

Division of Services Improvement, Clinical Technical Assistance Project
Technology-Assisted Care
Heartview Foundation
Call Summary
December 9, 2013 • 10:00 am ET

Submitted to: Danielle Tarino, Kurt Sneider, Beth Stroup-Menge, Jodi Greff, Ryan Messer

Date of Submission: December xx, 2013

Attendees

Substance Abuse and Mental Health Services Administration (SAMHSA): Danielle Tarino

Heartview Foundation: Kurt Sneider, Beth Stroup-Menge, Jodi Greff, Ryan Messer

JBS International (JBS): Dave Wanser, Leslie McElligott, Iris Chai

Meeting Purpose

The purpose of the call is to make introductions between the SAMHSA Government Project Officer (GPO), Danielle Tarino, members of the Heartview Foundation team, and the technical assistance contractors at JBS International, Inc. SAMHSA and JBS are committed to helping the Heartview Foundation succeed and would like to assess how they can provide assistance with program implementation needs.

Grantee Program

Background

- Staff titles and roles
 1. Kurt Sneider: Executive Director
 2. Beth Stroup-Menge: Project Director
 3. Jodi Greff: Website Administrator and also administers GPRA
 4. Ryan Messer: Business Office Manager

Status

- Heartview Foundation has begun accepting clients and is in the process of implementing the program, based on client feedback.
- The program uses a team-based approach for all clients admitted to the program. Consequently, it was important to find a secure communication platform that would work with their team approach to client care. Staff is working with vendors to develop a suitable portal platform.
- Although hiring and orientation took longer than anticipated, a team was formed and ready by November 1, when the first client was admitted. The admitted number of clients now stands at 14. Admission began primarily with clients from residential care as they are easier to capture, as opposed to the clients from primary outpatient care. There have been two challenges involving admission:
 1. The three-day GPRA data collection window is not applicable for all clients. Some are not able to complete GPRA intake questions until have they been enrolled for 5-7 days.
 2. Primary outpatient clients who agree to participate in the program, but do not show up.

- When individuals agree to participate in the Heartview Foundation program, they agree to taking part in the Network Assisted Recovery (NAR) and identify the best method of contact so that the program team can contact them on a daily basis, or as needed.
- The grantee is analyzing their no-show rates and determining how to reduce these numbers. One approach is to have contact prior to admission.
- When clients arrive in residential care, they are given the option to enroll into the program. Eligibility criteria include the following:
 1. The individual is from rural North Dakota.
 2. The individual has a co-occurring disorder or an opioid addiction.
 3. The individual is Native American.
- There is currently one computer at the residential care location that is dedicated for the program. Only participants of the program may use the computer, so it is an incentive for clients to enroll.

Technology

- Approximately 75% of Heartview Foundation's clients are technologically savvy, while 25% require more coaching (e.g., a rancher who has never used a computer or mouse before). Overall, technology is embraced by clients. Even if the clients do not respond daily to the program team, they are still responding and active.
- Heartview Foundation will implement their electronic health record (EHR) on Wednesday, December 11, 2013. The staff believe the EHR will be valuable, particularly to help with documentation.
- The first smartphone has been purchased for texting purposes.
- Since the NING system for building a social network is unable to meet program needs, Heartview Foundation is considering a portal with more individualized features (e.g., journaling and treatment modules). The grantee has been working with vendors regarding the portal development.

Evaluation

- Heartview Foundation finds it is valuable to have pre-portal data to compare to post-portal data once the portal has been developed. These results can help compare the differences in whether or not a portal is used and contribute to lessons learned.

GPRA

- Heartview Foundation is not currently capturing GPRA intake data. Heartview Foundation hopes to begin capturing GPRA in a month.
- There is uncertainty in the number of individuals agreeing to participate. The staff has talked to SAMHSA about adjusting their GPRA intake goals because they feel that the number proposed in their grant application may be too high. They will submit a justification to SAMHSA to change their numbers once they have a better sense of clients they can realistically serve.

Marketing

- Not only has the staff fully embraced the program, but clients have helped spread the word about the program as well.
- The 3-part marketing series developed by JBS is available on the Ideas Exchange, providing information on Web design, using video, and developing a marketing plan.

- Part 1: <https://www.ideas-exchange.net/learn/resources/webinar-part-1-promoting-your-technology-through-web-design-and-web-strategy>
- Part 2: <https://www.ideas-exchange.net/learn/resources/webinar-part-2-promoting-your-technology-using-video>
- Part 3: <https://www.ideas-exchange.net/learn/resources/marketing-matters-strategies-to-maximize-your-outreach-potential-youtube-presentation>

Recommendations

- The Ideas Exchange is a great resource for grantee collaboration. The biweekly grantee calls, and the grantee conference, March 20-21, 2014 (<https://www.ideas-exchange.net/learn/announcements/save-the-date-for-the-2014-tce-tac-grantee-meeting>) are also excellent opportunities for grantees to learn from each other.
- SAMHSA and JBS want Heartview Foundation to succeed. There are often inevitable changes in workflow when transitioning, particularly shifting from paper to electronic information, data collection, and evaluation. JBS can provide Heartview Foundation with any needed TA. Please do not hesitate to contact JBS for technical assistance needs. For more information about Technical Assistance, please go onto the Ideas Exchange for helpful resources. Please click on each link to view.
 - About Technical Assistance: <https://www.ideas-exchange.net/about/about-technical-assistance-and-journey-partners>
 - Best Use of Technical Assistance: <https://www.ideas-exchange.net/learn/resources/making-the-best-use-of-technical-assistance>
- JBS can assist Heartview Foundation with grantee connections in areas of technology implementation, such as:
 - First Call and Centerstone of Indiana both use portals and they may be good resources in developing the application for Heartview Foundation. The First Call presentation (<https://www.ideas-exchange.net/learn/resources/biweekly-tac-grantee-conference-call-featuring-first-call-alcohol-drug-prevention-and-recovery-inc>) is located on the Ideas Exchange.
 - River Edge uses robust technology, the VealMea system, to provide telehealth services. Their presentation (<https://www.ideas-exchange.net/learn/resources/biweekly-tac-grantee-conference-call-featuring-river-edge-behavioral-health-center-youtube>) can be found on the Ideas Exchange as well.

Action Steps

- A site visit from JBS (Dave Wanser and Iris Chai) is pending for June 2014. **Please provide any available dates that work with your schedules.**

Next meeting

TBD