Follow Up Survey
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General Questions

Q. Why do follow up surveys?

A. Follow up surveys provide data on the long term impacts of treatment, can help improve client outcomes and provides the ability to make data informed decisions for providers and stakeholders.

Q. What are the requirements?

A. Surveys are required for non-ATR IDHW and IDJC funded clients that have an admission and discharge. A follow up survey is required at thirty days, six and twelve months post discharge. If you are unable to get a hold of the client and complete the survey at thirty days, you do not need to attempt to contact the client at six or twelve months. If you are unable to get a hold of the client and complete the survey at six months, you do not need to attempt to contact the client at twelve months.

Q. Which funding types are included in the non-ATR IDHW populations?

A. The included funding types are: Adult, Adult Mental Health, Adolescent, Child Protection, Domestic Violence Court, IVDU, Mental Health Court, Misdemeanant Problem Solving Court, PW/WC, State Hospital, and Supervised Misdemeanants.

Q. What are the performance expectations of this program?

A. 100% of IDHW non-ATR and IDJC clients should have a completed survey or documented reason for why it wasn't completed. 100% of clients should have an informed consent form either signed, or declined by the client in the file.

Q. What is the implementation for the follow up?

A. All new admissions under the specified populations should receive the informed consent regarding the follow up. All clients should have a signed or declined form in their file. When reviewing the informed consent with the client, remember to emphasize the importance of the information.

Q. What are the compensation rates for the follow up?

A. Four documented unsuccessful attempts will result in billing a $20 encounter. Completed surveys will result in a $30 encounter, and completing the initial survey opens the opportunity to bill again at six and twelve months.

Training

Q. I missed the live trainings on doing the surveys and am not sure where to start, what should I do?

A. The best place to start is to go to the WITS HD website at the link below and review the Follow-Up Survey section which includes: video documentation of creating and billing an unsuccessful follow up, video documentation of creating and billing a successful follow up, video documentation of the follow up policy, and quick start guides documenting the process.
http://wits.idaho.gov/IdahoWITSHome/Announcements/WITSUserGuides/tabid/2712/Default.aspx

Informed Consent

Q. Where can I find the informed consent form?

A. It is located on the WITS HD Website at the following link:

http://wits.idaho.gov/Portals/73/Documents/substanceUse/Follow-up%20Survey%20Assessment/Informed%20Consent.pdf

Q. What if the client refuses to sign the informed consent?

A. At the time of intake, if the client refuses to sign the form, review the instructions at the bottom of the form and have the client write the word “Decline” on the subject line, initial the form next to the word decline and date the form. Do not put any contact information on the form if the client is declining to participate in the survey to avoid confusion and accidental contact of the client. Keep a copy of the form in the client’s file. There is no requirement to document the unsigned consent in WITS.

When to Complete Surveys

Q. When do I have to do the surveys?

A. The survey intervals are thirty days, 6 months, and 12 months post discharge. Surveys can be done up to one week before the interval and up to two weeks past the interval.

Q. How will I know when the surveys are due?

A. The WITS Help Desk will email the WITS administrator with a list of clients that have a survey due date approaching each week. This process will eventually be replaced with alerts that will be set up in WITS. A provider communication will be sent out well in advance of the change to the alerts.

Q. I wasn't able to complete the thirty day survey. Do I still need to try to get a hold of the client again at six and twelve months?

A. No, if you are unable to get a hold of the client and complete the survey at thirty days, you do not need to attempt to contact the client at six or twelve months. You will not be emailed or alerted to contact clients that have missed a previous interval.

Q. I was able to complete the thirty day survey, but not able to complete the six month survey. Do I still need to try to get a hold of the client again at twelve months?

A. No, if you are unable to get a hold of the client and complete the survey at six months, you do not need to attempt to contact the client at twelve months. You will not be emailed or alerted to contact clients that have missed a previous interval.

Q. I completed a thirty day survey with a client during the pilot project that started in January of 2016; do I need to contact the client for the six month survey still?

A. Yes, please continue to complete the six and 12 month surveys with clients that were included in the pilot project.

Who needs surveys completed

Q. What if the client dropped out of treatment?

A. Attempt to re-engage client regularly up until thirty days since last date of contact. Complete the discharge for the client upon day thirty of no contact. Once the discharge is complete, try to reach the client again to complete the survey and explain the new reason for contact.

Q. What if the client transfers to another agency?

A. Even if the client is transferring, if there is a break in services, complete the survey. Do not complete the survey if there is no break in services.

Q. If I have a client that completes Residential, but intends on going into IOP/OP, what do I do?

A. If the client completes Residential treatment, complete the survey with the client regardless if they transfer to a lower level of care or not. The survey is designed to pick up that they are still in treatment while completing the survey. Conducting the survey post Residential and post-IOP/OP will allow for a better understanding of the changes that take place following participating in both levels of care. This will also address the clients that intend on transferring to IOP/OP post-Residential, but do not engage.

Q. Am I going to have to do surveys on clients that only show up for an assessment?

A. No, as long as you do not create an admission in WITS, you will not have to do the survey. An admission should only be created after the assessment is completed, an authorization for the level of care has been received, and the client has engaged in treatment.

Q. I only provide Recovery Support Services (RSS); do I need to complete the survey with clients too?

A. No, only providers of Treatment services through a level of care including Outpatient (OP), Intensive Outpatient (IOP), or Residential treatment will be required to complete the surveys with the clients.

Q. I am working with a client that has "braided funding" of Medicaid and one of the populations listed above, do I need to do a survey with that client?

A. If the funding for the treatment is paid for by Medicaid and the RSS is paid for by one of the population listed above then you will not be required to complete the survey with the client. If any part of the client's clinical treatment is paid for through one of the populations listed above, then you will be required to complete the survey with the client.

Contacting the Client

Q. How should I attempt to contact the client?

A. All available methods of contact should be used, including phone calls, texts, emails, social media, mailing the paper form, utilizing collateral contacts, utilizing prescheduled appointments with the client, etc.

Q. What if I can't reach the client?

A. Document attempts to contact the client by completing an unsuccessful Follow Up survey in WITS. After completing four unsuccessful Follow Up surveys, you can bill for the unsuccessful attempts and cease efforts to contact the client. Create one unsuccessful Follow Up survey per day.

Q. What do I do if the client is in crisis or has relapsed when I call them?

A. Treat this situation as you would if a client were in crisis in the lobby of your agency. Do everything possible to assist the client to stabilize and provide appropriate linking to referrals. If the client has relapsed and requires additional treatment, encourage the client to screen with BPA Health or contact their Juvenile Probation Officer for funding if applicable. If the client is stable enough, please attempt to complete the survey with them once you have assisted them in getting the necessary assistance.

Q. Can I get answers to the survey from anyone other than the client?

A. No, the answers must come from the client. If you are working with an adolescent and the parent would like to be present when the child answers the questions that is acceptable, but a collateral contact cannot be the sole source of the information.

Procedural

Q. How do I successfully complete the survey?

A. All of the questions must be answered in order to be completed. Information can only come directly from the client. Answers should be provided one week before or up to two weeks after the due date.

Q. Who can complete the surveys with the clients?

A. Non-clinical staff may complete the surveys as long as they have a rapport with the clients while they are in treatment.

Q. What needs to be done at discharge?

A. Remember that the discharge date is the last date of contact, not the date the discharge activity is completed in WITS. Complete the discharge activity in WITS no later than fourteen days after the last date of contact, unless the client has been out of care for the fourteen days and you are attempting to contact the client to reengage in care. You can re-engage the client in the same episode of care for up to thirty days. If you are unable to contact them during this time period or they have opted to drop out, complete the discharge information and attempt to complete the follow up survey.

Q. I just received an email to do a survey on a client that declined to sign the informed consent, what do I do?

A. Create an unsuccessful Follow Up and select the status of "Unable to Follow Up – Unable to Contact." You will not be able to bill for this unsuccessful attempt. You will have a copy of the informed consent in the paper file with Refused written on it.

Q. I just received an email to do a survey on a client that transferred to another provider and there was not a break in treatment, what do I do?

A. Create an unsuccessful Follow Up and select the status of "Unable to Follow Up – Transferred."

Q. I just received an email to do a survey on a client that transferred funding sources and there was not a break in treatment, what do I do?

A. Create an unsuccessful Follow Up and select the status of “Unable to Follow Up – Transferred.”

Q. I just received an email to do a survey on a client that is incarcerated, what do I do?

A. Contact whatever collateral contacts you have available to determine if it is possible for the client to be released within the window of time available to complete the survey.

If it is possible the client will be released within in the window for the survey, create a Follow Up with the status of “Unable to Follow Up – Awaiting Response”. Continue to attempt to see if the client has been released and is able to complete the survey.

If during this process (attempt one through three) it is determined that the client will not be released in time to complete the survey, create a Follow Up with the status of “Unable to Follow Up – Incarcerated”.

If it is still possible for the client to be released through the fourth attempt, the fourth Follow Up survey will have a status of “Unable to Follow Up – Unable to Contact,” In the encounter note briefly summarize the collateral contacts that provided reason to believe that the client may be released within the window for the survey.

Q. I called a client to do the survey and found out they have passed away, what do I do?

A. Please offer whatever assistance/referrals you can to the person whom informed you the client passed away if appropriate. Create a Follow Up with the status of “Client Died”. Create an encounter note and select the service for a Completed Follow Up.

Q. I mailed the survey out and received it back, but one of the answers wasn’t completed, can I still bill for completing the survey?

A. Not until you are able to contact the client again and get all of the answers. In instances like this, if you need the additional time to get the remaining answers, it is allowable to go beyond two weeks past the interval since the initial responses were received within the allotted time frame, Please document in the note when billing for a survey outside of the allotted time frame the reason for going beyond the two weeks post interval.

Questions

Q. What if we have questions regarding the Follow Up policy and procedures?

A. For questions about the follow up standards, contact Dan Greenleaf at the Idaho Department of Health and Welfare at (208) 334-6681 or by email at greenled@dhw.idaho.gov.

Q. What if we have questions regarding the Follow Up functionality in WITS?

A. For questions about WITS, contact the WITS help desk at 208- 332-7316, 844-726-7493, or by email at dbhwitshd@dhw.idaho.gov.