

California AT Act Information & Assistance & Reporting Webinar Transcript

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>>KATHRINE CROWLEY: Hi, thank you for joining us today. My name is Kathrine Crowley, I'm CFILC's AT Access Coordinator, and I'd like to welcome you to the Ability Tools' newest installment in a series of professional development webinars outlining the activities established by the AT Act. Today we'll be providing an overview of the activity information and assistance. Last month we discussed the activity public awareness because it serves as a natural starting point when thinking about how consumers become informed that there are services available to them. Using that trajectory of thought, we're continuing along with the experience of the consumer which would likely bring them to an information and assistance activity. Because once the consumer has been reached via a website, event, radio interview, or whatever successful public awareness method used, the next step the consumer takes is reaching out to your center and getting information and assistance. Our training objective for today will be to clarify the particulars of the activity Information and Assistance, as it is defined by the AT Act. This is with the intention of facilitating more frequent and effective execution of information and assistance activities under the AT Act, and also facilitating a more comprehensive and accurate reporting of information and assistance activities under the AT Act. Information and Assistance activities deliver information on AT devices, AT services, and the availability of resources including funding through public and private sources, to obtain AT devices and AT services. They also include assistance to an individual and troubleshooting problems with an AT device. Terminology and definitions can become tricky. Because the AT Advocates performing AT Act activities work within Independent Living Centers, and Independent Living Centers have their own lexicon of terminology and definitions provided by the language of their funding source, the Rehab Act. The Independent Living Center activity most similar to information and assistance is information and referral. Information and referral is practically identical to information and assistance in it's execution, providing information resources and referrals to a consumer to enable them to make the appropriate next steps to solving the challenge they're facing. Interestingly, in the legislation, the AT Act actually does use the terminology Information and Referral, but since it's interpretation and implementation, it's been standardized as information and assistance. The official reason for the change? I couldn't find any definitive answer, but I have a theory. Based on the introduction of the next Rehab Act activity, which also interacts with today's activity, Technical Assistance. Technical Assistance as defined by the Rehab Act, is executed by providing assistance to consumers with technical issues they are having with their AT. This definition is very different from the technical assistance activities we perform under the AT Act. But we'll get into that later in the presentation. My thoughts are that since the definition of Information and Referral under the AT Act merged these two activities under one activity, where you are on one hand providing information and referrals are a form of information after all, and also specific acts of assistance with hands on troubleshooting for truly technical but sometimes low-tech AT problems, the executors of the activities just naturally took the two most meaningful elements of the names of these activities and simply merged them to give us Information and Assistance. That's just my theory though, please let me know if anyone knows or finds out for sure. As we progress through this AT Activities series, I will continue to draw comparisons between AT Act definitions and Rehab Act definitions in the hopes of demystifying the more confusing overlaps between the activities. You might be asking yourself Is this activity a required activity for me to perform?. If you're operating with AT Act funding, then yes, information and assistance activities are required activities. Information and assistance activities exist within the state leadership category. And all activities within this category are designated with the intention of facilitating a consumer's access to assistive technology. It's required by the federal government that State Leadership activities take up 40% of AT Act funding received by the state, with the remaining 60% going to state level activities. So there is an expectation and built-in supports for information and assistance activity implementation. Information and Assistance is the activity where you are addressing the individual challenges of the community. Community members reach out with a challenge and you respond to their needs. This can manifest in the form of responding to AT related emails, answering AT related calls, or assisting AT related walk-ins. People may be reaching out because they just learned that services are available to them or they're new to the community, or they're trying to get their bearings and were referred to us. People may be um, seasoned consumers. And are reaching out to us because they have new needs, or need additional support for the services they were already utilizing. You could perform one-on-one AT Services information exchange, where you provide them with brochures your organization has developed detailing the scope of your services and ways to connect with programs, like the Digital Access Project. You could be connecting consumers with methods of AT Device Funding, like grants available to them, or our Freedom Tech loan program. You could be connecting consumers with and or performing home modification services. An individual could come in with a repair that is needed for their device, and you're able to troubleshoot the AT problems and perform the repair of the device or refer them to a reputable vendor who can make the repair. People may be reaching out because they are professionals who interact with the disability community and are attempting to support their colleagues and or clients. In that case your Information and Assistance activity would take the form of informing those entities about the services available for their staff, clients, or the public who interacts with them. One activity commonly conflated with Information and Assistance is Public Awareness. The key differences are that Information and Assistance activities utilize a narrow scope, which is intended to provide personalized support to individual consumers. Public Awareness activities are a much more wide scope, which is intended to reach a broad audience. When AT Advocates perform Information and Assistance activities, they're addressing the specific concerns of their consumer and directing them to relevant resources for their specific situation who are providing direct services themselves, which leads into another difference. Information and Assistance has the aforementioned tailored information transfer, as opposed to Public Awareness activities which are about disseminating general assistive technology related information to the masses. Additionally, Information and Assistance activities are intimate focused types of information dissemination, to a specific consumer who you can easily identify and interact with and hone into their needs. Versus Public Awareness activities, which in general won't allow you to be able to identify all or sometimes any participants. Another activity under the AT Act which commonly becomes confused with Information and Assistance activities is Technical Assistance. This is completely understandable, as we earlier discussed in the state of California, the Rehab Act and the AT Act live under the same roof, and this is one of those instances of a shared lexicon with differing definitions causing a lot of disruption. There are quite a few markers to assist you in determining whether the activity you are trying to report is an Information and Assistance activity or a Technical Assistance activity, as defined by the AT Act. Information and Assistance activities provide one-on-one support to individual consumers. Versus Technical Assistance, where support is provided to entities. Information and Assistance activities typically consist of a single interaction. Whereas Technical Assistance activities consist of multiple interactions. Information and Assistance activities are typically quickly resolved, and Technical Assistance Activities typically are long-term projects working toward a resolution of organizational change. Also, if you look at what gets reported at the end of the year, a high number of information and assistance activities are performed throughout the year. Whereas a very low number of Technical Assistance activities are performed throughout the year. Like two to three, for the entire state of California. For me, it's always easiest to determine where an activity should be reported based on the ultimate goal of the interaction. And with Information and Assistance, we are trying to address a single issue that our consumer has come to us with. As opposed to Technical Assistance, where we're trying to address systemic issues that will hopefully bring about systemic change for members of our community. DOR has determined that the AT Act and AT Advocates will be supported under the same roof as ILCs, which is very unique as California is the only state which does this. California AT Advocates and the hub, Ability Tools, perform state leadership activities. And Ability Tools, as the hub, performs and contracts out the performance of state level activities. As is the case with California's Device Lending and Demonstration Centers, or DLDCs. As we continue further into the series, we will discuss state level activities in much greater detail. One of our requirements as the hub is to collect, organize, and report all state leadership and state level activity to the federal government. In order for us to count all of the hard work that gets done, it needs to be individually reported by the centers performing the activities. National Assistive Technology Act Data System, NATADS, is the web based aggregate data reporting system used by a state AT program to submit the required data elements of the APR as mandated by the AT Act. NATADS primary purpose is to serve as the official APR data collection mechanism. However, NATADS also has a web based day-to-day data collection system that can optionally be used by state AT programs for collecting and managing data reporting for all activities including in the state plan for AT and required by the Annual Progress Report, the APR. As a result of this day-to-day reporting option being available as a central reporting system capable of ensuring the validation of all of California's data, California's Assistive Technology Advisory Council and the Department of Rehabilitation made the decision that California would utilize NATADS for collecting the data relevant to our state's AT Act activities. Upon your reminder email this morning, you should have received a word document titled NATADS Activity Guide: Information and Assistance Activity Entry. I'm now going to do a live walk through of the steps you'll go through to enter your Information and Assistance activities. First we'll take a look at what the Activity Guide looks like. I sent this Activity Guide out this morning in a word document. It's going to look a little different when you look at it in the app in your computer, this is the online version. Anyone whose received these Activity Guides before should be pretty familiar with them. Moving on to NATADS, the first step to ensuring any activity um in NATADS, before you enter any activity into NATADS is to verify that your consumer has an account in the NATADS system, and if they don't, to add them into the system in order to record their current and future activities. To check if that consumer has a NATADS account, first you're going to want to sign-in to NATADS. Your username is going to be your work email. And the password is going to be a password of your choice. If you can't recall your password, you can reset your password using your associated email address or you can contact me at Kathrine@cfilc.org for one-on-one assistance.

[Keyboard clicks]

>>KATHRINE CROWLEY: So on the next screen Home Page, select the button titled Day to Day (new). And on the next screen, on the Day to Day Application page, under the banner Clients and Inventory Functions, select the button Clients. On the next screen, Clients Home, under the banner titled Client Functions, select the button View Clients. Sorry, flipped us back to where we didn't need to be.

[Chuckles]

>>KATHRINE CROWLEY: On the next screen, uh Client List, under the banner titled Search Parameters, select the Search By function and select the most appropriate choice from the drop-down menu of search type options. So I'm going to go ahead and type in my favorite fictitious consumer, and he popped right up. So in the following field, um, you'll enter the name in here, select the region that's relevant to your area, although in most cases it's going to be locked to your center, and when you hit search, you're either going to have your consumer pop-up, and if so, you can click right in and scroll down to the Information and Assistance category and add the activity associated with them from there. However, if they didn't pop up in your search, you can see that at the bottom of the record table there's an Add Client button just before the Go Back and Export Data buttons. If you click on the Add Client button, it'll take you to the Client Entry screen. And so from here, you're going to select the region that the consumer is going to be a part of, so you're going to select your region. This is um, the State Client ID is going to autofill with the NATADS ID that gets associated with the person once their account is created. It requires that you put in their first name and last name, or you put in their company name, this is particularly useful if you're entering in a consumer who is looking for professional information, they're looking to obtain information about AT for their students if they're an educator. Or if they're an employer who is looking to be able to make work place accommodations for their um, employees and they want to try out items before they make the purchase of getting the item that their employee needs. So, one or the other, or both. You can put in their title. You're going to select their client category, so how they identify. As an individual with a disability, a family guardian or authorized representative, or any other representatives of education, employment, health, and such. After there, you can add in the client type, you can put that they're a social worker, that they're a nurse practitioner. Make sure that the active box is checked, that they are an active consumer. Select Share Client Statewide. And the Do Not Loan button is something that we can use in the future if someone checks out items and doesn't bring them back and we don't think that it's a good idea to be able to loan items out to them anymore. From there, you can add their address into the address section. I would highly recommend starting with the Zip Code, if you type in the Zip Code, you have to make sure whenever you're pulling from the drop down menus in NATADS to actually select from the drop down menu, otherwise it's going to throw up an error. You can't just directly type into a drop down menu field. But once you've put in the Zip Code, you can select the County, and it will only give you the option that's relevant to that Zip Code. You can select the City, and it will give you the city that's relevant to that Zip Code. And obviously your state is California. From there, the only stuff that you need to actually type in or look for would be the actual address, the street address. Scrolling down the screen, you can select from Contact Type which type of contact you're wanting to put in to be able to connect with the consumer. You can choose from different types of email and different types of phones. Select that type and it's going to refresh your screen and it will kind of jump you up, so scroll back down to it and you can enter in the phone number and any contact notes. For example, if the consumer states that they can only be called after 5 o'clock, because they're working otherwise, put that in the contact notes and it will be reflected in your record um table. Select whether it's a primary contact or not, and hit the Add Contact button and it will enter that contact into the Records Table and you can do this with as many points of contact as you have. So the record table can be filled with numerous amounts of ways to contact the consumer. From there, you can scroll down after you're done with that, and add in any internal notes that you might have about that consumer. You can put out how they reached out to you, they emailed you, called you, if they were a walk-in. You can put the date that they came in to see you. And you can put in what the inciting reason was that they can in to see you. What was the issue that they were dealing with? And how were you able to um, assess what needs they had? So from there, you're going to make sure that they're signed all required liability release forms. And that's just if there is a liability and release form required for what this consumer is up to. Um, if there aren't any required forms, then they have signed all that is required. If there aren't any required then they don't need to sign any, so you can select True and hit Save. And it will create the account for your consumer. So, once that account is created, it'll take you to the same page that you would have been navigated to if you'd found them in the search. The Client View page, it has all of the information that you just entered, and at the top you can select a button just underneath the Client View banner, you can select to Modify or Delete this contact. And if you need to make any changes, so let's say the consumer reaches out and says Hey, I moved, I need to give you my new address., you can come in and modify their account to reflect their new address. Usually it isn't a bad idea when they call to make changes like that to go ahead and add that to the notes. And let's say they used to live at XYZ address, now they've changed their address to reflect that they've moved. That way you can keep track of where people have been, where they might have been loaning from, some people move right across the state and so they used to be an Access to Independence um consumer, and now they're working with DRAIL. So from here you can continue to scroll down and look at all of the items that are available to associate with them. You can associate a Device Loan activity, Device Demonstration activity, basically every activity can be associated with them expect for Public Awareness. Because as we discussed, you can't really keep track of every specific consumer that participates in a Public Awareness activity. So, you're going to select Information and Assistance to be able to enter this person into the system. There is another way to go about it, but it's not recommended. You can go to the Day to Day home, scroll down to the State Leadership functions, and go to this Information and Assistance button. Select it and underneath the Information and Assistance functions button banner, you'll see Add Info &amp; Assistance Activity. This is a way that you can go ahead and hop in there and quickly add an information and assistance activity. But the problem is is that if you start to add in all of this information, and you go to add your client, and you haven't checked first to see if the consumer is in the system, then all of the work that you might have already put into this document is going to have to be erased when you back out and have to create a new consumer. So it really is a good idea to go ahead and start with the consumer first.

[Mouse clicks]

>>KATHRINE CROWLEY: So moving by that model, let's go ahead and find Old Thunder again. And let's add an activity to him. So, Add an Information And Assistance Button underneath the Information And Activity um, records table. And it takes you to the same page that you would have gotten by selecting to add the information and assistance activity from the home page, but it already has your client inserted into it, you don't have to add any clients to it. If you do need to add a client to it, if you had two people in for instance, and they were both participating in it, you can hit the Add Clients button, that's located underneath the Clients Related to Information and Assistance banner, and I know somebody is going to say in the chat that it says Search and Add Client(s) to Technical Assistance. I've already reached out to Vance when I was putting together these materials and he's going to be fixing that mistake in the next update that I believe is coming out this weekend. So, from here you can search by last name.

[Typing]

>>KATHRINE CROWLEY: Oh, you know what it is? Well you can search by last name, and find the consumer. And their name will populate on the data table, the record table here. And you'll be able to select their name which will be hyperlinked, and when you click on it, it will automatically populate underneath the data table under clients related to Information &amp; Assistance. So backing up a little bit, let's make sure that we modify the date to reflect the date that the Information and Assistance activity actually did occur. Otherwise it's going to, if you wait until the end of the week to put all of your record keeping in, then it's going to look like you took a lot of calls just on Friday and didn't have anything else going on throughout the week. And that can be pretty problematic depending on which types of activities you're putting in, especially if you're putting in a Public Awareness activity. Those are a lot of expos to go to in one day. The entered by button is going to be populated with whoever is signed into NATADS. That's why it's really important to have your own NATADS sign in so that the data is valid and that nobody is putting in information under your name, and you're not putting in information under their name. Under the type of I&A section you're going to select from the drop down menu whether you're performing an I&A that is assisting with AT Device or Services or AT Funding. Under the banner Participants Related to Information and Assistance, in this section you're going to be adding anybody who is participating with your consumer. You can see that upon adding the consumer, it already put in how that consumer identifies, as an Individual with a Disability. Let's say you have a consumer come in with their IHSS worker, or you have a consumer come in with one of their educators, you can add a participant to the activity by clicking the Add Participant button under the participants related to Information and Assistance banner. And when the form pops up that you can select from Participant Category drop down menu, and select how they identify. Individual with a Disability, Family, Guardian, or Authorized Rep, all the different representatives of education, employment, and health, and then add how many people who identified that way attended. And just go ahead and add until you have the full party that was involved in the activity in the system. From there, you can add into the notes system. Sorry about that. In the notes field, you're going to want to add any relevant information. So you're going to be wanting to put in the day that they came in, what they were looking for, and how you were able to assist them. I have it broken down, um, into a list on your activity guide. That will tell you exactly what you need to put in. So, Date of Contact, if they called you, emailed, um, the names and demographics of people involved and how they're related to each other and why they were there. Put the staff or the vendors who were involved. So, first and last name in the title. So it could be the DLDC Manager, or an AT Advocate. And their organization, it could be the name of a center or the name of a DME store if you reached out to somebody, a vendor to be able to facilitate their needs. Describe the need that was addressed and any other details of note. Any resources that you gathered, so how did you address their issue? Did you troubleshoot or fix a malfunctioning device? Did you refer them to the AT Loan Program, did you make any other referrals? Perhaps they were looking to get a laptop, but it's not just about the device they need to have WiFi capability and you also referred them to the Digital Access Project. If you put that all in the notes then we have a complete picture of how this interaction went. After that you're going to select the Save button underneath the left corner of the notes text box to complete entry of your Information and Assistance activity. And with that you've completed your entry of your Information and Assistance activity. Does anyone have any questions, clarifications, or concerns? This is a really good opportunity for us to have an open discussion and get to any points that anybody has.

>>MEGAN COWDELL: This is Megan. We do have one question in the Q&A. Um, Marisol wants to know What can we do if a consumer has an item and they are refusing to communicate and return it to us?

>>KATHRINE CROWLEY: In the case of that, it's going to be an internal decision. Every center has their own way of handling these situations. Um, it can depend on the device. To take preventative measures there are, there's software that you can put on tablets and laptops that can track them, and it'll have a GPS location, um, from there you can reach out to the police, report it as stolen, give them the information for them to be able to go and physically get your item for you. Um, it really is dependent on how the center wants to handle it. How, how much they want to go and get that device back and whether it's worth the manpower and the effort to get it back. If it's something like a very small item, like maybe um one of those little pot timers that makes it so the pot doesn't boil over, then your director might just say let it go. But if it's something expensive, like a laptop or a tablet, I'm sure that they will want to take those measures. And that's usually what I've heard from most people. That they usually file a police report and will go and try and get it from that person um, bot those, that software that tracks them and uses the GPS, that is a pretty great piece of software, because not only can it do that, it can also push out applications. And so let's say you get some new apps that you want to have on all of your devices but you don't want to have to wait for all of them to come in, or to reach out to your consumers and say Hey, bring it in so I can install this app, you can from a central hub push out all of those applications onto those devices, and it'll just automatically populate and you can call your consumer and say Hey, check it out, there's a new app on your device. So they're really great services.

>>MEGAN COWDELL: Thank you. And following up on that, where in NATADS should we document uh, when something like that does happen and a consumer isn't following up with us?

>>KATHRINE CROWLEY: And so that is where, when we were entering into the client, um, the client view section, where you can select whether a client is active and whether they are seen statewide, there's also that option that says Do Not Loan, and you can select that option if you have somebody who is a perpetual, let's just say keeper of devices.

[Laughter]

>>KATHRINE CROWLEY: Um, I know that there are some people that we've discussed um, you know, that are, they kind of um, they will put in requests across the state for devices, and we're all kind of familiar with these groups of people. And uh, it's really useful to be able to, that's why it's important to be able to put Share Statewide, to select that. Because that way let's say somebody in San Mateo, um, they have someone who was taking things and not bringing them back, and they weren't able to communicate with the consumer to get the item back, and then the consumer makes a request in um, in FREED. And so you know, you have the AT Advocate in FREED can go into NATADS using that client's name and pull up their account and see that Oh, wow, look. CID said that they aren't giving any of their items back and that we shouldn't loan to them.. So you can select the Do Not Loan option and go down into the Notes section, that was on the very bottom, if you want I can actually show you. And go down into the notes section, let's go find Captain Ahab again. And see my silly notes, because I just did a word salad on it last time when I was just putting something in. So you're going to scroll down and under the Client Information section, once you hit the Modify button, just above the Client Information banner, you can go in and make changes. So select Share Client Statewide if they are not returning their devices and they keep borrowing and not bringing them back, you can select Do Not Loan. And scroll on down to the Notes section. And put in the information about what happened. They borrowed these items, they've been, we've called them on such and such date. We've called them again on such and such date. Document everything that occured, so that when somebody else goes in and they're interacting with this consumer they can see in the notes, oh no, I can't lend you know, a $600 device to this individual, that would be very risky. And once you have all of your notes put in, hit Save and it will be saved in the system for the entire state to be able to see.

>>MEGAN COWDELL: Great, thank you Kathrine. I hope that answered your question, um, if not please follow-up with us. And if you do have additional questions, please feel free to send them to us in the Q&amp;A. Uh, we do have another one which is How can we prepare to execute some I&A activities ahead of time? Do you have any suggestions on that?

>>KATHRINE CROWLEY: Well, you know if I were going to prepare for I&A activities ahead of time, um, I would look at what way the consumer is going to reach out to me, so if somebody is going to reach out to me via email, I'm going to have a saved template in my emails with all of the relevant resources that I'm going to be directing people to. You know with our website, with um any programs that we're working with, like FreedomTech or the Digital Access Project. Um, if we're wanting to, if we're working with someone whose a youth, we might want to connect them up with YO! Disabled and Proud so that they can be a volunteer. Or so that they can get some work experience and build their resume. Um, all of that information can be saved in a template that you can quickly pull up and be able to respond to people with. That way you're cutting down on the amount of digging time that you have to do to create these emails. And you make sure that you have complete information for them. Um, you can also have an I&A folder set up in your email to be able to deposit the communications into for reference and reporting and validation of your reporting. That way you don't have to go sifting through your emails trying to find all of that information. And you can just drop them into that folder for reporting later. Um, let's see. If you um call, if you want to prepare for people who are going to call in, you can have a script to follow whenever they call, that way you can collect this information. It can be kind of difficult and artificial when somebody is just trying to get a quick answer, to be able to go through the whole spiel of finding out their name and everything and their address, but what you can do is have this page open when they call, and just say Hi, my name is Kathrine Crowley, what's your name? And as they answer, type it in. And listen to what they're asking for. You know, that, you know I am in a wheelchair for the next six months I was in a car accident, so you're going to try to select from the Client Category Individual with a Disability. Uh, they're going to ask for resources. You're going to say Can I get your address? That way I can get the most relevant resources that are closest to you. And when they give you their address, you can type it into the address section. And that way you can sort of organically get the the information that you need to be able to enter the information into NATADS without having it be a laborious process for the consumer.

>>MEGAN COWDELL: Thank you, those are some great suggestions and I hope that they can help folks. Uh, does anybody have any questions? Please send them to us in the Q&A or you can raise your hand on Zoom too if that is easier for you. I'm not seeing any additional questions right now, Kathrine.

>>KATHRINE CROWLEY: Alright well, in that case, um, what I would suggest. I'm going to go ahead and pop our screen back up. That if you have anything else that you want to discuss, if you have any individual issues that pop up, reach out to us over the listserv, you know, if you're an AT Advocate, or if you're a DLDC staff, we all have our own listservs that we can send out information on and get assistance from our peers. Because honestly, I learn everyday from the AT Advocates. There's always something new to learn from the staff that we're working with together. So, reach out over that, call me, send me an email if there's any information that you need or if you're too shy to ask questions on the webinar, feel free to reach out to me after the webinar, I'd be happy to answer any questions or clarify anything that you need.