always be recorded as "free." Please see the example above.



PLANNED AND UNPLANNED LEAVE

Of course, there will be times when you will need time away from work. If you know of planned absences:

1. Let your supervisor, the GPRA Data Manager, know about your planned absence to get your time-off approved;
2. Record your time-off in your Outlook Calendar and the Google Calendar;
3. If you will be away for more than a day, set-up an away message for your email;

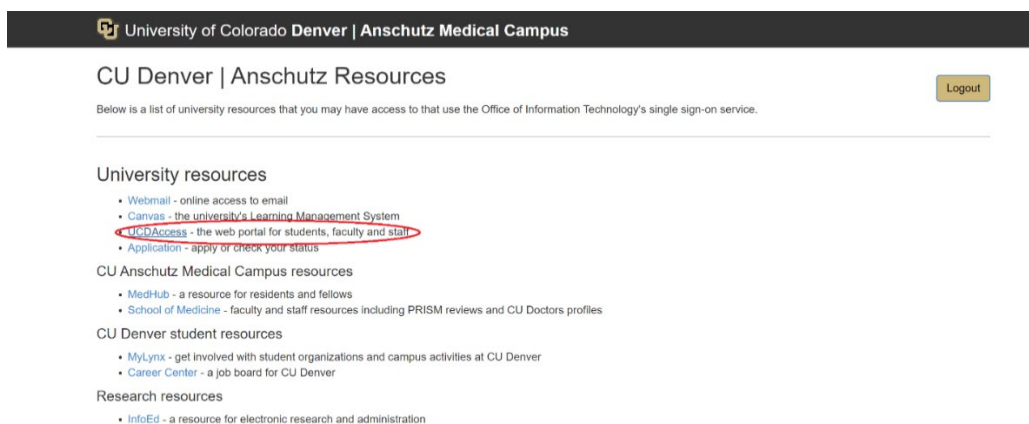
4. Inform the other GPRA Graduate Assistants that may be affected by your absence. The weekly team check-ins are a good time to do this; and
5. Enjoy your time-off!

If you are ill, an emergency arises, or you otherwise need unplanned time off, notify the GPRA Data Manager as soon as possible. If possible, also notify any other staff that may be affected by your absence.

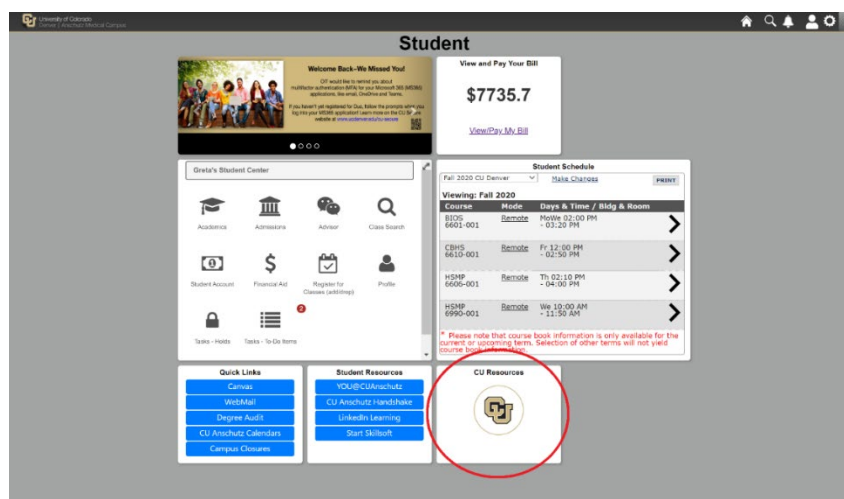
MY LEAVE IN UCD ACCESS

In addition to logging your work schedule in the Google Calendar, you will also be required to log your hours worked in the University's **My Leave** Portal. My Leave is the University's timekeeping system used to submit and track all leave and hours worked for hourly employees. You will then need to submit your timesheets in My Leave at the end of every pay period. (The hourly student payroll calendar can be found in [Appendix C.](#)) Here are the steps to submit your My Leave timesheet:

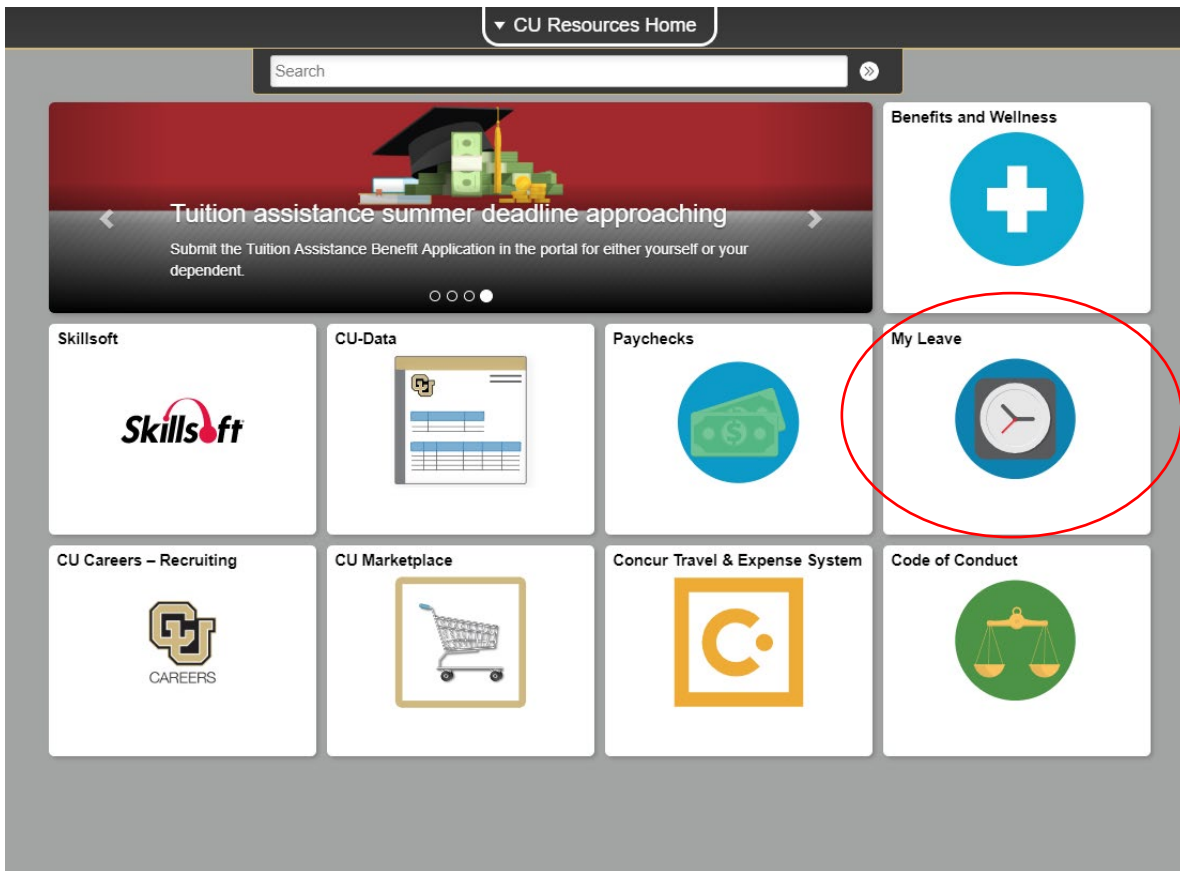
1. Sign in to the [UCD Access site](#) using your university username and password; if you have forgotten your username or password, see site for instructions on retrieval.



2. After signing into UCD Access, you'll be taken to the home screen of your student account. To access your timesheet, you will need to select the "CU Resources" tab shown below.



3. On the home page of “CU Resources,” select “My Leave,” this allows you to enter hours worked and submit your timesheet each month.



You can enter hours worked in one of two ways:

- a. Double click on any day for which you want to enter hours. Fill out the corresponding fields and click save.
 - i. Under “*Reporting To;” choose your supervisor (Allyssa Mastroni in this case). If your supervisor does not appear in the dropdown menu, please contact Allyssa for more information
 - ii. Under the dropdown menu “*Earnings Code;” choose “student faculty salary”
 - iii. Under the dropdown menu “*Status;” choose “Mark as Worked”.
 - iv. Make sure to uncheck the “include lunch” box.
 - v. Click the “Save” button.

Add/Edit Event

*From Date: 03/07/2019 *Time: 08 : 00

*To Date: 03/07/2019 *Time: 15 : 00

Include Lunch

Amount: 7.000 [Details](#)

*Reporting To: Allyssa Mastroni

*Earnings Code: Student Faculty Salary

*Status: Mark as Worked

Description:

SpeedType:

Save **Delete** **Close**

b. Click on the preferences tab and fill out your hours for a typical week. Click "Save and Return." One this is done, you can use this template to pre-populate the calendar so you don't have to fill in the hours every day. To do so, use the following steps

- i. Navigate to the month in which you would like to populate your hours from the template.
- ii. Click "add time."
- iii. Fill out the fields the same was as instructed above.
- iv. Just make sure you go back through and edit/delete any days or times you may have left early, taken a longer lunch, taken off.

Holiday Schedule: UC Denver Downtown

Overtime/CompTime Eligible: Overtime MyLeave Start Date: 06/05/2018

Default Work Days and Hours

Weekly Schedule: Standard Week (Full/Part Time)

Week Begin Day: Sunday

Day	Work Day	Start Time (Hrs)	Start Time (Mins)	Lunch Out (Hrs)	Lunch Out (Mins)	Lunch In (Hrs)	Lunch In (Mins)	End Time (Hrs)	End Time (Mins)	Work Hours in Day
Sunday	<input type="checkbox"/>	00	00	00	00	00	00	00	00	0.00
Monday	<input type="checkbox"/>	00	00	00	00	00	00	00	00	0.00
Tuesday	<input checked="" type="checkbox"/>	08	00	00	00	00	00	16	00	8.00
Wednesday	<input checked="" type="checkbox"/>	08	00	00	00	00	00	13	00	5.00
Thursday	<input checked="" type="checkbox"/>	08	00	00	00	00	00	15	00	7.00
Friday	<input checked="" type="checkbox"/>	08	00	00	00	00	00	13	00	5.00
Saturday	<input type="checkbox"/>	00	00	00	00	00	00	00	00	0.00

Email Preferences

CC All Emails To: Jeffrey.Proctor@ucdenver.edu
(Separate multiple email address with a semi-colon.)

MyLeave Email Triggers	As Employee	As Supervisor
Alter Event	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Timesheet Cancel / Rebuild	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Designate Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Leave Approve / Deny	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Leave Request Delete	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Preferences Change	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Leave Request	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

CU Resources Home MyLeave

Calendar-Month | Calendar-Week | Calendar-Day | Timesheet

Andrew Bick (375947) | Job: 0, STUWH-OT Eng | Preferences | Today is March 23, 2023 **Add Time** | Month | Week | Day

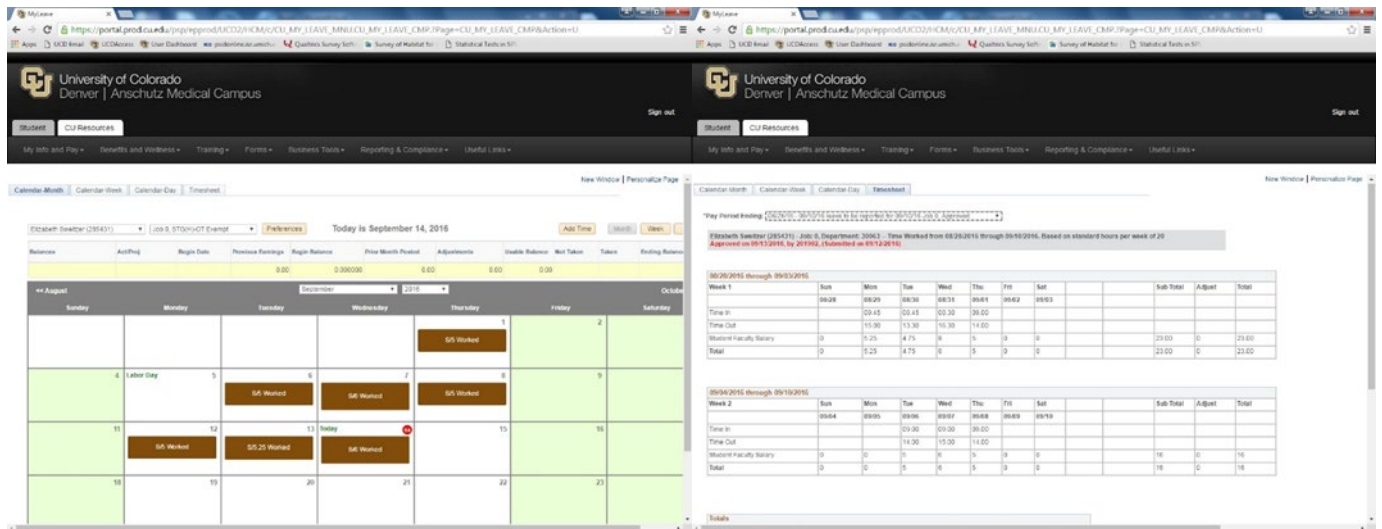
Balances	ActProj	Begin Date	Previous Earnings	Begin Balance	Prior Month Posted	Adjustments	Usable Balance	Not Taken	Taken	Ending Balance
Sick	Open	04/01/2023	1.50	13.596640	0.00	0.00	13.60	0	0	13.60

<< March | **April** | 23 | May >>

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						BW End - 1
2	3	4	5	6	7	8
		SB Worked		SB Worked	SB Worked	

- c. Once you have entered your hours worked and are ready to submit your timesheet, click the “Timesheet” tab at the top of your screen. You will see a summary of the hours you worked during a given month. Scroll to the bottom of the screen, check the “I agree” button, and submit.

If you do not submit your timesheet by 12 pm on the date that it is due, this may delay your payment. See [Appendix C](#) to view the student employee bi-weekly payroll calendar. This calendar lists when the pay periods begin, end, and when timesheets are due. You may also find the list of scheduled pay dates in this document as well.



TIME IQ

The purpose of Time IQ is to track time spent on various **billable** or **non-billable work**. The easiest, most accurate method to record your hours worked in Time IQ is by entering them on a daily basis. Time IQ entries are due at the end of each month. The due date varies slightly each month; however, Allyssa sends out a reminder around the 15th of every month with the exact date. Note that Time IQ does not determine hours for your pay, that is done by MyLeave; however, Time IQ does provide documentation for billing clients (i.e. The Office of Behavioral Health for SOR). See [Appendix F](#) for tips on using Time IQ.

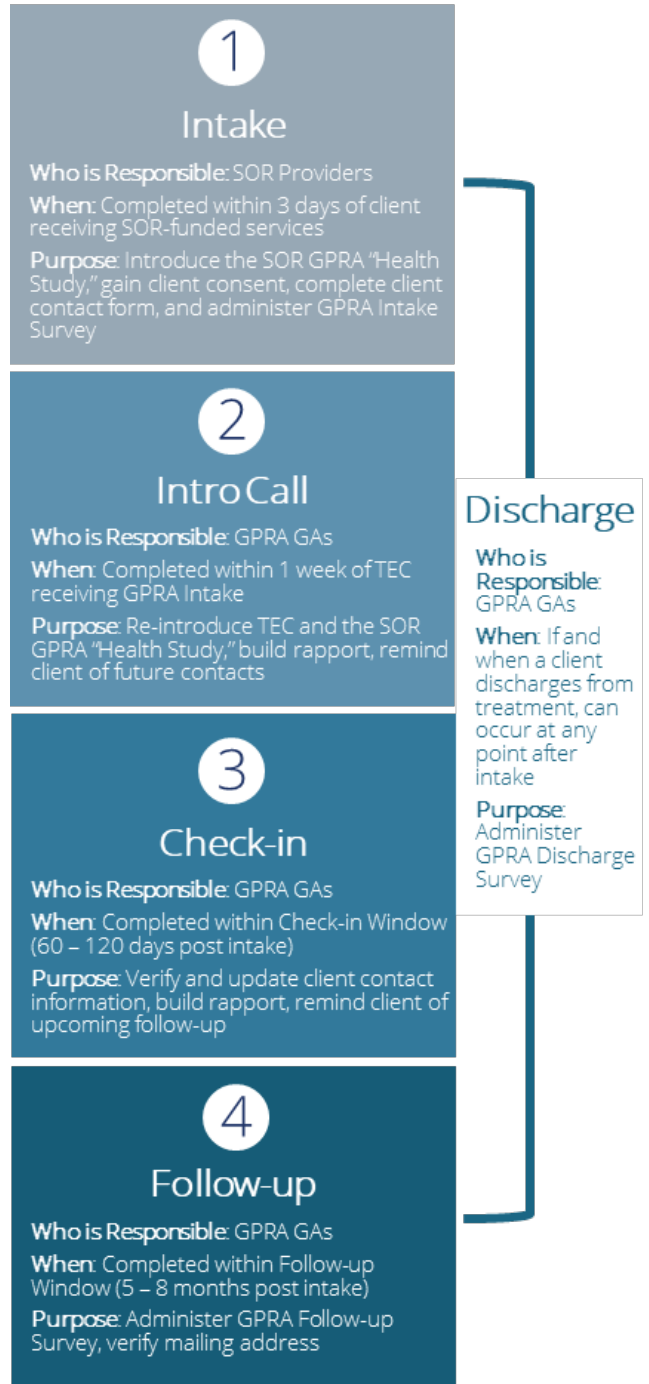
If you are logging your time for GPRA related work, you should select “**GPRA – GAs Only**” as the project and “**Data Collection & Analysis**” as the service type. For other non-GPRA work, always ask the project lead how to log your time and how many hours can be spent on the project. If you ever have Time IQ questions, ask Allyssa.

Follow the link to access Time IQ: <https://theevaluationcenter.timeiq.com/#/home/batch>

GPRA CLIENT CONTACT OVERVIEW

As required by SAMHSA, there are specific data collection and entry requirements as outlined below:

1. **Intake:** will be completed by SOR-funded Providers across the state. GPRA Graduate Assistants will not be responsible for completing this interview but will use the client contact information collected during this interview to complete subsequent check-ins, follow-ups, and other client contacts. In rare cases, GPRA Gas might be asked to complete intake data entry to correct Provider data entry errors. Allyssa will ask for your support and provide instructions if this occurs.
2. **Introduction Calls:** will be completed by GPRA GAs approximately one week following the submission of a client's intake. This call serves as an introduction to The Evaluation Center, the SOR grant, and the data collection process. During this call GPRA Gas should also remind clients about the upcoming check-in and follow-up calls, as well as the \$30 gift card incentive that they will receive if they participate in the follow-up survey. **(Introduction Calls are NOT currently being implemented but may be reinstated in the future.)**
3. **Check-in:** will also be completed by GPRA Gas. The purpose of the check-in phone call is to remind the client of their participation in the GPRA data collection and the associated incentive, verify and update the client's contact information, and continue to build rapport. The check-in calls will be short, between five to ten minutes, and will occur approximately three months after the client's intake.
4. **Follow-up:** is a mandatory interview that must be completed within a window starting five months after the client's intake date and must be completed no later than eight months after the client's intake date. GPRA Gas are responsible for contacting clients to schedule and complete all follow-up interviews. Contact attempts for this window can be completed via phone call, text message, and/or email.
 - a. **Administrative Follow-ups:** do not require completing the full interview and should only be completed if a client refuses to continue participating in the GPRA data collection, or if the follow-up interview can absolutely not be completed during the follow-up window. An administrative follow-up does require SPARS data entry. Only Section I (Follow-up Status) of the survey needs to be completed during the



administrative follow-up. Beware, administrative follow-ups should only be entered if necessary as they do not count towards the required 80% target follow-up rate.

- **Discharge:** Graduate Assistants will also complete discharge interviews. You will be notified about client discharges on an as needed basis. Discharge interviews should be completed within 14 days of the clients' discharge date. If the client cannot be reached within 14 days to complete the interview, an *administrative discharge* must be completed.
 - a. **Administrative Discharges:** similar to administrative follow-ups, administrative discharges do not require completing the full interview and should only be completed if you are not able to contact the client to complete a full discharge interview within 14 days of the discharge date. An administrative discharge still requires SPARS data entry. However, only Section J (Discharge), and Section K (Services Received) need to be completed during the administrative discharge.

Please note that clients can discharge from treatment at any time. Nonetheless, follow-up data entry must be completed for all clients no matter if they discharge before or after their follow-up window has opened/closed (reminder: follow-up window is open between five and eight months post client intake date). Also note that clients are not considered discharged when completing an administrative follow up in Section I of the SPARS tool unless we have received a formal discharge from the provider. If a client reports no longer seeing that provider but we do not have a formal discharge for them, please still fill out Section I, question 3 as "yes."

The GPRA Data Manager will conduct quality control checks on interview completion and data entry. Any issues or inconsistencies will be reviewed with you so that we can ensure that we are collecting the most complete and accurate information possible. Under some circumstances, you may need to contact clients again to collect missing information or provide clarification. We will regularly discuss any barriers or questions that you may encounter during data collection at weekly team meetings. However, please don't hesitate to contact the GPRA Data Manager at any time if a question regarding data collection or entry arises.

There is an expectation that Graduate Assistants make at least **four contact attempts** to reach the client for check-in and make **continuous contact attempts** (at least 6 but ideally 8 to 12) throughout the client's follow up window. Each contact attempt should be logged in Salesforce (see the [Systems Manual](#)). Consistently not meeting the contact attempt target is grounds for termination. There may be instances when the client you are contacting continuously hangs up but does not explicitly revoke their consent to participate. Each hang-up should be logged within the contact attempt record in Salesforce and after the **third hang-up** an administrative follow-up can be entered (similar to an administrative follow-up submitted for clients who explicitly revoke consent).

CLIENT COMMUNICATION GUIDELINES

It is extremely important that all interactions between yourself and the clients are positive. Show hospitality, compassion, respect – clients' lived experiences should be valued and not treated as problems that need to be fixed. Some tips to keep in mind during interviews include:

- Thank the client for speaking with you
- Be organized and prepared – value the client's time

- Engage in active listening
- Observe and be mindful of client behavior
- Validate the client's feelings
- Understand and respect cultural differences
- If interviewing a client, provide clear transitions throughout the interview to introduce new and potentially sensitive sections

If at first you don't succeed, try, try again... This will become your mantra as you begin contacting your clients for check in and follow-up. Successful client contacts will likely require multiple contact attempts using various contact methods.

Keep in mind, it is expected that GPRA Gas make at least four contact attempts (and log such in Salesforce) to attempt to complete a check-in. There is no limit on the number of contact attempts during the follow-up window – the client should be contacted throughout their follow-up window until the interview is completed. The GPRA Data Manager routinely reports the number of successful and unsuccessful contact attempts to the BHA. Listed below are the allowed and prohibited follow-up techniques:

CONFIDENTIALITY

It is important to maintain the patient's privacy. During any calls and in any voicemails, e-mails or text messages, never reveal any information that may indicate the client is receiving opioid treatment services until you have verified the client's identity. This includes provider names, clinician names (in most instances), and anything else related to the SOR grant and services. Remember, our clients have a right to their privacy when it comes to the services they are receiving.

ALLOWED/ENCOURAGED CONTACT METHODS:

- Calling via carrier number and Google Voice number
- Text message
- Contacting designated back-up contacts - usually for follow-up interviews only, used sparingly for check-ins (i.e. if there is no contact information for the clients)
- Email

PROHIBITED CONTACT METHODS:

- Social media
- Internet searches
- Home visits
- Contacting employers

- Contacting anyone related to the client that is not designated as a back-up contact
- Zoom

STAYING IN TOUCH WITH CLIENTS

The GPRA data collection process is structured to contact clients throughout their treatment/recovery journey until their follow-up survey is complete. This includes contacting clients for the brief introductory call and check-ins, contacting them if/when they discharge from treatment, and of course for follow-up. Staying in touch with clients throughout this journey and building rapport with them will improve the likelihood of successful GPRA data collection.

Keep in mind that you will access and update all client contact information in REDCap (see the [Systems Manual](#) for instructions). Make sure to verify and update client contact information during every successful contact attempt, including during the follow-up survey.

As previously mentioned, log every contact attempt that you make no matter if it is successful, unsuccessful or an attempt made to the client's back-up. Logging every contact attempt is important so that as a team, we are able to track when communication occurred, what forms of communication were used, and the outcome of the contact attempt.

The following sections provide guidance on how to complete the following types of contact attempts:

- Introductory
- Check-in
- Follow-up

OUTDATED CONTACT INFORMATION

At any point if you encounter a client with outdated contact information, such as a disconnected/unavailable phone number, record the client in the outdated client contact information [form in the GPRA channel of the SOR Evaluation Team in Teams](#). Allyssa will then attempt to contact providers to collect updated contact information. However, only do this if all contact information is out of date. E.g., if you find the phone number is disconnected but the client still has a working e-mail address (or vice versa), please do not add them to the outdated contact form. If clients only have a backup contact and no other contact information, they may be added to this form as well.

MAKING THE INTRODUCTION CALL

THIS STRATEGY IS NOT CURRENTLY BEING IMPLEMENTED BUT MAY BE REINSTATED IN THE FUTURE.

An introductory phone call should be made to every client within a week of their induction to SOR-funded services. 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. GPRA GAs are assigned to make the introductory calls on a weekly basis. This is assigned and recorded in the Google Calendar. If you are assigned to make introductory calls for the week, you should attempt to complete all calls within your assigned week. If you are unable to complete all the introductory calls assigned to you, let the team know as soon as possible.

In addition to the Google Calendar assignment schedule, all GPRA Gas will receive an email with the list of the new GPRA clients for that week. Salesforce automatically generates this report every Tuesday morning. This email will serve as a reminder of the introductory phone calls for the week; however, it is the responsibility of all GPRA Gas to check the Google Calendar and remember when they are personally assigned to make the introductory calls.

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. Thank you for agreeing to participate. 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 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/REDCap (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 to 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>

Thank you for participating in this health study, your time and effort will help improve health care across the state!

4. Record the intro call in Salesforce. On the client record:
 - a. Enter the date that the call was made on
 - b. Indicate if the call was successful (i.e., client answered the phone and you spoke with them)

LEAVING A VOICEMAIL

If you are unable to reach the client and their contact form indicates that it is okay to leave a voicemail, you may do so. Below is a script that you can adapt/use:

“Hello, this message is for [client name]. This is [your name] at The Evaluation Center at The University of Colorado Denver. I am calling in regard to a health study you agreed to participate in on [intake date/month]. As part of this study, we will be reaching out in about two months to try to schedule a 10 – 20 minute follow-up interview with you. You will receive a \$30 grocery gift card for completing this interview. Please contact us at [your TEC number] if you have any questions. [if applicable – I will also send you an email with this information as well.] Thank you!”

SENDING AN EMAIL

If you are unable to contact the client via a phone call, you can also e-mail them if their contact form contains a client email address. We find it helpful to mention that you will also send an e-mail in any voicemail you leave. Remind the client to check their spam folder.

There are email templates available in the GPRA Gmail account but feel free to generate your own as you become more comfortable

BACK-UP CONTACTS

GPRA GAs should not contact client back-up contacts during the introductory stage.

INTRODUCING THE CHECK-IN

Check-in attempts are made between two to four months post-intake. The purpose of the check-in is to reconnect with the client, verify and update their contact information, remind them of the upcoming follow-up survey/associated incentive, and overall build rapport. We also find it helpful to verify they are still interested in participating in the study. Check-ins are not completed for clients who have been discharged from treatment as indicated in Salesforce.

During every check-in, remind the client of their participation in the GPRA “Health Study.” Once you verify the client’s identity (date of birth), you should remind them of the follow-up survey that will be completed within the next couple of months, as well as the importance of their participation in the survey – survey responses will help to improve future programs and services.

CHECK-IN PROCEDURE AND SCRIPT

1. Open all data collection/entry systems (i.e. REDCap, Salesforce, and possibly SPARS)
2. View Check-in Dashboard/Check-in List View
 - a. Determine which clients need to be contacted, noting their client ID
3. Once the check-in clients are determined, look up contact info based on client ID in REDCap
4. Attempt to contact client
5. 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 the GPRA health study that you began participating in back in [intake month]. Does that sound familiar?”

Client responds: Yes	Client responds: No
<p><i>Wonderful. Thank you for agreeing to participate in the study. I am just calling to see if you're still interested in participating in the study and to update your contact information so we can move forward with that study. Can I start by verifying your birthday?</i></p> <p>(Find client DOB in REDCap (SOR III GPRA Intake Survey) to verify.)</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>(Find client DOB in REDCap (SOR III GPRA Intake Survey) to verify.)</p>
<p><i>Thank you, [client name]. Is this still a good phone number to reach you at, or is there a better number</i></p>	<p><i>Thank you for that information. It looks like you would have agreed to participate in this study on</i></p>

<p><i>I can list as your primary? Is it okay to call, text, and leave you voicemails at this number?</i></p> <p><i>Is there also a good e-mail address we can reach you at as well?</i></p> <p><i>In the event we're unable to reach you is there a good person we can call to possibly pass along the message? Perhaps a family member or close friend.</i></p> <p>Proceed with updating primary and secondary numbers, back up contacts, and address in REDCap if needed. Never push a client to give out information they do not want to give out such as e-mail or a back up contact. We also do not typically find it necessary to update physical addresses at this stage.</p>	<p><i>(intake date) at (clinic name). Is that somewhere you recall receiving services from?</i></p>
<p><i>Okay, that is all I need to update. Again, thank you, client name. I also just wanted to remind you that we will be reaching out again in about two months to conduct a follow-up survey. After completion of that survey, you will receive a \$30 grocery card.</i></p>	<p><i>Okay, we are partnering with them to collect data regarding treatment outcomes. Is it okay if I update your contact information?</i></p> <p>Proceed with updating primary and secondary numbers, back up contacts, and address in REDCap if needed.</p>
	<p><i>Thank you, client name for taking a few minutes to update that with me. I just want to remind you that we will be reaching out again in about two months to conduct a follow-up survey. After completion of that interview, we will send you a \$30 grocery gift card.</i></p>
<p>During either type of call you should let the client know that they can access the SOR Colorado Client Website: https://www.sorcolorado.org/gpra-clients/</p>	

- c. To update client contact information, verify the following information is correct:
 - i. Client's Preferred Primary Contact Information
 - ii. Client's Preferred Secondary Contact Information
 - iii. Client's E-mail Address
 - iv. Client's Back-up Contact Information

5. After the call is complete, record the contact attempt in Salesforce
 - a. Both successful and unsuccessful contacts are logged. See further instructions for logging client contacts in the Systems Manual.

Things to keep in mind during the check-in call:

- Clients may answer and hang up on you as you are introducing yourself and the purpose of the call. This would still count as a contact attempt and would be recording in Salesforce as “unsuccessful.”
- Most withdrawals of consent happen during the first contact. It is not unusual for clients to have no recollection of agreeing to participate in the GPRA Health Study, and they may become defensive. Especially in these cases, it is important to keep trauma informed interviewing in mind. You are welcome to explain the data collection more after verifying their birthday, but always be understanding of what the client may be going through at the moment and do not force them to participate.
- Clients may sound confused on the phone; it is okay. Be kind and answer their questions as best you can.

LEAVING A VOICEMAIL

If you are unable to reach the client and REDCap indicates it is okay to do so, you may leave a voicemail.

“Hello, this message is for [client name]. This is [your name] at The Evaluation Center at The University of Colorado Denver. I am calling in regard to a health study you agreed to participate in on [intake date/month]. As part of this study, we will be reaching out in about two months to try to schedule a 10 – 20 minute follow-up interview with you. You will receive a \$30 grocery gift card for completing this interview. I am calling you to confirm you are still interested in participating, answer any questions you may have and to update your contact information if anything has changed. If you could give me a call or text back at [your TEC number], I would appreciate it. Thank you!”

EMAILS

If you are unable to contact the client via a phone call, you can also e-mail them if their contact form contains a client email address. We find it helpful to mention that you may also send an e-mail in any voicemail you leave. Remind the client to check their spam folder.

There are email templates available in GPRA Gmail account.

BACK-UP CONTACTS

GPRA GAs typically do not contact client back-up contacts during the check-in stage. Back-up contacts can be contacted during this stage if there is no contact information for the client at all.

DISCHARGED CLIENTS

Check-ins are not completed for clients that have been discharged prior to check-in. If a client discharges from services during their check-in window, check-in attempts will be discontinued.

INTRODUCING THE FOLLOW-UP

The Follow-Up survey is an interview that must be completed within a window starting five months after the client's intake date and must be completed no later than eight months after the client's intake date. GPRA Gas are responsible for contacting clients to schedule and complete all follow-up interviews. Contact attempts for this window can be completed via phone call, text message, and/or email.

Again, once you verify the client's identity, it is important to remind the client of the importance of the survey. Explain that their survey responses are confidential and will be used to improve future treatment/services. You should also remind them of the \$30 incentive that they will receive for participating.

BACK-UP CONTACTS

If you are unable to directly reach the client for a follow-up or discharge interview only, you may contact their back-up contacts. Back-up contacts were designated by the client and may include parents, partners, relatives, or friends of the client. Do not contact the back-up if they are listed as the provider. Instead, add this client to the [Outdated Client Contact Form](#). Please see the script in the "[Contacting Back-up Contacts](#)" section below for best practices in reaching out to back-up contacts.

INCENTIVE POLICY

Clients will be incentivized to participate in the follow-up interview with a \$30 grocery gift/gas card for either Kroger or Albertsons Brands. They will only receive an incentive for their participation in the follow-up interview and will not receive a gift card during the check-in call or at discharge. The Kroger gift card is valid at all [Kroger stores including but not limited to King Soopers and Kroger/King Soopers Gas Stations](#). locations. For a full list visit: <https://www.kroger.com/i/terms/gift-cards>. The Albertson's card is valid at all Albertson's Stores including but not limited to Safeway. For a full list visit: <https://albertsons.thegiftcardshop.com/alb-everyday-ph> - scroll down to "terms and conditions". Gift cards may be distributed to the client via email (e-gift card) or mail (physical gift card) depending on their preference.

Gift cards are distributed approximately a week after the survey is completed.

CONFIDENTIALITY

It is important that your client understands that all information shared during any contact will remain confidential. All the clients you contact will have consented to participating in the GPRA data collection during their intake interview. You may find a copy of the consent form on the SOR Colorado website. If you are completing a follow-up or discharge interview, remind the clients of their rights and confidentiality. This may help client participation during the interview and may encourage more accurate data collection.

"Your substance use disorder records are protected under federal law, including the federal regulations governing the confidentiality of substance use disorder patient records, 42 C.F.R. Part 2, and the Health

Insurance Portability and Accountability Act of 1996 (“HIPAA”), and cannot be disclosed without your written consent unless otherwise provided for by the regulations.”⁶

Although most information collected for GPRA reporting purposes will remain confidential, there are instances where you must break confidentiality. Such circumstances include if the client discloses a threat to themselves or to others, or if a medical emergency occurs during the interview.

“Please be aware that I must break confidentiality and immediately alert your provider if you disclose information that leads me to believe you may be a threat to yourself or others. This includes thoughts of harming yourself, threatening to compromise the safety of others, instances of child and elder or dependent adult abuse, or if you report that someone wants to harm you.”

FOLLOW-UP PROCEDURE AND SCRIPT

1. Open all data collection/entry systems (i.e. REDCap, Salesforce, and possibly SPARS)
2. View Follow-up Dashboard/List View/Tasks Lists
 - a. Determine which clients need to be contacted, noting their client ID
3. Once the follow-up clients are determined, look up contact info based on client ID in REDCap
4. Attempt to contact client
5. 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 the GPRA health study that you began participating in [intake month]. Does that sound familiar?”

Client responds: Yes	Client responds: No
<p><i>Wonderful. I am just calling to complete the follow-up survey. Can I start by verifying your birthday?</i></p> <p>(Find client DOB in REDCap (SOR III GPRA Intake Survey) to verify.)</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>(Find client DOB in SPARS (SOR III GPRA Intake Survey) to verify.)</p>
<p><i>Thank you, [client name]. Is now a good time to complete the follow-up survey or would you like to schedule it for another time? It should take about 10 – 15 minutes.</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 (provider location). Is that somewhere you recall receiving services from?</i></p>

⁶ Legal Action Center Sample Individual Consent

Okay, we are partnering with them to collect data for the State Opioid Response grant that funds treatment and services for you and others across the state. Is now a good time to complete the follow-up survey or would you like to schedule it for another time? It should take about 15-20 minutes.

Thank you [client name] for taking the time to complete the follow-up survey. Again, your responses will help to improve treatment and access to treatment for many across the state. Can you verify your mailing address so that we may mail you your gift card for participating? [EMPHASIZE THIS when speaking to client]

Verify/update address in REDCap.

Do you have any questions for me?

Thank you again and have a great day!

Keep in mind that you should not reveal any information about the client until you have verified the client's identity. Since you will be collecting sensitive health information during interviews and phone calls it is crucial to verify who you are speaking with over the phone. You may do so by verifying the client's birth month and year. Once you have verified the client's identity, you may give more details about the survey and SOR grant. If the client is unable to verify their identity, do not reveal any health or treatment related information. If the client is hesitant to participate, you may explain the importance of their participation; remind them of the incentive gift cards given to clients who participate in follow-up interviews, and generally describe the next steps in the process. You may also remind the client that the follow-up interviews are similar to the interviews the client participated in at intake. It can also be useful to explain to the client that these data collection efforts allow for continued SUD/OD treatment funding across the state. (See the [SOR Provider Script](#) for tips on how to talk about the GPRA survey with clients.)

Remember to always thank the client for their time and participation!

LEAVING A VOICEMAIL

For clients that indicate it is okay to leave a voicemail (see client contact form in REDCap), you may leave a voicemail using the script below.

"Hello, this message is for [client name]. I am [your name] from The Evaluation Center. I am contacting you about your continued participation in the GPRA health study. You may remember that we are scheduling follow-up surveys and will compensate you for your time. Please call or text us at [your TEC phone number] to schedule (or complete) your survey. Thank you and we look forward to hearing from you."

When you do leave a message, make it brief, introduce yourself and the organization, and state that the purpose of your call is to contact the participant.

CONTACTING BACKUP CONTACTS

If you are unable to reach the client you may contact their designated back-up contacts. You will find the contact names, their relationship to the client, and their contact information under the client contact form in REDCap. Even though the client listed these individuals as back-up contacts, by no means is it appropriate to reveal client health information during your contact with them. Please refer to the scripts below in conducting phone calls to individuals other than the client themselves.

Scenario A

Interviewer	Backup Contact Response
"Hello, I am [your name] and I am calling from CU Denver. May I speak with [client's name]?"	"What's this about?"
"[Client name] has been participating in a health study and we are trying to contact them for a follow-up interview. Are they available?"	"No, he's not here."
"Can you tell me when the best time for me to call back and talk to them is?"	"I don't know when he'll be around."
"Can I leave a message for them? They agreed to participate in our health study and it's important that we reach them. We will compensate them for their time." [Leave a message that only mentions the health study follow-up interview, the compensation that will be paid, and the number for the participant to call for more information.] Thank you for your time."	

Scenario B

Interviewer	Backup Contact Response
"Hello, I am [your name] and I am calling from CU Denver? May I speak with [client's name]?"	"He doesn't live here anymore."
"Can you tell me how I might reach them? They gave us this number so we could get in touch with them."	"I can't tell you anything more than that."
"Could you please take a message for them? They agreed to continue to participate in our study and it's important that we reach them. We will compensate them for their time." [If the respondent still has contact with the participant, leave a message using	

the guidelines recommended above. If there is no longer any contact, refer to the other back-up contacts.]	
Thank you for your time."	

Scenario C

Interviewer	Backup Contact Response
"Hello, I am [your name] and I am calling from CU Denver. May I speak with [client's name]?"	"He doesn't live here anymore."
"Can you tell me how I might reach them? They gave us this number so we could get in touch with them."	"Sure, His new phone number is 303-555-5555."
"Great thank you for your time."	

LEAVING A VOICEMAIL

You can follow a similar script leaving a voicemail for a back-up contact as you would for the client. Be sure not to reveal any health information in the message. Simply refer to the client's participation in a "health study."

If any updated client contact information surfaces during phone calls, be sure to record the new information in the client contact record in REDCap.

CLIENT FACING SURVEY

We are currently working on implementing an online version of the survey to send to the client that they can do on their own. Further details are to follow pending piloting by the GPRA Team.



RED FLAG SITUATIONS

Considering the sensitive nature of the questions in the GPRA Client Outcome Measures Tool, the clients will be sharing very personal information detailing their lived experiences. This information is protected by HIPPA and 42 CFR part 2 privacy laws and is required to remain confidential. However, if the client shares information that leads you to believe they are in danger of harming themselves or others, you must immediately report this information. If you are ever unsure, do not hesitate to contact Allyssa.

THREAT TO SELF

In section F, the GPRA Client Outcome Measures Tool specifically asks, “In the past 30 days, how many days have you attempted suicide?” You should treat this question as neutral data collection and ask it as written to obtain the numeric response. You should only feel the need to report a client if they responded with the fact that they are actively considering suicide or had a plan to do so. In such cases, give them the Colorado Crisis Services line and immediately report this to the Evaluation Data Manager (Allyssa).

Colorado Crisis Services phone line: 1-844-493-8255 or you can text “TALK” to 38255. Additionally, there is a live chat option at <https://coloradocrisiservices.org/>.

IMPORTANT RESOURCES

The [SOR GPRA GA Website](#) houses everything you need, including:

- Links to:
 - [REDCap](#)
 - [Salesforce](#)
 - [SPARS](#)
- A Resource Library, which contains:
 - GPRA GA Handbook
 - Systems Manual
 - CSAT GPRA Outcomes Measures Tool (GPRA Survey) in English and Spanish
 - GPRA Survey Question by Question Guide in English and Spanish
 - Sample Provider Script (used at Intake)
 - Client ID Convention
 - TEC GPRA Flowchart
- Training Videos:
 - Provider Video Series
 - Mock GPRA Client Calls

OTHER USEFUL LINKS

[CU Denver Portal](#)

[The Evaluation Center's Website](#)

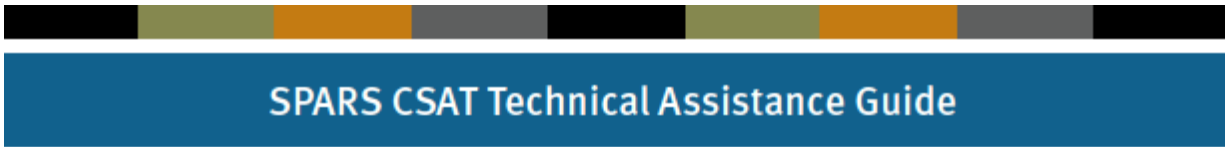
[SOR Colorado Website](#)

OTHER FREQUENTLY USED SOFTWARE APPLICATIONS

[Zoom Video Conferencing](#)

APPENDIX A

Click on image below to access the entire guide –



Improving Client Participation in GPRA Follow-up Interviews

Your behavioral health program collects Government Performance and Results Act (GPRA) client data at intake, discharge, and follow-up about 6 months after the initial intake interview. This data is an invaluable source of information about your program and your clients. It can help you evaluate the effectiveness of your program and inform key decisions about services.

Obtaining follow-up data from clients after they have left your program can be challenging. It may be difficult to contact or locate clients. Furthermore, clients might express reluctance or unwillingness to participate in follow-up interviews.

ABOUT THIS GUIDE

This Center for Substance Abuse Treatment (CSAT) Technical Assistance (TA) Guide developed by SAMHSA's Performance Accountability and Reporting System (SPARS) is designed to help behavioral health program staff enhance their ability to successfully contact and conduct follow-up interviews with clients.

WHAT IS IN THIS GUIDE?

The three sections of this TA Guide focus on the importance of collecting follow-up data and strategies to increase the likelihood of clients participating in follow-up interviews.

- **The importance of collecting follow-up data.** This section provides a brief overview of the value of data obtained through follow-up interviews and common challenges in contacting clients to obtain this data.
- **Strategies for locating clients.** This section provides tips and resources that can be used to locate clients.
- **Strategies to increase client participation in follow-up interviews.** This section provides practical strategies to engage with clients and enhance their willingness to participate in follow-up interviews. Elicit–Provide–Elicit (E–P–E) is a framework for interviewers to use during their interactions with clients—for those inclined to participate in follow-up interviews, those who are reluctant to take part, and clients who express a desire not to participate.

Staff members typically include specialists, counselors, clinicians, or other program staff. For the purposes of this guide, we will refer to any program staff members who conduct follow-up interviews as *interviewers*.



APPENDIX B

Pronunciation of Selected Drugs from the CSAT GPRA Tool

(Emphasis should be given on the segments in ALL CAPS)



DRUG	PRONUNCIATION	FIRST REFERENCE
Acamprosate ¹	a-KAM-PRO-sate	Section B2
Anxiolytic ²	ANG-zee-oh-LIH-tik	Section B1d4
Barbiturates ²	bar-BIH-chuh-rayts	Section B1d3
Benzodiazepine ²	BEN-zoh-dy-A-zeh-peen	Section B1d4
Buprenorphine ¹	BUE-pre-nor-FEEN	Section B1b11
Bupropion ¹	Byoo-PROE-pee-on	Section B5
Cannabinoid ²	kuh-NA-bih-noyd	Section B1c2
Demerol ²	DEH-meh-ROL	Section B1b5
Dilaudid ²	dy-LAW-did	Section B1b4
Disulfiram ²	dy-SUL-fi-ram	Section B2
Fentanyl ¹	FEN-ta-nil	Section B1b3
Ketamine ³	KET-uh-meen	Section B1i2
Khat ⁴	KĀT or COT	Section B1i5
Kratom ⁴	KRĀ-təm or KRAY-tum	Section B1i4
Mescaline ⁴	ME-skə-lən or MES-ka-lin	Section B1g5
Oxycodone ¹	ox-i-KOE-done	Section B1b9
Oxycontin ⁴	ox-e-KĀN-tin or ox-e-CON-tin	Section B1b9
Percocet ⁴	PER-kō-set or PERK-o-set	Section B1b6
Salvia ⁴	SAL-vē-ə or sal-VEE-ah	Section B1g6
Varenicline ¹	var-EN-I-kleen	Section B5



¹MedLine Plus Drugs, Herbs and supplements page

²National Cancer Institute

³Penn Medicine

⁴Miriam Webster Online Dictionary



APPENDIX C



Student Employment Office

Student Employment Bi-Weekly Payroll Calendar 2023-2024

	B#	PAY PERIOD		TIMESHEET DUE DATE: BY 12PM	PAY DATE	
		BEGIN	END			
Fall '23 Pay Period Begins	<u>8/6/2023</u>	B19	08/06/23	08/19/23	08/21/23	09/01/23
First Day of Fall Classes	<u>8/21/2023</u>	B20	08/20/23	09/02/23	09/04/23	09/15/23
		B21	09/03/23	09/16/23	09/18/23	09/29/23
		B22	09/17/23	09/30/23	10/02/23	10/13/23
		B23	10/01/23	10/14/23	10/16/23	10/27/23
		B24	10/15/23	10/28/23	10/30/23	11/10/23
		B25	10/29/23	11/11/23	11/13/23	11/24/23
		B26	11/12/23	11/25/23	11/27/23	12/08/23
End of Fall Semester	<u>12/16/2023</u>	B01	11/26/23	12/09/23	12/11/23	12/22/23
Fall '23 Pay Period Ends	<u>12/23/2023</u>	B02	12/10/23	12/23/23	12/25/23	01/05/24
Spring '24 Pay Period Begins	<u>12/24/2023</u>	B03	12/24/23	01/06/24	01/08/24	01/19/24
First Day of Spring Classes	<u>1/16/2024</u>	B04	01/07/24	01/20/24	01/22/24	02/02/24
		B05	01/21/24	02/03/24	02/05/24	02/16/24
		B06	02/04/24	02/17/24	02/19/24	03/01/24
		B07	02/18/24	03/02/24	03/04/24	03/15/24
		B08	03/03/24	03/16/24	03/18/24	03/29/24
		B09	03/17/24	03/30/24	04/01/24	04/12/24
		B10	03/31/24	04/13/24	04/15/24	04/26/24
		B11	04/14/24	04/27/24	04/29/24	05/10/24
End of Spring Semester	<u>5/11/2024</u>	B12	04/28/24	05/11/24	05/13/24	05/24/24
Spring '24 Pay Period Ends	<u>5/25/2024</u>	B13	05/12/24	05/25/24	05/27/24	06/07/24
Summer '24 Pay Period Begins	<u>5/26/2024</u>	B14	05/26/24	06/08/24	06/10/24	06/21/24
First Day of Summer Classes	<u>6/3/2024</u>	B15	06/09/24	06/22/24	06/24/24	07/05/24
		B16	06/23/24	07/06/24	07/08/24	07/19/24
End of Summer Semester	<u>7/27/2024</u>	B17	07/07/24	07/20/24	07/15/24	08/02/24
Summer '24 Pay Period Ends	<u>8/3/2024</u>	B18	07/21/24	08/03/24	07/29/24	08/16/24

Off-Campus Employers, please submit timesheets via secure upload at ucdenver.edu/fadocs

Please direct all student employee questions regarding pay checks, paystubs or direct deposits to *Employee Services* at 303-860-4200. For all other student employee issues or questions please refer them to the *Student Employment Office* at 303-315-1842 or

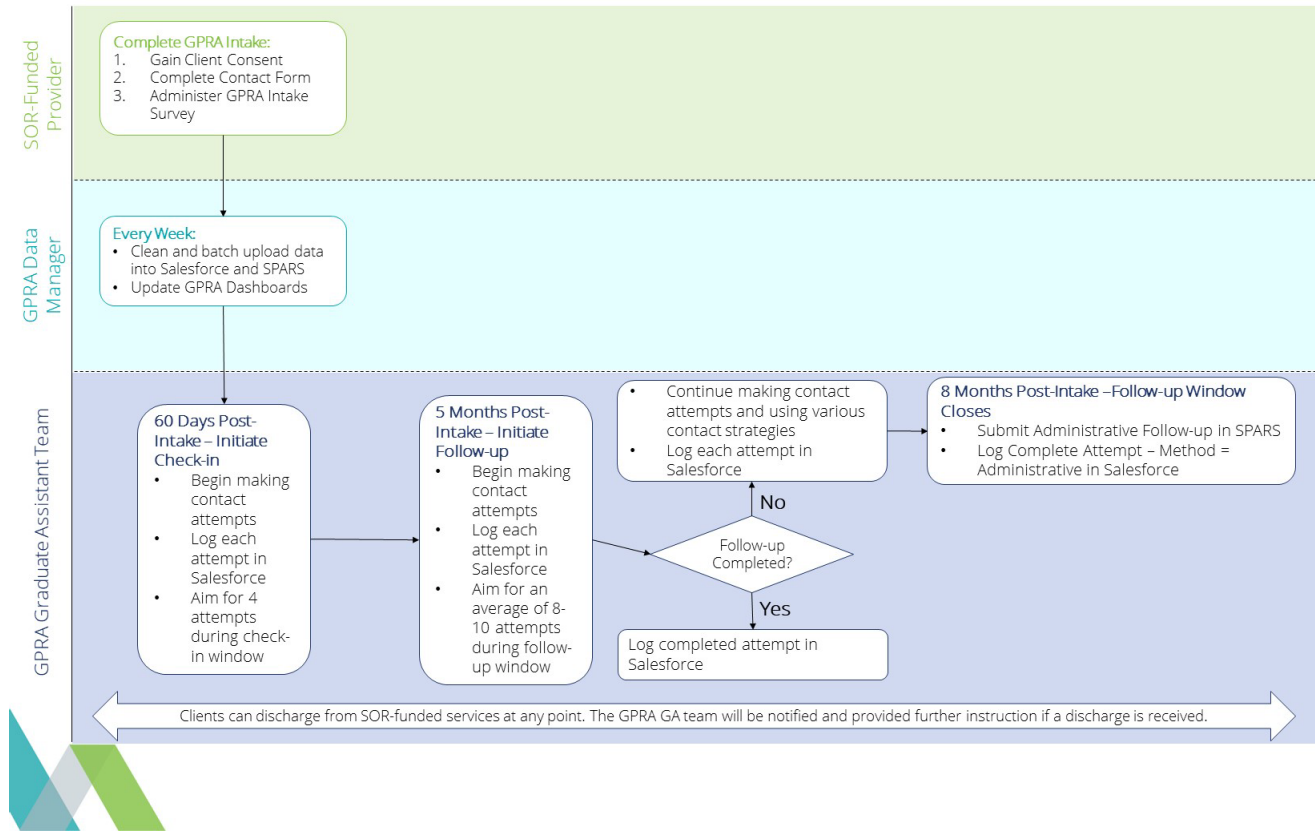
Student Employment Office

P.O. Box 173364, Campus Box 125 Denver, CO 80217-3364

Phone: 303-315-1842 Fax: 303-315-1835 Email: studentemployment@ucdenver.edu

Revised 04/10/2023

APPENDIX D



Click on image above to link to full size chart.

APPENDIX E

GLOSSARY OF FREQUENTLY USED TERMS AND ACRONYMS

Please use this resource to acquaint yourself with some key acronyms and terms that will become part of your daily vocabulary as a GPRA GA and TEC Team Member.

1st Month Rent – SOR-funded provider that provides first month rent services to clients

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 contacted and reports moving out of state, therefore, no longer receiving SOR funded treatment.
- 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

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).

BHG- Behavioral Health Group, a Treatment Provider, see also list of all other providers on the [SOR Colorado website](#)

CITI- Collaborative Institutional Training Initiative human subject research certification

Client- The individuals that are receiving SOR funded treatment

Client ID- The 6-to-15-digit number associated with each client, used to maintain confidentiality.

Client contact- A way to reach a client by way of phone call, text message, email, and/or back up contact outreach

Clinician: clinical staff employed by the provider who is providing the services

Contact attempts- The successful or unsuccessful phone calls, emails, and text messages used to try completing an intro, check in, or follow up call.

Contact records- The page within Salesforce that contains a running record of all contact attempts.

CRA- Community Reinforcement Approach, a SOR funded program

CSAT- Center for Substance Abuse Treatment, a subsection of SPARS

Follow-Up Interview- 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.)

GPRA- Government Performance and Results Act, a federal act mandating standard data collection for any SAMHSA funded grants

Intake- The initial GPRA survey clients complete with providers when beginning SOR funded treatment.

Introductory Attempts- Introductory attempts are a strategy that the GPRA team has used previously to increase rapport between us and clients. Currently, introductory attempts are not part of the GPRA workflow, but can potentially be reinstated in the future.

IPS- Individual Placement Services, a SOR funded program

JMAT- Jail-based medication assisted treatment, a former SOR funded program

Master Contact Attempt Record: the record in which you will record contact attempts specific to the contact stage which the client is in.

MAT- Medication Assisted Treatment, also known as Medication Addiction Treatment in some settings; a SOR funded program

MHU- Mobile Health Unit, a SOR funded program

MSO- Managed Service Organization

OBH- Office of Behavioral Health "The State"

OCS- Outdated Client Contact Information Sheet/Outdate Contact Sheet

Provider: the entity or organization which is providing the services. This information can be found in both REDCap and Salesforce.

OTP- Opioid Treatment Program, a licensed provided that is able to administer MAT

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 Form](#).

REDCap- Data collection platform used to collect client contact information at intake.

RCO – Recovery Community Organization funded by SOR that provides peer-based services

RR – Recovery Residence funded by SOR that provides residential services

Salesforce- The client tracking platform to monitor contact attempts as clients move through recovery journey.

SAMHSA- Substance Abuse and Mental Health Services Administration

Skillssoft- University based training platform where employees complete university required training (great resource to take advantage of as an employee of the University!)

SOR- State Opioid Response grant

SPARS – SAMHSA's Performance Accountability Reporting System is the data entry system where GPRA Surveys data is submitted

Stage/Status/Sub-Status Stages- These are stages in Salesforce after check-in or follow up calls are completed. These stages reflect defines who is responsible for the contact record at each stage, what actions are necessary and how the assigned individual is notified.

TEC- The Evaluation Center

TIC- Trauma Informed Care

TII- Trauma Informed Interviewing

TIP- Trauma Informed Practices

APPENDIX F



Guide for Using Time IQ



STEPS TO LOG YOUR HOURS:

1. Log into Time IQ: <https://theevaluationcenter.timeiq.com/>.
2. Navigate to your preferred "Entry" option (day, week, or batch).
3. Then choose the **project** and **service** category that best fits your entry.

HOW TO CHOOSE A PROJECT/SERVICE CATEGORY:

Choose a Project:

A. Internal Activities
Non-Billable

-OR-

B. Current Clients
Billable

Choose a Service:

- Business Development
- Internal Work Groups
- New Proposal Development
- Sick/Vacation/Holiday Leave
- Team Meetings/Administration
- Professional Development

Monthly Target = 20% of your time

Log all:

- Sick or vacation leave or university holidays under "Internal – Sick/Vacation/Holiday Leave"
- Workgroup hours related to activities including meeting time as well as any time spent outside of meetings under "Internal – Internal Work Groups"

Choose a Service:

- Data Collection & Analysis (i.e. interviews, survey administration, qualitative and quantitative analysis)
- Deliverable Preparation & Review (i.e. reviewing reports)
- Project Management (i.e. internal or client meetings)
- Project Planning & Design (i.e. client or internal meetings to work out decisions about the project, responding to emails from a client)
- Training & Technical Assistance (i.e. assisting clients, developing training materials)

Monthly Target = 80% of your time

Log billable activities under the correct "Client." If you are unsure what amount of your time is billable, check with the project leads.

IMPORTANT GUIDELINES:

- Your total hours for the week should equal the total hours you work in a normal week. The only exception is if you work *more* than your allotted hours in a given week.
- Enter all of your time into Time IQ before the monthly deadline. (Allyssa will notify the team when this occurs every month.)
- Do not edit your entries after the monthly deadline. Reach out to Allyssa if you need to make any edits.
- We recommend that you enter your time on a daily or weekly basis. It can be stressful if you wait until the end of the month to log all of your entries.

All Time IQ entries must be submitted by the monthly due date for accurate billing.

APPENDIX G

TIPS AND TRICKS

Over the years, GPRA GAs have compiled this list of tips and tricks that they have found helpful in their work. Keep in mind that everyone's work style is different so some of these tips/tricks may work well for you, or they may not. If you come across any tips or tricks that work for you, please let us know so that we can add them to this list.

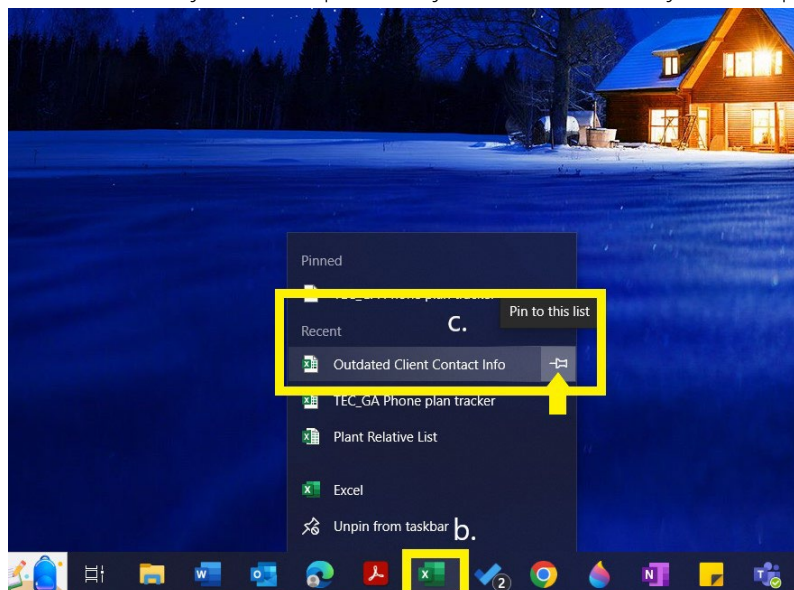
HELPFUL FOR CLIENT CALLS

- Some clients may push back when you ask them to confirm their birthdate. Instead of explaining that this is for "confidentiality reasons" it can be helpful to include the term "HIPAA" in your explanation. Since HIPAA is so popular in the media these days, most people are familiar with the term and associate it with privacy of health information. This also gives you a chance to build credibility and many clients appreciate the attention to privacy that HIPAA is associated with. Overall, you can stress that we are asking to verify their identity so that we can protect the clients' private health information.
- Another tip related to confirming client identities is by specifically asking for only their birth month and birth year. This is all that is collected in SPARS, therefore, the only information that you need. It might make clients feel more comfortable sharing this information compared to sharing their entire birth month, birthdate, and birthyear.
- If clients still seem wary, you can also refer to the clinician (e.g., Pete Cantu is typically a clinician that many clients recognize). This is a strategy that you must be careful about using. If the clinician can be easily identified as working at the specific provider or in this particular field, do not use the clinician's name. E.g., Ursula Hollins can be easily identified as working for Colorado Treatment Services by Googling her name.
- You can also offer to reach out to the client's provider or clinician to see if they can refresh their memory. In these cases, reach out to Allyssa to have her send a message to the clinician. Do not contact clinicians on your own.
- Sometimes you just have to take one for the team! If a client chooses to share feedback about the grant, the services they received, or your approach to calling them, it can be beneficial to simply thank them for their feedback instead of trying to explain/defend further. This is when those trauma informed interview skills come into play.
- If a client feels uncomfortable or weary with the check in call only being a call to update personal information, you can offer to schedule their follow-up survey at that time. This may feel more comfortable to the client and legitimize the check-in call. This might also be a good technique to use if you get the impression this person might not answer a future call from you. The follow-up should be scheduled 5-8 months from the intake date, and if it is scheduled in advance, it should be scheduled via Calendly when possible. If that is not possible, log it in the Google Calendar.

- You can also offer to send the client facing website to the client during a Check In call as well.
- Sometimes saying “(Your name) at The Evaluation Center at The University of Colorado Denver” can be a lot of information at one time. Saying “(Your name) at the Evaluation Center at *CU Denver*” is an option to shorten your introduction, sound more personable, and many people in Colorado are familiar with referring to the school as CU Denver.

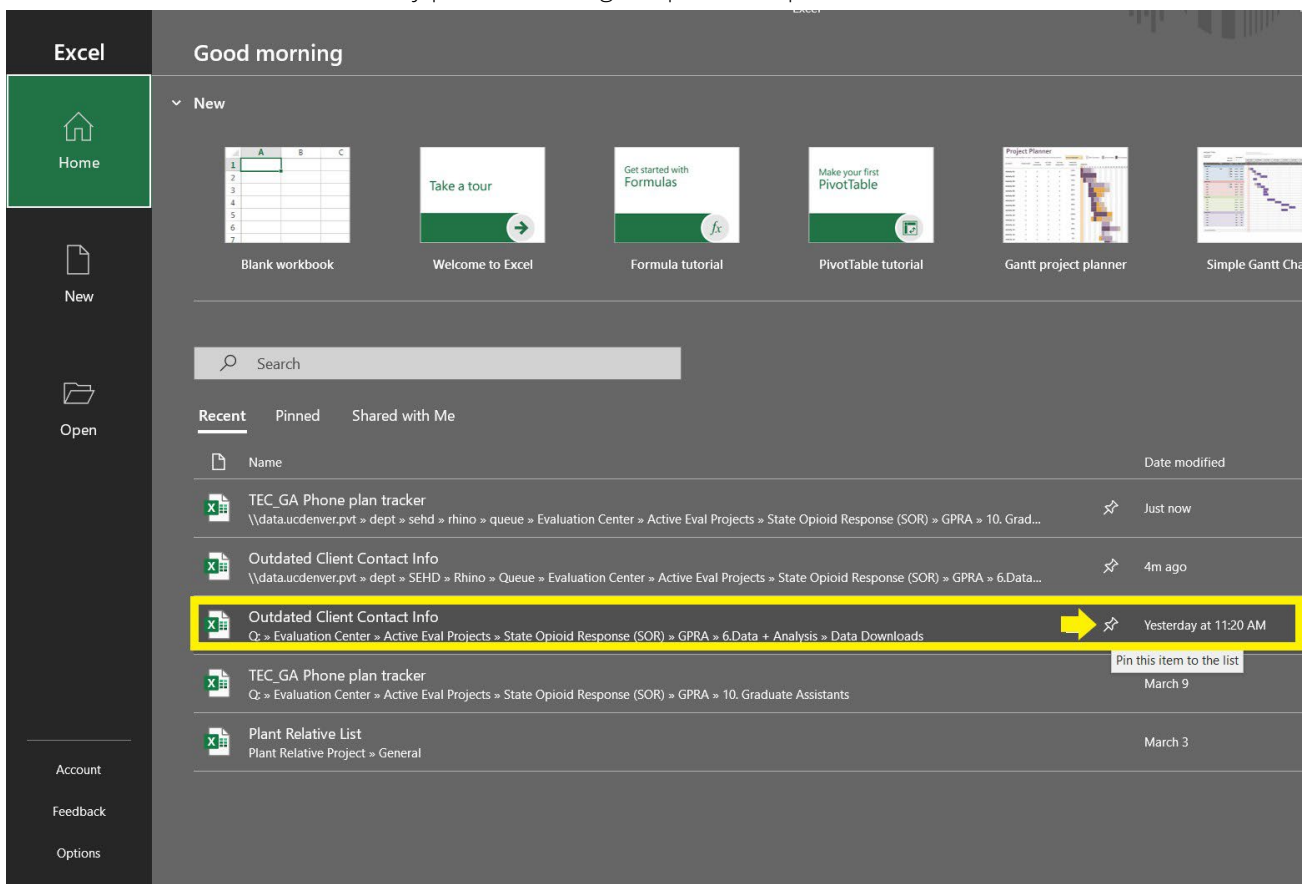
HELPFUL FOR DATA ENTRY

- When looking up a phone number in REDCap (for example, if a client returns your call and you are unable to answer), the phone number needs to be entered using the following formatting for the REDCap search to work: (XXX) XXX-XXXX. It is often easiest to simply omit the area code altogether.
- Pinning Documents to Quick Access: There are two ways you can pin documents to quick access in the various Microsoft Office programs. We will use the example of pinning the Outdated Contact Sheet below.
 1. Pinning to quick access in the task bar. Note this may only be helpful if you have Excel pinned to your task bar as well.
 - a. First, open the document in Excel.
 - b. Once it is open, navigate to your task bar and right click on the Excel icon to open the recent docs menu. Here you will see a list of documents opened recently. The sheets you currently have open should appear here. Sometimes you may need to wait a minute for the one you have open to populate.
 - c. Once it is in the list, hover your mouse pointer over it and you will see the pin button. Click it and the document will be pinned to your list at the top.
 - d. Now, whenever you right click the Excel icon from the task bar, you will see this document always at the top with any other documents you have pinned.



2. Pinning to Excel pinned docs

- a. Open Excel as if you were to opening it to create a blank spreadsheet. Here you will see the home screen where you can create new spreadsheets or open existing ones. There will also be a list of your recently opened documents here. If you haven't opened the the desired document in a while you may need to open it once so it will populate in this list.
- b. Hover your mouse over the document and on the right of the document name and location, to the left of the date, you should see the pin icon appear. Click it to pin it to the list. It will now show up at the top of the recent list or in the pinned list as well.
- c. In the image below you will also see documents already pinned. If a document is already pinned to the list you will see the pin icon without having to hover over it. If the document is already pinned, clicking the pin will unpin it.





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

UNIVERSITY OF COLORADO
DENVER | ANSCHUTZ MEDICAL CAMPUS

w: the-evaluation-center.org | e: TheEvaluationCenter@ucdenver.edu