

# **TATE: Training Assistive Technology in the Environment Training Toolkit**

## **Section IV Resources**

**This section contains a list of additional resources and references that provide more information on training assistive technology for cognition (ATC) and brain injury. Also included is an additional case study.**

*Published by the Center on Brain Injury Research and Training*



UNIVERSITY OF OREGON

cbirt

*National Institute on Disability and Rehabilitation Research  
Project # H133G090227*



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## Resources

**Purpose:** To provide a “starter set” of resources to support learning more about brain injury, assistive technology apps and devices to support cognition and training methods.

### Updated September 2013

<i>Aphasiatoolbox.com</i>	Provides online rehabilitation for people with Aphasia/Apraxia, offering individual recovery plans for clients and comprehensive services for Speech Language Pathologists.	<a href="http://www.aphasiaapps.com/">http://www.aphasiaapps.com/</a>
<i>Assistive Technology Industry Association</i>	The mission of ATIA is to serve as the collective voice of the assistive technology industry so that the best products and services are delivered to people with disabilities.	<a href="http://www.atia.org">http://www.atia.org</a>
<i>Brain Injury Association of America</i>	The mission of the Brain Injury Association of America is to advance brain injury prevention, research, treatment and education and to improve the quality of life for all people affected by brain injury.	<a href="http://www.biausa.org">http://www.biausa.org</a>
<i>Brain Injury Association of America ATC webinars</i>	Webinars are available on a wide variety of issues relevant to caregiving, quality of life, education, and treatment for people affected by brain injury.	<a href="https://secure.biausa.org/SearchResult.aspx?CategoryID=61">https://secure.biausa.org/SearchResult.aspx?CategoryID=61</a> <a href="https://secure.biausa.org/detail.aspx?ID=730">https://secure.biausa.org/detail.aspx?ID=730</a>
<i>Brainline</i>	Brainline provides information about brain injury symptoms, diagnosis, and treatment for those living with a brain injury, their families, and professionals in the field.	<a href="http://www.brainline.org">http://www.brainline.org</a>
<i>Brainline Military</i>	Brainline Military provides information for service members, veterans, national guard, reserves living with TBI and their families.	<a href="http://www.brainlinemilitary.org">http://www.brainlinemilitary.org</a>

<i>Brainline Recommended Apps</i>	Life-changing iOS and Android apps for people with brain injury.	<a href="http://www.brainline.org/content/2011/07/20-android-apps-for-people-with-brain-injury.html">http://www.brainline.org/content/2011/07/20-android-apps-for-people-with-brain-injury.html</a> <a href="http://www.brainline.org/content/2011/05/23-lifechanging-iphone-ipad-apps-for-people-with-brain-injury.html">http://www.brainline.org/content/2011/05/23-lifechanging-iphone-ipad-apps-for-people-with-brain-injury.html</a>
<i>Center on Brain Injury Research and Training</i>	CBIRT's research focuses on developing interventions to improve outcomes related to education, employability, and quality of life.	<a href="http://www.cbirt.org">http://www.cbirt.org</a>
<i>Cognitopia</i>	Develops assistive technology tools focused on individuals with cognitive disabilities, such as autism, traumatic brain injury and the elderly.	<a href="http://www.cognitopia.com">http://www.cognitopia.com</a>
<i>Institute for Matching Person to Technology</i>	The Institute works to enhance the lives of technology users through research, assessment, training and consultation.  Scherer, M.J. (2005). The Matching Person & Technology (MPT) Model Manual and Assessments, 5th edition [CD-ROM]. Webster, NY: The Institute for Matching Person & Technology, Inc	<a href="mailto:IMPT97@aol.com">IMPT97@aol.com</a>
<i>ID 4 the Web</i>	ID 4 the Web is an organization devoted to creating instructional and learning materials.	<a href="http://id4theweb.com">http://id4theweb.com</a>
<i>Making Cognitive Connections...an ID 4 the Web Project</i>	A centralized location for individuals with cognitive challenges, and professionals who work with them, to post reviews of apps they find useful for work, home, and school.	<a href="http://id4theweb.com/appreviews">http://id4theweb.com/appreviews</a>
<i>Optimizing Cognitive Rehabilitation: Effective Instructional Methods - reproducible sheets</i>	These sheets accompany the text by the same name, providing a critical resource for clinicians delivering systematic instruction across a range of instructional targets, not just assistive technology for cognition.	<a href="http://www.quilford.com/cgi-bin/cartscript.cgi?page=pr/sohlberg3.htm&amp;dir=pp/neuropsych">www.quilford.com/cgi-bin/cartscript.cgi?page=pr/sohlberg3.htm&amp;dir=pp/neuropsych</a>

<i>Oregon Technology Access Program</i>	The Oregon Technology Access Program provides training, information, technical assistance and resources regarding the uses of technology for children with disabilities.	<a href="http://www.otap-oregon.org">http://www.otap-oregon.org</a>
<i>Personal Technologies</i>	Site devoted to working in areas of software development, qualitative research methodology, cognitive rehabilitation and living with the effects of cognitive impairment.	<a href="http://www.personaltechnologies.com">http://www.personaltechnologies.com</a>
<i>Rehabilitation Research Engineering Center (RERC) for the Advancement of Cognitive Technologies</i>	The RERC-ACT strives to improve the quality of life of individuals with cognitive disabilities through research and development of new cognitive technologies.	<a href="http://www.rerc-act.org">http://www.rerc-act.org</a>
<i>Tactus Therapy Solutions</i>	This site was founded to bring the latest technology and proven therapy methods to therapists and people with Aphasia and other communication disorders.	<a href="http://www.tactustherapy.com">http://www.tactustherapy.com</a>
<i>TBI Staff Training</i>	A new website which provides learning materials for staff working with people with acquired brain injuries.	<a href="http://www.TBIStaffTraining.info">http://www.TBIStaffTraining.info</a> (see smart phone apps link)
<i>Virginia Commonwealth University: Autism Center</i>	The mission of VCU-ACE is to build state-wide capacity to improve outcomes of individuals with ASD by improving the knowledge, skills and understanding of families, educators, and professionals who support someone with a spectrum disorder.	<a href="http://vcuautismcenter.org/resources/AutismTechnology/index.cfm">http://vcuautismcenter.org/resources/AutismTechnology/index.cfm</a>

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## TEACH-M Clinician Skills Checklist

**Purpose:** To provide another example of a checklist of steps to follow when designing and delivering systematic instruction

**Directions:** Use this checklist before and after your training sessions to evaluate how it went.

### T

- ☐ Did I use a **task analysis/analyze content**?
  - ☐ Did I develop multiple probe and training examples?
  - ☐ Did I establish training and generalization contexts/settings?

### E

- ☐ Did I prevent errors from occurring (**errorless learning**) while the client was learning the skill?
  - ☐ Did I provide a sufficient number of models before the client attempted the step(s)? (Unless conducting an assessment, I didn't let them figure it out by trial and error.)
  - ☐ Did I carefully fade my support (i.e., cues/prompts)?
  - ☐ Did I keep my instructional wording simple, clear, and consistent?

### A

- ☐ Did I conduct an **“initial assessment”** before starting treatment?
- ☐ Did I conduct a **quick assessment** (probe) at the beginning of each treatment session?

### C

- ☐ Did I conduct a **cumulative** (comprehensive) **review** of all the steps learned so far?
- ☐ If the client made an error, did I provide immediate, **corrective feedback**?

### H

- ☐ Did I give the client plenty of opportunities to correctly practice the skill/steps several times? (**high rates of practice**)
- ☐ Did I distribute the practice trials over time?

### M

- ☐ Did I provide the client the opportunity to evaluate their own performance/increase effort-engagement? (**metacognitive component**)

Adapted with permission from: Ehlhardt, Sohlberg, Glang & Albin (2005)

## Ken: Case Study

### Background

**Client:** Ken is a 27 year-old veteran, who sustained a mild traumatic brain injury from an IED blast two years ago while deployed in Iraq. He lives with his wife, Liz, and their two children, ages 6 and 8. Liz works full time as a high school biology teacher. Ken would like to return to work full time in the future but his injuries prevent it at this time. He enjoys spending time with his children and running the household. Ken drives the children to school and to their afterschool activities. However, challenges in attention, memory, and organization make it difficult for Ken to keep up.

**Trainer:** Darrel is a 35 year-old speech-language pathologist at the VA hospital near where Ken and his family live. Darrel is very comfortable using his smartphone for a variety of purposes, including receiving and sending phone calls, organizing tasks, scheduling appointments, and listening to music. He has access to a high-speed Internet, a computer, and a budget for downloading apps to try out with his clients. During Ken's outpatient rehabilitation, Darrel and Ken met once a week for cognitive rehabilitation therapy focused on the assessment and training of assistive technology for cognition (ATC) to help with Ken's cognitive challenges at home. They used the *TATE ATC Toolkit* to guide this process.

### Needs Assessment

**General:** Darrel and Ken spent their first two sessions focused on obtaining client background information and goal planning. Darrel also contacted Liz via email asking her to help fill out the *Walk through the Week log*, which brought her into the planning process and prepared for her involvement with training. **Take a moment now to review the forms on pages 11-22 of the *Resources* section of this Toolkit.**

**Device & Apps:** Darrel and Ken spent their next two sessions looking at how Ken used technology to compensate for his cognitive challenges. Together with Liz, they concluded that establishing a "family calendar" using Google Calendar would be an efficient way to help Ken stay on top of family activities. Using the *Basic Skills and Routines Assessment Checklist*, Darrell and Ken determined that Ken did not need training (on either his desktop computer or smartphone) on the "basic skill" of entering, modifying, or checking events on Google Calendar. However, he needed training to make the calendar system part of his daily "routine." **Take a moment now to review forms on pages 23-25 of the *Resources* section of this Toolkit.**

### Training

**Before training:** Darrel, in advance of his next session, mapped out a training plan consistent with the family's needs and preferences. They collectively decided on a 2-part process for routine training.

**During training:** Routine #1: Daily Family Matters Planning meetings: Before the kids woke up, Ken and Liz reviewed their Google Calendar over coffee. Sunday mornings they planned for the entire week while on weekday mornings they double-checked and modified the calendar, as needed. While Ken and Liz worked on Routine #1 at home, Ken and Darrell worked on Routine #2: On-the-Fly Family Matters during their weekly sessions. They developed a “self-rule” for remembering to respond to alerts as well as check, enter, and modify events “on-the-fly” using his smartphone’s Google Calendar. Darrel provided Ken with multiple practice opportunities to use the self-rule, modify events, and respond to alerts. Darrel used some of his session time to stay in touch with Liz to support her efforts in helping Ken at home. Once Ken and Liz agreed that Routine #1 was well-established at home, they began focusing on Routine #2 at home and in the community. **Take a moment now to review the forms on pages 26-33 of the *Resources* section of this *Toolkit*.**

**Impact:**

After three months, Ken and his wife reported that they were experiencing fewer instances of “dropping the ball” with household and family activities. They said this has been very helpful to overall family dynamics. **Take a moment now to review the revised *Goal Planning sheet* on page 34.**

## Survey of Technology Use (Client)

Name Ken

Form completed by Darrel

Today's Date 4/23

### SECTION A. TECHNOLOGIES YOU FREQUENTLY USE:

Check the items you used either before and/or after your injury:

For General Purposes		For Memory/Organization (ATC)	
<input checked="" type="checkbox"/> ATM /cash machine		<input type="checkbox"/> Watch with a programmable alarm	
<input checked="" type="checkbox"/> TV		<input type="checkbox"/> Electronic calendar or PDA (ex. Palm Pilot; iPod Touch)	
<input checked="" type="checkbox"/> Remote control for my electronic devices such as my TV, DVD player		<input type="checkbox"/> Audio recorder	
<input checked="" type="checkbox"/> Game console (xBox, Nintendo Wii)		<input type="checkbox"/> Cell phone (e.g., alarm function)	
<input checked="" type="checkbox"/> DVD/VCR player		<input type="checkbox"/> Smart phone	
<input type="checkbox"/> CD/tape player		<input checked="" type="checkbox"/> Digital camera	
<input checked="" type="checkbox"/> Portable music player (ex. iPod, MP3 player)		<input checked="" type="checkbox"/> Computer—Used for?	
<input checked="" type="checkbox"/> Portable game device (ex. Gameboy, Nintendo DS)		<input type="checkbox"/> Work	
<input checked="" type="checkbox"/> Answering machine or voice mail		<input checked="" type="checkbox"/> Pleasure	
<input checked="" type="checkbox"/> Cell phone or smart phone for call only		<input type="checkbox"/> GPS	
		<input type="checkbox"/> Other	
		<input type="checkbox"/> None	
Did you use general technology before your injury?	Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>	Did you use ATC before your injury?	Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>
Do you use general technology now (in the last week)?	Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>	Do you use ATC now (in the last week)?	Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>

### Notes:

*Very comfortable using a range of technologies.*

## Survey of Technology Use (Client)

### SECTION B. OVERALL FEELINGS ABOUT TECHNOLOGY

Answer all the questions below by circling the option that you agree with most. There is no right or wrong answer. This helps you understand your feelings about technology.

	Strongly Agree	Agree	Disagree	Strongly Disagree
I am comfortable with technology.	①	2	3	4
Using technology comes easy to me.	①	2	3	4
Technology helps with my creativity.	1	②	3	4
I enjoy using technology.	①	2	3	4
Technology brings me together with people.	①	2	3	4
Technology raises my opinion of myself.	①	2	3	4
Technology helps me achieve my goals.	①	2	3	4
Other people encourage my technology use.	①	2	3	4
My experience with technology is positive.	①	2	3	4
I can solve problems with technology.	1	②	3	4

**Total the points received:**

**12**

A score of 10-20 indicates a generally positive view of technology.

A score of 21-20 may indicate mixed feelings about technology.

A score of 30-40 indicates a generally negative view of technology.

#### Notes:

*Liz, Ken's wife, mentioned she's equally comfortable with technology.*

This section is from the *Survey of Technology Use* and is used with permission from the Institute for Matching Person & Technology, Inc. (Section B)

#### NEXT STEPS:

Move on to the **Client's Abilities** form.

## Client's Abilities

Name: Ken

Form Completed By: Darrel

Age/DOB: 27

Today's Date: 4/23

Date of brain injury: 2010

Type of brain injury: mild TBI -IED  
blast

As of today, rate your abilities in each area.

### Section A. Thinking & Remembering

	Poor	⇒	Excellent	Comments
Attention/Concentration	1	②	3 4 5	
Self-Awareness	1	2	3 4 ⑤	
Remembering	1	②	3 4 5	
Organizing	①	2	3 4 5	
Navigation (not getting lost)	1	2 3	④ 5	Uses GPS

### Section B. Language-Senses-Movement

	Poor	⇒	Excellent	Comments
Understanding	1	2 3	4 ⑤	
Expression	1	2 3	4 ⑤	
Seeing	1	2 3	4 ⑤	
Hearing	1	2 3	4 ⑤	
Speech	1	2 3	4 ⑤	
Physical Strength and Stamina	1	②	3 4 5	Easily fatigues
Lower body use (hips, legs, feet)	1	2 3	④ 5	
Grasping and use of fingers	1	2 3	④ 5	
Upper body use (arms, shoulders, trunk)	1	2 3	④ 5	
Mobility (getting around)	1	2 3	④ 5	

### Section C. General - Life Satisfaction

	Poor	⇒	Excellent	Comments
Personal care and household activities	1	2 ③	4 5	
Physical comfort & well being	1	2 3	④ 5	
Overall health	1	2 3	④ 5	
Freedom to go wherever desired	1	2 3	④ 5	
Participation in desired activities	1	② 3	4 5	
Educational attainment	1	2 ③	4 5	
Employment status/ potential	1	2 ③	4 5	
Family relationships	1	2 3	④ 5	
Close, intimate relationships	1	2 ③	4 5	
Autonomy, self-determination (choosing)	①	2 3	4 5	

Fitting in, belonging, feeling connected	1	2	③	4	5	He says "It depends and can change"
Emotional well-being	1	2	③	4	5	
Finances	①	2	3	4	5	

**Section D. Other Medical Conditions (e.g., seizures, dizziness, headaches). List here:**

*Fatigues easily, occasional headaches*

**Section E. Self-Understanding -Which of the 5 statements below BEST describes you?**

- |  |  |
|--|--|
| <input checked="" type="checkbox"/> I have the support I want from family/friends. | <input type="checkbox"/> I am curious & excited about new things.  |
| <input type="checkbox"/> I feel encouraged by people who help me.                  | <input type="checkbox"/> I am usually calm and patient.            |
| <input type="checkbox"/> I feel the general public accepts me.                     | <input type="checkbox"/> I am often discouraged.                   |
| <input checked="" type="checkbox"/> I want to go to school or work.                | <input checked="" type="checkbox"/> I like having a challenge.     |
| <input type="checkbox"/> I have many things I want to accomplish.                  | <input type="checkbox"/> I feel nervous in groups of people.       |
| <input type="checkbox"/> Family/friends don't encourage me.                        | <input checked="" type="checkbox"/> I find technology interesting. |
| <input checked="" type="checkbox"/> I am often frustrated or overwhelmed.          | <input type="checkbox"/> I want more independence.                 |

**Summary:**

**Section A: Thinking-Remembering**

**Notes:** *Difficulty w/ organization in particular. Self-aware, gets around w/ GPS*

**Section B: Language-Senses-Movement**

**Notes:** *No major challenges here.*

**Section C: General-Life Satisfaction**

**Notes:** *Concerns in several areas, particularly self-determination, finances, etc.*

**Section D: Other Medical Conditions**

**Notes:** *Except for fatigue & occasional headaches, no major challenges reported.*

**Section E: Self-Understanding**

**Notes:** *Positive outlook; feeling overwhelmed likely connected to challenges w/ organization.*

This section is from the *Assistive Technology Device Predisposition Assessment* and is used with permission from the Institute for Matching Person & Technology, Inc. (Section C-E)

**NEXT STEPS:**

Move on to ***Client's Memory and Organization Systems, Low vs. High-Tech Tools*** and/or ***Client's Background Summary*** forms.

## Client's Current Memory and Organization Systems

Use this as a conversation starter to understand current memory/organization systems.  
Circle all that apply.

### Scoring Scale:

- 5 Independent (no help needed)
- 4 Can do with minimal help
- 3 Can do with some help
- 2 Can do with lots of help
- 1 Not independent; can't do without help

Name: Ken

Form completed by: Darrel

Date: 4/23

### Appointments (activities, events, other)

What is your current system for tracking appointments? Examples:

**Low tech:** wall calendar, planner, someone else **High tech:** cell phone, smartphone, tablet

**Other:**

How well do you keep track of appointments?    1       2       3       4       5

### Contacts (name, address, phone, other)

What is your current system for keeping track of contacts?

**Low tech:** address book    **High tech:** cell phone, smartphone, tablet

**Other:**

How well do you keep track of contacts?    1       2       3       4       ⑤

### To Do List (daily, weekly, long-term)

What is your current system for keeping track of the things you need to do?

**Low tech:** piece of paper, notepad, planner **High tech:** cell phone, smartphone, tablet

**Other:**

How well do you plan or follow to do lists?    ①       2       3       4       5

### Expenses/Finances

What is your current system for keeping track of your finances/ the amount you are spending?

**Low tech:** notepad, planner    **High tech:** cell phone, smartphone, calculator, tablet

**Other:**

How well do you keep track of finances or use a calculator?

1       ②       3       4       5

### Self-Reminders (medications, ideas, people to call, etc.)

What is your current system for remembering important information other than an appointment?

**Low tech:** sticky notes, notepad, timer **High tech:** recorder, cell smartphone, tablet

**Other:**

How well do you keep track of reminders/memos?

1       ②       3       4       5

Adapted with permission from Gillette, Y., DePompei, R., & Goetz, E. The School of Speech-Language Pathology and Audiology, The University of Akron. NIDRR # H133A030810.



## Client's Current Memory and Organization Systems

1. In general, are you happy with the current systems you use for memory and organization?

☐ YES ☒ NO

Why or why not?

*I struggle to stay on top of things. A better scheduling system would help.*

2. Which of the above areas do you think could be improved by using ATC (i.e., scored 4 or less). Check all that apply:

☒ Appointment/Activities

☐ Contacts

☒ To-Do List/Task

☒ Calculator/Expenses

☒ Self-Reminders

☐ Other:

3. Do you have a support system (e.g., family member, friend, staff) that could assist you with learning to use ATC?

☒ YES ☐ NO ☐ MAYBE

4. What is the current status of your finances for purchasing a new device and/or service contract, if applicable?

☐ Unlimited available resources - enough to purchase a device and on-going contract.

☐ Some resources - enough to purchase a device only.

☐ Very limited resources - enough to contribute some funds toward a device

☐ No resources for purchasing ATC.

☒ Non-applicable - already has a device; doesn't need service contract, etc.

### NEXT STEPS:

Move on to ***Client's Background Summary.***

## Client's Background Summary

**Purpose:** To obtain and summarize the background information needed to determine the next steps with this *Toolkit*.

### Directions:

1. Complete the ***Survey of Technology Use (Client), Client's Abilities, and/or Current Memory and Organization Systems*** first. Use the information from these forms to complete Step 2.
2. Fill out the Summary checklist below to determine whether the client is a good candidate for ATC at this time.

Name *Ken* Form completed by: *Darrel* Date: *4/23*

From the <b><i>Client's Abilities</i></b> form:	Yes	No
<b>Time since injury:</b> Has the client stabilized from his/her brain injury? (Client is not in the acute phase of recovery; s/he is at least 6 months - year post-injury).	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Attention and awareness:</b> Does the client have relatively good attention skills and awareness of his/her strengths & challenges?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Remembering and organizing:</b> Does the client have memory and/or organizational challenges that could benefit from using ATC?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Language, senses, movement:</b> Does the client have relatively good vision, hearing, hand movement, and language skills?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
From the <b><i>Survey of Technology Use &amp; Current Memory &amp; Organization Systems (Client)</i></b> forms	Yes	No
<b>Experience and comfort:</b> Did the client use low-tech and/or high-tech systems before the injury?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Does s/he use some type of system now?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<b>Motivation—Expectations:</b> Can the client and trainer answer this key question: "What will ATC help me accomplish that I'm not already able to do?"	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Motivation—Readiness:** Does the client demonstrate a generally positive view toward technology and/or indicate a readiness to learn ATC? ☒ ☐

**Finances:** Does the client have the resources to purchase a device as well as a service contract, data plan, or maintaining the device, if needed? ☐ ☐

**Note:** If the client already has a device that is a good fit, then write N/A. N/A

**Support system:** Does the client have other people in his/her life besides the trainer to encourage and reinforce his/her use of ATC? ☒ ☐

The client need not meet all the above conditions to successfully learn to use ATC. Consider these conditions as a whole and discuss them with the client and his/her family.

### Is the client a good candidate for ATC? Why or why not?

#### Notes:

*Yes. He's very comfortable with technology and aware of his challenges. His wife is very supportive. Great starting point for establishing a more flexible, consistent scheduling system and daily routines.*

#### NEXT STEPS:

1. If the client appears to be a good candidate for ATC, continue with the *Toolkit* on the next page (***Client's Goal Planning***).
2. If the client does not appear to be a good candidate for ATC at this time, continue on to the ***Client's Goal Planning*** section with other purposes in mind (e.g., training low-tech systems).

## Client's Goal Planning—Interview Questions

Name: Ken Interview completed by: Darrel Date: 4/23

**Introduction script:** “I’d like to learn more about your hopes, dreams, and goals for the future and to see how technology might help you achieve those goals. Let’s begin with the big picture, then go from there.”

Trainer: Ask the questions and record answers in the space below.

1. “What are your hopes for your future in terms of \_\_\_\_\_?”  
[Fill-in the blank with specific items from list below or other options appropriate to the client.]
  - Employment; Volunteerism
  - Education
  - Family life
  - Social life
  - Personal health
  - Transportation
  - Recreation
  - Hobbies
  - Other

*eventually wants BS in comp. sci.*

*wants to help around the house more*

*would like to coach kids softball team*
2. “What are you or people you know **already doing** that could help you reach your goals for [item(s) from above]?”

*Taking kids to/from school, attends all their games*
3. “What is the first thing you or someone you know and trust **could do next** to help you increase your chances of success in each area?”

*Weekly master schedule of all kids activities*
4. Summarize the above information for client and write it down.

**NOTE:** Refer to the **Goal Planning Sheet** for items # 5-12.

5. Pull out **Goal Planning Sheet**; point to “My Goal is to...” in the cloud on the mountain top.
6. “This says My Goal is to [insert goal]. Below that are some examples of goals other people have had. You might share some of these goals or have others of your own.”
7. “What is an achievable goal you’d like to focus on for [insert timeframe]?”
8. Point to “You are here” on the left side of the sheet. “Where would you say you are with this goal right now?”
9. Point to “How will technology help?” in the middle of the form. “Let’s talk about how technology can help you achieve your goal.”
10. Read through each area listed and discuss possible applications.
11. “Based on your goal, choose one or two of these areas to focus on as you select and learn to use technology.”
12. Summarize all three sections of the **Goal Planning Sheet**.

### Notes/Steps:

#### *Summary*

- *Dropping the ball with the kids/family*
- *Need to focus on memory/organization using smartphone*
- *Goal—to be more involved on top of it with family*

### NEXT STEPS:

1. After completing the *Client’s Goal Planning* process, move on to **A Walk Through the Client’s Week—Overview**.
2. Develop a list of specific steps with the client to help him/her move forward with goal planning, including ATC device selection and training as appropriate.

## Client's Goal Planning

Goals for: Ken

Today's Date: 4/25

Completed By:  
Darrel

### How will technology help? (Check top 1-2 choices)

- ☒ MEMORY: Remembering where I need to be, what I need to do, and when (Ex. Calendar & alarms for appointments, birthdays)
- ☒ ORGANIZATION: Keeping track of important information (Ex. To do list, memos)
- ☐ CONNECTION: Getting in touch with other people (Ex. Phone, email)
- ☐ GETTING AROUND: Going places (Ex. Camera, GPS)
- ☐ STIMULATION: Exercising my brain & having fun (Ex. Games, music)

YOU ARE HERE



*Involved but  
"dropping the  
ball"*

*Although Ken wants to go to school and return to work eventually, we chose to begin working with his goals around family b/c these are more immediate.*

My goal is to:

Be more involved with kids' school and afterschool activities & manage household without dropping the ball

### Examples of Goals

- Increase contact with family
- Volunteer
- Get a job
- Go to school
- Do more around my apartment/house
- Take my medications
- Take care of a pet
- Other:

## A “Walk Through the Week” Log

<b>Name</b>	<u>Ken</u>			<b>Week of:</b>	<u>April 30</u>		
	<b>Sunday</b>	<b>Monday</b>	<b>Tuesday</b>	<b>Wednesday</b>	<b>Thursday</b>	<b>Friday</b>	<b>Saturday</b>
<b>Morning</b>	Made big breakfast; played softball -Liz	Forgot lunches -Ken			Got kids to school on time; then came home and started laundry, forgot appt w/ clinic -Ken	Took a long nap and was late picking up kids -Ken	Went to start laundry and realized I never bought the laundry soap at the store -Ken
<b>Afternoon</b>	Watched family movies -Liz	15 minutes late to pick up kids -Ken		Picked up kids on time but forgot their clothes for softball ☹️ -Ken	Took a long nap and was late picking up kids -Ken	Kids got picked up on time, came home everyone happy 😊 -Liz	
<b>Evening</b>	Ken made us a great dinner -Liz	Forgot to stop by the store to pick up stuff for dinner -Liz	Great day! -Liz		Off day today, ordered pizza, everything seemed chaotic, kids homework didn't get done -Liz		
<b>NOTES:</b>	Things seem to spiral downward as soon as one “ball is dropped”						

## Device & App Selection

### Selecting Devices Checklists do not need to be completed in order.

**OPERATING SYSTEM:** What is the operating system (OS) of the device? (Note: If a client is considering a device upgrade, transitioning between devices with the same OS [e.g., iPod to iPhone] is generally easier than switching between OS [e.g., iPod to Android phone].)

iOS	Android	Windows	Other
			<i>Google Calendar</i>

**EASE-OF-USE:** Is the device relatively easy for the client to handle and operate? For example, can the client do the following? *Smartphone:*

- |  |                                 |
|--|---------------------------------|
| <input checked="" type="checkbox"/> Transport and hold the device?   | <i>Will use Google Calendar</i> |
| <input checked="" type="checkbox"/> Press on/off, volume buttons, etc.?  | <i>on smartphone and home</i>   |
| <input checked="" type="checkbox"/> See and read information on the screen?  | <i>desktop computer.</i>        |
| <input checked="" type="checkbox"/> Enter information and respond to the device via typing text, audio, photo, etc.? |                                 |
| <input checked="" type="checkbox"/> Hear the phone's ringer, alarms, alerts, etc.?                                   |                                 |

**COST:** Is the device, service/data plan (if applicable), and/or additional non-native apps, etc, affordable to the client?

- ☒ Yes ☐ No

### Selecting Apps

**SUPPORTING COGNITION:** What app support does the client need? The client needs help with:

- |  |  |
|--|--|
| <input checked="" type="checkbox"/> Remembering to do future things (acting on intentions) | <input type="checkbox"/> Performing multi-step tasks, sequencing   |
| <input type="checkbox"/> Recalling past events   | <input type="checkbox"/> Multi-tasking (doing several things at once)                                      |
| <input type="checkbox"/> Recalling newly learned information and skills                    | <input type="checkbox"/> Problem solving, making decisions   |
| <input type="checkbox"/> Recalling important information/facts                             | <input type="checkbox"/> Finding one's way (route finding)   |
| <input type="checkbox"/> Planning ahead  | <input checked="" type="checkbox"/> Time management (including estimating and tracking time, pacing, etc.) |
| <input checked="" type="checkbox"/> Getting and staying organized                          | <input type="checkbox"/> Concentrating in the midst of distractions  |

Adapted with permission from Wild (2013).



## Examples of Specific Apps

Native	Non-Native
<input type="checkbox"/> Calendar: Used to schedule appointments	<input checked="" type="checkbox"/> Week Calendar: Used to schedule appointments better than native Calendar app when scheduling recurring or complex appointments
<input type="checkbox"/> Reminder: Used to manage tasks and to-dos	<input type="checkbox"/> Evernote: Used for taking and managing notes. Includes ability to record and include photos.
<input type="checkbox"/> Camera/Photos: Used to take and manage photos	<input type="checkbox"/> Appigo Todo: Used for high-level task management. Includes ability to manage project tasks.
<input type="checkbox"/> Notes: Used to take brief notes	<input type="checkbox"/> Corkulous Pro: Used to create and organize visual notes
	<input type="checkbox"/> PocketMoney: Used to track and monitor financial information
	<input type="checkbox"/> Forgetful: Used to store text, audio, and video reminders

**More Points to Consider** (Note: Native applications, while potentially useful for some clients, are generally limited with regard to options for repeating information, setting alerts and tracking overlapping appointments.)

**COMPLEXITY:** How much “app complexity” can the client handle (e.g., number of steps involved with using the app; potential for getting lost in the app, etc.)?

*High level of complexity*

**FEATURES:** For calendar and other “reminder” apps, determine the following:

- ☒ Options for repeating information
- ☐ Options for alerts, including separate sounds, number of alerts one can set, ability to record one’s own sounds/voice, etc.
- ☐ Notification for overlapping appointments
- ☒ Appointment color-coding
- ☒ “Push” notifications-alerts and reminders take over the screen; device has to be turned on

**BACK UP:** What is the system for backing up app contents - syncing to computer? Web-based “cloud” back up? Who will be responsible for backing up contents?

*N/A – web-based app*

**Summary:** What are the most appropriate device and apps at this point? Rationale: *He’s interested in using everything— we’ll need to focus/prioritize based on most immediate needs, “Walk through the week” log, etc. Google Calendar is the best option for now.*

**NEXT STEPS:** Once a device and app(s) have been selected, move on to the **Basic Skills and Routines Assessment Checklist.**

## Basic Skills & Routines Assessment Checklist

Name: Ken  
 Date: 5/7 Completed by: Darrel  
 Device/Apps iPhone & Google Calendar

1 = Not independent; can't do without help  
 2 = Can do with lots of help  
 3 = Can do with some help  
 4 = Can do with minimal help  
 5 = Independent (no prompts needed)  
 N/A = Non-applicable

Program	Basic Skill (Device operation)	Routine (Device integration)	Comments
<b>Phone (if applicable) Smartphone</b>			
Receives calls	1 2 3 (4) 5 N/A	1 2 3 (4) 5 N/A	
Makes calls	1 2 3 (4) 5 N/A	1 2 3 (4) 5 N/A	
Retrieves voice msg	1 2 3 (4) 5 N/A	1 2 3 (4) 5 N/A	
<b>Calendar Google Calendar</b>			
Identifies today's date & time	1 2 3 (4) 5 N/A	1 2 3 4 (5) N/A	Hasn't been trained on routine use yet.
Enters appts/events	1 2 (3) 4 5 N/A	1 2 3 4 (5) N/A	
Checks appts/events	1 2 3 (4) 5 N/A	1 2 3 4 (5) N/A	
Responds to alerts	1 2 (3) 4 5 N/A	1 2 3 4 (5) N/A	
Programs alerts	1 2 (3) 4 5 N/A	1 2 3 4 (5) N/A	
<b>Contacts Smartphone</b>			
Enters phone # & addresses	1 2 3 (4) 5 N/A	1 2 3 (4) 5 N/A	
Checks phone # & addresses	1 2 3 (4) 5 N/A	1 2 3 (4) 5 N/A	
<b>Notes/To Dos Smartphone</b>			
Enters notes/To-Dos	1 2 3 (4) 5 N/A	1 2 3 (4) 5 N/A	
Checks previously written notes/To-Dos	1 2 (3) 4 5 N/A	1 2 (3) 4 5 N/A	
<b>ABCs of ATC Smartphone</b>			
A-Always has the device	N/A	1 2 3 (4) 5 N/A	
B-Be on it (Uses the device regularly)	N/A	1 2 3 (4) 5 N/A	
C-Charges the device	1 2 3 (4) 5 N/A	1 2 3 (4) 5 N/A	
S-Knows what to do when Stuck	1 2 (3) 4 5 N/A	1 2 3 (4) 5 N/A	

How many icons/apps does the device currently have on the home/main page? 15  
 List below any additional programs/apps the client is currently using and at what level (scale of 1-5): *Very fluent using the iPhone for calls, games, music, GPS*

### NEXT STEPS:

Initial Training Focus *Routine of using Google Calendar*

## Trainer's Session Guide: Before Training Session – Ken

Before Each Training Session:		Ken
WHAT—Training Focus		
Using shared Google Calendar w/ wife		
WHY—Reason		
Wants to be more successful w/ managing household & getting kids where they need to be		
Pre-requisite Skills & Materials	Step-by-Step	
Basic skill of entering & checking appts in Google Calendar	<ul style="list-style-type: none"><li>Daily morning meeting with wife to review schedule</li><li>State Rule and when applied</li><li>Notice alerts</li><li>Make any changes in schedule</li></ul>	
WHERE—Places		
<ul style="list-style-type: none"><li>during sessions with me</li><li>at home over morning coffee with wife</li><li>when out and about w/ kids (final phase)</li></ul>		
WHO—Other People		
<ul style="list-style-type: none"><li>Liz (wife)</li><li>clinic receptionist -</li></ul>	<ul style="list-style-type: none"><li>school related contacts</li><li>counselor</li><li>other family members</li></ul>	
WHEN—Situations		
Changes in family schedule; weekly routines and other important events		

### NEXT STEPS:

Move on to ***During Training Session - Overview.***

## Trainer's Session Guide: During Training Session—Overview

**Purpose:** To provide a guide for what to do *during* each training session.

- ☐ **CHECK—Is it sticking?:** Ask the client *to show you* the skill/routines from the previous session without any help. If the client does this easily & independently, move on to the next new step, skill, or routine. If not, model-practice the difficult step(s) first until mastered.
  - Record how the client does on the **Trainer's Data** sheet—*Check* section.
- ☐ **MODEL—Prevent mistakes:** Demonstrate new and/or difficult steps *before* the client tries them.
- ☐ **PRACTICE—A LOT!:** Provide **several correct practice opportunities** with different examples for each new/difficult step(s). **Take breaks.** Then try again to make sure the client can do the step before adding in a new step(s).
  - Record how the client does on the **Trainer's Data** sheet—*Practice* section.
- ☐ **REVIEW:** Review previously mastered steps, skills, and routines to make sure they are still solid.
- ☐ **FEEDBACK-CORRECTIONS:** Throughout the session, use a neutral tone of voice, providing **immediate, clear feedback** when the client is correct (“That’s right; do it again.”) as well as when incorrect (“Not quite; I’ll show you.”). If the client continues to struggle, reduce the number of steps to something more manageable.
- ☐ **SELF-REFLECTION:** At the end of each session, ask client to rate his/her performance. The client can also rate his or her understanding (“I know what to do; I just need more practice.”)
  - Use 1-5 scale on the **Client Progress Tracking** sheet.

### NEXT STEPS:

Move on to **Mini-Scripts** and **Training Data Collection Sheet**.

## Mini-Script—Basic Skill Training Ken (Client) & Liz (Trainer)

**WHAT— Training focus—**Checking and entering family events into Google Calendar

**WHEN—** Every morning over coffee before the kids get up

**WHERE—** Home

**WITH WHOM—** Liz, Ken's wife

### MODEL

#### Direct prompts

**Liz:** *Sweetie, it's Family Matters coffee time. Let's look at the family calendar and plan ahead.*

**Ken:** [Agrees. Turns on computer and brings up Google Calendar.]

**Liz and Ken:** [They discuss each event, making changes as needed. Ken sometimes has difficulty leaving enough time to get from one place to the other. Liz provides help with this.]

**Liz:** *You need to get to the soccer game by 4:00. Given traffic, set your alert for 3:30.*

**Ken:** [Ken clicks on the appropriate alert time interval.]

[As the routine gets established over the course of a few weeks, Liz fades the direct prompts.]

At first, Liz simply tells him how much time he'll need rather than asking him. Avoid "quizzing" loved ones with brain injury.

#### Indirect Prompts

**Liz:** Indirect hint-*It's coffee time.*

**Ken:** [Turns on computer, etc.]

[They discuss each event and how much time will be needed between the alert and event.]

**Liz:** *How much time do you want to leave to get there on time?*

**Ken:** [Estimates how much time. They discuss whether or not this will be enough. He clicks on the appropriate time interval.]

As Ken gains confidence & skill, Liz doesn't have to provide as much input

#### No Prompts

**Ken:** *Hey Liz, coffee is ready. Let's do Family Matters.* [He sets up the computer, Google Calendar, gets her input on each event, estimates alert time and Liz weights in.]

### PRACTICE

Routine practice occurs at home on a daily basis.

Daily practice is critical to establishing routines. It's not enough to go once or twice a week to rehab therapies.

## CORRECTIONS

**Ken:** [He forgets about their morning meeting and/or makes a mistake checking or changing information in the calendar.]

**Liz :** [provides a more direct prompt] Time for Family Matters coffee! OR I'll show you how. OR You might want to make it 45 vs. 20 minutes between when your alert goes off and you need to be there.

## SELF-REFLECTION

At the beginning of each Family Matters session:

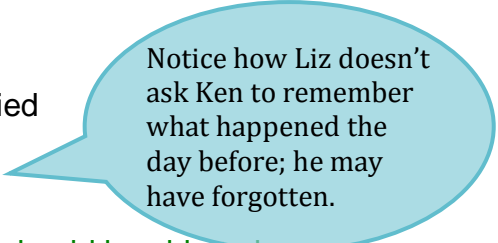
**Liz:** Yesterday was a pretty busy day with dental appointments and soccer, uh?

[They discuss both the positive and challenging situations tied to events scheduled in the calendar.]

At the end of each session:

**Liz:** How do you think it will go today?

**Ken:** Pretty well. I have a lot of running around to do but I should be able to keep up.



Notice how Liz doesn't ask Ken to remember what happened the day before; he may have forgotten.

## WHAT HAPPENS NEXT?

Ken and Liz repeat this routine daily, modifying as they go. Liz emails Darrel 1-2x weekly to let him know how it's going. Ken is aware she is doing this and is fine with it.

## NEXT STEPS:

After reviewing the *Training Data Collection Sheet*, move on to *Mini Script—Routine Training*.

# Training Data Collection Sheet

Name Ken

Date 5/14

What - Training Focus: Self Rule for using Google Calendar

Where & When - Places & Situations: clinic; home & community

Who - People: receptionist, counselor, school related contacts

**SCORING:** + (correct) — (incorrect) B (write "B" whenever you take a break)

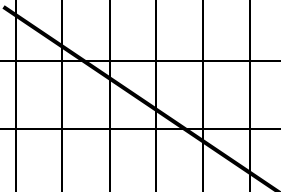
**"CHECK"** (Columns 1 & 2) Without providing any assistance at first, ask client to do previously trained steps to see if these are sticking.

**"PRACTICE"** (Columns 3-15) Provide lots of practice on new and/or difficult steps. Remember to take breaks, then practice again.

Basic  
Skill

	Check	Check	PRACTICE (model new and/or difficult steps)												
Steps	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
1. Press Google icon	+														
2. Enter email	+														
3. enter password	+														
4. read today's schedule	+														
5. read yesterday & tomorrow's schedule	+														

Self  
Rule

1. State Rule															
Family Matters keep me Alert			+	+	+	B	+	B	+	B	B	+	B	+	+
2. State when Rule applies															
–Notice Alert															
–Make Any changes															

**Comments:** Additional practice with clinic receptionist scheduling more sessions. Also called school regarding dates for field trip. Responded to alerts for medication. Continue with this next session.

## NEXT STEPS:

Move on to **Mini-Script—Routine Training.**

## Mini-Script: Routine Training with Ken (Client) & Darrel (Speech-Language Pathologist)

**WHAT— Training focus—** Self-rule for using Google Calendar to manage family events

**WHEN—** Once a week outpatient sessions

**WHERE—** VA outpatient clinic; later home & community

**WITH WHOM—** Darrel; VA Clinic receptionist; counselor; school related contacts

### CHECK

- Darrel:** [Darrel wants to confirm Ken has the **basic skill** of checking and entering information into Google Calendar before moving on to self-rule.]  
*What's on your family's schedule for today?*
- Ken:** [Independently locates, opens up, and reads the day's schedule off of Google Calendar on his smart phone.]
- Darrel:** *You have a lot going on! What if I had called earlier to cancel our session today and reschedule for Friday at 2:00, how would you change this in the calendar?*
- Ken:** [Independently changes schedule for demonstration purposes, then changes it back.]

### BRIEF DISCUSSION

- Darrel:** *Nice job! Now, you've mentioned that it's easy to ignore the alerts or forget to update your calendar when you're out and about. What's a self-rule you could create and learn to help with this?* [brief discussion]
- Ken:** *My wife and I call our morning meetings- Family Matters. How about **Family Matters keep me alert** ...?*
- Darrel:** *I like it. I might just use it for our family schedule!*

The self-rule should be a short, easy-to-remember expression that's meaningful to the client.

### MODEL—PRACTICE

- Darrel:** *Let's get some practice with the rule here in the office first. So, your rule is **Family Matters keep me alert** . For practice, again what is your self-rule?*
- Ken:** [Correctly states rule] [Darrel repeats the question with longer breaks in between until Ken can easily state the rule, then...]
- Darrel:** *Now, let's discuss then practice **when** to apply the rule:*
- Ken:** *(1) whenever I hear an alert; and (2) whenever anything changes with my kid's schedule*

It's as important to:

1. Practice **saying the rule.**
2. State **when to apply the rule** followed by...
3. **Acting on the rule.**

[They practice stating the rule and when to apply the rule followed by practice with alerts delivered through Google Calendar off his smartphone as well as when having to make changes to his schedule, e.g., when communicating with VA staff, making family & school arrangements via phone.]



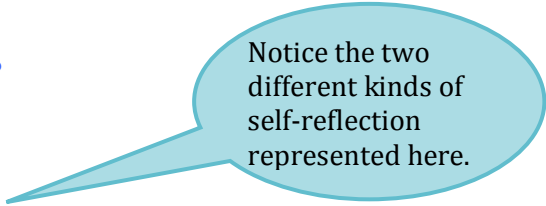
## CORRECTIONS

Darrel provides immediate, clear but kind feedback.

## SELF-REFLECTION

### Predict-Reflect:

**Darrel:** Before making a phone call regarding the soccer schedule, how do you think it will go?  
What will be easy? Difficult? [Afterwards....]  
How did it go? What went well?



Notice the two different kinds of self-reflection represented here.

### End of session-Progress Tracking Sheet:

Darrel asks Ken to rate himself based on today's performance and where he'd like to see himself by the end of the next session.

## WHAT HAPPENS NEXT?

Darrel conducts a "check" to see if Ken remembers the rule and when to apply it. Based on a phone call with Liz, he also plans to incorporate training on judging how much time is needed between alerts and scheduled events.

### NEXT STEPS:

Move on to ***Client Progress Tracking Sheet.***

## Client Progress Tracking Sheet

### Purpose/Directions:

To help the trainer and client evaluate overall progress each session.

Before starting to learn a new program or app (calendar, phone, notes, etc) or routine, ask the client:

### Trainer:

- “What is your starting point?” for the Program/Routine.
- “What would mastery look like?” (Write in client’s answers.)

At the end of each training session (during Self-Reflection), ask the client:

- “Where would you place yourself on the 1-5 scale with this Program/Routine?”
- “What would it take to move from 0-1 or 1-2 or 2-3, etc, on the 1-5 scale of progress?” (Write in client’s answers.)

**Name** Ken

Remembering & applying Self-Rule

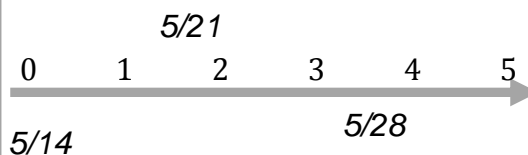
**Focus**

“Family Matters keep me alert”

Write in **starting point**.

*Keep forgetting calendar*

*Don’t have a way to remind myself*



Write in what **mastery** would look like.

*Self-Rule automatically kicks in.  
I look at the calendar*

### NEXT STEPS:

Move on to updated **Goal Planning Sheet**.

## Client's Goal Planning

Goals for: Ken

Today's Date: 7/30 - updated

Completed By: Darrel

### How will technology help? (Check top 1-2 choices)

- ☒ MEMORY: Remembering where I need to be, what I need to do, and when (Ex. Calendar & alarms for appointments, birthdays)
- ☒ ORGANIZATION: Keeping track of important information (Ex. To do list, memos)
- ☐ CONNECTION: Getting in touch with other people (Ex. Phone, email)
- ☐ GETTING AROUND: Going places (Ex. Camera, GPS)
- ☐ STIMULATION: Exercising my brain & having fun (Ex. Games, music)

YOU ARE HERE

I'm not "dropping the ball" as much at home.  
Going well using Google Calendar

My goal is to:  
*I want to volunteer as a peer mentor at local VA*

### Examples of goals

- Increase contact with family
- Volunteer
- Get a job
- Go to school
- Do more around my apartment/house
- Take my medications
- Take care of a pet
- Other: