

REPORT FROM BRIEFING AND TRAINING OF TEST PERSONS, HOME CARE GIVERS AND NURSES

Deliverable D.T3.7.3

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1. Introduction

The **Monitoring Grid** was developed in the present project as part of WP T2 “The design and development of technical solutions”. The Monitoring Grid is a web application, which shall enable a professional and trained monitoring team to detect early signs of deterioration of health and social conditions of older person, and consequently enable them to live independently at home as long as possible. In order to observe the development of the state of health, a trained monitoring team calls the elderly once a week. The basis for these calls is the Monitoring grid. In this simple monitoring tool, the questions of the interviews are mapped and evaluated. This means, it not only pursues the goal of recognizing a deterioration in the state of health as quickly as possible, it also intends to manage and facilitate phone interviews with frail elderly people, thus constituting a true “guide” to handle phone interviews.

In addition to the development of the Monitoring Grid, the **home emergency call** has been expanded to include a further button, the so-called service button, as part of the present project. The interviewed persons, of the 12 of the 13 participants who have a home emergency call, have the possibility to be connected directly to the monitoring team with a single push of a button and to ask important questions.

In order to be able to meet this task, it is essential that both the interviewers and the people interviewed complete **targeted training** about tools to be installed, including presentation of the functionality of Monitoring Grid, and receive extensive information about scope, objectives and timeframe of the pilot action.

A joint training session was organized with the interviewers on March 3rd 2021. Due to Covid-19, a breakfast briefing with elderly could not be carried out. Instead, the people participating in the project were visited at home in compliance with all applicable Covid-19 requirements. In the course of this, they were informed about the project, the Monitoring Grid in particular, and the pilot action. In addition, the corresponding tools have also been installed and activated (for more information about installation see “D.T3.7.4 Installation and testing of technical devices and applications”).

The Monitoring Grid primarily appeals to people whose state of health is still so good that they can live alone in their own home. The persons addressed here therefore do not need the support of (home) care givers or family members. For this reason, no training was organized with care givers or family members (as none of the people involved need to seek help from care givers).

The **present document** first describes the initial briefing and targeted training of interviewers, which took place on March 3rd 2021 from 9:00 a.m. to 12:00 p.m. In a further step, it is shown how the interviewed people were informed about the project and the pilot action and how the training with the interviewees was organized despite Covid-19.



2. Initial briefing and targeted training of interviewers

Due to Covid-19 and the associated restrictions, the initial briefing and targeted training were merged: On March 3rd, 2021 from 9:00 am to 12:00 p.m., the first joint meeting of the interviewers and the project management was organized. The following table shows the people present and a short description of them.

Name	Function	Function in Pilot action	Number of interviewees assigned	
			Beginning of the project	As of May 2021
Goran Kajtaz	Residential area manager of the nursing home in Weppersdorf (NUTS region 111)	Interviewer	7	7
Christoph Sztubics	Residential area manager of the nursing home in Großpetersdorf (NUTS region 113)	Interviewer	6	4 In the course of time, however, 2 people ended their project work. One participant moved into the nursing home and another participant no longer wanted to work on the project due to personal issues.
Anna-Maria Matzka	Residential area manager of the nursing home in Draßburg (NUTS region 112)	Interviewer (Representation in case of absence of the interviewers)	-	-
Sylvia Lomosits	Project Management (Developed the concept and participated in the technical implementation of the Monitoring Grid)	Project Management / Contact person for interviewers / Trainer	-	-

Table 1: Description of the participants of the interviewer training.



Picture 1: Interviewers during training.

The aim of this meeting was, on the one hand, to provide information about the project and pilot action and, on the other hand, to provide training in their job as an interviewer. For this reason, this meeting was divided into two parts: (1) General information about the project and pilot action and (2) Targeted training for the Monitoring Grid.

2.1. General information about the project and pilot action

Since the people present (picture 1) have already attended the two thematic workshops (D.C.4.1) in June and September 2020 and thus also decisively shaped and helped to develop the Monitoring Grid, the presentation of the **project/** Monitoring Grid was kept short. The following essential content of the Monitoring Grid were, among other things, communicated again:

- Aim of the Monitoring Grid: Monitoring the health of the elderly in order to enable them to live an independent life at home as long as possible.
- Structure of the Monitoring Grid: Division into clinical, functional and social factors. In this context it was again emphasized that inquiries about social factors are primarily aimed at identifying (possible) social isolation.
- Analysis/ evaluation of the Monitoring Grid: Use of two different diagrams: network and line diagram. These two forms of evaluation were again explained in detail and any related questions answered.



In the next step, the **pilot action** was presented. In this context, the following were discussed:

- Objectives of the pilot action: Testing of the Monitoring Grid developed in WP 2 and measurement of the indicators defined in the action plan: usability, technology acceptance, effects on quality of life, and social isolation.
- Time Frame: April to September 2021.
- Definition of the task of/ responsibilities as an interviewer (Scope of the pilot action):
 - Finding appointments for the weekly calls together with the participants.
 - Observation of the health of the participants with the help of weekly calls/ diagrams.
 - Immediate implementation of appropriate measures if the state of health deteriorates.
 - Possibly arrangement/ contact with relatives (if necessary).
 - Advice on support measures (if necessary).
 - Documentation of the calls.
 - etc.
- Allocation of participants to the interviewers: This was done in advance by the project management and agreed with the interviewers during the meeting. During the allocation, care was taken to ensure that the interviewers do not know the interviewees and the interviewees do not know the interviewers.

2.2. Targeted training of the interviewers

In order to optimally prepare the residential area managers for their task as an interviewer, the functionality of the Monitoring Grid was explained to the future interviewers as part of the organized training. For this purpose, a training document (see Appendix 1) was prepared in advance, which was sent to the interviewers by email a few days before the training. The training document describes all aspects of the Monitoring Grid that are important for the interviewers and also contains important screenshots that are intended to help the interviewers better visualize.

The training was structured according to the training document. The following content was transmitted, among other things:

- Brief explanation of the objectives and the functionality of the Monitoring Grid.
- Emphasizing the importance of educating participants about healthy living.
- Entry: Password and username were created by the project management and sent to the interviewer in advance by e-mail. It was also pointed out that it is advisable to change the password after first access.
- Create a new person.
- Enter data: The distinction between the answer options was also explained.
- Possibility and functionality to create a user for the interviewed person.
- Different evaluation options: show diagrams, comments, combinations, interviews again.
- Edit personal data of an interviewee.
- Delete an interviewee.

In order to clearly explain how the Monitoring Grid works and to be able to present the diagrams in a practical way, the project management entered fictitious interviews in advance. These were deleted after the training/ before the start of the pilot action.

The follow-up described below was agreed with the interviewers:

- During the meeting, the project management was defined as the contact person who can be contacted at any time if they have any questions.
- Ongoing feedback is obtained from the project management by telephone.
- Another personal meeting for feedback/ evaluation is planned for summer 2021. Project management will inform the interviewer in a timely manner.

Since health-specific and therefore rather sensitive data are queried within the framework of the Monitoring Grid, it is necessary that the interviewers also have essential information about data protection. For this reason, before the start of the pilot action, they completed a “data protection training course” as well as a “training course on digital security in the workplace” at the Academy of the Samaritan Association Austria.

3. Targeted training of the interviewees

In February 2021, 13 interviewees were visited from the project management and responsible person for the home emergency call in compliance with all Covid-19 requirements and, as already in “D.T3.7.2 Engagement of test persons and consideration legal aspects” mentioned, informed about the following:

1. the most important benefits and principles of the project.
2. the functionality of the Monitoring Grid and the time span of the testing as well as the further procedure of the pilot.
3. that this phase is a pilot and that the Samaritan Burgenland Department of Home Care cannot give any guarantee for all measures taken. This is also anchored in the written consent.
4. the possibility that the data or the analysis of the data can also be viewed from the elderly themselves. However, only two of the thirteen participants visited wanted to make use of this opportunity.

Points 1 and 3 have already been described in “D.T3.7.2”. In the following, points 2 and 4 will now be discussed in more detail.



During the visits the participants were informed about the pilot action, the Monitoring Grid and the service-button of the home emergency call. In this regard, the following topics were discussed, among others:

- What is the Monitoring Grid? The Monitoring Grid is a simple monitoring tool, which shall enable a monitoring team to detect early signs of deterioration of health and social conditions and consequently enable older people to live independently at home as long as possible. In this respect, it represents the basis for weekly calls. These calls serve to identify a deterioration in mental and physical health as quickly as possible. This means, it not only pursues the goal of recognizing a deterioration in the state of health as quickly as possible, it also intends to manage and facilitate phone interviews with frail elderly people, thus constituting a true "guide" to handle phone interviews.
- Aim of the Monitoring Grid: Monitoring the health of the elderly in order to enable them to live an independent life at home as long as possible.
- Objectives of the pilot action: Testing the Monitoring Grid.
- Time frame of the pilot action: April to September 2021.
- Role of the interviewee: Interviewee is to be called weekly on a set date. At this appointment, she/he will be asked questions about her state of health. The answers are entered in the Monitoring Grid and evaluated with the help of network and line diagrams.
- Possibility of being an user of the Monitoring Grid: The Monitoring Grid was originally designed in such a way that the people interviewed also have access to their evaluations. This possibility was also explained to the participants. 2 of the total of 13 participants expressed interest in their own user. During the takeover of the Monitoring Grid (the Monitoring Grid was technically developed by the Czech University of Brno, PP2, and subsequently taken over by the Samaritan Burgenland Department of Home Care) it turned out that the Monitoring Grid currently only works in the Samaritan network for security reasons. Outside persons have no access to this network. They were then informed that an own user is unfortunately not possible in the current development phase of the Monitoring Grid. Nevertheless, a training document was also prepared for the interviewees. This document, drawn up in German, can be found in the appendix 2.
- In addition to the information about the Monitoring Grid, they were also informed about the possibility of being able to contact the residential area manager independently. This works via the so-called service button, which is located on the home emergency call and was activated during the visit. If the interviewed people press the service button, they are connected directly with the residential area manager assigned to them and can, in addition to the weekly appointment, ask questions or express important concerns. The service button was explained to the interviewed persons and they were trained in its functionality. The picture below shows how the person responsible for the home emergency call explains the service button to a participant.



Picture 2: One interviewee is informed about the functionality of the home emergency call.

A short written project information as well as the contact details of the project management and the person responsible for the home emergency call was created for the participants. This document written in German can be found in the appendix 3.

The following follow-up was agreed with the interviewees:

- The interviewees were informed that the residential area managers assigned to them will contact them in the foreseeable future to arrange a joint weekly appointment.
- Another personal meeting for feedback/ evaluation is planned for summer 2021. Project management will inform the interviewee in a timely manner.



4. Conclusion

The Monitoring Grid is a web application which aims to detect early signs of deterioration of health and social conditions and consequently enable older people to live independently at home as long as possible. This web application is supported by the so-called service button, which has been activated on the already existing home emergency call devices. The service button enables the interviewed person to be connected directly to "their" interviewer and to ask important questions for them. In order to be able to use both the Monitoring Grid and the home emergency call optimally, it is of course important that the people involved are informed and trained accordingly. This has been described in this document.

A total of 16 people were trained in how the Monitoring Grid works. 13 interviewees were visited in February 2021 by the project management and the person responsible for the home emergency call and informed about the Monitoring Grid, service button, and pilot action. Three residential area managers of the Samaritan Burgenland Department of Home Care take on the role of the interviewer. A joint appointment was organized on March 3rd, 2021, at which the Monitoring Grid was explained to them with the help of a training document.

In order to develop sustainable information for the interviewer and also the interviewee, three documents were developed by the project management.

5. Appendix

1. Training document for the interviewers (in German).
2. Training document for the interviewees (in German).
3. Short project information for the interviewees (in German).