RETAIN | Retaining Employment and Talent
After Injury/Illness Network

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Tip Sheet

Using Technology to Support RETAIN Program Implementation[1]

A host of different technology-based tools are available to help support RETAIN project activities, from participant recruitment and enrollment to program implementation, reporting, and continuous quality improvement efforts. This tip sheet describes options for tools that may be integrated into RETAIN projects to support implementation and collaboration with project partners. The areas covered include Stay at Work (SAW)/Return to Work (RTW) service delivery (e.g., intake procedures, appointment scheduling, communication with partners and participants), patient confidentiality, and continuous quality improvement (CQI). The resources provided in this document do not represent a comprehensive list of the tools available for use by RETAIN projects. Instead, they reflect examples of tools that project teams can consider when thinking about how best to leverage technology to improve project performance.[2]

SAW/RTW Service Delivery

Intake Procedures

For RETAIN projects that are currently relying on paper-based intake and screening, collecting this information and transferring it into a central database can be a time-intensive process. Employing a technology-based solution can help save time and can create a more efficient, cost-effective, and standardized approach. For example, RETAIN states could consider using a software program to host their project's baseline surveys and screening tool. This not only could help streamline the intake process but also could provide immediate feedback regarding participants' eligibility for RETAIN.

There are a number of software options that can be used both online and offline to gather participant data. When used in areas with internet connectivity, data can be collected on small, inexpensive, hand-held devices (e.g., tablets or smartphones) and can be transferred directly to the project's central database. In addition, the issues associated with collecting data in challenging environments (e.g., low internet access and/or limited computer access) can be easily mitigated by using data collection software. With these options, participants can fill out

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[1] The tools described in this tip sheet are provided as examples only; they do not constitute an endorsement by the Office of Disability Employment Policy or the RETAIN Technical Assistance (TA) team.
[2] RETAIN TA is available to work with state teams and provide additional information about these and other technology options.

the intake forms on their own device or on a RETAIN device. When used in areas with limited or inconsistent internet access, the information can be collected offline and loaded into the central database upon return to a work location or an area with internet connectivity.

A few free or inexpensive options include:

- KoBo ToolBox (https://www.kobotoolbox.org/)
  A free-to-use software platform that works on both tablets and smartphones

- SurveyCTO (https://www.surveycto.com/)
  A paid software platform that also works on both tablets and smartphones

- SurveyToGo (https://www.dooblo.net/)
  A paid software platform that works only on tablets

Appointment Scheduling

Scheduling and managing appointments with RETAIN participants, health care providers, and employers can be a time-consuming process. If all participants are using the same calendar platform within the same organization, this becomes significantly easier. However, if they are not, software programs can help manage this process while maintaining privacy and giving users control over their own schedule. Appointment scheduling software is a tool that enables organizations to easily automate and update scheduling tasks (e.g., booking and rescheduling meetings, appointments, and events). These tools offer multiple features that could be of use to RETAIN projects. These include appointment reminders and confirmations, employee and customer management, online self-scheduling, calendar integration, and 24/7 access and security. A few free, inexpensive options include:

- Doodle (https://doodle.com/en/)
  A paid meeting schedule and polling software program that is very simple to use and is especially useful when setting up meetings with participants in multiple time zones and significantly different schedules.

- Scedule (https://www.scedule.com/)
  A paid software program that enables people to share their calendars while keeping the contents of their calendars private. The software makes scheduling easy and is useful for those who have many meetings with the same group of people.

- Calendly (https://calendly.com/)
  A free (for basic services) scheduling software program that offers features such as calendar integration (e.g., with Google, Outlook, Office 365) and time zone detection. The software also allows users to set availability preferences and buffer times between meetings.

Communicating With Participants and Partners[3]

Text Messaging

Multiple text messaging software options are available. You can use a software program for group texts, to manage your contacts, and to keep track of your communications with participants and colleagues. You may find that texting is the preferred mode of communication for some people and that they will respond more quickly to a text message than to a phone call. Text messages are well suited for brief messages that can be read quickly, such as appointment confirmations or reminders, requesting a callback, or reminders about document requests or deadlines. Text messaging can also be an effective method for reinforcing training content, following up with training objectives, and gathering feedback. In addition, text messaging services include features to help streamline your communications process. For example, you can preschedule text message alerts with information to be sent on a specific day and time, create group distribution lists, or set up a business text messaging number that allows you to keep your own phone number private. Text messaging options include:

- TextNow (https://www.textnow.com/)
  A free text messaging service that allows you to set up a new phone number for texting and calling. You can use the service on any device—cell phone, tablet, or computer.

- Remind (https://www.remind.com/)
  A free text messaging service that is marketed primarily to educators; also for texting and calling.

- Guide by Cell (https://guidebycell.com/)
  A paid communication platform (includes text messaging services) that offers all-inclusive service for organizations.

Videoconferencing, Document Sharing, and Communication

RETAIN projects also have a number of options to facilitate document sharing and communication among RETAIN project partners and between RETAIN project staff and participants. Each offers slightly different features and functionality. Deciding which software will work best for you depends on a number of factors, including whom you are communicating with, what hardware all participants have available to them, team collaboration preferences and protocols, and financial resources available. Also, it is important to note that many of these platforms are continually updating their features and capacity in response to the demand for virtual collaboration tools. Some options include:[4]

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[3] Note that when selecting technology-based communication tools, considerations regarding cultural responsiveness apply. For example, texting may not be appropriate for individuals with limited English proficiency or limited literacy skills.
[4] For a complete breakdown of features and functionality, see the following document:
http://heldrich.rutgers.edu/sites/default/files/products/uploads/Virtual_Services_Toolkit_The_Basics.pdf

Video and Videoconferencing Services[5]

- FreeConferenceCall.com (https://www.freeconferencecall.com/)
  A free online video and audio conference call program that allows up to 1,000 participants.

- Google Duo (https://duo.google.com/about/)
  A video chat mobile application made for one-to-one calls using smartphones and tablets.

- Google Voice (https://voice.google.com/u/0/calls)
  An integrated call system for individuals and businesses. It includes audio calls only and does not include videoconferencing functionality.

- GoToMeeting (https://www.gotomeeting.com/)
  A paid, web-hosted conference calling service for online meetings, desktop sharing, and videoconferencing.

- Microsoft Teams (https://www.microsoft.com/en-us/microsoft-365/microsoft-teams/group-chat-software)
  A paid web conferencing and collaboration platform that allows users to set up video, audio, and text chats and to share and edit Word, PowerPoint, and Excel files in real time.

- Zoom (https://zoom.us/)
  A paid videoconferencing service that can accommodate between 100 and 1,000 participants. It supports high-definition video and voice, screen sharing, and whiteboarding. It allows facilitators to host private and group chats, share content, and create recordings. Zoom offers a free option with a 40-minute time limit for group calls.

- Cisco Webex (https://signin.webex.com)
  A paid videoconferencing service that can accommodate up to 500 participants. It supports high-definition video, screen sharing, and whiteboarding and allows facilitators to host chats, share content, and create recordings.

Creating and Sharing Documents

- Google Drive (https://drive.google.com/drive/u/0/)
  An online document creation and sharing suite of tools. Google Docs and Google Sheets both mimic the functionality of Microsoft products but are free to use and easy to use for collaboration.

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[5] The Zoom and Webex information refers to a basic subscription. Expanded features are available at different price points.

⭕ Microsoft Office (https://www.office.com/)
This software suite offers multiple options for creating and sharing documents. In addition to creating documents in Word, teams of individuals can use SharePoint and Teams for real-time document collaboration.

Messaging

⭕ Slack (www.slack.com)
An online instant messaging platform whose functionality is very similar to that of Microsoft Teams. The platform enables easy communication and includes instant messaging functionality as well as voice and video communication. Participants can share documents, but Slack does not include document creation or real-time document collaboration functionalities.

⭕ Google Hangouts (https://hangouts.google.com/)
An online instant messaging tool within Google's email (Gmail) platform. Hangouts is free to use and includes both voice and video call functionality.

⭕ Skype/Skype for Business (https://www.skype.com/en/business/)
Similar to Slack and Hangouts, Skype is also an online instant messaging tool with voice and video call functionality. Skype also includes a paid calling service that enables users to call telephone numbers via voice over internet protocol (VoIP) functionality.

Participant Confidentiality

The use of technology requires consideration of issues such as participant confidentiality, privacy, and data security; and some options are more secure and provide more privacy than others. For example, while texting is quick and convenient, in most cases it is not secure. However, some apps do allow for more secure texting whereby messages are encrypted before they are sent. While participant confidentiality should always be at the forefront of communication among RETAIN stakeholders, this is especially important when dealing with a participant's personal health information. Health Insurance Portability and Accountability Act (HIPAA) compliance must be considered when selecting technology options for RETAIN projects. HIPAA-complaint software does not have to be expensive or overly complicated, and there are some options for collecting, accessing, storing, and transmitting patient information. Examples of platforms that report HIPAA compliance include:

⭕ JotForm (https://www.jotform.com/)
An online form creator for data collection is an easy-to-use option for collecting health-related information. The HIPAA-compliant version is available for a monthly fee. JotForm can be integrated into any boxed software, and a free trial is offered.

◯ Google G Suite (https://gsuite.google.com/)
Google's paid, monthly fee per user service is ISO-27017 and HIPAA compliant and is widely used by schools, universities, and other types of businesses.

◯ Microsoft Teams (https://www.microsoft.com/en-us/microsoft-365/microsoft-teams/group-chat-software)
Microsoft's online meeting platform combines instant messaging, videoconferencing, calling, and document collaboration within a single, integrated app.

Continuous Quality Improvement

CQI Dashboard and Database

Continuous quality improvement (CQI) is a systematic approach that uses information to make improvements to a program with an emphasis on future results. It is an ongoing process of gathering and reviewing process and outcome data to improve the program, both during and after implementation, and it is required for RETAIN projects.[6] Developing a CQI database and dashboard is a good way to incorporate CQI procedures in your everyday implementation of the RETAIN program. For example, the RETAIN Technical Assistance (TA) team developed the Recruitment and Enrollment Dashboard to help states track these processes. There are also easy-to-use online databases and dashboard programs that can help you translate your data into visual graphics for reports and analysis. Options for online database software to keep track of your CQI data include:

◯ Knack (https://www.knack.com/)
A free online database that does not require coding, Knack allows you to bring in your data (either manually or through data upload), link tables together, and use basic spreadsheet-type formulas in your data. It also allows users to build applications through their application programming interface (API) or to develop a dashboard—all without the need to know any programming code.

◯ Airtable (https://airtable.com)
Similar to Knack, Airtable is an online database. It functions more like a spreadsheet than a database but allows you to create links between sheets. You can also create applications and a dashboard directly through Airtable.

Options are also available for project teams who want a point-and-click dashboard software program that does not require building a database or a software platform that can connect directly to an existing data software program or database:

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[6] See the RETAIN TA CQI "how to" document or the "Data for Decision-Making" blog posts on the RETAIN Online Community website for more information on ways to develop a CQI process for your RETAIN program.

- Tableau (https://www.tableau.com/)
  A point-and-click visualization software that allows analysts to create visualizations and dashboards.

- Power BI (https://powerbi.microsoft.com/en-us/)
  A Microsoft point-and-click visualization software platform that enables users to create data visualizations and dashboards. For those familiar with Microsoft products, Power BI has the same toolset ribbon found in all Microsoft products, which can reduce the burden of entry.

Stakeholder Feedback

Gathering stakeholder feedback is an important part of the CQI process. This information enables you to determine program strengths and challenges, including whether you are meeting the needs of you participants and stakeholders. It also helps you identify changes (both small and large) that could improve stakeholder experiences and ultimately increase participation in RETAIN.

Technology can help you expand your reach for gathering anonymous or confidential feedback. Many online survey tools are available to support this process. Options include:

- SurveyKing (https://www.surveyking.com/)
  A free online survey and form platform, SurveyKing includes skip-pattern logic, unlimited SMS (short message service) and email campaigns, image uploads, and multiple question types.

- SurveyGizmo (https://www.surveygizmo.com/)
  An online survey software platform that enables customers to create, distribute and report on surveys and polls.

- Qualtrics (https://www.qualtrics.com/customer-experience/)
  An enterprise-level survey platform that integrates into your existing back-end systems and includes a customizable business analytics dashboard.