



**RETAIN** | Retaining Employment and Talent After Injury/Illness Network

## Phase 1 Interim Summary – Ohio

*The Phase 1 Interim Summaries were completed in January 2021.*

**RETAIN Ohio** developed partnerships across health, workforce, and other disciplines to create an innovative program to help injured and ill workers stay at work (SAW) and return to work (RTW). The RETAIN Ohio team developed detailed process descriptions and service flow diagrams, facilitated open communication and collaboration among their partners, integrated a “data lake” to support data collection, reporting, and continuous quality improvement, and proactively planned to scale up and sustain operations.

### Program Description

**Partners.** The Ohio Department of Job and Family Services leads the RETAIN Ohio program. Their key partners are:

- Governor’s Executive Workforce Board, represented by the Office of Workforce Transformation
- Local Workforce Development Boards numbers 17 and 18
- Mahoning Valley Manufacturers Coalition
- Mercy Health
- Ohio Bureau of Workers’ Compensation
- Ohio Department of Health
- Ohio Manufacturers’ Association
- Opportunities for Ohioans With Disabilities

**Target Population.** RETAIN Ohio recruits participants from Youngstown and the surrounding counties of Mahoning, Columbiana, and Trumbull with nonoccupational musculoskeletal (MSK) injuries, mainly involving the low back, shoulder, or knee, and later added cardiovascular conditions. Eligible participants must be currently employed and at risk of leaving the workforce because of an injury.

**Service Coordination.** RETAIN Ohio primarily identifies and recruits participants from Mercy Health’s emergency department, urgent care, primary care practices, and MSK specialists, including physical medicine and rehabilitation, orthopedics, and rheumatology. RETAIN Ohio encourages clinicians to discuss the program during the potential participant’s health care appointment, and the RETAIN Ohio Health Services Coordinator (HSC) based at Mercy Health follows up with additional information about RETAIN Ohio. The HSC facilitates communication and documentation about the SAW or RTW processes between participants, their employers, health services providers, and insurers, as needed. The HSC interacts with clinicians before and after completing RETAIN Ohio training modules, provides support as they implement RETAIN processes, and works with participants to develop a plan of care.



*Ohio is participating in the Retaining Employment and Talent After Injury/Illness Network (RETAIN), sponsored by the U.S. Department of Labor in collaboration with the Social Security Administration. RETAIN states are building connections and improving coordination among employers, health care providers, and other key parties to help newly injured and ill workers stay in the workforce.*

## Program Successes

**Implementation and Participant Successes.** RETAIN Ohio successfully assembled a strong team, including five HSCs and two assistants; established collaborative partnerships with key organizations; and developed detailed processes, resources, tools, and data systems. RETAIN Ohio consistently exceeds goals for clinician participation with at least 108 clinicians participating and 89 who have completed at least some of the training modules. In summer 2020, these modules were converted to an e-Learning format to enhance accessibility. RETAIN Ohio's pilot enrollment period closed in September 2020, having enrolled 210 participants into the program. Another major success for the program is the use of a "data lake" to combine data from disparate sources that don't typically mingle, including participant data from Mercy Health's patient care database, the State of Ohio's Workforce Case Management System, unemployment insurance wage records, and other sources. This enables the RETAIN Ohio team to run automated reports quickly and easily from a secure system and facilitates continuous quality improvement. RETAIN Ohio also is working on data plans to support sustainability and future statewide expansion.

**Outreach and Program Milestones.** The RETAIN Ohio team, including HSCs involved in patient care management, conducted outreach to clinicians, employers, and others to expand awareness of and involvement in the RETAIN program. The team is also planning to disseminate pocket guides and other resources to remind clinicians about the RETAIN program. For employer outreach, RETAIN Ohio launched a website to provide information and resources such as SAW and RTW policies and forms. The team also wrote three articles about RETAIN for the Ohio Manufacturers' Association and other employer and industry groups' newsletters.

Several major milestones for RETAIN Ohio were achieving success with participant and provider recruitment, moving the provider training programs to an online format, and developing data plans for long-term sustainability.

## Program Challenges

**Challenges.** The primary challenge for the RETAIN Ohio program was lower than anticipated participant enrollment relatively early in Phase 1. This was, in part, attributed to COVID-19 and the related several-month restriction on the delivery of many elective services by Mercy Health and closure of businesses. Additionally, several recruitment and enrollment processes needed improvements.

**Strategies to Address Challenges.** RETAIN Ohio used the COVID-19-related slow-down in participant enrollment to examine and improve processes. The team developed five strategies to address participant recruitment and enrollment challenges: (1) expanded participant inclusion criteria to include cardiovascular conditions; (2) implemented a "softer touch" process for outreach to potential participants; instead of mailing enrollment information packets to potential participants, the program first sends a welcome letter that describes the program and includes the name and contact information for the HSC, who follows up with the participant to discuss RETAIN in greater depth after they have met with their clinician; (3) creation and distribution of a RETAIN index card and business card for clinicians to carry to remind them about RETAIN and several key program details; (4) offering clinicians support in coordinating RETAIN services after they complete the training modules; and (5) incorporated the Nurse Access team, a cluster of 1-800 numbers for patients to call when they are sick or have questions about health services, into the service flow. This team also assists with screening callers for potential eligibility and referral to RETAIN.

## Looking Ahead

RETAIN Ohio continues to identify strategies to increase participant enrollment, including further expanding the target population and conducting outreach to other possible sources of participants, such as insurance companies and employers. RETAIN Ohio is also proactively planning data collection systems that will support scalability in the longer term. These plans aim to minimize reporting burden on health care providers and will offer flexibility in data submission processes. As a result of RETAIN, collaboration increased among health care providers, employers, and the workforce system in Ohio, which enhanced their mutual understanding of the interdependence of health and employment outcomes for persons with illnesses and injuries. It also highlighted the need for health care and employment sectors to work in partnership to achieve health and employment goals. The extensive group of partners within RETAIN Ohio recognizes the tremendous value of this project to Ohio's citizens and is developing plans and systems to sustain the project and scale it up statewide.

*Ohio RETAIN has integrated use of a data lake that combines data from health systems, Ohio's Workforce Case Management System, unemployment insurance wage records, and other sources. This secure system facilitates service coordination across partners, project reporting, and is expected to support efforts to scale up and sustain SAW/RTW initiatives statewide.*

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