

# Concurrent Session 1: New to Overdose Fatality Review: Everything You Need to Know to Be Successful

Moderator: Melissa Heinen, Institute for Intergovernmental Research



# New to OFR: Everything You Need to Know to Be Successful

Melissa Heinen, RN, MPH

OFR and Suicide Fatality Review Senior Research Associate/Manager  
Institute for Intergovernmental Research

[mheinen@iir.com](mailto:mheinen@iir.com)

[www.OFRTools.org](http://www.OFRTools.org)



# OFR: Guiding Principles

- Goal of reducing overdose deaths
- Recognition of substance use disorder as a chronic, treatable, and preventable disease
- Use of multi-sector data to inform response strategies
- Continuous improvement process

# OFR Process



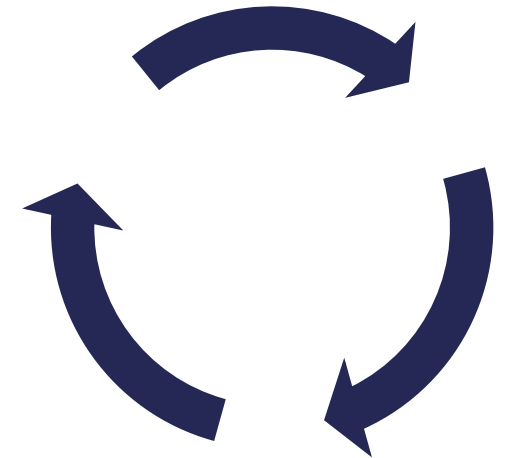
Analysis and review of aggregate data to understand overdose trends, select cases to review, and provide context for case findings and recommendations



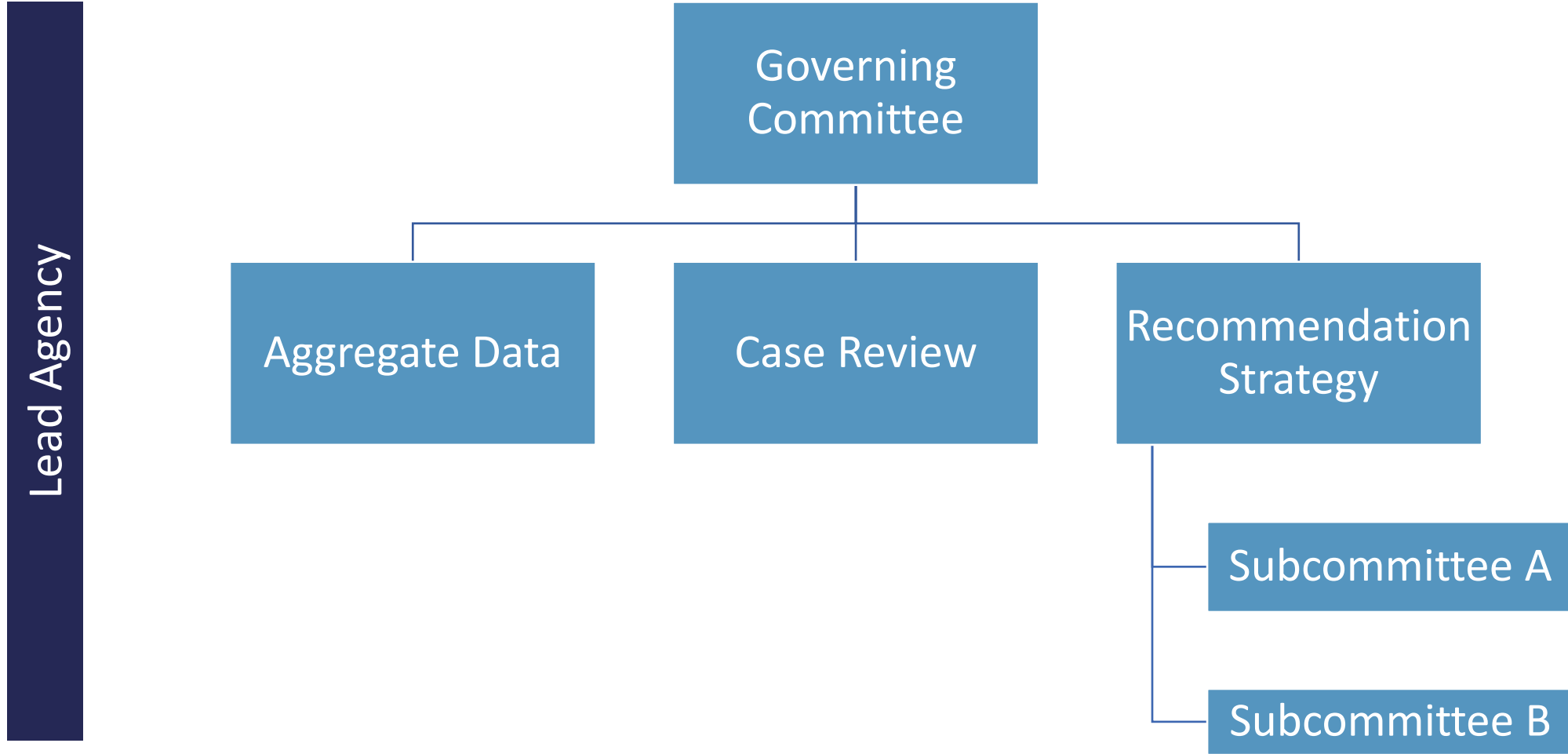
Series of confidential individual death reviews by a multidisciplinary team to effectively identify system gaps and innovative community-specific overdose prevention and intervention strategies



Recommendations are developed and presented to a governing committee that supports and provides resources for an implementation framework for accountability for action



# OFR Structure



# Lead Agency Staff Roles



## OFR Team Coordinator

- Obtains and shares case information with team members
- Reviews data and reports from team members
- Researches information about cases that may not be provided by OFR members, such as reviewing social media, obituaries, media coverage, etc.
- Drafts OFR meeting agendas, in partnership with the OFR team facilitator
- Manages meeting logistics (such as date and time, location, and technology support)
- Takes minutes during each meeting
- Documents activities since the last OFR meeting
- Updates the governing committee
- Supports and communicates with subcommittees

## OFR Team Facilitator

- Facilitates OFR meetings
- Recruits OFR team members
- Builds and maintains relationships with OFR team members
- Orients new OFR team members

## OFR Data Manager

- Enters case information and recommendations into OFR database
- Writes data or summary reports for sharing with the OFR team and the governing committee
- Analyzes OFR data

# Public Health and Safety Team (PHAST)— Common Aggregate Data Shared



- Nonfatal overdose data—emergency medical system and emergency department
- Naloxone distribution (ODMAP)
- Harm reduction kits distributed
- Drug-related arrests
- Drug seizures
- Social determinants of health (number unsheltered, rent occupancy rate, unemployment rate, high school graduation, etc.)
- Overdose deaths

# PHAST—Common Team Members



- Behavioral and mental health treatment provider
- Certified/Peer recovery specialist
- County sheriff's office
- Coroner's or medical examiner's office
- Data analysts/epidemiologist
- Emergency medical services (EMS) agency representative
- Harm reduction service provider
- Hospital representative
- Housing/homeless services
- Overdose response strategy (ORS) drug intelligence officer
- ORS public health analyst



OFR teams need a diverse set of members from disciplines and sectors that represent the community



It is important to partner with agencies willing to:

Provide quality services

Develop successful partnerships

Maintain consistent engagement

Be good stewards of data—following confidentiality

Engage in public policy or advocacy

# Common OFR Team Members



- Local health department official
- Local law enforcement representative
- Medical examiner/coroner
- Prosecutor
- Local human services department official
- Substance use treatment provider
- Medication for opioid use disorder (MOUD) provider
- Mental health social worker
- Pain management clinician
- Emergency department physician
- Primary care provider
- Pharmacist/toxicologist
- Prescription Drug Monitoring Program (PDMP) representative
- High Intensity Drug Trafficking Area (HIDTA) public health analyst and drug intelligence officer
- Sheriff
- Probation and parole officer
- Emergency medical service provider
- Drug treatment court representative
- Patient advocate
- Deflection/diversion representative
- Child protective services representative
- Substance use prevention professional
- School counselor
- Tribal elder, traditional leader
- Community leader
- Housing authority representative
- Harm-reduction outreach professional



# Recommendation Strategy

- The bulk of the work of an OFR happens outside of the aggregate and case review meetings
- Prioritize, dig in and develop recommendations work plan, prep for governing committee proposal/ask
- Subcommittee membership may include members of the governing committee, OFR or PHAST team, outside experts (e.g., experts related to addiction, harm reduction, homelessness, veteran's affairs, or family survivors), or those with lived and living experience

# Governing Committee

The governing committee is composed of senior-level (decision makers) representatives of city, county, and state agencies and community partner organizations.

The committee provides leadership and support for implementing recommendations identified through the OFR process.

There may be an already existing local drug prevention task force, or one may be formed solely to support the OFR initiative.

# Governing Committee—Common Members



Chief of police

Mayor

Commissioner of  
health

Researchers at a  
local university

District attorney

School  
superintendent

Medical  
examiner/coroner

Chief executive  
officers at local  
hospitals

County sheriff

Attorney general

Secretary of  
Department of  
Corrections

Behavioral health  
administrator

# The "SOS" Process



- Shared understanding
  - OFRs increase members' understanding of area agencies' roles and services as well as the community's assets and needs, substance use and overdose trends, current prevention activities, and system gaps
- Optimized capacity
  - OFRs increase the community's overall capacity to prevent future overdose deaths by leveraging resources from multiple agencies and sectors to increase system-level response
- Shared accountability
  - OFRs continually monitor local substance use and overdose death data as well as recommendation implementation activities. Status updates on recommendations are shared at each OFR team meeting and with a governing committee, reinforcing accountability for action



**OFR**  
Overdose Fatality Review



# Tools & Resources



# Overdose Fatality Review Team



**Melissa Heinen,  
RN, MPH  
Manager, IIR**  
[mheinen@iir.com](mailto:mheinen@iir.com)



**Lauren Savitskas,  
MPH  
Senior Research  
Associate, IIR**  
[lsavitskas@iir.com](mailto:lsavitskas@iir.com)



**Mallory O'Brien,  
PhD, Associate  
Scientist, Johns  
Hopkins Bloomberg  
School of Public  
Health**  
[mobrie54@jhu.edu](mailto:mobrie54@jhu.edu)



**Nneka Abara  
Program  
Communications  
Strategist, IIR**  
[nabara@iir.com](mailto:nabara@iir.com)



**Chris Morgan  
Senior Research  
Associate, IIR**  
[cmorgan@iir.com](mailto:cmorgan@iir.com)



**Cat Gangi,  
MPH, CHES  
Senior Program  
Specialist, IIR**  
[cgangi@iir.com](mailto:cgangi@iir.com)



**Natalie Giese  
Research  
Associate, IIR**  
[ngiese@iir.com](mailto:ngiese@iir.com)

# OFR Tools Website



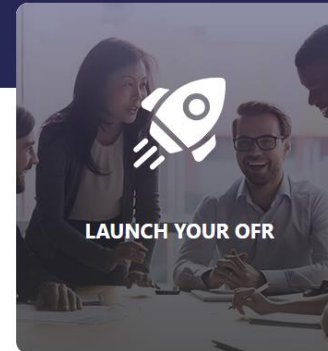
[Toolkits](#) [Profiles](#) [Resource Library](#) [Learn](#) [Take Action](#) [Q](#)

## A DATA-DRIVEN RESPONSE FOR COMMUNITY CHANGE

[WHY OFR?](#)



### Explore



Get in touch! Sign up with OFR Exchange. [✉](#)

[SIGN UP](#)

# Launch Your OFR



## Launch Your OFR

Jurisdictions interested in establishing their own OFR should use the resources below.

### Checklist

<b>OFR 101 Webinar</b> <input type="checkbox"/>	<b>OFR: A Practitioner's Guide to Implementation</b> <input type="checkbox"/>	<b>New to OFR Virtual Training</b> <input type="checkbox"/>	<b>OFR 101 Webinar</b> <p>Presented by leading OFR experts at COSSUP and CDC, this January 2021 webinar details roles and expectations of OFR team leaders and members, describes agenda items of an OFR meeting and measures of success, and provides guidance on OFR data collection and plans for implementing OFR team recommendations.</p> <p><input checked="" type="checkbox"/> I've read this</p> <p><a href="#">See OFR 101 Webinar</a></p>
<b>OFR Practitioner's Guide Project Management Tool</b> <input type="checkbox"/>	<b>OFR: National Standards</b> <input type="checkbox"/>	<b>OFR Information Sharing Guidance</b> <input type="checkbox"/>	
<b>OFR Mock Reviews</b> <input type="checkbox"/>	<b>OFR Message Exchange</b> <input type="checkbox"/>	<b>OFR Data System</b> <input type="checkbox"/>	
<b>Request OFR TTA</b> <input type="checkbox"/>	<b>Register Your OFR</b> <input type="checkbox"/>	<b>OFR Mentor Program</b> <input type="checkbox"/>	

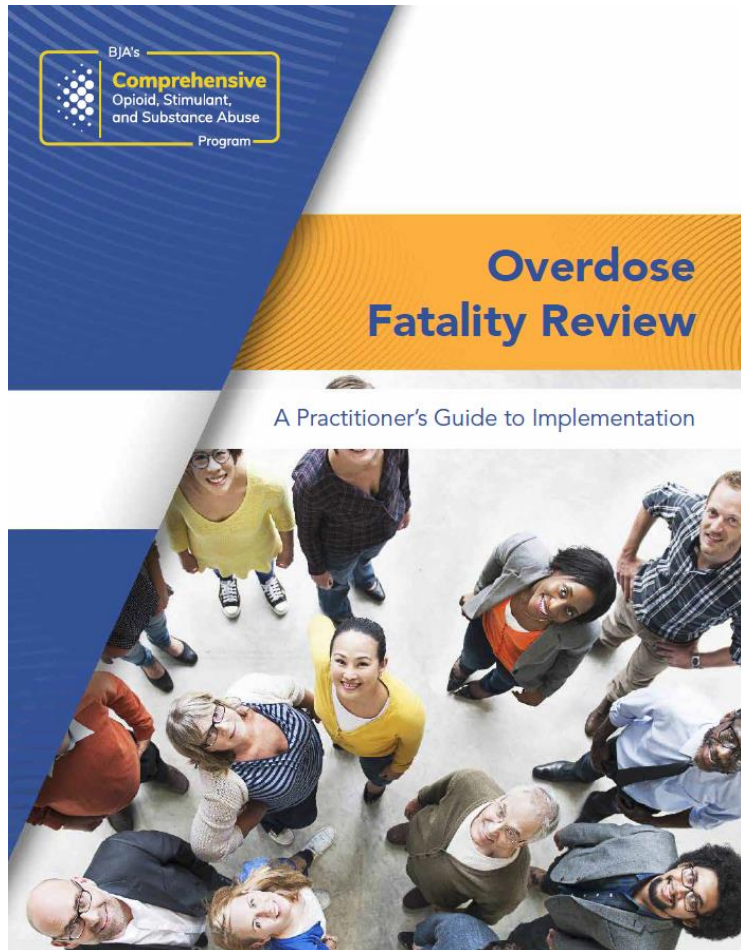


## Overdose Fatality Review: National Standards



Companion document to "Overdose Fatality Review: A Practitioner's Guide to Implementation"

# Overdose Fatality Review: A Practitioner's Guide to Implementation



## Modules



**Recruit**  
Recruit Your  
OFR Members



**Plan**  
Plan Your OFR  
Meeting



**Facilitate**  
Facilitate Your  
OFR Meeting



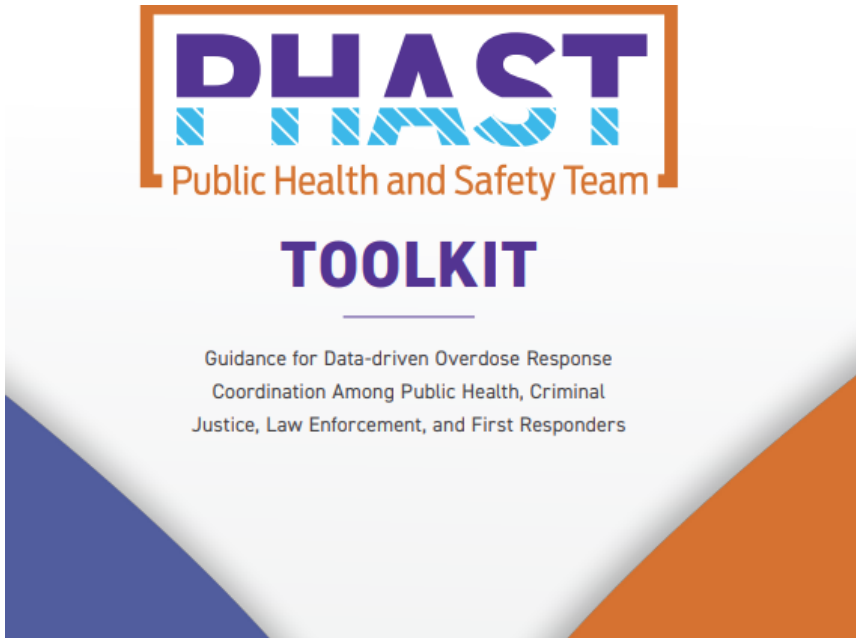
**Collect**  
Collect Your  
OFR Data



**Build**  
Build a  
Recommendation  
Plan



# Public Health and Safety Team (PHAST)



<https://phast.org/>



# Information Sharing Guidance Documents



## 1 Obtaining Medical Records

### How can an OFR team obtain medical records after a person dies?

Medical records containing protected health information (PHI) are safeguarded by the Health Insurance Portability and Accountability Act (HIPAA) for 50 years after an individual dies. Therefore, to obtain medical records of a decedent that contain PHI from a HIPAA-covered entity, an OFR team must rely on one of the following options:

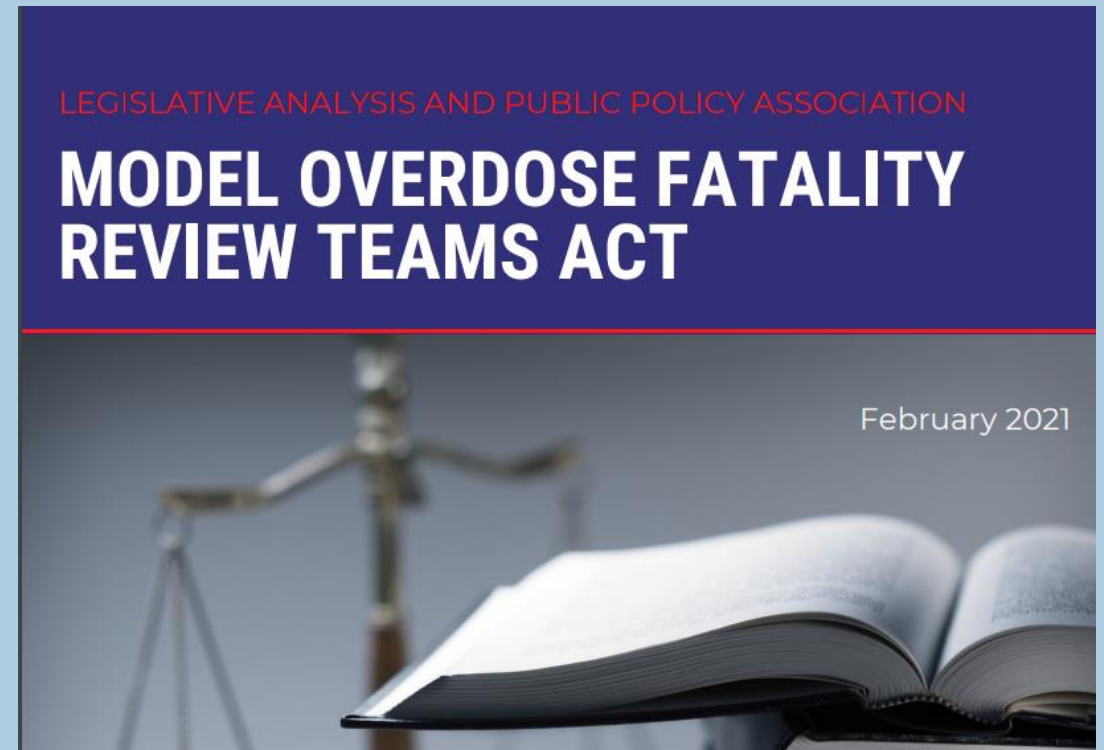
- State statute, state regulation, or local ordinance that specifically allows an OFR team to receive the information.
- State statute, state regulation, or local ordinance that allows a public health authority to access medical records for certain purposes (such as health surveillance or death investigations).
- Authorization form signed by the decedent's authorized personal representative.

A dark blue rectangular button with white text that reads 'For more information, check out the PDF!' followed by a white download icon (a square with a downward-pointing arrow) and the text 'DOWNLOAD PDF' in white capital letters.

# State Legislation Can Enhance Data Sharing

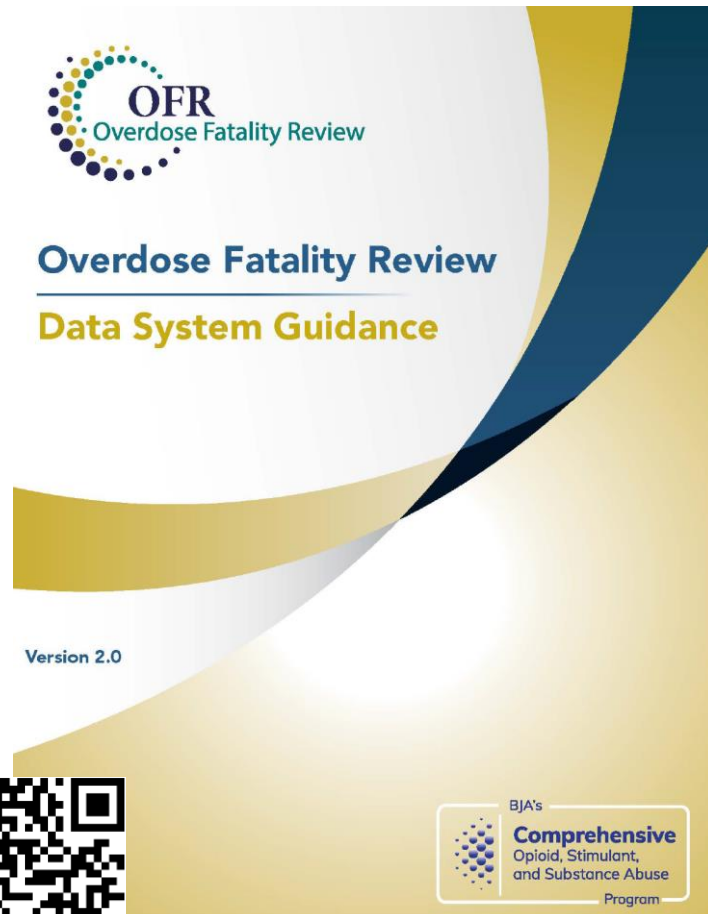


- Model law created through Legislative Analysis and Public Policy Association (LAPPA)
- Enables, but does not require, OFR teams



<http://s.iir.com/Uec58JHX>

# OFR Data System



Case information

---

Next-of-kin (NOK) interview

---

Community context

---

Recommendation monitoring



# OFR Mentor Site Opportunities



- The purpose of the Overdose Fatality Review (OFR) Mentor Program is to elevate, communicate, and leverage OFR promising practices while building bridges between nascent teams and those with demonstrated success. The OFR Mentor Program provides a unique opportunity to learn the application and practice of OFR from experienced peers
- Interested sites can apply here

A flyer titled "Overdose Fatality Review Peer Mentor Site Opportunities". The flyer includes a description of the program's purpose, a list of activities for a typical OFR mentee experience, and a call to action to request a virtual site visit. It also features the OFR logo and the BJA's Comprehensive Opioid, Stimulant, and Substance Abuse Program logo.

**Overdose Fatality Review**

## Peer Mentor Site Opportunities

The purpose of the Overdose Fatality Review (OFR) Peer Mentor Program is to elevate, communicate, and leverage OFR best promising practices, while building bridges between nascent teams and those with demonstrated success. The OFR Peer Mentor Program provides a unique opportunity to learn the application and practice of OFR from experienced peers.

### OFR Peer Mentee Application

OFR peer mentor participants are matched to an experienced mentor site program that provides consultation and support through direct communication and a virtual\* OFR site visit, to see first-hand how OFRs work in practice.

A typical OFR mentee experience will include:

- One-hour introductory call at least one week before the OFR virtual site visit
- Two-hour OFR observation
- One-hour post review discussion call at least one week after the OFR virtual site visit
- Facilitated discussions with one or two OFR members as requested by peer mentee
- Feedback to IIR by both mentor and mentee about their experience

(\*Note: In-person virtual site visits are on hold during the COVID-19 response.)

Request a virtual site visit by completing this online form. ([http://s.ilr.com/OFRSite\\_Visit](http://s.ilr.com/OFRSite_Visit))

**OFR**  
Overdose Fatality Review

BJA's  
**Comprehensive**  
Opioid, Stimulant,  
and Substance Abuse  
Program

# OFR Email Exchange



- Great way to network with your peers!
- Sign up through our website!



Toolkits ▾

Profiles

Resource Library

Learn ▾

Take Action ▾



## OFR Message Exchange Sign-Up

The OFR message exchange is a platform for those involved in Overdose Fatality Reviews to engage with one another. Enrollment in this message exchange is by permission only, and the [terms of use](#) apply.

The fields marked with the \* are required.

First Name\*

Last Name\*

Title\*

State/Territory\*

Select State/Territory

Agency\*



# Training and Technical Assistance (TTA) Request



- Expertise is available to support your OFR efforts
- We are here to help you troubleshoot day-to-day challenges as they arise
- Submit your TTA request here



Toolkits ▾

Profiles

Resource Library

Learn ▾

Take Action ▾



## Training and Technical Assistance Request

Regardless of funding source, anyone can request OFR training and technical assistance. Expertise is available to support the expansion and development of overdose fatality review (teams) through a variety of formats, including but not limited to:

- Host one-on-one calls to troubleshoot day-to-day challenges
- Identify available resources and materials
- Connect TTA requestor to peers in the field
- Present to team or meeting attendees
- Convene professionals to address a need
- Facilitate virtual meetings and workshops

The fields marked with the \* are required.

Name\*

Agency\*



# OFR Mock Reviews and New-to-OFR Virtual Training



- All three are available on our Resource Center website on [www.OFRTools.org](http://www.OFRTools.org)

## 2021 National Virtual Forum on Overdose Fatality Review: Mock OFR Review 2: Rural Review

Publication Date: 2/25/2021

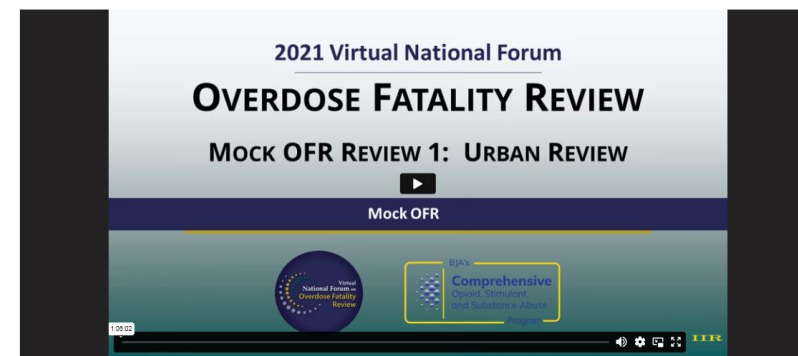
A mock OFR team conducts a rural overdose fatality review.



## 2021 National Virtual Forum on Overdose Fatality Review: Mock OFR Review 1: Urban Review

Publication Date: 2/25/2021

A mock OFR team conducts an urban overdose fatality review.



## New to OFR Virtual Training

Publication Date: 1/5/2023

Join the Comprehensive Opioid, Stimulant, and Substance Abuse Program (COSSAP) for a virtual two-part training opportunity to learn how to establish an effective OFR. In this initial, three-hour kickoff event, participants will receive training and information on how to staff, recruit, plan, and facilitate successful OFR meetings, as well as identify measures of success and strategies to store data and implement identified recommendations.

### Resources

- [Presentation Slides](#)



# NOK Interview



- Provides an in-depth look at how someone lived, their social supports, and the circumstances that lead to an overdose death
- A tool that OFRs can use to expand their understanding of the life experiences of a decedent and identify nontraditional touchpoints or systems
- Resources available through COSSUP:
  - NOK Webinar
  - NOK Toolkit
  - NOK Training (for those completing the interview)
  - NOK Learning Community



# Wrap-up

# Questions