

Help Desk:
Training Undergraduate and Nursing
Students to Become Community Resource
Navigators



help desk

TRAINING CURRICULUM: PRAPARE and
CBO Training
May 2020

PRAPARE and CBO Training

Content Time	2 hours
Learning Objective(s):	<ol style="list-style-type: none">1. Learn how to complete pre-call data entry2. Describe Community Based Organizations3. Distinguish ways in which resources and referrals vary4. Become comfortable navigating the CBO directory5. Recognize some of patients most common needs6. Have general knowledge about the commonly referred resources
Methods of Instruction:	<ol style="list-style-type: none">1. Facilitator instruction2. Small group activities3. Watching video recording
Sections:	<ol style="list-style-type: none">1. Workflow and PREPARE2. How resources vary?3. Deep dive into most common needs and referrals
Supplies:	<ol style="list-style-type: none">1. PRAPARE and CBO directory training slide deck2. CBO directory training activity guide3. Entering data on PRAPARE demonstration video
Required Reading for Facilitator:	<ol style="list-style-type: none">1. None
Handout(s):	<ol style="list-style-type: none">1. CBO directory training activity guide

Section 1: Workflow and PRAPARE

Time: 20 minutes

Learning Objective:

1. Learn how to complete pre-call data entry

Supplies:

- PRAPARE and CBO directory training slide deck
- Entering data on PRAPARE demonstration video

Handout(s):

- None

Preparation:

- Prepare a Data entry demonstration video if your documentation process varies

1) Workflow and PRAPARE (20 minutes)

- Slide 7-10:
 - This is what the PRAPARE form that case managers at Lincoln use to screen patients for needs and refer them to resources
- Slide 11:
 - ****The specifics of this presentation may vary as different programs have different workflow and setting****
 - Here is general PRAPARE workflow:
 - Case managers at Lincoln complete PRAPARE forms with patients, either in person or over phone.
 - A designated case manager scans and uploads the completed PRAPARE to Dukebox
 - Then a volunteer coordinator assigns data entry of PRAPARE to an individual volunteer
- Slide 12:
 - ****The specifics of this presentation may vary as different programs have different workflow and setting****
 - Now, your role is to open Google Sheets to check which patients you are assigned to enter onto REDCap
 - Go to Dukebox and open the file (DO NOT DOWNLOAD the forms to your computer). Make the window smaller and shift it to one side of your screen
 - Open REDCap on another window. Make the new smaller and shift it to the other side of your screen
 - Create a New Record ID on REDCap
 - Enter patient information in the appropriate boxes.
- Slide 14:

- Lets watch a demonstration video showing this workflow in action
- Example video on Appendix 4C

Section 2: How Resources Vary

Time: 10 minutes

Learning Objective:

- Describe Community Based Organizations
- Distinguish ways in which resources and referrals vary
- Become comfortable navigating the CBO directory

Supplies:

- PRAPARE and CBO directory training slide deck
- CBO directory training activity guide

Handout(s):

- None

Preparation:

- None

How Resources Vary

- Slide 16:
 - Here is the flow chart showing most common referrals
- Slide 17:
 - The patients we follow-up from Help Desk are often referred to various community based resources.
 - These resources vary, some are internal to Lincoln, some are external
 - Some are governmental programs, some are small local-non-profits
 - Sometimes patients are referred to one specific resource and sometimes they are given a list of resources.
 - ***Explain how resources vary in your site***
- Slide 18:
 - ***Ten seconds thought on how resources vary**
 - Given this variation in resource types, how would that change the way to follow-up with a patient about their referral?
 - What information would you want to know before you called a patient?
 - ***Pose these questions to the group, give a few seconds to think about it and hear their thoughts***
- Slide 20-27:
 - These slides cover different ways patients can access resources in Durham.
 - In Durham, we identified four main ways patients can access: Choosing from a list, applications, phone call, and in-person.
 - For each way, we describe how it was happening before the COVID-19 pandemic, and how it has changed during the pandemic. Additionally, we provide examples of some community resources that offer their assistance via the specific way

- Slide 29-31:
 - Exploring the directory and becoming familiar with its format
 - ***The directory and its format will vary from site to site***
- Slide 32:
 - Send links to the directory to participants.
 - Give them 3-5 minutes to students to familiarize themselves with the directory
 - After exploration, ask participants how the format of directory could be improved and what is good as it is.
- Slide 33:
 - Update on Durham directory going online

Section 3: Deep Dive into Most Common Needs and Referrals

Time: 2 Hours

Learning Objective:

- Recognize some of patients most common needs
- Have general knowledge about the commonly referred resources

Supplies:

- PRAPARE and CBO directory training slide deck
- CBO directory training activity guide
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Handout(s):

- Appendix 4B: CBO directory training activity guide

Preparation:

- Identify most common needs
- Identify top referrals to address a specific need
- Divide participants into group of 3-4 and assign a referral to each group for each need domain

Deep Dive into most common needs and referrals:

These set of slides go hand in hand with the CBO directory training guide

*** The details of the needs, resources are specific to Lincoln Community Health Center and Durham, North Carolina. Please use these slides as templates to include details specific to your site***

- Slide 35-65:
 - Activity to dive deep into the specific resources in the directory
 - We identified eight most common needs of the referred patients
 - We presented basic overview of the resources
 - Identified four resources in the directory that address the specific need and assigned a group of 3-4 students to a specific resource
 - In breakout rooms, students research the resource and present to the whole group.
 - Refer to the CBO training activity lesson plan
- Slide 66:
 - We described some referrals that are most common during the COVID-19 pandemic
- Slide 68:
 - Go over homework and to-dos