SBIRT Refresher Training

FOCUS: RE-ASSESSMENTS AND FOLLOW UP’S

TAYLOR D’ADDARIO
Grounding Exercise

5 4 3 2 1
GROUNDING TECHNIQUE

5 things you can see
4 things you can feel
3 things you can hear
2 things you can smell
1 thing you can taste
Why Follow Up?

- Learn how clients are doing after treatment
- Find out what contributes to clients’ long-term success
- Understand which clients drop out and why
- Document treatment agency success
- Learn what support services clients need after treatment
- Get client feedback on a program
- Help relapsing clients return to treatment
- Support clients in their recovery efforts
Integrating Follow-Up into Your Work Day

- How do you currently integrate Follow ups into your work day at your agency?
Techniques and Sources of Information To Locate Clients

- Re-assessment Coordinator Luz Roman 401-408-0298
- Locator Tracking Form
- Electronic Health Records
- Current Care Access
- Mail Contacts
- Social Media Contacts- Facebook
- Phone/ Texting Contacts
- Internet Searches
- Home Visits
- Team meeting discussion of clients who are unlocateable
- Homeless Clients
Follow up Workflow

SBIRT conducted; Locator tracking form completed

Any client selected for follow up is notified within 1 week. Additional contact information is collected. Client is notified about when they can expect to be contacted again.

At the 4 month mark, client is sent the letter/postcard about the $5 bonus card.

If client did not proactively outreach prior to the 4 month mark, start outreach efforts.
Clients Who Are Resistant to Follow Up

- Active Refusal
- Passive Refusal
- Non-Trustors
- When to Take ‘NO’ For an Answer
## How Many Times Do You Outreach a Client?

<table>
<thead>
<tr>
<th>Client</th>
<th>Outreach Attempts for this Month</th>
<th>Attempts Start Date</th>
<th>Client Reached Date</th>
<th>Methods Used</th>
</tr>
</thead>
<tbody>
<tr>
<td>301100477500453</td>
<td>8</td>
<td>08/16/2019</td>
<td>Unable to Locate</td>
<td>Mailed bonus letter, search on EPIC, called number (phone not in service), coordination with DOC screener for additional information.</td>
</tr>
<tr>
<td>3011004800003036</td>
<td>8</td>
<td>08/16/2019</td>
<td>Unable to Locate</td>
<td>Participated in client tracker form, mailed bonus letter, called, texted, searched on EPIC.</td>
</tr>
<tr>
<td>301100480500478</td>
<td>8</td>
<td>08/29/2019</td>
<td>Pending</td>
<td>Called, texted, search on EPIC, mailed out bonus letter.</td>
</tr>
<tr>
<td>301100495500494</td>
<td>8</td>
<td>09/25/2019</td>
<td>Pending</td>
<td>Called, texted, and searched on EPIC.</td>
</tr>
<tr>
<td>301100497500508</td>
<td>8</td>
<td>09/25/2019</td>
<td>Pending</td>
<td>Called, texted, emailed, sent bonus letter, and searched on EPIC.</td>
</tr>
<tr>
<td>30110060161000896</td>
<td>7</td>
<td>10/03/2019</td>
<td>Pending</td>
<td>EPIC search and Current Care search, no current information found yet.</td>
</tr>
<tr>
<td>301100486500537</td>
<td>8</td>
<td>10/17/2019</td>
<td>Pending</td>
<td>Called, EPIC search, mailed bonus letter.</td>
</tr>
<tr>
<td>301100486600546</td>
<td>8</td>
<td>10/17/2019</td>
<td>Pending</td>
<td>EPIC search, bonus letter, called &amp; left voicemail messages.</td>
</tr>
<tr>
<td>3011004928000029</td>
<td>7</td>
<td>10/17/2019</td>
<td>Pending</td>
<td>Called, daily EPIC search, called sister (emergency contact), she will relay message to participant.</td>
</tr>
<tr>
<td>30110060181000935</td>
<td>3</td>
<td>11/12/2019</td>
<td>Pending</td>
<td>Epic search, called, sent bonus letter.</td>
</tr>
<tr>
<td>301100488500558</td>
<td>6</td>
<td>11/12/2019</td>
<td>Pending</td>
<td>Epic search, called, left voicemails.</td>
</tr>
<tr>
<td>301100480000594</td>
<td>4</td>
<td>11/19/2019</td>
<td>Pending</td>
<td>EPIC Search, has no current contact information.</td>
</tr>
<tr>
<td>301100481000594</td>
<td>2</td>
<td>11/25/2019</td>
<td>Pending</td>
<td>EPIC search, called phone number on EPIC and left a message.</td>
</tr>
<tr>
<td>301100464500597</td>
<td>1</td>
<td>11/25/2019</td>
<td>Pending</td>
<td>EPIC Search, participant is currently homeless and has no phone.</td>
</tr>
</tbody>
</table>
Tracking Clients

- Client Locator Form
- Advance Letter/ Outreach
- Incentive/ Reward Letter $5 Bonus
- Tracking by Telephone
- Family/ Friends
- EHR/Cross Directories
- Search Engines/Internet/Email/ WhitePages
- Home visits- Safety!
Before You Give Up…

- Assign a Primary Tracker for Hardest To Find Cases
- Hard To find Case Conference’s
- Trade Cases
- Don’t Give Up! Ask for Assistance from Luz.
Brainstorm Activity on how to get 80% - What strategies would benefit:

- Community Health Teams?
- Primary Care?
- Urgent Care?
- Department of Corrections?
- FQHC’s?
- Emergency Departments?
References


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Thank you!