

Bryna: Hello everyone. This is Bryna Furner with Texas Promoting Independence at UT Health San Antonio. We are so happy you could join the CAT Technical Assistance webinar today. I'm happy to welcome Cynthia Sierra who will be discussing how to provide resources and educational material during a CAT session. Just a few routine housekeeping reminders before we get started. You can listen to this presentation either through your speakers on your computer or through your telephone via the number that was provided on the webinar invite. You will want to choose one or the other, so you do not hear an echo or feedback. Everyone is muted, so the only way to communicate is through the questions box on your control panel. The questions are being monitored and will be addressed. Again, we're asking each participant to type their name and agency into the questions box so we know who is participating on the webinar today. There will be some polls and chats today via some examples throughout the webinar. Please note if you are sharing a computer, only one response will be counted. After each question is read. You will have 20 to 25 seconds to answer the poll or chat and we encourage everyone to participate. The slides for today's webinar are available under your handout section of the control panel. And the webinar is being recorded and both the link to the recording as well as the slides will be sent out to all attendees later this afternoon. The email will also include instructions on how you can receive a certificate of attendance. Please allow about 24 hours for receipt. And without further ado, please welcome Cynthia Sierra.

Cynthia: Good morning, everyone. Thank you for joining us today. My name is Cynthia Sierra and I will be providing this morning's webinar, how to Provide Resources and Educational Material during a CAT Session.

We would like to thank you for attending this month's webinar presented by Texas Promoting Independence Learning Community.

To begin, let's do a quick poll. Is CAT different from case management, yes or no? Okay. Looks like majority of you say yes.

One large difference between CAT and case management is that CAT sessions should always be an active visit. We like to say if you are sitting, you are not doing CAT. We use this phrase to emphasize the principle that a CAT practitioner should not be sitting and stagnant during a visit. A CAT practitioner is the leading partner for keeping momentum during CAT services. If you are in a person's home and they are not motivated or are getting distracted when trying to complete a task, as the CAT practitioner, you will be the one observing what is going on and making suggestions on how to place interventions in their environment to overcome these hurdles. Engaging the individual in activities and tasks while you are in their home will allow you to see what barriers are getting in the way of the individual completing the task independently. If motivation is the barrier, then being able to

do the task at hand side by side with the individual will be one way to guarantee they will complete the task. Sometimes just the thought of taking on a task no matter the size, may be too overwhelming for the individual. However, if it is done in a partnership, the task may no longer seem so daunting.

We will be covering five areas that are most common when providing resources and educational material to those receiving CAT services. First, we will review groceries, clothing, and financial assistance, followed by transportation, then work, school and volunteering, after that, leisure, stress and coping, and lastly, physical and mental health. As we mentioned in both our trainings in previous webinars, if the person you are serving is having difficulty meeting their basic needs, they will most likely not engage in CAT services. This is why the first area we address is groceries, clothing, and financial assistance. Before we move on to review how we can provide information to these resources utilizing CAT interventions, I want to hear from you in the chat box. What are other areas where you have provided resources for the folks you serve? Looks like we have a shy bunch this morning.

Okay. Groceries, clothing, and financial assistance. Resources for grocery needs are typically provided in the form of a list of local food pantries the individual can access. When providing community resources during a CAT visit, you want to keep in mind the person's executive functioning and behavioral type.

Now here's a quick poll. Should the CAT practitioner provide a list of resources and leave for homework the individual to call the resources on their own, yes or no? Okay. Looks like majority voted no.

Leaving the resources as homework assignment is an option and there is certain information to take into consideration when making that decision. One, you will want to consider the person's executive functioning and behavioral type regarding when you should assign calling the resources as a homework assignment. If the person has a history of not completing homework assignments on their own, you might not want to leave this task for them to do alone. As the CAT practitioner, you want to be mindful of other aspects regarding the need for the resource. If the individual does not have any food and will most likely not eat if the resource is not utilized immediately, as the cat practitioner, you want to address the need at that moment versus leaving it as a homework assignment.

Now let's take a look a closer look at how you, as the CAT practitioner may introduce the resource list and set up interventions to reduce any barriers that may be in the way of the person successfully utilizing them. Someone who is poorer on executive functioning and disinhibited may not do well with simply providing a list of local resources. When providing the resource list, you want to follow the CAT session structure in which you present the

resources and then go through the resource list step by step with the person. While reviewing the resources you want to make note of areas that need attention or further intervention. The slide shows examples of steps you as a CAT practitioner can assist the individual in completing or plan for. You can first start with providing the resources. Schedule a visit to go to the resource, write the date and time on the calendar for the visit, call the resource and find out what items you need to access it. Gather items needed for access to the resource. Place the items in a folder that the individual can easily take with them. Make sure you place the folder in a location that the individual can easily recall and grab before they go. Plan transportation to and from the resource.

Let's cover how we can assist someone with transportation resources. When we complete the EFA with the individual, we are able to get a quick picture of what their transportation needs may be. The CAT practitioner will ask what the person's primary source of transportation is, what places are they able to go out to in the community alone, and what challenges do they have in going to these places alone? When asking these questions, the CAT practitioner is making note of areas in which they may need assistance. You're also taking into account whether the person is aware of any community resources that may be of benefit to them if a need arises and whether they know how to utilize those resources. While providing a resource for transportation would be similar to providing resources to the food bank, here may be additional steps to consider. If the CAT practitioner determines the person has apathy and is poorer executive functioning, you may provide additional support. Perhaps as the CAT practitioner for this individual, you will motivate the individual to use a resource like Medicaid transportation by not only doing the steps outlined in the slide, but also meeting the individual at their home a few minutes prior to their scheduled pickup time to ensure that the individual is home, awake, dressed, and prepared to leave. This may be the intervention needed at first to get the person used to a new mode of transportation. As time goes on, you can reduce your involvement slowly. For example, instead of meeting the person at their home prior to their pickup time, you can call them to prompt the task mentioned above and then meet them at their destination to confirm they made the trip successfully.

Now onto public transportation. Some of the individuals we work with are very well versed in accessing public transportation. However, there are those who may not be as knowledgeable on how to access public transportation. As a CAT practitioner, you can provide resources on how to utilize public transportation like bus schedules and application for discounted fare or a monthly bus pass. As discussed above, with utilizing Medicaid transportation, you want to go through each step of accessing public transportation with the individual.

Now, I'd like to do another poll and find out are you well versed in taking public transportation in your city? Yes or no? Okay, looks like majority of you said no. Well, as a young CAT practitioner, I had the privilege of venturing out with the individual I was serving and boy was it a learning experience, not only for the person, but for myself as well. I had felt pretty confident in going out and modeling a bus ride to and from the doctor's office with the individual. However, I underestimated the number of transfers and the fact that I was new to San Antonio myself. I used public transportation back home, but it is not nearly as large of a city, nor was it an unfamiliar place for me to navigate. Nonetheless, here I was with the individual, planning our day with bus schedules, making notes of transfers and making sure we had not only our bus fare, but also our transfer tickets. Needless to say, I got us lost and it turned out to be an empowering experience for the person since they were the one who got us to our final destination. This trip took both of us working together to make it to the destination. As the CAT practitioner, I had all the information on schedules, transfers, and figuring out the monies and tickets, but the individual had the knowledge of their town, the location we were going to and the whereabouts. I am proud to say after this visit, the individual utilized the bus as their primary mode of transportation, providing them a more independent lifestyle.

On this slide, there are some suggestions similar to the previous ones on ways you can use CAT to provide resources for public transportation. I would like to provide an example of an individual who is better executive functioning and mixed behavioral type. Let's call them Anna. While Anna is working while working with Anna, she stated during her EFA that she used public transportation to get to places she needed to visit. However, Anna also stated she arrives late to appointments or does not make it to the appointment at all because she gets lost on her way there. Upon review of the bus schedules that were provided, Anna discloses she knows what bus routes to take. Anna states that she gets off the bus on other stops to shop at a convenience store on the way. She likes to get a drink and snack for her trip. Anna also says she will sometimes get off on the wrong stop because she makes a friend while on the trip and will exit the bus when they get off. In learning about these barriers while taking the time to introduce the bus schedules, as the CAT practitioner, you can now plan your interventions to bypass these hurdles. The first intervention we set in place was a checklist for Anna to use to pack a snack and drink with her before heading out to the bus stop. Next, was coming up with an intervention to stop Anna from getting off at the wrong stop after making a new friend. To do so, we agreed that I would meet her at the final bus stop on her next appointment. If she made it to the bus stop on time, a snack and drink for her ride back home would be provided as a reinforcement for her hard work. You may ask, why would we provide reinforcement for Anna making it to her visit? Well, as I mentioned before, her behavioral type is mixed. This means there are instances of apathy

and disinhibition, so we may have a loss of motivation or simply distraction that is leading Anna to follow her new friends off the bus. Keeping this in mind, we want to encourage the behavior of staying on the bus until she reaches her final stop. The CAT practitioner is trying to change the behavior by providing a small incentive like a snack and drink for her trip back home, making that a motivator to stay on task.

Let's take some time and review providing resources and educational material for work, school and volunteering. Each person's needs are going to be very specific and individualized when it comes to this area. If an individual's goal is working, I encourage CAT practitioners assist the individual in finding out what their respective income cap is if they are actively receiving disability benefits. Many of the individuals we come in contact with have been informed that they are not allowed to work or receive any additional income as that could jeopardize their disability benefits. As a CAT practitioner, we should take the time to educate ourselves as well as those we provide services to on what is possible and what is not. For example, Kevin is someone I provided CAT services to. Kevin was receiving disability, housing and SNAP benefits while working 10 hours a week with a cleaning company in the evenings. This job supplemented some of Kevin's income. However, Kevin still struggled to meet some of his needs. In further discussing with Kevin his goal of finding a new job, he stated he only works 10 hours a week because that is what social security has approved. I encouraged Kevin to call social security during our visit and we're able to clarify that he has not restricted to 10 hours a week of work, but rather a \$600 a month of additional income aside from his disability benefits. Kevin was ecstatic and went to work that evening to request additional hours that will not impact his earning over \$600 a month.

A large part of providing resources in this area is actively working with the person on those resources. The CAT practitioner will not only provide applications for work, school or volunteering, but also go through the process of filling out the application with the individual or reviewing it once it is filled out. Also, you want to actively role play interviews. Work with the person on getting comfortable in an interview setting. CAT practitioners may also assist the person in identifying appropriate interview clothing or work attire. The role of the CAT practitioner is to walk the person through the whole process step by step, allowing you to identify where they may need assistance in reaching their goal. When the goal is volunteering, the CAT practitioner can go out with the individual and explore places of interest. Try spending a day at the local clubhouse. Visit the Humane Society, nursing homes or places of worship. Have the individual provide a list of interest or maybe previous work experience that may help you find volunteer sites that fit their abilities and interest. United Way is always a good option to find a variety of places searching for volunteers.

Onto leisure, stress and coping. This is a great area where educational material is helpful when working on developing leisure activities and managing stress and coping. Individuals who exhibit apathy may have difficulty identifying leisure and coping activities. While someone exhibiting disinhibition may have many ideas on activities to try but do not consistently complete the activities. This is where providing some educational material on stress and coping comes in handy. As the CAT practitioner, you may want to remind the individual that their favorite leisure activity could easily be considered a coping skill. This usually provides some relief when they are asked to list some activities they feel comfortable trying. Utilizing their leisure activity as a coping skill is always a great start, since it is something they probably do very well and already enjoy. As you introduce new activities, make sure you try the activities with the person and while doing the activity, track their enjoyment before, during, and after the activity.

On this slide, we emphasize the act of participating in the activity. As a CAT practitioner, I have participated in all sorts of leisure, stress and coping activities. Some of my favorites have been scheduling morning visits to accommodate walks around the person's neighborhood or a nearby park. CAT practitioners have attended gym sessions with individuals to encourage and motivate the activity. A season pass at a local theme park has been purchased for an individual who enjoyed walking the premises and socializing with people. It actually turned out to be a good workout. By combining it with healthy eating, the individual started to lose weight. As a CAT practitioner, keep in mind we are not solely providing a list of resources during our visits, we are actively walking through the process, allowing the individual to share their experience and identify what barriers are interfering with their independence. Leisure activities will be covered in greater detail on our upcoming webinar on January 12th, 2021.

Lastly, physical and mental health. This is a great area where educational material is helpful when working on illness and symptom management. As a CAT practitioner, your role will be that of an advocate for the individual as well as a partner for healthcare providers. While cat practitioners do not pick sides between the person and the healthcare provider, as CAT practitioners, we must be the bridge between our colleagues and the persons we serve. I would like to take a moment and clarify that a CAT practitioner is not practicing medicine while providing educational material. Discussing educational material is not outside of a CAT practitioner scope of practice. However, follow your licensure and organization's guidelines. CAT practitioners should be providing validated information from a reputable resource on what the topic at hand may be. For example, going to the American Diabetes Association website to get information on managing diabetes.

As a CAT practitioner, your involvement in providing educational material is beneficial to the person's engagement with healthcare providers. Keep in mind providing the educational material is not going to be simply reviewing information with the person. As the CAT practitioner, you want to take into account their executive functioning and present the information in a manner that will be best understood by the person. Do you provide an educational video or maybe utilize pictures to explain a process? As a CAT practitioner, you will determine based on the person's executive functioning and behavioral type, how to present the educational material in an array of methods that is best for the individual. One example is providing a list of foods that were encouraged by the cardiologist to incorporate in the person's diet to help manage their high cholesterol. A CAT practitioner can then build on this by finding recipes that included these foods or modifying some of the individual's personal recipes to fit the new medical recommendations. A CAT practitioner can also make learning the material interactive. You can take a paper plate and bring food magazines to the visit, and during your session, sit with the person and cut out foods to glue onto the paper plate. This activity can show portion control between grains, meats, fruits and veggies, but also can lead to a conversation of which foods are recommended and which are not. Always keep in mind, it is not simply talking about the information, it's more about making the information come to life for the person and walking the individual through fully understanding the information that is being provided, while making note of what may get in the way of the person successfully making changes and how to intervene at those points.

Now I'd like to thank everyone for attending this webinar. I would like to open our discussion for questions at this moment, so if there's any questions, please go ahead and put those in the chat box. Okay, looks like there's one. What if the person I am working with has no interest in and working on going to school, work or volunteering? If they don't have interest in working in any of those areas, that's definitely not something you have to force upon them, and just let it naturally come to that if that's something that maybe in the future they want to do. I would just keep my ears out for instances when they might say that they're bored or they feel their day's redundant, or maybe they don't feel like they have enough stuff to do during the day, those are usually times when, we'll make suggestions of what can we do to keep you busy? And volunteering might be an option or maybe just attending like a day program, and getting out of the house a little bit. Another question. How long are your visits when you are doing activities with the person? So typically, when we are out at visits, our visits are anywhere from 45 minutes to about an hour long depending on what your interventions are for the day. If we're doing activities, something like, let's say going to a theme park, and engaging the person at the theme park, that's definitely gonna take out far more than an hour of your day. So you wanna block out the

right amount of time, that would take travel, time spent at the theme park and time away. So it will be dependent on the person that you are seeing if they need you to transport them there or you're meeting them there, and how you gauge they'll do on their own if you're not there the whole time. Last question. Instead of going with the person to the food bank, can I just bring them items when I visit? Preferably you want to encourage them to access the food bank on their own, or you guys do it together if that's something that they're not comfortable with doing at the very beginning, but we want them to feel comfortable accessing those resources on their own because eventually you won't be there. And so we don't want to just bring items to them all the time. We want to wean them off of that and have them be independent on their own. So that's why start with going to the food bank together and then wean yourself off from being involved in the activity and having them do it on their own. Okay. Looks like we're coming up on time. Those were all really great questions, everyone, thank you so much for participating today.

Bryna: Thank You so much, Cynthia. All right everyone. Thank you for joining us today. The webinar is now over just a few reminders. The webinar was recorded and both the link to this recording as well as the slides will be sent out to all attendees later this afternoon. Email will also include instructions on how you can receive a certificate of attendance upon completion of an evaluation. Please allow 24 hours for receipt. and please join us Tuesday, January 12th for the next CAT Technical Assistance webinar where Bryna Furner will be discussing leisure skills and CAT. We hope you can make it. Thank y'all.