

Stay Connected – Care Coordination Guide

“Stay Connected” strategies involve support and evidence-based strategies for adult clients experiencing stress or greater isolation due to COVID-19. This guide is intended for social workers, case managers, trained volunteers, and other staff working on the front lines with clients experiencing elevated stress, isolation and depression. During the COVID-19 public health emergency often these encounters will take place by phone or videoconferencing. Below we outline steps to take when initiating contact and follow-up by phone or video during this time.

Guide Contents

Initial Call: Brief Checklist.....	2
Initial Call: Client Engagement and Needs Assessment.....	3
1. Introduction and Engagement.....	3
2. Review and Address Urgent Concerns.....	3
3. Assess Stress, Anxiety, Depression, and Loneliness.....	4
4. Provide Resources and Self-Management Strategies.....	4
5. Wrap Up.....	4
“Stay Connected” Follow-up Call: Brief Checklist.....	5
“Stay Connected” Follow-up Call.....	6
1. Greeting and Agenda Setting (3 minutes).....	6
2. “Stay Connected” Strategies (20 minutes).....	6
3. Wrap Up.....	6
Client Resources and Education Materials for Stay Connected.....	7
Resource Sheet.....	8
A Vicious Cycle.....	9
List of Pleasant and Rewarding Activities.....	10
Scheduling Activities: Pleasant – Social – Physical.....	11

This work in part, is supported through the Archstone Foundation Care Partners project, grant number 14-04-71.

Initial Call: Brief Checklist

Use this checklist to guide you through an initial call and conduct a needs assessment with a client.

- _____ Introduction and engagement

- _____ Review and address urgent problems and concerns

- _____ Assess stress, anxiety, depression, and loneliness
Use standardized measures (PHQ, GAD, etc.) based on program protocols

- _____ Provide resources and self-management strategies
 - _____ Stress and anxiety management strategies
 - _____ Client Activation strategies for depression

- _____ Set up next contact

Initial Call: Client Engagement and Needs Assessment

1. Introduction and Engagement

For known or new clients:

- Introduce yourself and your role at the center.
- Let clients know you are calling to do a “wellness check” to see how they are doing.
- Ask them about any struggles related to the COVID-19 outbreak.

Listen for:

- Concerns about finances, family, housing, food, medication, supplies
- Increased isolation and loneliness
- Emotional distress, depression, anxiety

If client reports any level of distress, low mood, anxiety, or reductions in social contact:

- Ask “We have some resources to help in this time. Can we spend some time talking about what might be helpful for [mention their concerns here]?”

If the client does not have interest in discussing:

- Ask “Can I ask what about this doesn’t interest you? Could I reach back out to you in a couple of weeks to check on you?”

2. Review and Address Urgent Concerns

Assess urgent client concerns (e.g., finances, food, obtaining or taking medication, supplies, housing).

If urgent concerns:

- Ask “Is anybody working with you already to help out, such as your church, someone from the meals on wheels program, or local social services agency [name local agency]?”
- Attempt to address unmet client concerns, if any, by using local resource list.

Additional topics to address (if not brought up by client):

- Disruptions in needed medical care
- Concerns about COVID-19 (e.g. do I need to get tested?)
- Difficulty acquiring food or other essentials
- Concern over finances (i.e. bills, rent)
- Not attending “physically-distant” social events or group activities where you live (i.e. shared meals), if applicable
- Not going outside
- Not running usual errands
- Haven’t seen family
- Not getting physical exercise
- Limited access to transportation
- Disruptions in caregiving – providing care or receiving care
- Discrimination
- Limited phone or internet access

3. Assess Stress, Anxiety, Depression, and Loneliness

Normalize, validate & identify behavioral health symptoms

- Say & Ask “The current situation with COVID-19 has been stressful for most people, and it’s common to experience more distress and worry than usual. How has your mood been? Have you been experiencing any stress or anxiety? Have you been missing contact with others, or feeling lonely?”
- Ask clients to describe their experience. Clients’ behavioral health symptoms can guide selection of most relevant Stay Connected strategies.

Consider use of standardized measures for clients based on your own program’s protocols. High measure scores will indicate a need for more intensive mental health treatment. Measures include:

- PHQ-9 for depression
- GAD-7 for anxiety
- English Longitudinal Study of Ageing Loneliness Scale (ELSA)

4. Provide Resources and Teach Self-Management Strategies

Choose from any of the below self-management strategies to help clients take care of themselves, find creative ways of staying connected to others, or to manage stress, anxiety, and depression:

- Telephone or online classes, support groups or social opportunities that your center or community organizations may offer. Add to client’s customized resource sheet.
- Review resource sheet and discuss anxiety and stress management strategies, as applicable.
 - Provide information and education about COVID-19
 - Discuss ways to increase sense of safety
 - Discuss helpful strategies to reduce physical anxiety (i.e. deep breathing techniques) and worry
- “Activation” strategies for depression
 - Describe how “Activation” strategies can help clients take care of themselves and find creative ways of staying connected to others (Vicious Cycle handout)
 - Help client brainstorm pleasant and rewarding activities (Activity worksheet)
 - Help client with how to structure their days, including scheduling pleasant and rewarding activities for the week (Action Plan worksheet)

5. Wrap Up

Set a specific time to follow up with the client.

- Say “I’d like to set up a follow up call with you on _____ (a few days to one week depending on client distress and/or desire). We can discuss how you are doing and go over how your action plans are helping.”



“Stay Connected” Follow-up Call: Brief Checklist

Use this checklist to guide you through follow up call with a client.

- _____ Greeting and agenda setting
- _____ Address urgent concerns
- _____ Assess stress, anxiety, depression, and loneliness
Use standardized measures (PHQ, GAD, etc.) based on program protocols
- _____ Check in on goals and teach additional self-management strategies as needed
- _____ Stress and anxiety management strategies
- _____ Client Activation strategies for depression
- _____ Make a plan for this week and set up next contact



“Stay Connected” Follow-up Call

1. Greeting and Agenda Setting (3 minutes)

Consider this script for setting a follow-up call agenda with a client:

- “Let’s start today’s call by setting a plan. We could start by checking in on any urgent concerns you have. Then we can check in on your mood and anxiety level to see if there are any changes in how you’ve been feeling. Next, we can review any progress with goals or plans you had for yourself from last time. And lastly, we can discuss any new goals and plans for this week. Is there anything you’d like to add to our agenda to make sure we cover today?”

2. “Stay Connected” Strategies (20 minutes)

Address urgent client concerns, if any (e.g., finances, food, obtaining or taking medication, housing).

- Inquire about these concerns even if clients didn’t bring them up in prior call.
 - Consider: Do I need to check with the center team on any of this information, do I need to consult with anyone?

Assess stress, anxiety, depression, and loneliness, and discuss any changes.

- Ask open-ended question about changes in quality or quantity of social contact.
 - Consider: Is this a big change and do I need to consult or refer client for formal care?
 - Use standardized measures for anxiety and depression based on program protocols.

Check in on “Stay Connected” goals and teach anxiety management or Client Activation strategies as needed.

- Review action plans from previous call
- Discuss current progress on strategies
 - Relate these to client goals, reinforce small gains, problem-solve challenges, adjust strategies and goals (if applicable)

Plan for this week (Use resources sheet and Activity Scheduling worksheet)

- Anxiety management strategies (see resources sheet)
- Social connection goals
- Physical activity goals
- Other rewarding activities

3. Wrap Up

Consider additional follow up calls for clients reporting elevated stress, anxiety, loneliness or depression.

- Consider a regular call frequency based on the needs of the client.
- Say “I’d like to set up a follow up call with you on _____. We can discuss how you are doing and go over how your action plans are helping.”



Client Resources and Education Materials for “Stay Connected”

The following pages include resources, education materials and worksheets to use with clients when supporting them to stay connected.



Resource Sheet

Tips for Managing Stress Associated with COVID-19

These information sheets from federal healthcare agencies offer practical tips for managing the stress or anxiety associated with COVID-19. Click on the links below to view the informational handout.

- Managing Stress (National Center for PTSD)
<https://ahcpsychologists.org/wp-content/uploads/2020/03/COVID19ManagingStress032020.pdf>
- Taking Care of your Behavioral Health (SAMHSA)
<https://www.samhsa.gov/sites/default/files/tips-social-distancing-quarantine-isolation-031620.pdf>
- Mindfulness Coach mobile app (Veterans Association)
<https://www.mobile.va.gov/app/mindfulness-coach>

“Mindfulness means noticing and paying attention to what is going on in the present moment, without passing judgment on it. Mindfulness has been shown to be effective for reducing stress, improving emotional balance, increasing self-awareness, helping with anxiety and depression, and coping more effectively with chronic pain.”

Other Tips for Well-Being

This list includes links for virtual activities like museum tours, videos, and other information.

- Scroll down for the section on "Older adult and family resources": <https://gerocentral.org/clinical-toolbox/covid-19-resources/>

Pen Pal Project

Join the Phinney Center's Pen Pal project. Kids practice their penmanship, communication skills, and how to address an envelope. Kids and seniors both get to make a new friend. Visit the below for information on how get matched with a pen pal. <https://www.phinneycenter.org/pen-pal/>

Friendship Line

This 24-hour toll-free Friendship Line from the Institute on Aging offers both a crisis line and non-emergency emotional support calls for adults 60 years and older and adults living with disabilities.

- Call 1-800-971-0016 (toll-free)
- Visit <https://www.ioaging.org/services/all-inclusive-health-care/friendship-line>

Washington Listens

This service provides non-clinical support to people who feel sad, anxious, or stressed due to COVID-19. Any Washington resident can call and a support specialist will listen and help to guide to connections within their community, including crisis services.

- Call 1-833-681-0211 (toll-free)



- Visit walistens.org

National Suicide Prevention Lifeline

If you're thinking about suicide or harming yourself, are worried about a friend or loved one, or would like emotional support, reach out! These services are available 24/7, free and confidential.

- Call: 1-800-273-8255
- Text: 'HOME' to 741741
- Web chat: <https://suicidepreventionlifeline.org/chat/>



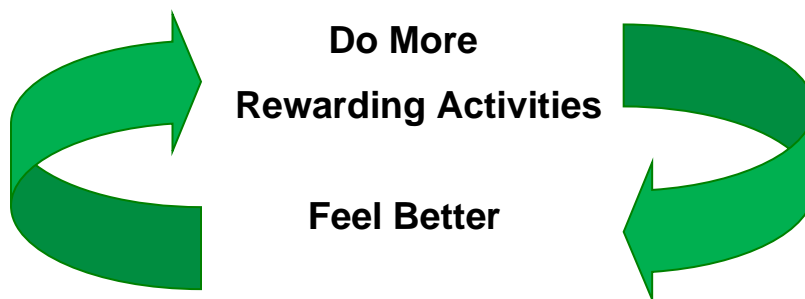
A Vicious Cycle

Why is it Important to Do More Pleasurable and Rewarding Activities?

When people feel stressed or down or are unable to see family members and friends in person, they may not feel up to doing the kinds of things they typically enjoy. By doing fewer enjoyable and rewarding things, they begin to feel worse. As they feel worse, they do even less and get caught up in a vicious cycle.



As part of our calls, we will help you set a goal of doing at least one pleasurable or rewarding activity each day. These goals can include physical activity, socialization, or other recreational activities or hobbies that have value and meaning to you. Engaging in pleasurable activities like these will help break the vicious cycle of negative emotions and improve your mood, interest level, and energy.



List of Pleasant and Rewarding Activities**Instructions:** List desired activities and rate the difficulty of each.

	ACTIVITY	DIFFICULTY: E = Easy M = Medium H = Hard
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
11.		
12.		
13.		
14.		
15.		



Scheduling Activities: Pleasant – Social – Physical

Plan at least one activity each day. It is an important way to deal with stress and depression. Schedule out a week's worth of daily activities.

Each day should contain at least one activity. These can be pleasant, social, or physical activities. For example, a pleasant activity might be reading a book or doing a hobby; a social activity might be calling or video-chatting with a friend; and a physical activity might be going for a walk.

Rate how satisfied you felt after doing the activity.

Daily Activities			How satisfied did you feel? Rate from 0 to 10: 0 = Not at All 10 = Extremely	Completed? ✓
Day	Date	Activity (What? Where? With Whom?)		
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Saturday				
Sunday				