Health Resources and Services Administration (HRSA) SPNS Outreach Initiative

Outreach Encounter Form Instructions

Introduction

Properly documenting each outreach encounter is the most critical part of the multi-site evaluation, because the main focus of the evaluation is to learn if there is any association between outreach and the engagement and retention of people living with HIV in medical care. This has never been studied before. We also want to understand the association between outreach and other important outcomes such as the receipt of non-medical services and quality of life. If we can show that outreach makes a difference, then it is possible that more attention will be paid to this activity. But to make the case, we need to need to provide some basic information about who provides the outreach, how often and for how long outreach is provided, where the outreach takes place, and what happens during the outreach encounter.

The outreach encounter form has been designed for outreach workers to use on the streets, in the office, or at other agencies or locations as a simple check-off list of what, where, who, and how long each encounter lasted. It can be used by street outreach workers; nurses, case managers, doctors or social workers who conduct outreach; volunteers; and individuals whose main function is to call people to remind them of appointments or reschedule missed appointments. Your use of this form should be guided by the efforts that you consider to be part of your outreach intervention.

Instructions to Staff/Volunteers Who Conduct Outreach

The outreach encounter form should be completed for each study enrollee, **for each encounter that they receive** as part of your outreach intervention. The forms should be submitted, in hard copy, to CORE for each individual enrolled in the study for the six months prior to their enrollment in the study and for the duration of their enrollment. If this information is maintained in a computer database, please work with your CORE liaison and the CORE data manager to discuss computerized data submission.

Outreach workers can complete this form at the time of, or shortly after, each encounter. If this happens, outreach workers should complete all sections of the log, with the exception of the Client ID. Outreach Workers are not likely to know the client ID at the point of contact with a client. Therefore, the outreach form includes a place for the client's "street" name, and general location as well as outreach worker notes that will help them remember who was contacted. **<u>All</u> sections should be filled out before submitting to the evaluation team.**

Please submit ONLY one form for each encounter, even if multiple staff members are involved in the encounter. If multiple staff are involved in the encounter, please note:

- The number of outreach workers;
- The different types of staff involved (if applicable) by circling all that apply from the list of outreach staff codes.

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Each grantee should develop a system for organizing files for outreach contacts in order to track contacts with the same individual over a period of time.

Instructions for Specific Sections

A. Location of Contact:

Please check only one location per encounter. If you see or accompany a client to several locations during one encounter, check the location where you spend the most time with the client.

B. Purpose/Content of Outreach Encounter

Check all the activities that you do with a client during the encounter. Check the "other" category if you do not find an item that best matches a description of the activity, and be sure to write a brief description of your activities with the client.

Please use the following definitions to describe your encounter with clients as they appear on the form:

- Service Coordination: working with a client to arrange and schedule several different services at once, such as case management, food, transportation, mental health, substance use treatment, medical care, and other support services. If you check off service coordination, please also note the services being coordinated.

- Advocate for a client: when a staff member participates in a meeting with a service provider to support the client or represent the client's expressed interests in obtaining a service.

C. Outreach Staff Codes

Circle all the items that best describe the role of the staff involved in the encounter with the client. Use the following definition to distinguish between a peer and a non-peer outreach worker:

- Peer Outreach worker: persons who are HIV infected, affected or at risk for infection who are engaged to perform outreach, educate/inform, advocate and empower their respective communities. Each program should have a specific definition for peers. For example, in one program peers may be HIV-positive, in another a peer could be selected based on racial/ethnic identity regardless of HIV status, and in other programs it could be ex-drug users.

- Non-peer outreach worker: persons who are engaged to perform outreach, educate/inform, advocate and empower the general community about HIV/AIDS or engage people living with HIV/AIDS in care. Non-peer outreach worker are not necessarily from a specific community identified by gender, race/ethnicity, HIV status or other risk factors.

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D. Duration of Contact
Check only one box indicating an estimate of the time that you spent with the client during the encounter. Use the following definition for the item "attempted contacts":

1) Attempted Contacts: This box should be selected when a staff member left a message (either by phone or mail) regarding a medical appointment or referral to any HIV service, including housing, benefits/entitlements or immigration issues, etc.

E. **What is not an Outreach Encounter?**

As mentioned above, an outreach encounter form should be filled out for each encounter a client receives with a staff member related to the outreach intervention. Do not fill out and submit an encounter form for the following activities:

- Efforts to find a client were not successful;
- Any encounters related to the study including survey interviews or interview appointment reminders;
- Collateral contacts: any contact between a staff member and another service provider that is related to client care or services.

The purpose of the outreach encounter form is to help us determine the association between outreach and engagement in medical care. Therefore, we want to be able to accurately measure the number and type of direct encounters with a client that may affect a client's engagement in care. While documenting the level of effort and how staff members spend their time is important to the program, it is not the main effort of the cross-site evaluation. CORE encourages sites to collect the information for their own local evaluation purposes.

Instructions to Evaluation Staff/Data Managers

The evaluation staff is responsible for making the link between the client street name and general location and the Client ID for all individuals who have enrolled in the study and have consented to release this information. CORE does not want outreach encounter data on individuals who have not consented to participate in the evaluation.

Each grantee should establish a system for making the link between the client street name or other information supplied by the outreach worker in the notes section of the form, and the client ID for the individual enrolled in the study. CORE does not need and does not want these linkages and notes. Therefore, we recommend that grantee staff enter the client ID and then erase, white out, or cut out the outreach worker notes section of the form.

In some programs, outreach workers use different logs or forms to document outreach. As long as the program logs contain all of the information on the CORE form, data can be transposed from the program logs to the CORE forms.

Before submitting data to CORE, please review the forms and be sure that all sections have been filled out, and multiple responses are provided only in specified

sections. If there are blank sections, please review with the staff person to fill out the appropriate response to the section.

Collecting Pre-Study Phase II Enrollment Data on Outreach Encounter

The outreach encounter forms can be used to **collect** outreach encounter data on individuals prior to their enrollment in the Phase II study. Data can be collected anonymously – perhaps you might want a different color form for this purpose so you can readily distinguish anonymous data. No client ID would be entered on this form –instead you would only use the client "street name" or your own internal systems to identify multiple contacts with the same individual - until the client has enrolled in the study and given consent to release the information. Then when the client has enrolled in the study, you can go back and retrieve their outreach forms and submit them to CORE.

Other alternatives to the use of this particular form for the collection of pre-enrollment outreach data include your own logs, or if absolutely necessary, client interviews. However, whichever method you use, information on outreach contacts must be submitted to CORE **on this form.** Therefore, information from other logs or client interviews must be entered into this form to submit to CORE.