

## Roberta's House Referral, Tracking, and Enrollment Process

### Maryland Department of Health Statewide Initiative

#### 1. Data Use Agreement

Before referrals can be submitted, all statewide partners must sign a Data Use Agreement (DUA) with Roberta's House. This agreement ensures compliance with privacy, confidentiality, and data-sharing requirements for the Maryland Department of Health Statewide Initiative.

The DUA outlines:

- **Purpose of Data Sharing:** To coordinate grief and bereavement support services across Maryland.
- **Parties Covered:** Local health departments, local and state Child Fatality Review Teams, the Office of the Chief Medical Examiner (OCME), and Roberta's House.
- **Permitted Data Elements:** Referral information (participant demographics, deceased information, referral source, and program placement) necessary for service enrollment.
- **Data Protection Standards:** All data will be stored in secure, HIPAA-compliant systems; access will be restricted to authorized staff.
- **Use & Disclosure:** Information will be used only for referral, intake, enrollment, and reporting purposes; no secondary or external use without written consent.
- **Duration & Termination:** Agreement remains in effect for the duration of the initiative or until terminated by either party with written notice.
- **Reporting & Oversight:** Roberta's House will provide regular updates to MDH on referrals and enrollment in accordance with reporting templates.

No referrals will be processed until DUAs are executed with participating partners.

#### 2. Referral Submission

- A web-based referral form will be hosted on the Roberta's House website once data-use agreements are signed with all statewide stakeholders (local health departments, local and state Child Fatality Review Teams, and the Office of the Chief Medical Examiner).
- The referral form will collect:
  - Service participant's name, email, phone number
  - Cause of death of the deceased

- Other impacted family members (spouse, siblings, immediate relatives)
- Referral source
- Program referred
- Additional resource and referral needs, if applicable
- Information of family members attending RH (Roberta's House) program

### 3. Receipt & Initial Contact

- Completed referral forms are automatically directed to the Intake Coordinator and Administrative Services Coordinator via:
  - Email: [info@robertashouse.org](mailto:info@robertashouse.org)
  - Website: Web address to be announced
  - Staff will contact the individual listed on the completed referral form within 24 to 48 hours of receipt.
- Staff will attempt two phone contacts to complete the intake interview.
  - The staff will make the first attempt via phone and leave a voicemail, if available
  - The staff will make a second contact attempt via phone.
- If the participant cannot be reached by phone:
  - An email will be sent with a link to the full electronic application
  - The email explains available grief and bereavement services and invites the participant to self-enroll

### 4. Intake & Application Completion

- **If reached by phone:** the Intake Coordinator completes the full intake interview and places the participant into the appropriate program.
- **If completed electronically:**
  - Application Content – The participant fills out the extended application, which collects:
    - Demographics
    - Information about the deceased
    - Services of interest
- **Before Website Launch** – Until the website is live, participants will instead receive a fillable PDF attached to the email sent during the second contact attempt.
- **Submission** – Participants are expected to complete the PDF and return it by replying to that email.

## 5. Enrollment Pathways

Once intake is complete, participants are triaged into services:

### A. General Bereavement Support

- Participants are enrolled in HALO Maryland, a monthly support group for parents grieving children ages 0–17.
- Each enrollee receives a Grief & Bereavement Toolkit, including journals, resources, and educational materials.
- Families with grieving siblings also receive a Family Grief Toolkit, mailed to the home with physical activities, QR-linked education, and parent-child support tools.

### B. Specialized Bereavement Support

- Families grieving due to infant loss (< age 1) are connected to the HOPE Reimagined program.
- Families grieving due to homicide are connected to the Homicide Transformation Project (HTP).
- Program Directors triage participants to ensure appropriateness for group settings.

### C. Clinical Support

- Participants with high trauma or complex grief not yet ready for group are referred for at least three individual therapeutic sessions with a licensed clinician.
- HTP participants receive additional support and check-ins from a Survivor Advocate or Program Manager prior to group enrollment.

## 5. Pre-Group Engagement (Touch Points)

- Participants receive multiple touch points before group enrollment:
  - Delivery of the toolkit
  - Phone call or text check-in with resources and support
  - Facilitator call the day before the first group to introduce themselves, answer questions, and confirm attendance

## 6. Program Participation

- **HALO:** Monthly peer-based support group.

- **HOPE / HTP:** 10-week cycles, delivered virtually or in-person depending on program.
- Directors conduct regular triage and resource connection throughout group participation.

## 7. Tracking & Completion

- All referrals are logged in the Roberta's House data system.
- Intake staff document referral source, outreach attempts, and participant status (pending, enrolled, declined).
- Program Directors document group assignment, attendance, clinical referrals, and outcomes.
- Monthly audits ensure that referrals are closed, tracked, and reported to MDH.