STATE OPIOID RESPONSE

Systems Manual

Updated on 2/9/2024

The Evaluation Center
UNIVERSITY OF COLORADO
DENVER | ANSCHUTZ MEDICAL CAMPUS

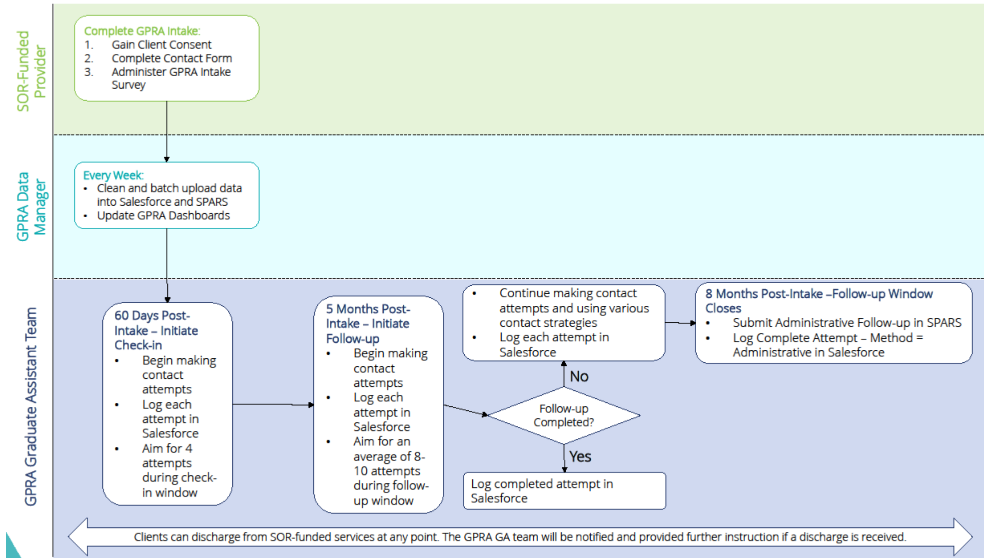
Table of Contents

ABOUT GPRA DATA COLLECTION

When a client begins SOR funded services, the GPRA data collection process begins when the SOR funded provider completes a GPRA Intake with the client. The first step to completing the GPRA Intake is introducing the SOR Grant and reviewing the informed consent documents with the client. If the client does not consent to being a part of the data collection, they are still able to receive SOR funded services; however, they will not complete the GPRA Intake or be contacted by the GPRA GA's at any time. After informed consent, the providers will then submit client contact information and complete the GPRA Intake Survey with the client. The GPRA Intake Survey is the longest survey out of all GPRA Surveys and collects the same information as GPRA Follow-up and Discharge surveys, as well as information about planned services and client demographics (not collected at follow-up/discharge). Providers should then share the SOR GPRA Flyer with the client. This flyer contains information about their participation in the "GPRA Health Study" as well as a client the SOR client facing website. At this point, clients should be aware that The Evaluation Center will be following up with them to check-in and complete the follow up survey in the months to come.

After the GPRA Intake is complete, the GPRA Data Manager will upload the client information into SPARS and Salesforce. At this point, client contact information will be available in REDCap as well. GPRA GA's initiate contact with the client through the check-in call 60 days after the GPRA Intake was completed. The purpose of the check-in call is to remind the clients about the "GPRA Health Study" that they agreed to participate in, verify existing contact information is still accurate, and inform the client that we will be contacting them again in a few months to complete the GPRA Follow-Up Survey. Throughout the check-in and follow-up windows, GPRA GA's use Salesforce to manage client caseloads and log all contact attempts.

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

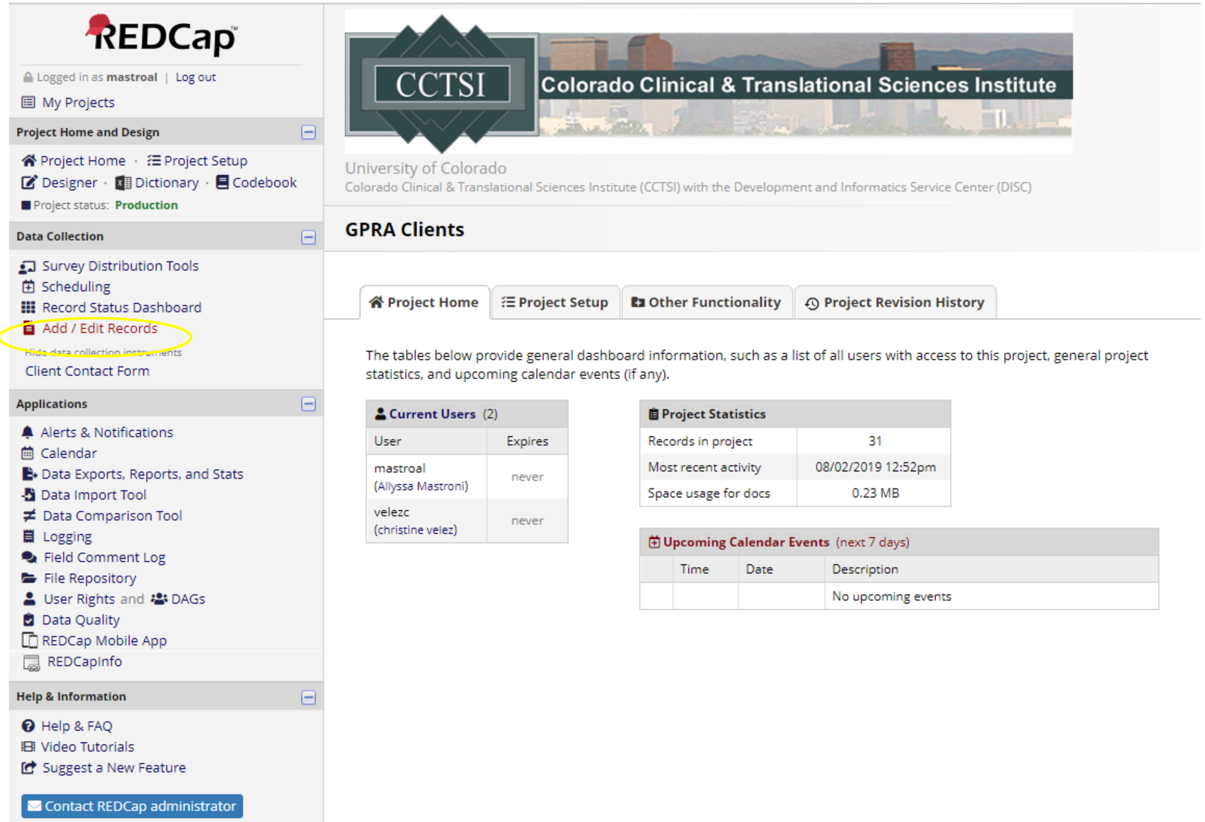


GENERAL REDCAP NAVIGATION AND USAGE

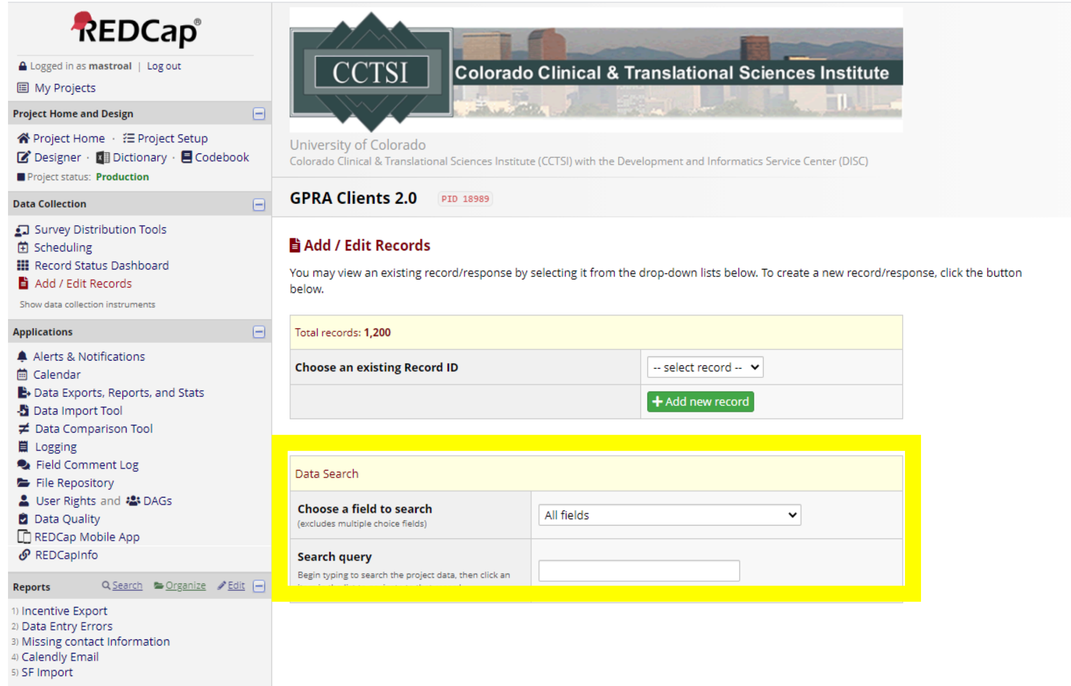
SOR Providers enter client data directly into the "SOR 3 GPRA Client Contact Form" and "SOR 3 GPRA Intake Survey." You will access the data collected in both forms. Primarily, you will use the Client Contact Form to look up, verify, and update client contact information. You will also look up clients' GPRA Intake Surveys to view clients' birth months/years which are used to verify client identities over the phone. You will not update the data in the GPRA Intake Surveys, if a birth month/year is incorrect and needs to be updated contact the GPRA Data Manager.

Steps for Navigating REDCap

1. When you log into your REDCap account (https://redcap.ucdenver.edu/), navigate to the "My Projects" tab at the top of the page. The GPRA Data Manager will add you to the "SOR 3 GPRA Client Contact Form" and "SOR 3 GPRA Intake Survey" projects. On the project homepage, you will be able to view how many total client records have been entered and can use the "Add/Edit Records" function to search for clients.



2. Then, in the data search table, search all fields and paste the client ID that you are searching for in the search query box. If the client ID is in REDCap, it will populate in a drop-down list below the search query box. Once you see the client ID that you are looking for, click on it to select that record. You can also search other fields, such as phone number or email address, by changing the field to search from all fields to the desired field. If you have any issues finding a client, contact the GPRA Data Manager.



3. Once you select the client ID (or other field) in the search query box, this will take you to the client's REDCap record. Here you will either view the client's contact information (client contact form) or access their birth month/year (GPRA Intake Survey) depending on which form you were searching. When verifying contact information, be sure to verify the following fields:

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

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

GENERAL SALESFORCE NAVIGATION AND USAGE

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

SALESFORCE TRAILHEAD

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

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

Salesforce Basics

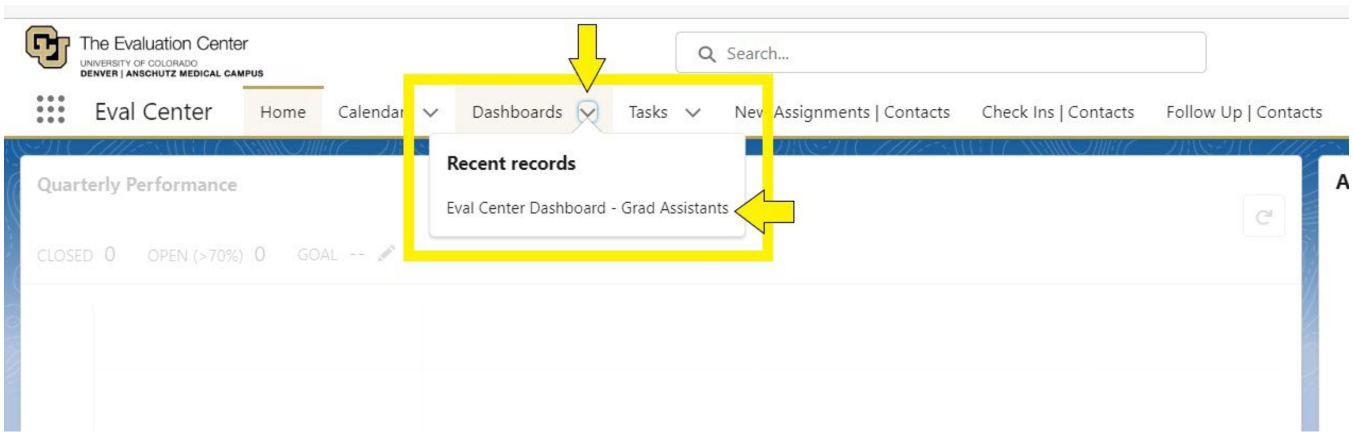
Salesforce CRM

Salesforce User Tour

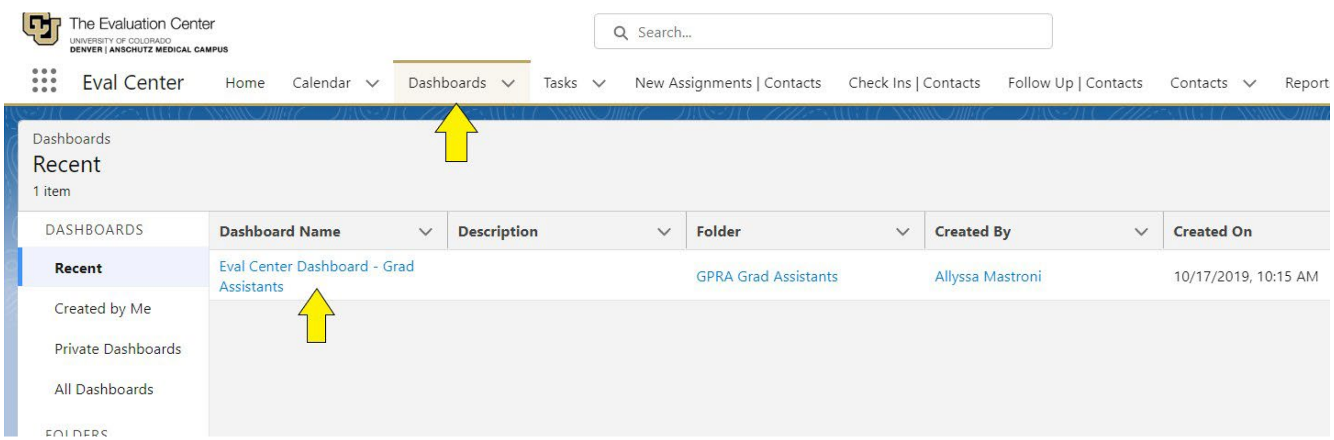
SALESFORCE DASHBOARDS

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

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

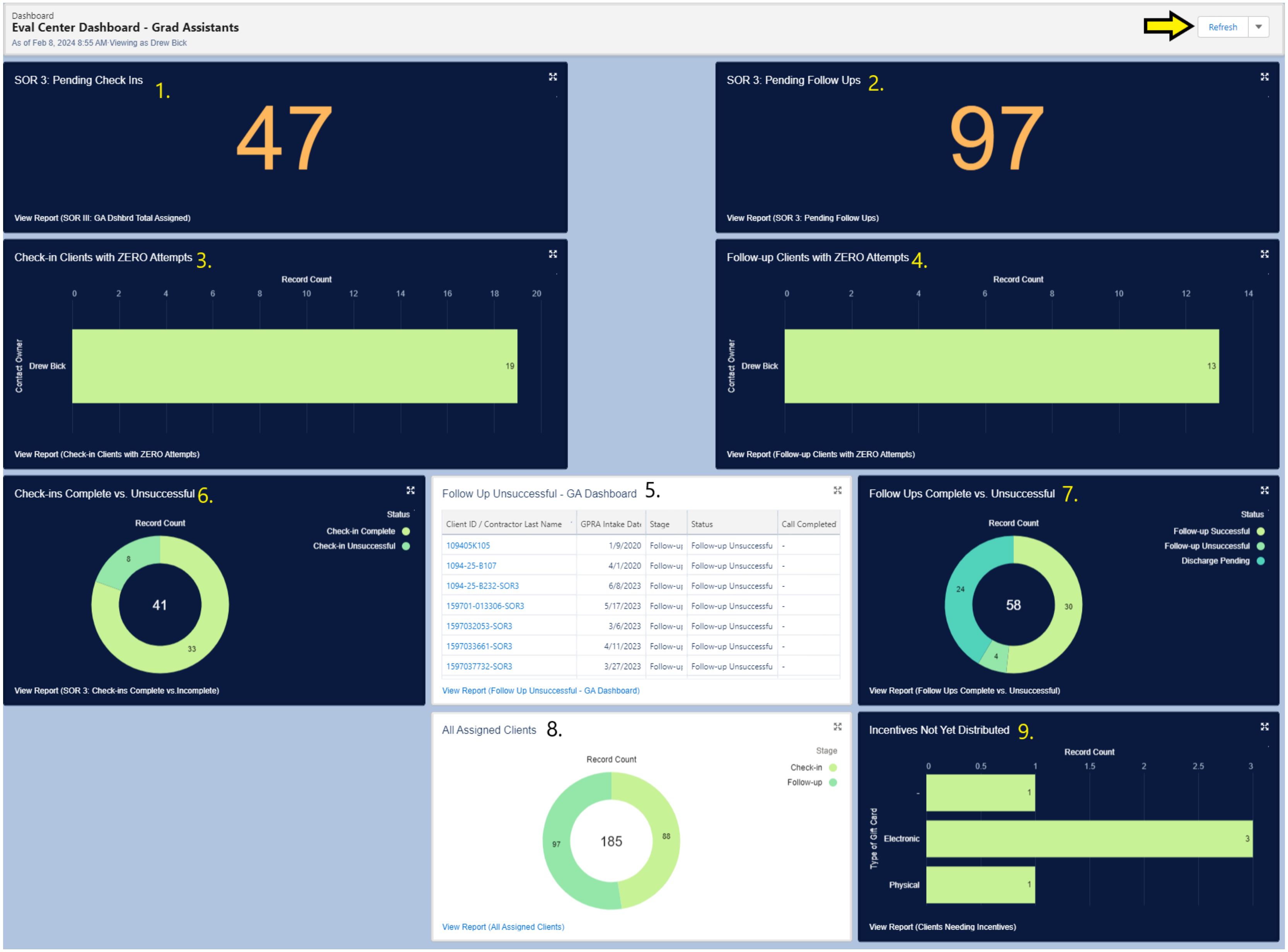


2. Click on the "Dashboard" object and then selecting "Eval Center Dashboard – Grad Assistants" on the next page.



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

The dashboard is a helpful resource so that you can easily see your current client caseload broken down by check-ins (1) and follow-ups (2), your current clients with zero attempts (3 & 4), and clients that are currently due for administrative follow-up (5). You can also see your current success rates for check-ins and follow-ups (6 & 7) and an overview of "All Assigned Clients" (8). "Incentives Not Yet Distributed" (9) is a snapshot of clients who have a completed follow-up but for whom the GPRA Data Manager has not yet sent a gift card.

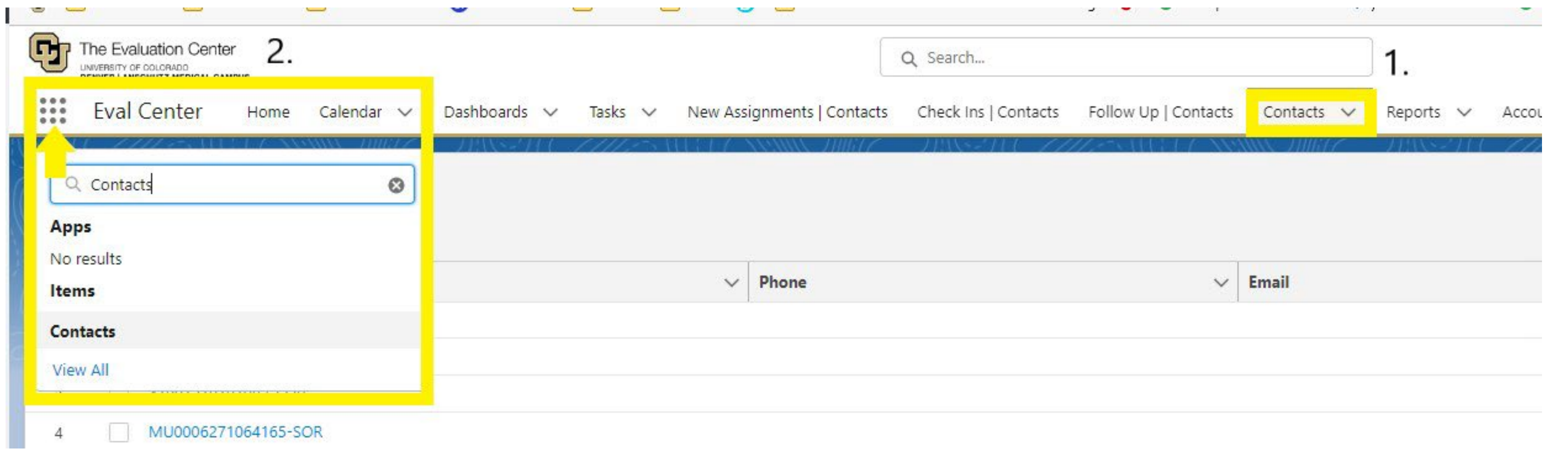


SALESFORCE CONTACT LISTS

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

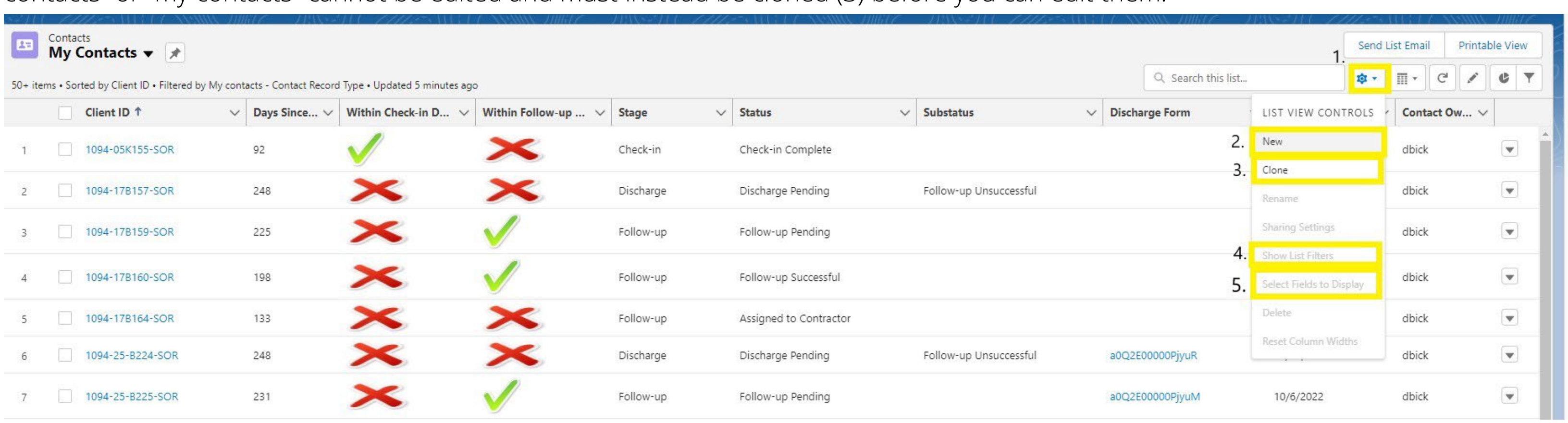
Creating New Contact Lists

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



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

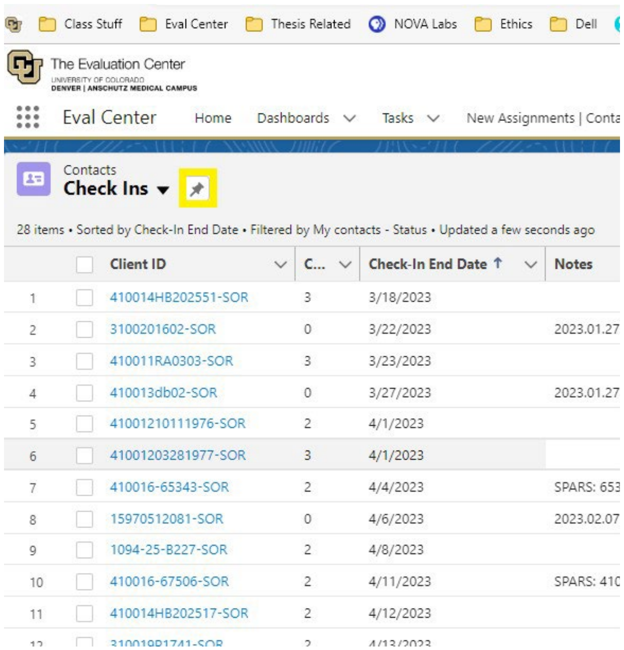
Once your new list is created you can use the gear icon again (1) to edit the list filters (4) and the fields/columns (5) which display. Certain default lists such as “all contacts” or “my contacts” cannot be edited and must instead be cloned (3) before you can edit them.

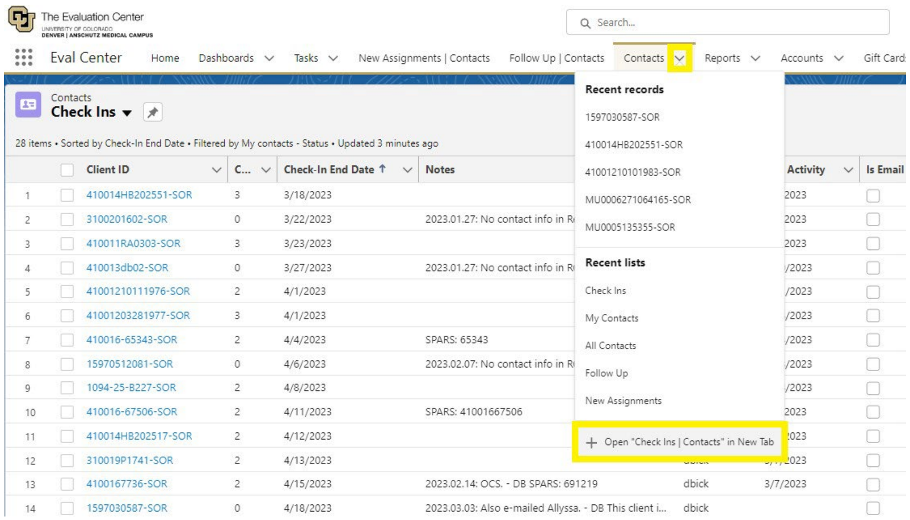


Once you have created a new contact list, you can pin it using the pin button so it is the first contact list you see when you use the contacts tab.

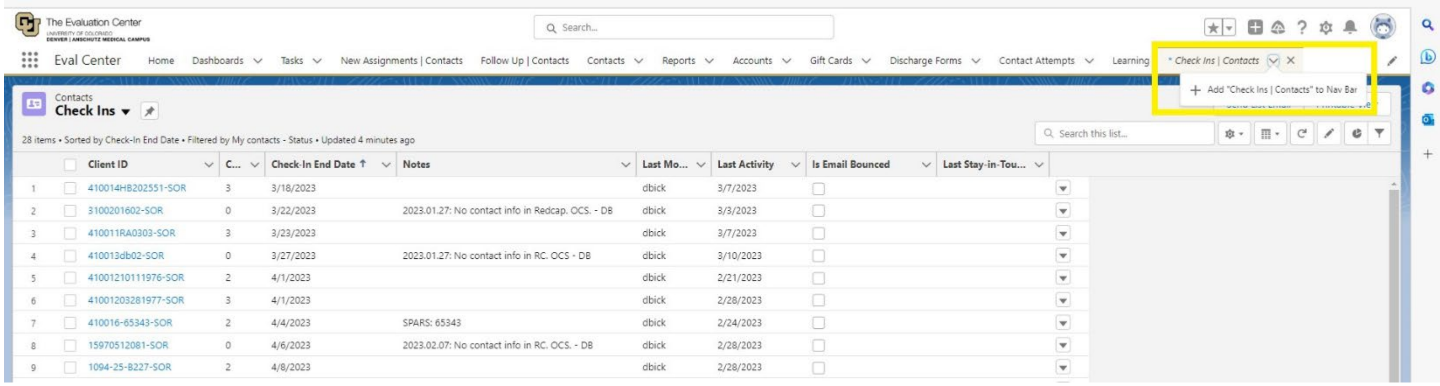
You can also add a tab for a particular list. When in the list, click the drop down to open the contact's tab recents list. Go to the bottom and click "open [name of current open contact list] in new tab."

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



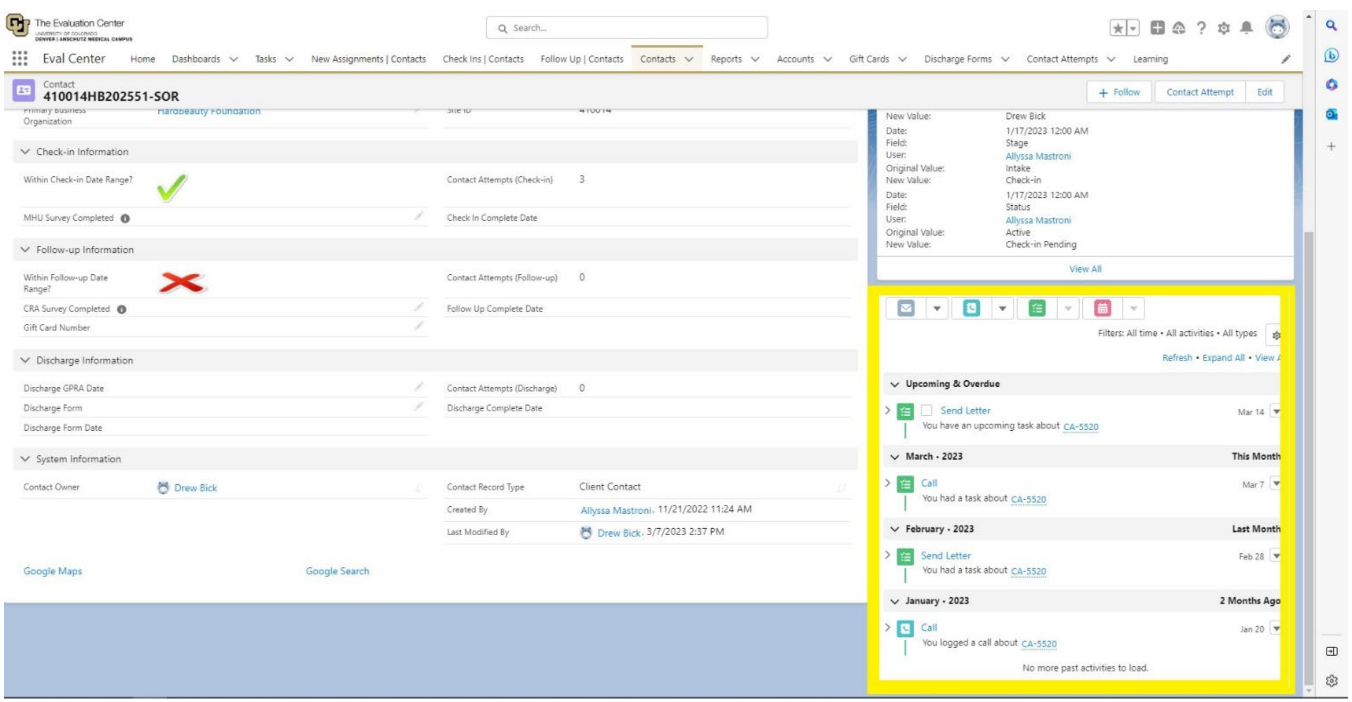


CREATING TASKS

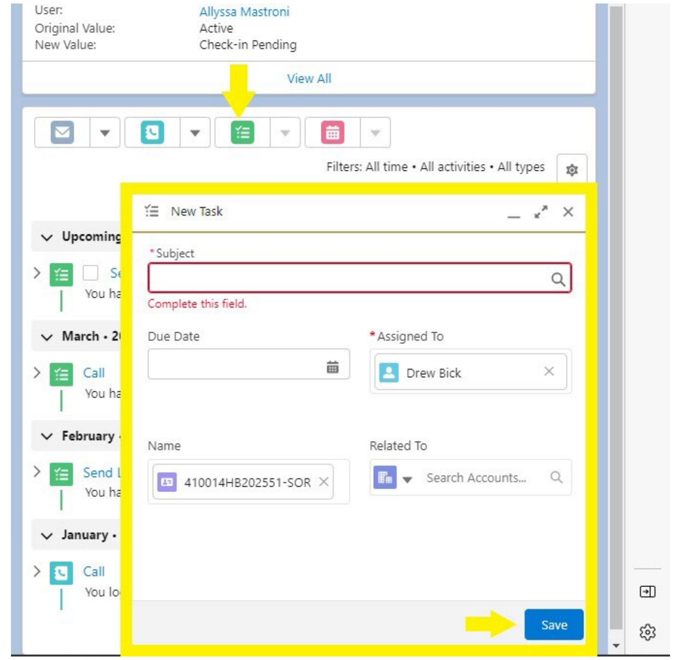


Tasks are another great way you can use Salesforce to help stay organized and on top of your client load. Salesforce already has a few default task lists; however, similar to the way you can create and manipulate contact lists, you can create different tasks lists to what suits you. You can also add specific tasks lists to your navigation bar in the same way you can do so with contact lists (see image to the right). When completing/closing out tasks, this will also populate a date in the "last activity" field that can be displayed in contact lists.

<u>IMPORTANT</u>: when utilizing tasks, it is important that you still use the "complete" and "incomplete" attempt buttons as outlined in the section below. Tasks and their ensuing activities do not count toward contact attempts. While we know this does slightly duplicate work, there is no other workaround currently.



In order to utilize and create tasks, you will first need to navigate to a client contact record. You will find that tasks pane in the bottom right corner. To create a task, you will click on the green box with the checkmark at the top. This will open a pop up which will let you quick enter the fields below. Don't forget to click save when you are done.



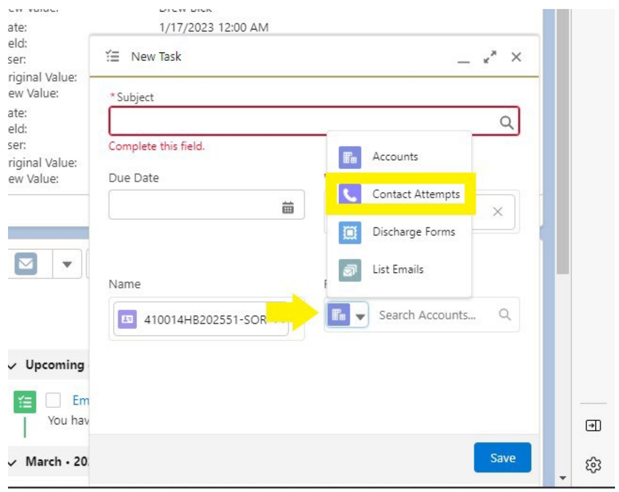
1. Subject: this can be the method of contact you'd like to use. Some defaults will drop down which you can use. You can also type anything you want into this field.

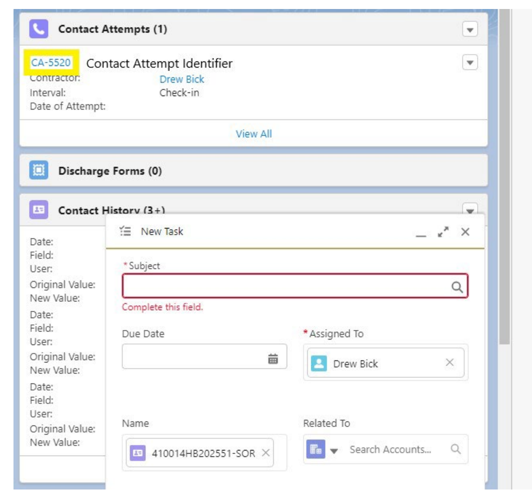
2. Due Date: this is the day the task will show up in your default "today's tasks" list. Note that if the task is overdue, it will also show up in this list. However, overdue tasks will only show up in the default today's task list for 30 days past their due date. Once they are 30 days past due they can only be viewed in the "overdue" tasks list or any custom lists you have made.

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

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

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





GENERAL INSTRUCTIONS FOR LOGGING CONTACT ATTEMPTS

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

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

Contact attempts can be either complete, or incomplete. A complete attempt is defined as:

- The client answered the call, and completed the necessary data collection for the interval you are calling about.
- The client responded to an e-mail or text message indicating they remember the survey and are still interested in participating (check-in only).

An incomplete attempt is defined as, an attempt in which you were unable to complete the appropriate data collection or verify recollection of the study and continued interest in participation due to client availability (i.e. phone number is disconnected, client hung up or asked you to call at another time, you left a voicemail, etc.). All text message and email attempts will, by default, be classified as unsuccessful when initially logging them in Salesforce. The remainder of this chapter outlines how to record contact attempts in Salesforce.

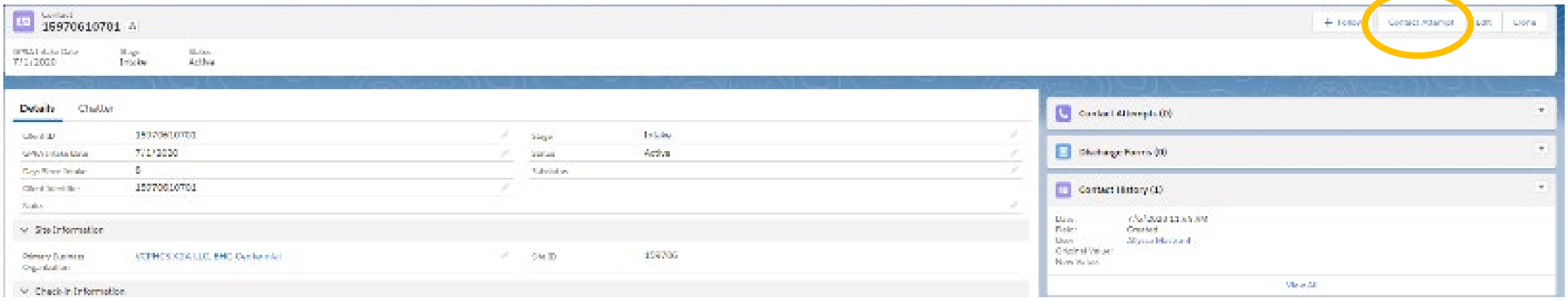
Remember: if a client call is considered complete via text message or e-mail, that have not *technically* verified the clients identity and thus should not send any identifying information such as the client facing website or the name of the clinic.

CREATE A MASTER CONTACT RECORD

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

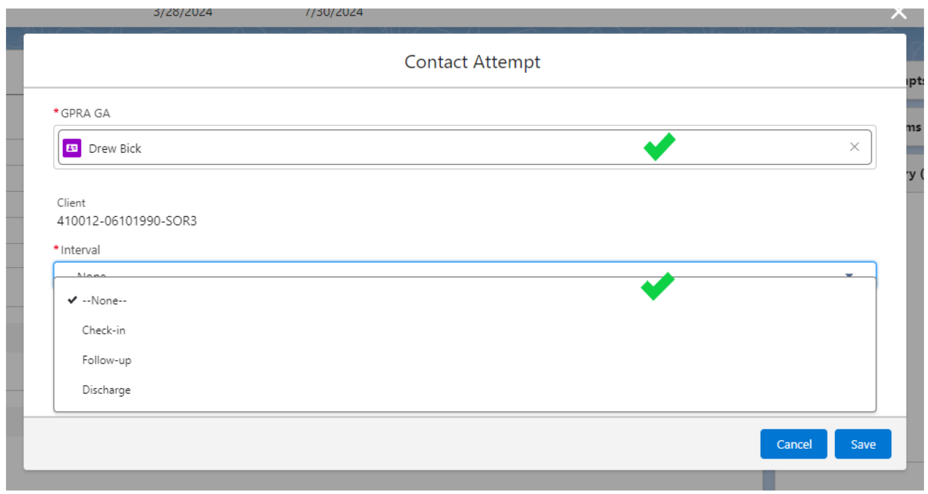
STAGE	TIMELINES
Check in	60-120 days since intake
Follow up	150-240 days since intake
Discharge	Can occur at any point

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



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

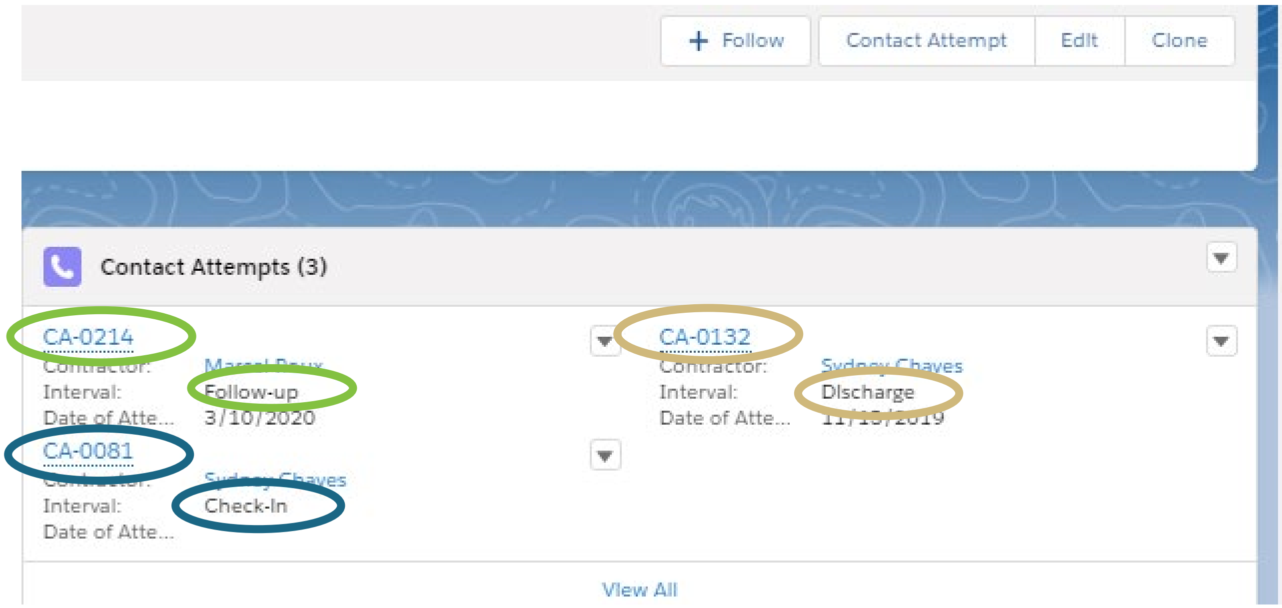
Only one master contact record should be created per stage/interval. Each individual contact attempt made within the given stage will be recorded within the master contact record for that appropriate interval. Each master contact record will be visible on the client record and the maximum number of master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



RECORD A CONTACT ATTEMPT

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

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

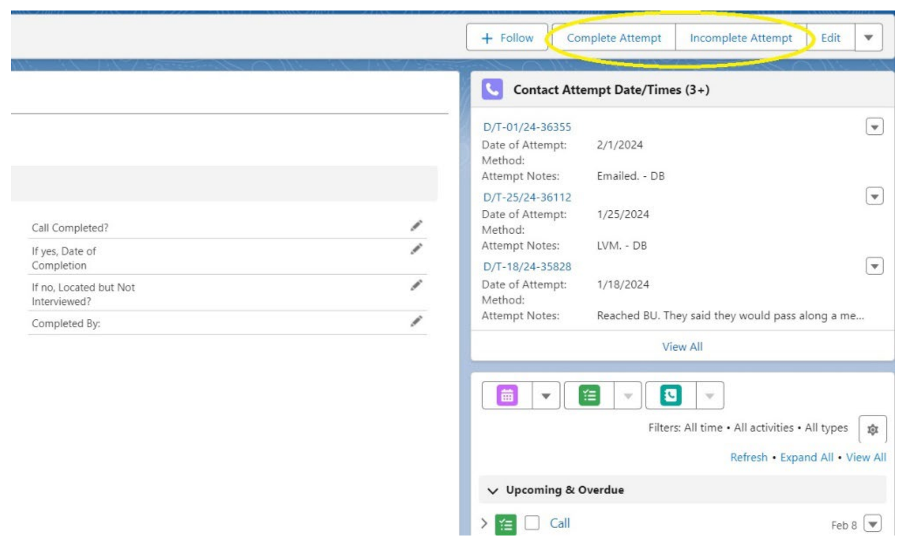


Individual contact attempts made for the given stage/interval are recorded by clicking on the corresponding master contact record (CA-###) and then selecting either "complete attempt" or "incomplete attempt." The method of contact attempts should match the method you used unless recording an administrative entry.

Contact Attempts

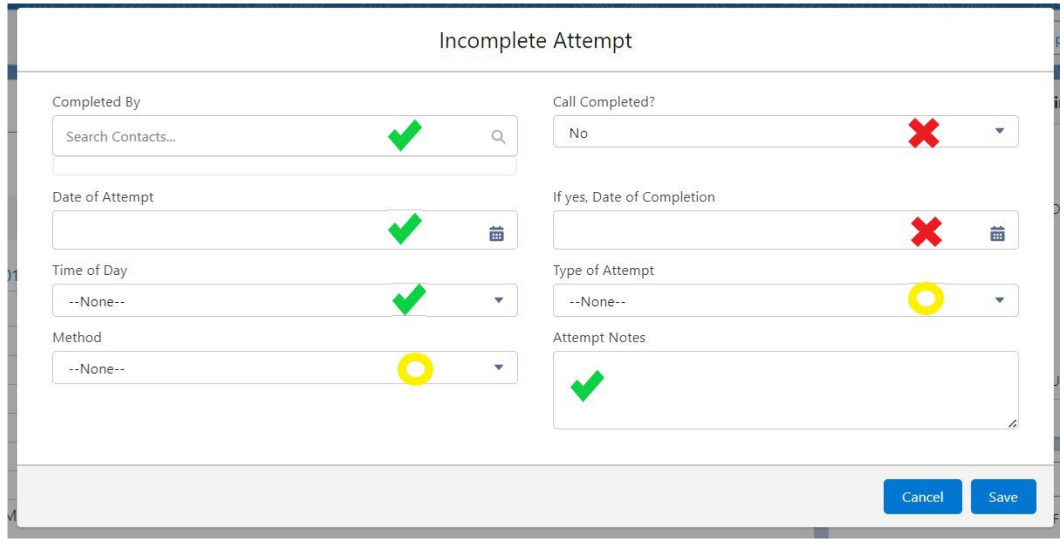
Now that you are in the master contact record for the appropriate interval, select the type of attempt you wish to record, either "complete attempt" or "incomplete attempt." Generally, most attempts you log will be considered incomplete.

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



Incomplete Attempts

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



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

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

<u>IMPORTANT</u>:

- If "okay to text message" is not selected on the contact form, do not contact the client via text message. You can edit the record and check the "no" box in this instance.
- If you are hung up on three times while making contact attempts during any stage, you should consider the client as refusing to participate and terminate them appropriately.
- During the check in phase, if four unsuccessful attempts are logged, Salesforce will automatically change the status to "check in unsuccessful." No further action is required at this time, though you may still make contact attempts if necessary.

Successful Attempts

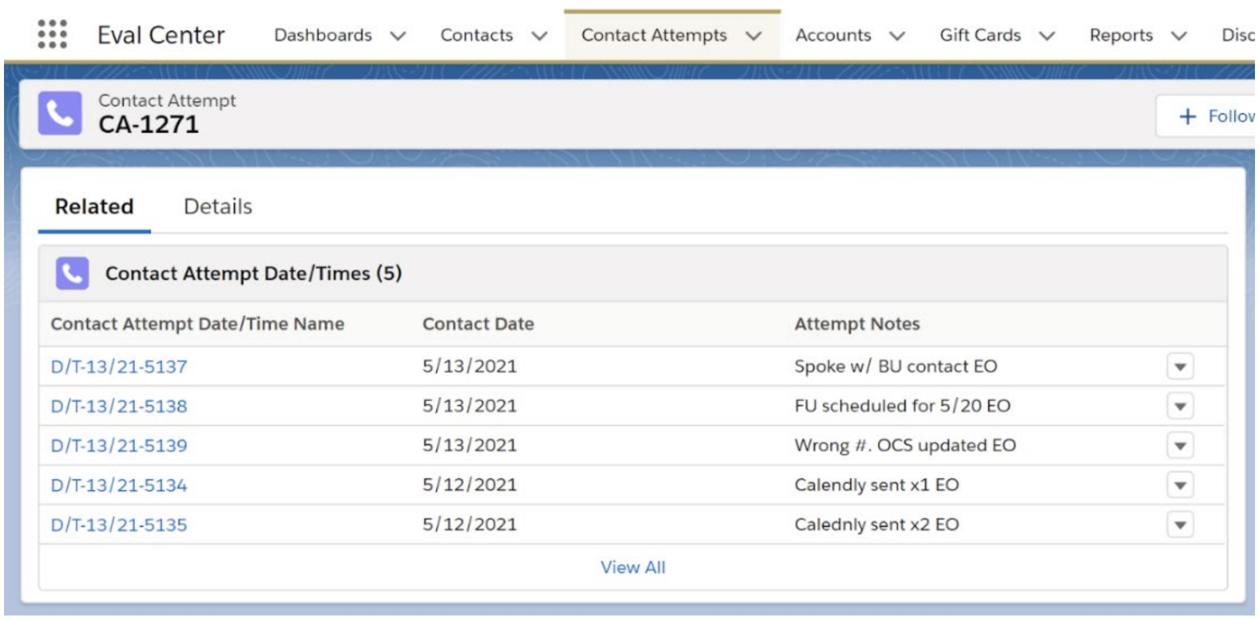
How to log successful attempts will be explained in detail in future sections of this manual.

SHORTHAND NOTES AND INSTRUCTIONS

Because GAs make numerous contact attempts each day, the following table outlines some shorthand that has been used by current and past GAs to increase notetaking efficiency. If you have additional shorthand suggestions, please bring them to the weekly GPRA team meeting so that we can discuss as a team and potentially add them to this manual. Keep in mind that each contact attempt note should include your initials, so we are able to quickly tell who logged the note.

Taking thorough and accurate notes for each contact attempt allows for efficient communication with clients and across our internal team. Notes support our team's ability to understand the clients' contact history and allows for smoother client reassignments. The image below provides an example of these notes as they would appear across several contact attempts. More detail is always better than not enough!

Shorthand	Meaning	Example
LMTCB	Left Message to Call Back	*"LMTCB x1"*
VM	Voicemail	*"VM full"*
CB	Call Back	*"CB after 5 pm"*
FU	Follow Up	*"FU completed"*
W/	With	*"Spoke w/ client"*
BU	Back Up (contact)	*"Spoke w/ BU"*
OCF	Outdated Contact Form	*"OCF updated"*
NIS	Not In Service	*"# NIS"*
VMBF	Voicemail Box Full	*"Called, VMBF"*
DOB	Date of Birth	*"verified DOB"*
TCFW or ECFW	Texted/Emailed Client Facing Website	*"CI Complete, TCFW."*
UTLVM	Unable to Leave Voicemail	*"Called. UTLVM."*



DATA ENTRY INSTRUCTIONS

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

- Check-in Attempts
- Follow-up Attempts
- Follow-up Interview (Successful Attempt)
- Administrative Follow-up
- Discharge Interview (Successful Attempt)
- Administrative Discharge

CHECK IN ATTEMPTS

The purpose of check-in attempts is to verify the client remembers and is still interested in participating in the study, and verify/update their contact information as needed. When making a call, you will also verify birth month/year, and contact information (including back up contacts). These attempts are also an opportunity to build rapport with the client and answer any questions that they might have about the survey. If making a phone call, you will verify the client's birth month and year which is available in REDCap – SOR III GPRA Intake Survey. If e-mailing or texting with a client, we do not attempt to verify DOB and do not give out any identifying information such as clinic name or what the services are.

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

Some GAs have used this attempt to actually schedule the client's follow-up call several months in advanced. If you use this strategy, please indicate so in the attempt notes as well as on the main contact page in the notes, and create a new event via Calendly. If the client is missing a required piece of information for Calendly scheduling, manually input the call into the Google Calendar.

All incomplete check in attempts should be logged in the clients Salesforce contact record as outlined in previous section.

Use the template below to draft check-in emails (this template is also saved as a draft in the GPRA Gmail account for easier access). Be sure to add the client's name and intake months to the bracketed text.

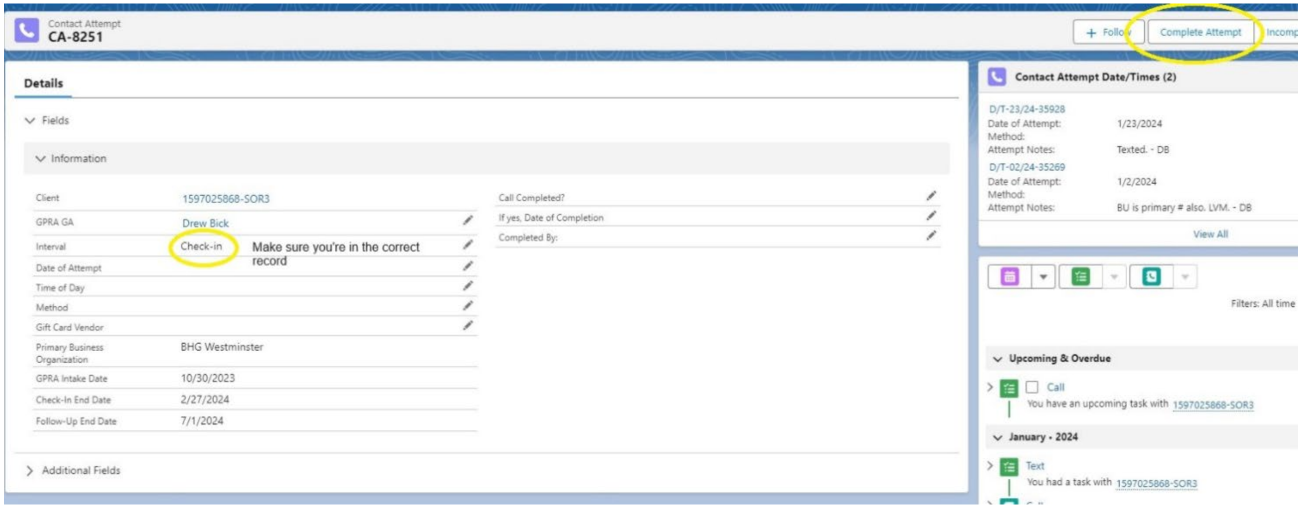
> Dear [Insert First Name],
>
> My name is [your name] and I work with the Evaluation Center at CU Denver. I'm reaching out regarding a health study you agreed to participate in related to some services you began receiving in [intake month]. The study involves completing a follow up survey in a month or two for which you'll receive a $30 grocery gift card for Kroger/City Market/King Soopers. I wanted to introduce The Evaluation Center, as we will be conducting the survey on your provider's behalf. I also wanted to make sure you're still interested in participating in the study and that your contact info is up to date. Please let me know if you are still interested in participating and if you have any questions feel free to e-mail me back or give me a call at [GPRA phone #]. If you have any questions and/or concerns, please do not hesitate to email us at healthstudyscheduler@gmail.com.
>
> We look forward to hearing from you!

IMPORTANT:

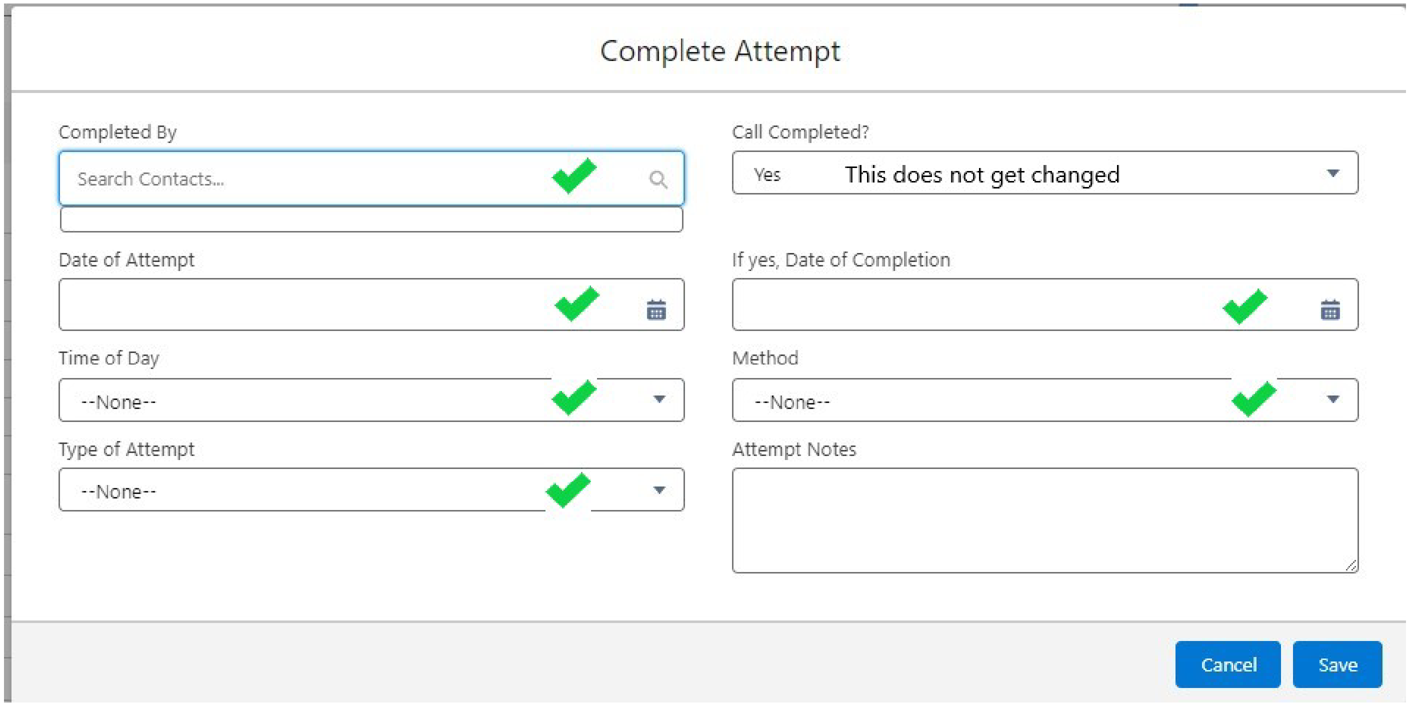
- If you encounter a birth month/year mismatch, apologize and thank the client for the time but do not share any identifying information. You will end the call and contact the GPRA Data Manager so that the discrepancy can be resolved.
- If the client reports no longer receiving services, let them know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

LOGGING A COMPLETE CHECK-IN IN SALESFORCE

First navigate to the master check-in contact attempt record. (If a master check-in contact attempt record does not exist, you can create one using these instructions.) Once in the check-in master contact attempt record, if your attempt is a brand-new attempt, press the "Complete Attempt" button.



A pop up will appear. Fill in all of the fields as outlined in the image below. The notes section may be left blank if there are no relevant notes.



FOLLOW-UP ATTEMPTS

When a client becomes eligible for follow up, GPRA GAs will make attempts to reach the client to conduct or schedule a time to conduct the survey. You can make phone calls, or send e-mails or text messages. An email or text message will include a reintroduction to the GPRA health study, The Evaluation Center, and reminder of the $30 incentive for participating in the follow-up. A Calendly link is also included in the email so that the client may schedule their follow up during a time that works best for them. If you had a successful check-in with the client, it may help to remind the client of when this was and who it was with if it was not you. An email should always be sent from the GPRA Health Study Scheduler Gmail account and should never be sent from individual email accounts. Text messages should always be sent from your GPRA phone and not your personal phone number.

Remember, if the current primary contact information is out of date, you should also contact the back-up contact. If the back-up contact is listed as the provider, do not contact them, instead, add this client to the Outdated Contact Form. The GPRA Data Manager contacts providers for updated contact information monthly. Use the template below to draft follow-up emails (this template is also saved as a draft in the GPRA Gmail account for easier access). Be sure to add the client's name and intake months to the bracketed text.

> Dear [Insert First Name],
>
> My name is [name]. I work with The Evaluation Center at CU Denver. We are reaching out to you regarding the GPRA health study you agreed to participate in at your appointment in [insert intake month]. As a part of the study, we would like to conduct an over-the-phone interview with you, which will take about 10-15 minutes. This interview will be the same interview that you completed in [insert intake month]. We appreciate you taking the time to participate and will send you a $30 grocery gift card upon completion of the interview.
>
> Please email us back to schedule a date and time that work best for you to complete the GPRA interview. You may also do so using our Calendly scheduler: https://calendly.com/healthstudyscheduler. You may expect a call from us at the time of your scheduled interview.
>
> We thank you in advance for taking the time to speak with us. The information you provide in the interview will be completely confidential and your responses will help to improve the health program you've been a part of over the last several months.
>
> If you have any questions and/or concerns, please do not hesitate to email us at healthstudyscheduler@gmail.com or give us a call at [your GPRA #].
>
> We look forward to hearing from you!

<u>IMPORTANT</u>:

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

SALESFORCE ENTRY

Once an attempt is made it should be logged in the clients Salesforce contact record as outlined in this section. It will count towards the total number of contact attempts made during the follow-up interval. In order to record the attempt, you must first create a follow-up master contact attempt if no previous attempts have been made. If a master contact record already exists for that interval, you should add this attempt to that record (see instructions in the "Follow-up Interview" section below). Then, log an "incomplete attempt" as outlined in the section above within this manual.

FOLLOW-UP INTERVIEW

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

- ✓ The client was contacted during the five to eight month follow-up window following the GPRA Intake Date. In most cases, the follow-up start date will be the same date of the month in which the intake occurred. E.g., if intake was done on March 23rd, 2024, then the follow-up window opens on August 23rd, 2024.
- ✓ The follow-up survey was administered and completed.

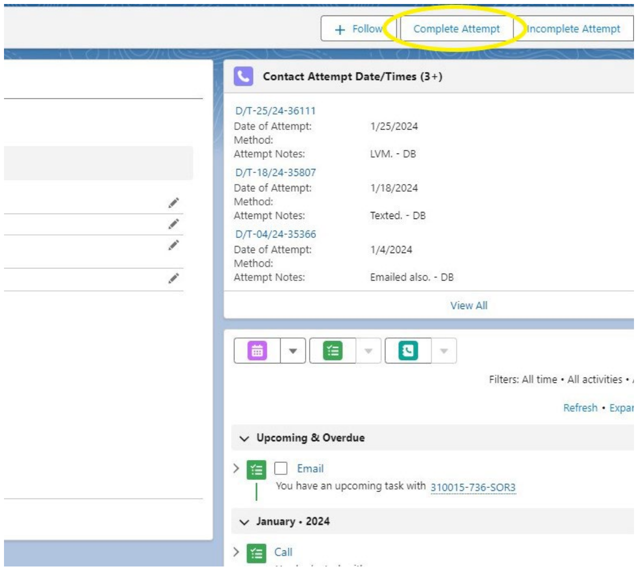
If the follow-up interview was completed, data entry in both REDCap and Salesforce is required.

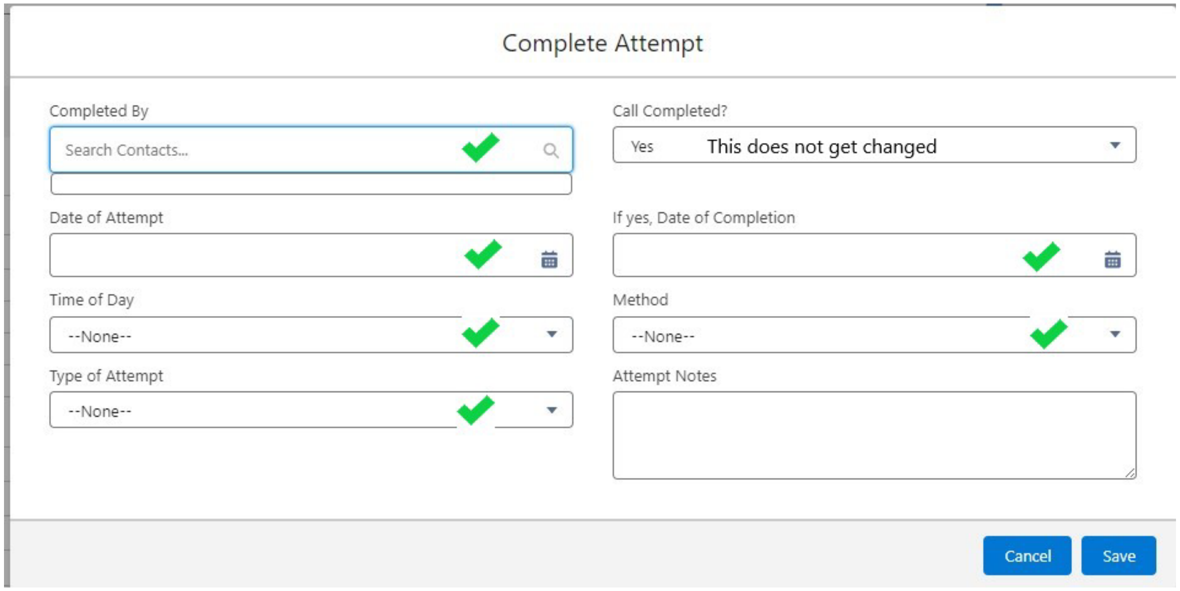
REDCAP ENTRY

First, use the REDCap SOR III GPRA Intake Survey to look up and verify client birth month/year. Then navigate to the REDCAP SOR 3 GPRA Follow-Up Survey to administer the follow-up survey. Navigate through the survey, asking all questions as they are written. You can always select the "refused" answer option if a client chooses not to answer. At the end of the survey don't forget to ask what type of gift card the client would like to receive (electronic or physical and Kroger or Albertsons) and then verify their corresponding email/mailing address in their REDCap Client Contact Form.

SALESFORCE ENTRY

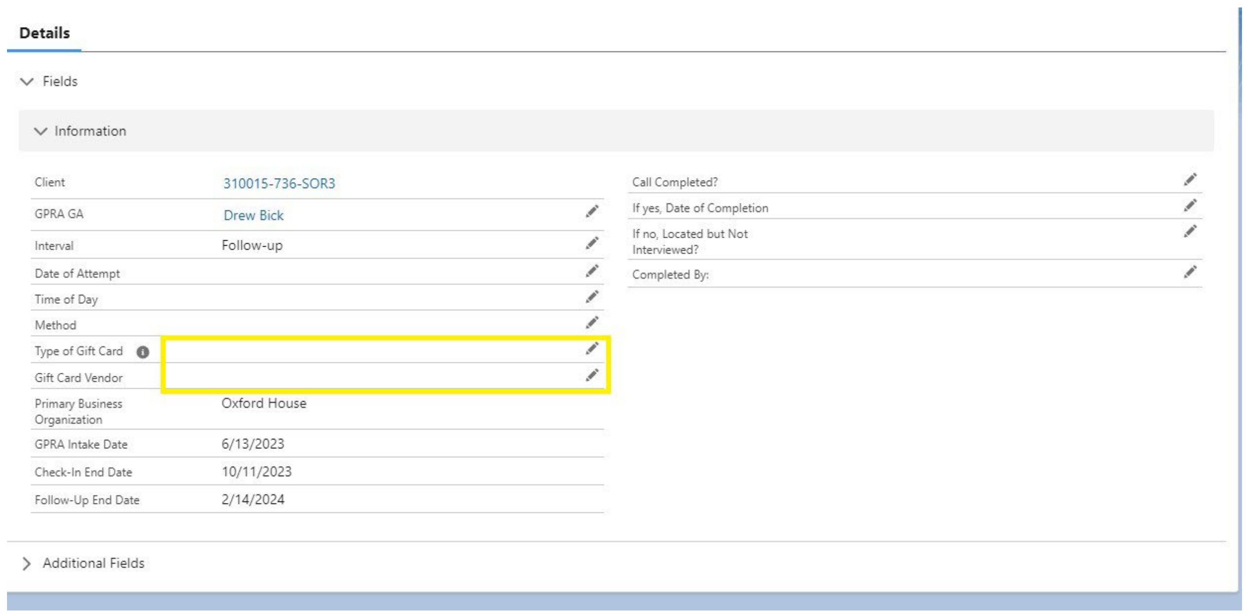
Once the follow-up is complete, the complete attempt should be recorded in Salesforce. Record a complete attempt in the master follow-up contact attempt by selecting "complete attempt" within the master contact attempt record. A pop-up will appear for your data entry. Complete the fields as displayed on the next page or as is applicable to your interaction.





After comleting these steps, you will record the gift card type and gift card vendor by selecting the pencil icons. Only do this after logging a complete attempt. If you are to do this step before logging a complete attempt, Salesforce will, unfortunately, erase the data entry in these two fields.

It is important that the completed follow-up is recorded correctly in Salesforce for the weekly report to determine which client's incentives need to be distributed.



ADMINISTRATIVE FOLLOW-UP

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

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

SPARS ENTRY

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

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

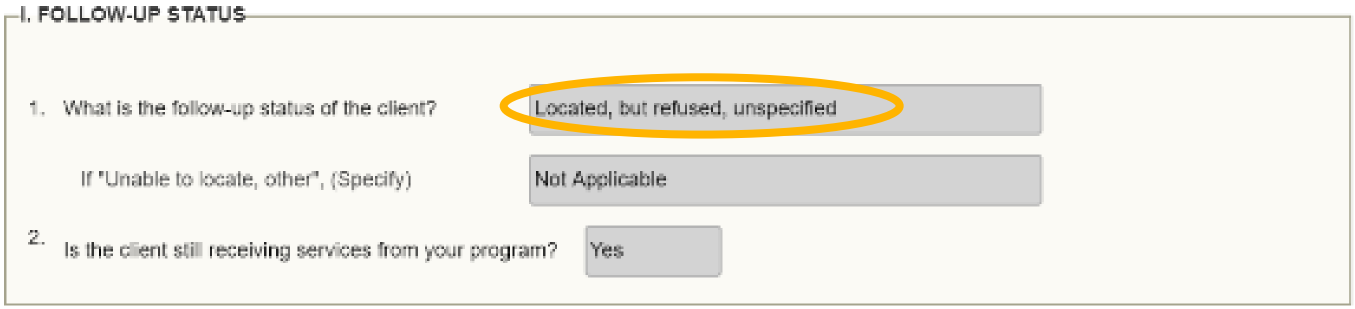
Only entries with "Completed interview within specified window" will satisfy the grant follow-up target. All other submissions will be considered an administrative follow-up. Therefore, the answer to "Did you conduct a follow-up/discharge interview?" must be "No" and the follow-up status should be "Located,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

- Deceased at time of due date
- Located, but refused, unspecified – used when a client refuses to participate
- Located, but unable to gain institutional access – usually selected if a client is incarcerated or began treatment in a residential setting without access to commincations
- Located, but otherwise unable to gain access – this option is usually not used
- Located, but withdrawn from project – this option is usually not used
- Unable to locate, moved – this option is usually not used
- Unable to locate, other (specify) – this option is usually not used

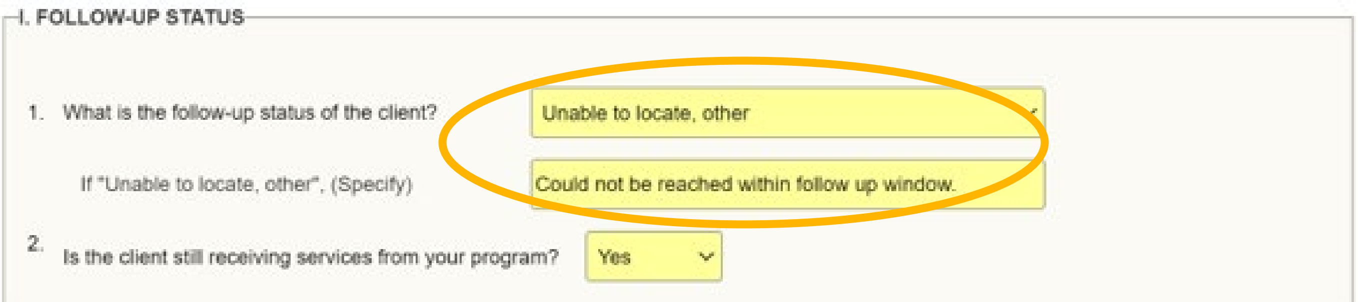
A. RECORD MANAGEMENT

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

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



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



SALESFORCE ENTRY

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

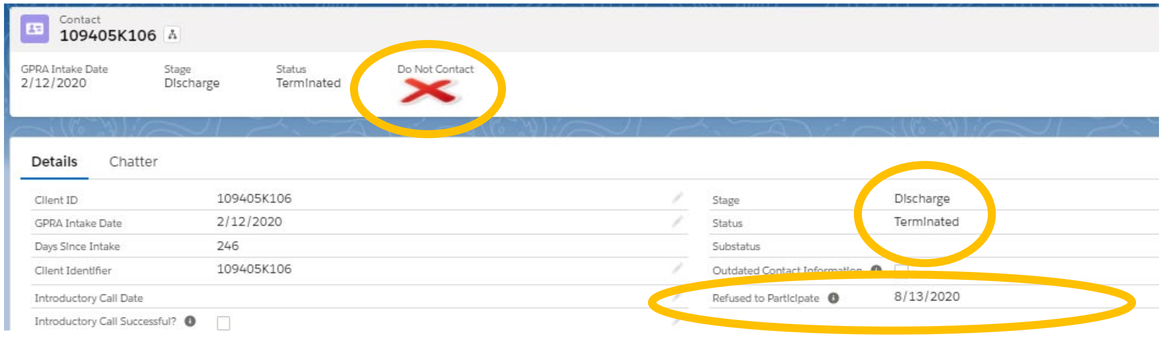
Client Refusing to Participate

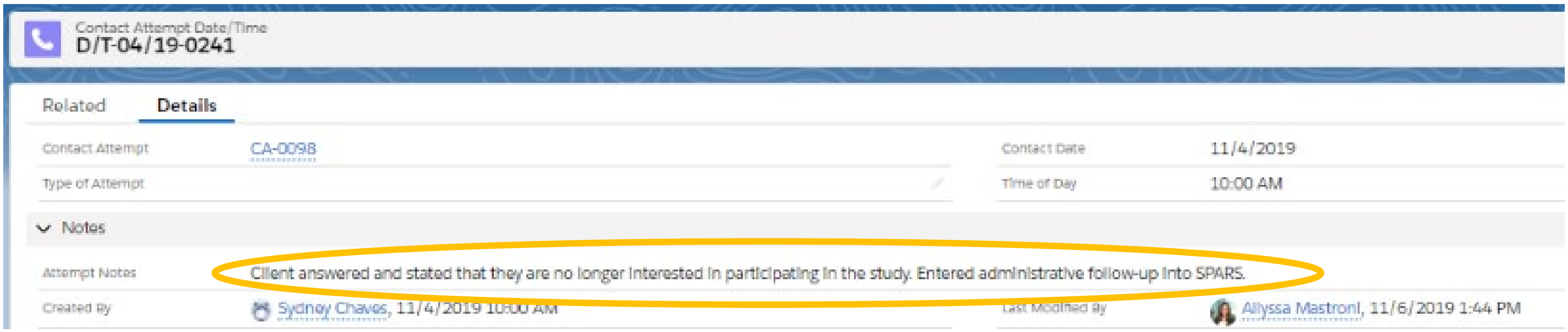
Although clients consent to participating in the GPRA health study during their intake appointment, they may revoke consent at any point during their recovery journey. If a client refuses to participate, complete an administrative follow-up in SPARS.

In addition, this refusal needs to be recorded within Salesforce. To do so, navigate to the clients' record (profile page) and edit the record by clicking any of the pencils. Record the date that the client refused to participate. This will populate the red "X" in the header, which designates that the client should no longer be contacted.

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

Finally, within the follow-up master contact attempt notes, note that an administrative follow-up was entered into SPARS and describe why it was entered. If this occurs during the client's check-in window, create a master follow-up contact attempt in which to complete the administrative follow-up.

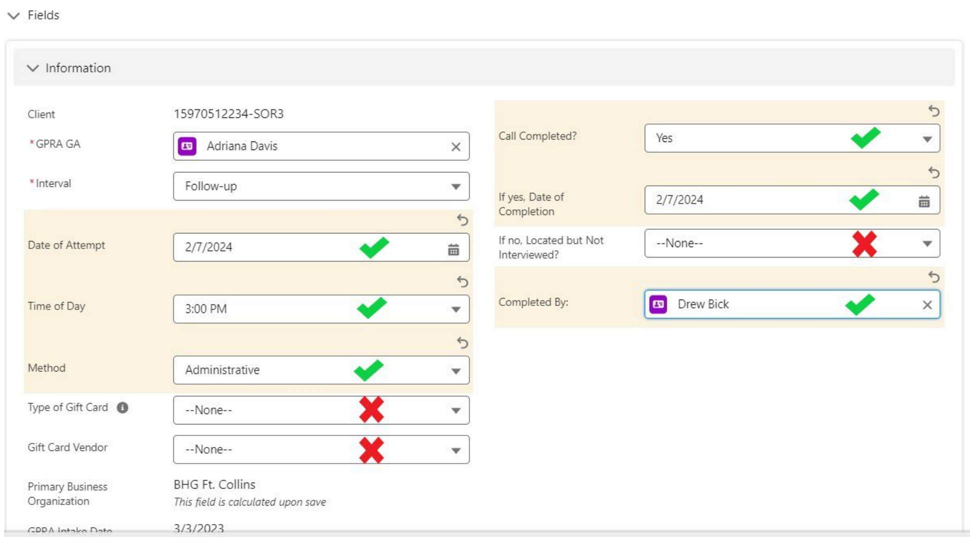




Clients Unable to be Contacted During the Follow-up Window

When recording an administrative follow-up in Salesforce for a client that was unable to be reached during their follow-up window, navigate to the client's follow-up contact attempt and select any of the pencil icons to edit the attempt.

Then, complete each field as shown in the example below.



DISCHARGE INTERVIEW

Discharge interviews can occur at any point throughout a client's recovery journey, and do not impact their eligibility to participate in follow-ups/receive incentives. Discharges are considered successful if they meet the following criteria:

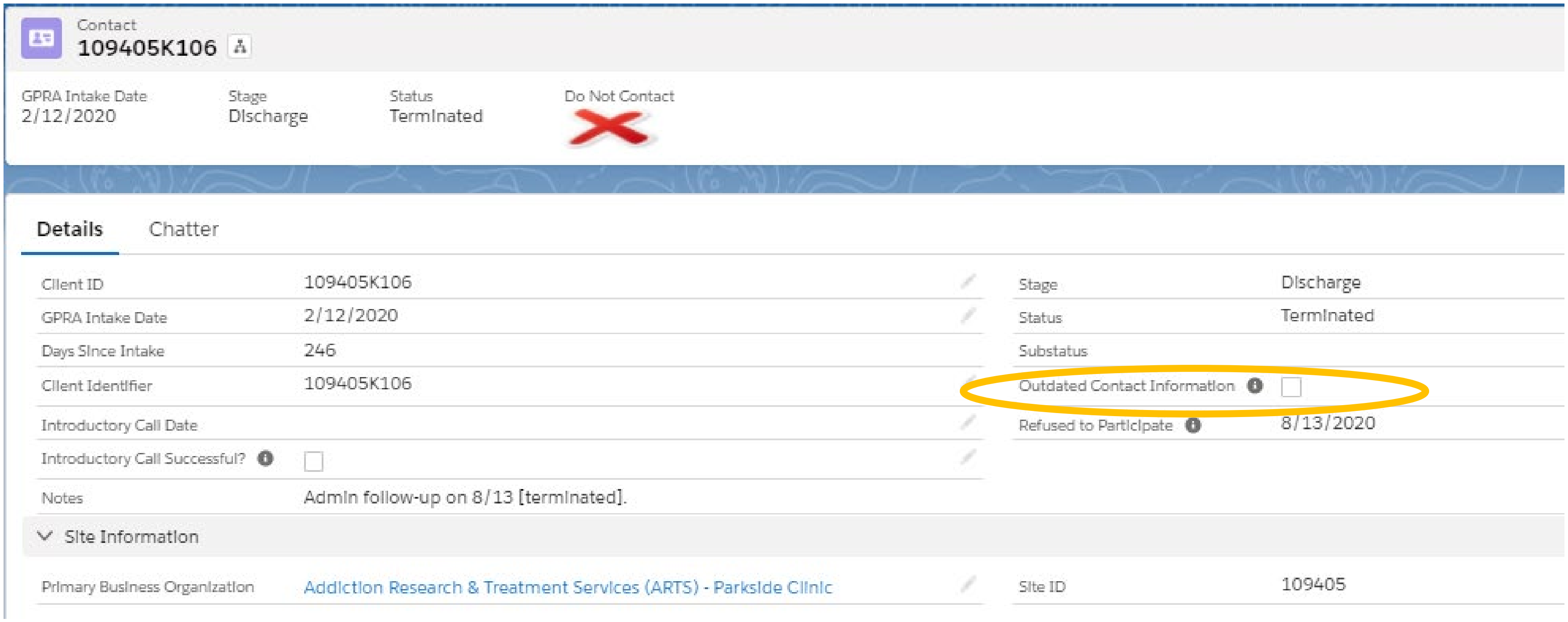
- ✓ The client discharged from treatment (a discharge form was submitted), and
- ✓ The discharge interview was administered and completed within 14 days of their discharge date.

We are still required to attempt to complete a follow-up with clients who were discharged from services even if they were discharged prior to their follow-up window.

The GPRA Data Manager will notify you if a discharge interview needs to be completed and will discuss data entry steps at that time.

OUTDATED CONTACT INFORAMTION

There are times when a client's contact information becomes outdated or otherwise invalid. Examples of this include disconnected or out-of-service phone numbers, numbers that no longer belong to the client, e-mails that bounce back or simply if there is no contact information in REDCap to begin with. If this is the case, check the "Outdated Contact Information" box in Salesforce and record the client in the Outdated Client Contact form on Teams. The GPRA Data Manager monitors the list and contacts clinicians/treatment site staff on a weekly basis. If the clinician provides updated contact information, the GPRA Data Manager will mark the record as resolved in the tracker, uncheck the box in Salesforce, and enter the updated contact information into the client's REDCap record. Only add to this form if *all* contact methods are not working. If there are two main methods and one works, e.g., phone # doesn't work but e-mail does, then do not add to the form.



Note: We sometimes find that the number will be back in service and the client can be reached at a later time. Thus, numbers that are not in service should still be contacted periodically. Also be sure to check the reasons for an e-mail bounce back and notate that in your Salesforce notes. Depending on the reason for the bounce back, you may want to try e-mailing again at a later date. You may also sometimes find that you can cross-reference an e-mail address with the client name or other identifying information and identify a typo. Or you may notice a typo in an easily recognizable domain. Feel free to try some different fixes and try again!

GAs should continue making follow-up contact attempts to the clients' designated back-up contacts even when the client's primary contact information is outdated.

STAGE/STATUS/SUB-STATUS AUTOMATION AND WORKFLOW

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

STAGE/STATUS/SUB-STATUS DEPENDENCIES

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

Stage/ Interval	Status	Sub-status	Assignment	Actions/Tasks	Notifications
Intake	Active	–	GPRA Data Manager	Contact record is imported into Salesforce	All Contacts List View
Check-in	Check-in Pending	–	GA	At 60 days post intake, the client will be assigned to a GA (via round robin assignment). The GA will attempt to contact the client to check-in and verify contact information (possibly ask additional questions to inform the peer or mobile health unit evaluation, if applicable). This is automatically recorded.	Check In Due List View
Check-in	Check-in Complete	–	GA	This is automatically updated when the GA has completed the check-in call.	Check In Completed List View
Check-in	Check-in Incomplete	–	GA	This is automatically updated when there have been four unsuccessful contact attempts recorded.	Check In Completed List View

Follow-up	Assigned to GPRA GA	–	GA	At 120 days post-intake, clients will be re-assigned, this may or may not be the same GA they were previously assigned to. At this point the follow-up window has not opened yet; however, GAs should use the next thirty days to assess capacity for completing follow-ups. This is automatically updated.	My Contacts List View
Follow-up	Follow-up Pending	–	GA	At 5 months post-intake, the follow-up window opens. The GA will begin attempting to contact the client to complete the follow-up interview. This includes sending a Calendly link via email and beginning phone calls. This is automatically updated.	Follow Up Due List View
Follow-up	Follow-up Pending	Survey Discharge Pending	GA	If the client is discharged during their follow-up window, you may combine the follow-up and discharge interview. (GPRA Data Manager will provide instruction.) This is manually recorded by the GPRA Data Manager whenever a discharge form is submitted.	Combined Follow up/ Discharge List View
Follow-up	Follow-up Successful	–	GA	This is automatically updated when the follow up is completed.	My Contacts List View
Follow-up	Follow-up Unsuccessful	–	GA	If follow-up successful is not recorded as a status by 8 months post intake date, the status will automatically change to Follow-up Unsuccessful. An administrative follow-up should be entered at this time.	My Contacts List View
Discharge	Discharge Pending	Follow-up Successful	GA	This change is manually made by the GPRA Data Manager and denotes that the follow-up interview was completed and the client is awaiting discharge. If the discharge date is within the past 14 days, the discharge survey will be attempted.	Assigned Discharges List View
Discharge	Discharge Pending	Follow-up Unsuccessful	GA	This change is manually made by the GPRA Data Manager and denotes that the follow-up interview was unsuccessful and the client is awaiting discharge. An administrative discharge should be entered into SPARS within 14 days of	Assigned Discharges List View

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

Discharges: The GPRA Data Manager will manually make all status/sub-status changes when discharge forms are submitted.

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