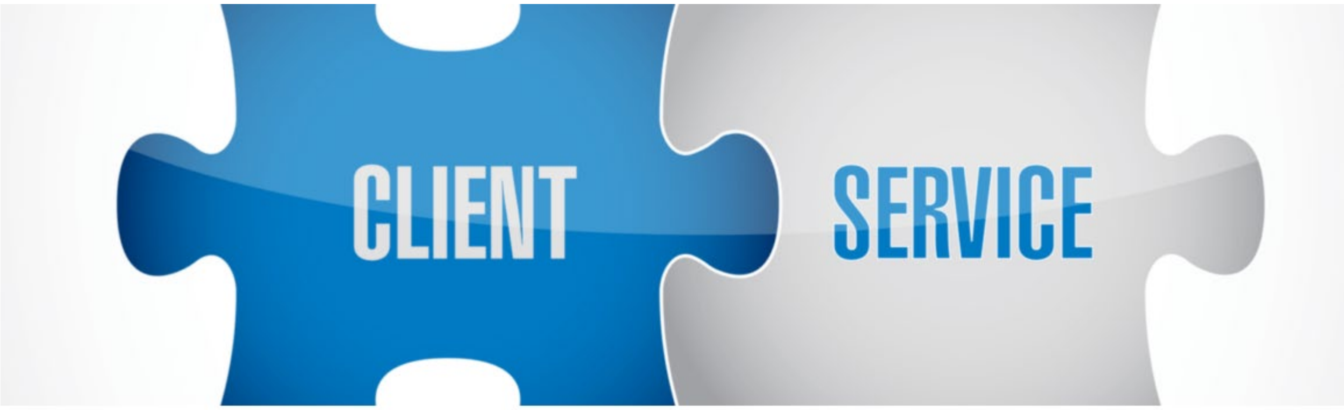



## Government and Performance Results Act (GPRA)

## Follow-Up Checklist

**80%**

**GPRA follow-up is integral in monitoring the effectiveness of SOR funded initiatives. We aim for 100% participation in follow-up, but the minimum participation for each organization is 80%. The follow-up does not begin when the follow-up window opens, it begins at intake! A checklist to aid in the success of follow-up can be found below.**

### GPRA INTAKE

- ☐ Clearly explain GPRA, service delivery and program expectations.
- ☐ Build a rapport with the client.
- ☐ Obtain accurate contact information for the client, including places the client frequents.
- ☐ Inform the client of the follow-up window and schedule the follow-up appointment.
- ☐ Thank the client for participating in the interview. Remember, this was voluntary!

### UPDATE TRACKING LOG SHEET 1

Ensure your program has a tracking log for client information (if using Excel, utilize two sheets). Input the client's contact information on sheet 1.

- ☐ Name
- ☐ Mail/email address
- ☐ Telephone number
- ☐ Social media account

### VERIFY INFORMATION

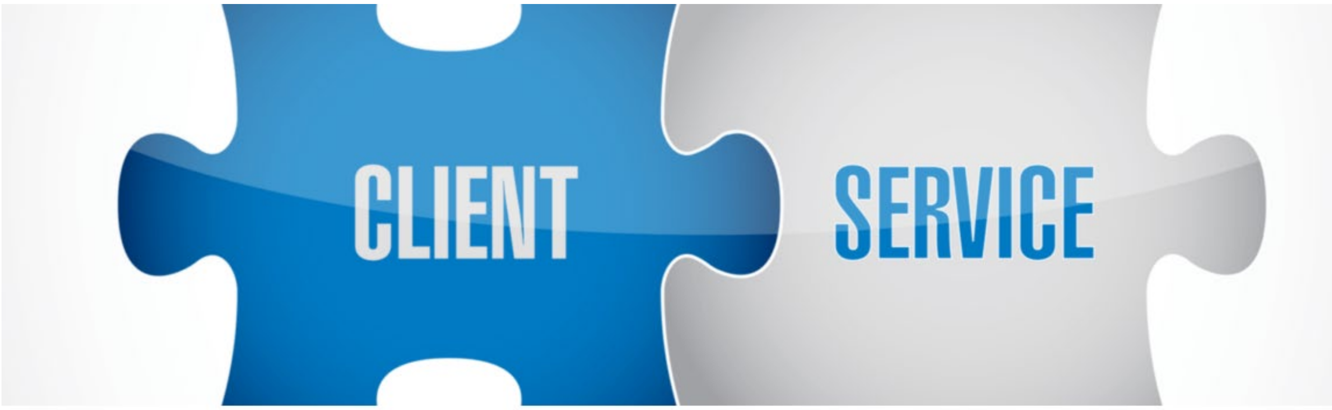
- ☐ Contact the client one week after intake.
- ☐ Verify the contact information provided during the intake interview:
  - Email address
  - Mailing address
  - Telephone number
  - Social media account
  - Emergency contacts (family/friends)
- ☐ Use contact information to send the client a quick 'thank you' for participating in the intake interview.
- ☐ Confirm places frequently visited.

'Thank you' messages can aid in the verification process. Receiving a response from the client confirms the contact information is accurate.

### PUBLIC SOURCES OF INFORMATION

There are several public sources that can assist in locating a client. Utilize these resources for follow-up attempts.

- ☐ Web-based directories
- ☐ Judicial Case Search systems
- ☐ Social Security Death Index
- ☐ White Pages (also found online)




## FOLLOW-UP TRACKING LOG SHEET 2

On the tracking log, It is imperative to document follow-up attempts for each client. If you are using Excel, this should be documented on sheet 2. Include the following information on sheet 2:

- ☐ Client – This does not mean the client's name. Your agency can develop a code for the client's name to maintain confidentiality.
- ☐ Date and time of attempted contact. This allows you to keep up with days/times the client might not be available. This should prompt you to choose a different day and time for the next attempt.
- ☐ Form of contact attempted – phone, email, social media.
- ☐ Each client should have a file in your organization. All information regarding follow-up attempts should be placed in the client's file.

## ADDITIONAL

- ☐ ______________________
- ☐ ______________________
- ☐ ______________________
- ☐ ______________________
- ☐ ______________________
- ☐ ______________________

This checklist is meant to serve as an aid in follow-up attempts. Review it when completing GPRAs for each client to ensure you are exhausting all possibilities for follow-up attempts. Feel free to write a date next to each bullet, after it's checked. **REMEMBER**: Follow-up begins at intake.

**ATTEMPTED CONTACTS:** Respect confidentiality and maintain HIPAA compliance. If using social media, do **not** post public messages. Send private messages and do not send any identifying information.

**ADDITIONAL**: This section gives providers an opportunity to document aspects of the follow-up (important to a specific client) that might not be included on the list. For Example: Maybe the client frequents a certain place. Write it down during intake and ensure that location is checked during the follow-up window.

**TRACKING LOG**: Develop a tracking log or utilize the sample provided. It's important to update tracking logs regularly.