Division of Services Improvement, Clinical Technical Assistance Project
Technology-Assisted Care
Promesa Behavioral Health
Call Summary
October 16, 2014 • 3:00 p.m.

Submitted to: Dantrell Simmons, Courtney Babcock, Dr. Herbert Cruz, and Jessica Taylor
Date of Submission: October 17, 2014

Attendees

Substance Abuse and Health Services Administration (SAMHSA): Dantrell Simmons
Promesa Behavioral Health: Courtney Babcock, Dr. Herbert Cruz, and Jessica Taylor
JBS International (JBS): Dave Wanser and Leslie McElligott

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Meeting Purpose

This is a brief call to discuss Promesa's Telecare Outpatient Alcohol and Drug Services program (known as TOADS) and to see if there might be opportunities where technical assistance could help to improve client intake and follow-up rates.

Discussion

The TOADS program has completed intake assessments on 106 clients, to date. There has been an Influx of referrals, mainly from within the immediate Fresno area but also from a local rescue mission in the rural community.

The program has matured well. Staff are confident about their ability to deliver individualized client care.

Promesa has had limited success working with the community's Native American population. While they have expressed comfort using technology, there are certain cultural considerations that impact where Native Americans are willing to go for care; thus influencing Promesa's ability to engage them in the program.

Intake Process

Promesa recently implemented an internal tracking measure to assess the intake process (which now takes approximately 45-60 minutes to complete). Specifically, the information collected by staff will help to identify if a correlation exists between intake time and service delivery (i.e., does the length of the intake process effect client engagement in service?). It was noted that the information being collected is not part of a formal study, but will instead inform internal operations.

Dr. Cruz (Promesa) is interested in building an evidence-base to support if (and to what extent) change is needed in their current intake process. The initial face-to-face encounter is an important indicator of client engagement, so it is critical to use that time in a meaningful way.

Promesa has an electronic health record (EHR), and Dave Wanser (JBS) recommended that staff connect with their EHR vendor about the status of developing a patient portal (a major requirement of meaningful use stage 2). Portals are supposed to capture client information that then becomes part of their patient record. Information supplied through the portal could help to inform the intake process.

Dave asked if Promesa has considered streamlining the intake process by collecting information from clients in advance of the face-to-face intake to maximize engagement opportunities. Examples of Technology-Assisted Care grantees that have had success with streamlining intake processes include: Aliviane, Inc. (El Paso, Texas – Cohort 1), Forest County Potawatomi Health and Wellness Center (Crandon, Wisconsin – Cohort 2), and San Antonio Council on Alcohol and Drug Abuse (San Antonio, Texas – Cohort 3).

If interested, JBS can facilitate a call between Promesa and others that have streamlined their intake process.

Follow-up Rates

Many TOADS' clients are temporarily housed at the local rescue mission or residence center. It is challenging to track clients for aftercare services when they leave these facilities. Clients are not unwilling to participate in the follow-up process; they are just simply hard to find.

Jessica Taylor (Promesa) is able to follow up with approximately 80 percent of her client caseload; however, the team is working on strategies (beyond their current cash incentive offering) to more effectively maintain communication.

Mandi Reed (Promesa) created a locater form for clients to complete while they were waiting to be seen, but it is not being used at this time. Staff are working to condense the form and extract information that is most pertinent to staff and clients. Dave suggested that staff consider loading some of this content onto a tablet. The forms could be configured to include skip patterns that are prompted based on client responses.

Dave mentioned that some programs have found that identifying three points of contact is often the key to maintaining a long-term connection with clients. Staff may have more success if they frame the follow-up as a wellness check and not a strategy to complete the GPRA form. For example: "If you lost your phone, how would we able to get a hold of you?" or "We want to follow up with you to make sure that everything is going okay."

The Ideas Exchange includes an active discussion on follow-up strategies that have been helpful for other TAC grantees: https://www.ideas-exchange.net/connect/discussions/6-month-follow-ups

Technology Use

Promesa transitioned from using Skype to WebEx. There were some initial glitches with the new platform, but overall, they are pleased with the system's sound and quality functions. Staff and clients like using the whiteboard feature to load materials and activities during sessions.

Most clients use some kind of mobile device. If they are not presenting at a distal site or the main office, clients use smartphones, laptops or tablets.

Policy Landscape

Progress has been sporadic for the program; attributed largely to changes in the county's substance abuse contracting policy. It has taken time, but Promesa is now seen an alternative substance abuse treatment center in the community that can address co-occurring issues in an innovative way using technology.

California is one of the leading states in telehealth reimbursement. It remains, however, one of the lowest utilizers of services under the Affordable Care Act, and approximately 10,000 individuals were recently dis-enrolled from Medicaid. Politically motivated topics (e.g., citizenship status and Ebola) are driving changes in healthcare policy.

Next Steps

JBS would be interested in learning about the results of Promesa's intake measure findings.

JBS offered to facilitate calls with fellow TAC grantees if Promesa is interested in learning more about their intake processes.

JBS is available to support any technical assistance requests that Promesa may have in the future.