

## Instructor Practice Call Guide

Check who you will be calling with in the sign-up sheet.

Email template:

*Hi \_\_\_\_\_,*

*I'm looking forward to our practice call later today! We will be doing it over Zoom. I'll send you a zoom invite. Please enter the PRAPARE information for Practice Call 1 (or 2, whichever one you are on), and I will check your entry at the beginning of our call. Be sure to also review other training material such as REDCap documentation, scripts, and the directory.*

*Talk to you soon!*

### Practice Call 1

#### **Green Flag: Business as Usual.**

Luisa Esquivel is a 42-year-old woman living with her husband and two children. She lost her job and applied for a stimulus check but hasn't gotten it yet. She is financially struggling and is needing food, medication assistance, and employment resources.

#### **Referrals:**

- Food Pantries
- NC MedAssist
- Employment

#### **Situation:**

First attempt - Answers, is driving, needs to reschedule to tomorrow (but just call right back)

Food: Hasn't gone, afraid of COVID (2)

NC Med: In the process of completing the application, most important (1)

Asks about why she hasn't received her stimulus check yet

CM talked about giving her employment resources but she forgets what they talked about  
COVID Qs, you haven't really been staying up to date and aren't familiar with any of the questions

1. Read through being Luisa and try to follow the general format
2. Help the trainee set up their desktop
  - a. REDCap, Script, CBO directory and other potential tabs

- i. Remind them that usually, we will use google voice, however, this time we will be just practicing over zoom
3. Help the trainee review their referrals
4. The first time, you need to reschedule, the second time you talk.
5. After the call, while they are doing post-call data entry, go through the fidelity checklist according to their call that's in the Practice Calls 2020 folder
  - a. Please copy this checklist template and make a new one, putting the trainee's ***name and date*** in the title and keep it in that folder.
6. Once they're finished, check their data entry and give them overall feedback. Ask how the call went for them.
  - a. Tell them what they did well and how they can improve

## Practice Call 2

### Green Flag:

Andrew Hutchinson is an anxious 30-year-old man who works as a part-time waiter and doesn't have housing. He feels like everything is fine because he can get by living in his car and is reluctant to accept help.

### Referrals:

- SNAP (2)
- Reinvestment Partners Durham Rental Guide (3)
- DSS Durham Housing (3)
- Durham Financial Assistance Handout (1)
- Lincoln Behavioral Health (4)

### Situation:

1. SNAP: CM completed app, still waiting
  2. Durham Rental Guide: Hasn't connected, intimidated by the form
  3. DSS: Doesn't feel like he needs it.
  4. Financial Assistance Handout: Used the executive Order 118
  5. Talked to CM for a bit over the phone on his initial call but doesn't want more help
- COVID Qs:** Is pretty informed, listens to the radio in his car

## Practice Call 3

### Green Flag:

Brianna Rainey is a 38-year-old black woman who struggles with diabetes and is receiving dental care from Lincoln. She previously used the Lincoln voucher but is now referred to NC MedAssist. She received a dental exam from Candace but wants to see her summary before

seeing a specialist. She has been out marching all week and is emotionally strained from what is happening regarding the BLM Movement.

**Referrals:**

- Food Pantries (2) - used
- NC MedAssist (1) - not started
- Financial Assistance (3) - not started

**Situation:**

1. Food Pantries (2) - Last call she was referred to Mt. Level Missionary and Greater Orange Grove Baptist Church for food pantries. She gave it a 10/10.
2. NC MedAssist (1) - She is in extreme need of paying for her medications but hasn't completed her application. Nekoba invited her to come fill it out at Lincoln last week but she hasn't had the chance because she was busy. She hasn't started the application.
3. Financial Assistance (3) - She hasn't reached out because Nekoba has notified her that none of the resources are offering money.