

# ***Step2, Women's Alliance for Strengthening Treatment Access and Retention (WASTAR)***

## ***Use of a Weighted Equation for Counselor Assignments***

### **Abstract**

Women's Alliance for Strengthening Treatment Access and Retention (WASTAR), a component of Reno, Nevada's Step2 treatment agency, had a counselor assignment system that caused some prospective clients to wait several days between addiction assessment and receiving an appointment with a counselor. That delay was determined to be a factor in the significant number of people attending assessment but not initiating treatment. This case study describes the methods by which the agency determined the changes to be made to the counselor assignment process and describes how they implemented those changes.

### **Aim:**

**Reduce waiting times, reduce no-shows**

### **Path:**

**Intake and Assessment, Scheduling**

### **Key Words**

counselor assignment, wait time, retention, weighted equation,  
walk-through exercise, intake and assessment, first treatment

Terry is twenty-four years old, with two children and an addiction to methamphetamine. Tired of battling her addiction and fearful that it prevented her from taking proper care of her children, Terry took the initiative to seek treatment. When, during her assessment, Terry was told that she met the criteria for outpatient treatment, she became excited about starting treatment and turning her life around. The assessment coordinator told Terry that a counselor would contact her soon to set up her first treatment session. But as the days passed, Terry's desire to enter treatment began to fade, and soon she was back to her "usual routine." When the counselor finally called her, Terry declined treatment. Her life and the lives of her children continued to be plagued by addiction.

Terry's story motivated WASTAR to critically evaluate their intake process and make changes to prevent other clients from encountering similar setbacks in accessing treatment. By evaluating their program services and improving areas where they found problems, the agency is now helping clients to engage quickly in treatment.

### **Agency Services**

Located in Reno, Nevada, WASTAR has been providing addiction treatment services to chemically dependent women and their families since 1988. In 2002, the agency served 119 women, 3 men and 106 children. Methamphetamine, alcohol, and marijuana were the top three addictions treated. The agency provides ASAM Level I, Level II and Level III treatment services, as well as long-term transitional housing. In addition to traditional addiction treatment services, WASTAR also provides mental health services, trauma-related services, smoking cessation, employment training, childcare, life skills development, transportation, and recreation.

### **The Issue to be Addressed**

After a client was first assessed at WASTAR, an additional two days would pass before the client was assigned to a counselor who would set up a treatment appointment, because only one Clinical Director at the agency was responsible for the task of making the assignments. This method relied exclusively on one individual's knowledge of counselor caseloads and work assignments. When this one person was not available, the wait time for counselor assignment would average up to four business days. WASTAR wanted to address both problems simultaneously: decreasing the time new clients waited to receive their counselor assignment and reducing the agency's reliance on the knowledge and availability of a single staff member.

To begin the improvement process, WASTAR evaluated the impact of wait times on client retention by gathering data on the percentage of clients who began treatment after being assessed and admitted. The agency found that of forty women admitted, only thirty made it to their first treatment session. The 25% drop out rate between assessment and treatment indicated that the time lapse between assessment and treatment meant that clients missed their window of opportunity to enter treatment.

Anxious to remedy this problem, WASTAR first tried letting the admissions coordinators assign a counselor immediately after assessment, but the admissions coordinators did not have all of the pertinent information, such specific client needs and counselor workloads, necessary to make efficient and equitable counselor assignments. As a result, counselors continued to be unhappy with their assignments and workloads, and the Clinical Director who had previously been making all counselor assignments took back the sole responsibility for counselor assignments.

This process revealed the assignment process that created wait times not only frustrated clients and impacted treatment engagement rates, but negatively impacted staff relationships as well. Counselors became upset if they felt they were unfairly assigned more clients or more demanding clients than were other counselors. Since there was not a system in place to explain how the client assignment choices were made, counselors often felt picked on and resented new assignments. For staff morale as well as for client treatment needs, WASTAR realized that this issue needed to be resolved.

### **The Change Process**

When WASTAR became part of the Network for the Improvement of Addiction Treatment (NIATx) project, which focuses on improving access to and retention in treatment services, they were asked to assess their services by performing a [walk-through](#) exercise in which a staff member acts as a potential client and goes through the steps of intake, assessment, counselor assignment and treatment. In the process of conducting one walk-through exercise, a staff member was assessed and admitted to treatment, but had to call the agency back after several days of waiting to be contacted by a counselor. In this case, two different staff members each thought that notifying the counselor assigned was the other person's responsibility. Seeing the potential of their current counselor assignment process to let clients fall through the cracks, the WASTAR staff decided to make reorganizing this system their first priority.

WASTAR developed the idea of using a point system to keep track of counselor caseloads in order to determine which counselor should be assigned to a new client. The staff and counselors devised a list of criteria to be considered in determining how to place clients, given counselors' caseload availability. The criteria included:

- ◆ The ASAM Level of care appropriate for the client (A residential client and an outpatient client, for example, require different treatment interventions from their counselors.)
- ◆ The number of children the client has (Clients with children typically need to work around issues of childcare, school, and other child-related issues, and therefore tend to need additional scheduling assistance and flexibility from their counselors.)
- ◆ Involvement in drug court (Clients involved in drug court usually have additional paperwork requirements that are demanding on counselors' time.)

Using these three primary criteria, WASTAR came up with a weighted point system, as follows:

- ◆ 5 points for each client involved in drug court
- ◆ 1 point per child of clients on caseload
- ◆ 10 points for each client in Level I treatment
- ◆ 20 points for each client in Level II treatment
- ◆ 30 points for each client in Level III treatment

A spreadsheet was then created to calculate the point totals for each client, and these were then totaled to calculate the caseload for each counselor. According to the agency's new weighted equation, counselors with higher total point values were considered to have heavier caseloads. WASTAR's admissions counselors were given the weighted equation spreadsheet, so that each time a new client is assessed the admissions staff can calculate the client's point totals, gain an approximation of the client's needs, and then can assign the client to an appropriate counselor. The information is continuously updated so that future counselor assignments can be made quickly and equitably.

### **Results of the Change**

Once the weighted equation system was up and running, counselor assignments were made on the same day that a client was assessed for treatment, because the system made it very easy to determine which counselors could be assigned to a new client. This improvement affords clients the opportunity to meet with their counselors and begin treatment immediately. This change can make the difference between entering a treatment program, or continuing to struggle alone with addiction (for people such as Terry, the client whose case motivated WASTAR to address wait times between assessment and treatment.)

In addition to improving the process of getting clients into treatment, the change has had a positive effect on the WASTAR staff. Since counselors now have a clear understanding of the counselor assignment process and believe it to be fair, the complaints and resentment about caseloads have subsided.

### **Additional Changes Planned**

Since the initial implementation of WASTAR's weighted equation system of counselor assignment, the agency has recognized that some modification is necessary. The original point assignments did not accurately correspond to the number of hours spent by counselors working with certain client situations. By conducting a staff evaluation of the weighted equation system, WASTAR has been collecting input to determine how to modify the system so it more directly reflects the time spent by counselors with various types of clients. Since group facilitation is another important responsibility of many counselors, WASTAR will also be assigning this a point value in the revised weighted equation system.

## **Conclusion**

The story of Terry, as well as WASTAR's walk-through of their admissions process, showed the agency where they needed to make improvements. By instituting the new weighted equation system for counselor assignment, the agency has helped to relieve counselors' frustration with their caseloads, improve staff morale, and get clients into treatment much more quickly. The efforts of the WASTAR staff have resulted in a win-win situation for everyone involved.

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