VOLUNTEER REFERENCE GUIDE

Getting Started

This document provides step-by-step directions for all resources available on the volunteer webpage.

Contents

Version 1.0
Release Date: 05   -05-2022

Proprietary & Confidential Statement: This document and the information disclosed within are confidential and the proprietary property of achi.

Page 1 of 22

Volunteer Webpage

In this section, you will:

1. Access the Volunteer homepage
2. Access Helpful Links

Try it: https://www.achisolutions.com/cachingmemories-volunteer

Copy and paste the above web address into a Chrome browser.
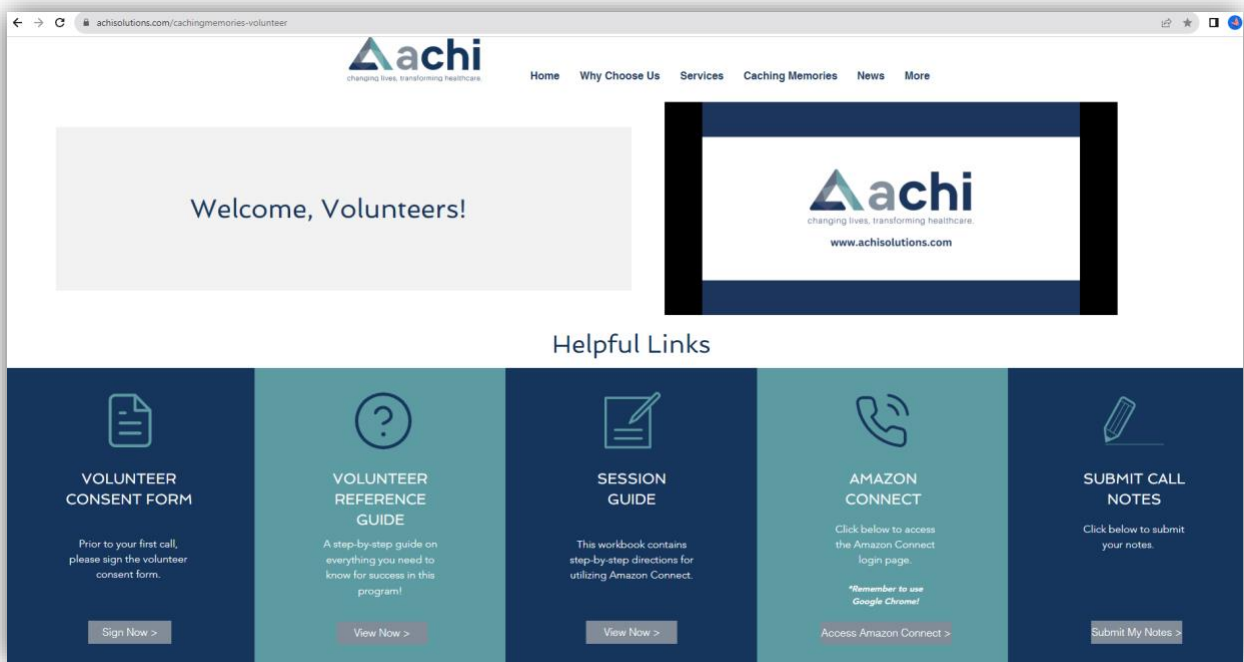
Tip: *Bookmark this page so that it is easily accessible on the days that you have scheduled calls.*

Version 1.0
Release Date: 12-22-2022

Proprietary & Confidential Statement: This document and the information disclosed within are confidential and the proprietary property of achi.
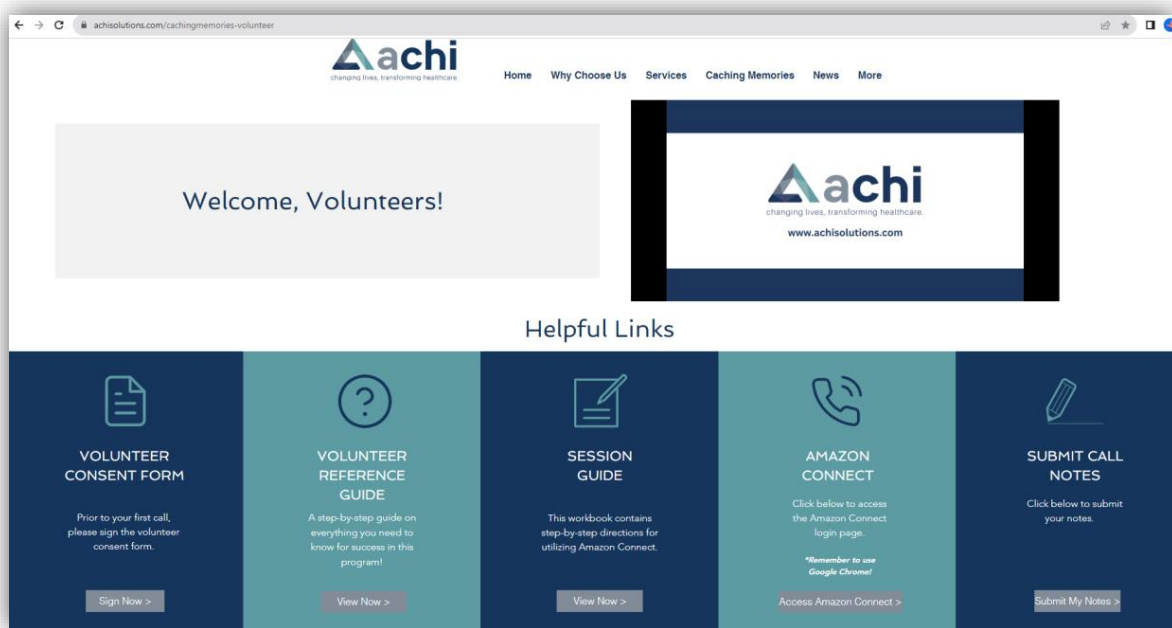
Page 2 of 22

Volunteer Consent Form

In this section, you will:

1. Access the Volunteer Consent Form
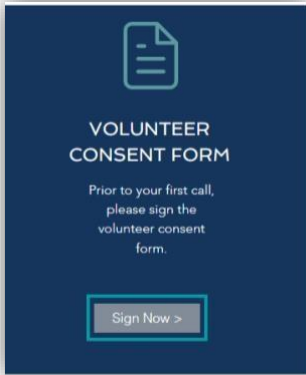2. Review and Sign Volunteer Consent Form

The Volunteer consent form is a requirement for all participating volunteers. It must be reviewed and signed before the given due date. Any questions regarding the consent content can be directed to the program manager.
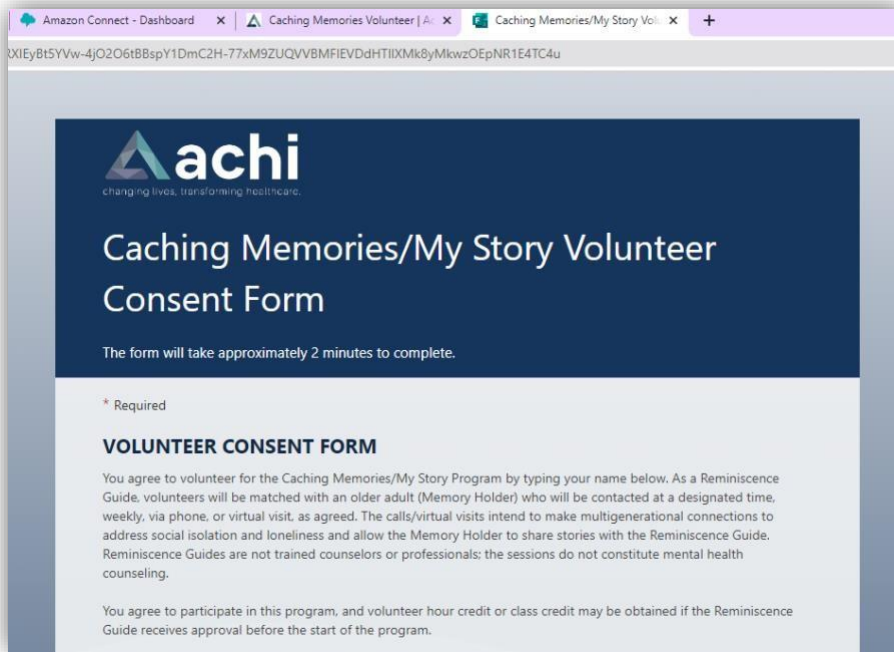

Try it: The consent form is listed under the **"Helpful Links"** section of the volunteer webpage.

Version 1.0
Release Date: 12-22-2022

Proprietary & Confidential Statement: This document and the information disclosed within are confidential and the proprietary property of achi.

Page 3 of 22

Select the **Sign Now** button.

The consent form will populate in another browser tab.

The consent form should take approximately 2 minutes to review. After you have read the consent form details, fill in the required information.

1. Enter your **First** and **Last name.**

2. Enter **Today's date.**

3. Select the **Submit** button.

Your response will be sent to the Program Manager for review. A **"Thanks!"** acknowledgment will be displayed.

Note: If you do not type in your name when you complete the form, it will show up as "Blank" on the report the program manager pulls. You will receive an email to resubmit your form.

Amazon Connect

In this section, you will:

1. Log into Amazon Connect
2. Launch Contact Control Platform

Amazon Connect is the dialing platform to contact Memory Holders during the Caching Memories/My Story program. Amazon Connect must be launched using Google Chrome.

Note: Reminiscence Guides are not permitted to use Amazon Connect for any other use than the Caching Memories/ My Story program.

Try it: Launch Google Chrome by double-clicking on the icon.

Navigate to the volunteer webpage. Select the **Access Amazon Connect** link from the **"Helpful Links"** section.

You will receive an email with your login credentials.

Enter your **Username.**

Enter your **Temporary Password**.

Select **Sign In.**

Tip: *Bookmark this page for future use in your Chrome browser.*
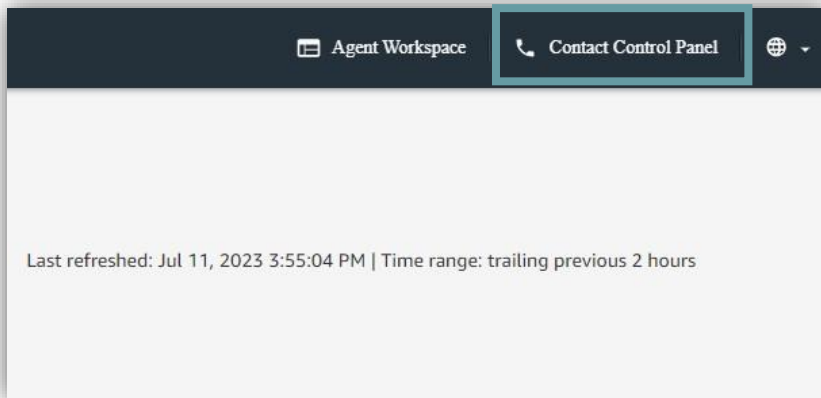
Once successfully logged in, the **Amazon Connect Dashboard** will be displayed.
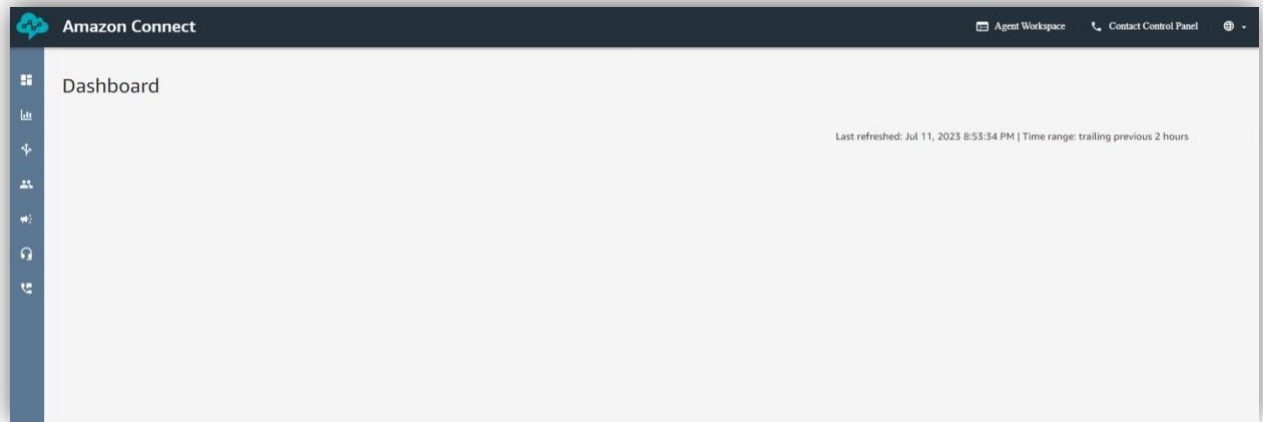
Note: The Dashboard may look different than seen in the image above. You will not need to use the toolbar on the left side of the Dashboard.
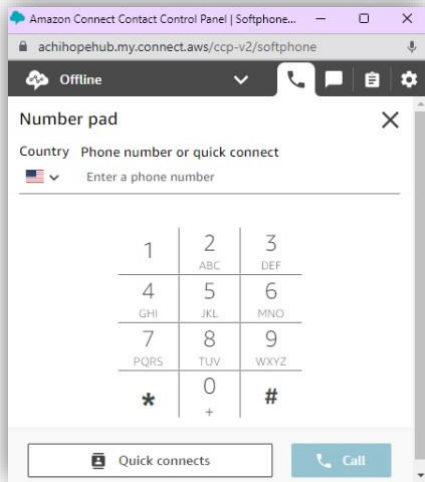
To call the Memory Holder, locate the **Contact Control Panel** on the Dashboard's upper right-hand side.
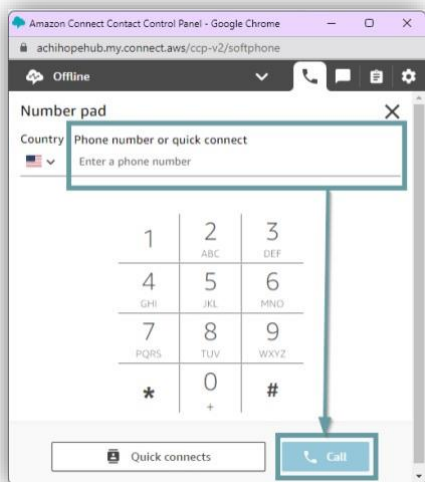
Select the **Contact Control Panel** icon.

A pop-out window will appear, displaying the number pad.

Enter the Memory Holder's phone number on the number pad.

Select the **Call button.**

Tip: *Remember to dial **"1"** before entering the area code and phone number.*

Note: All calls will be recorded while using Amazon Connect for training and quality purposes.
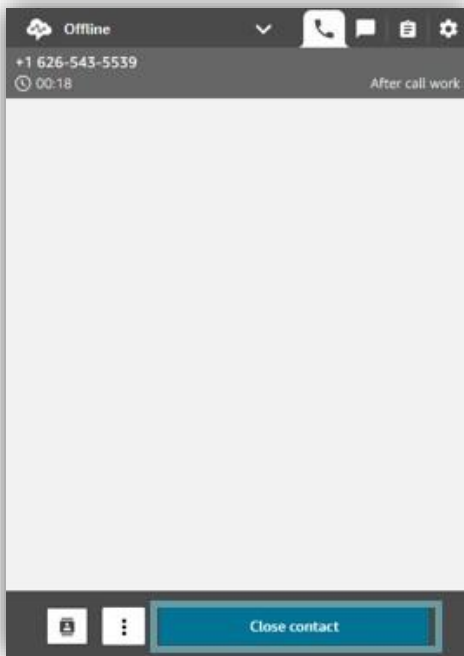
When the session is complete, follow the steps below to disconnect the call correctly.

Select the **End Call** button.
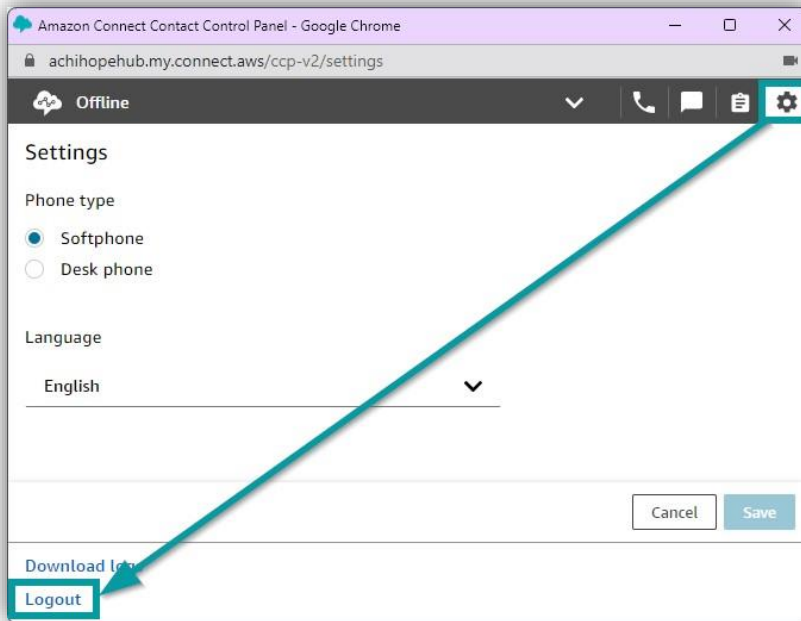

Select the **Close Contact** button.

Note: Failing to complete this step will result in the call not appearing in the Contact Results report.

After you have closed the call, sign out of Amazon Connect.

Select the **Settings** icon.

Select the **Logout** option.

Step 5: Submitting Call Notes

In this step, you will:

3. Access Microsoft Forms from the Volunteer home page
4. Submit Call Notes

Reminiscence Guides are required to submit their call notes within 48 hours of completing their sessions. Before ending each session, Reminiscence Guides should review their notes with their Memory Holder for story accuracy.
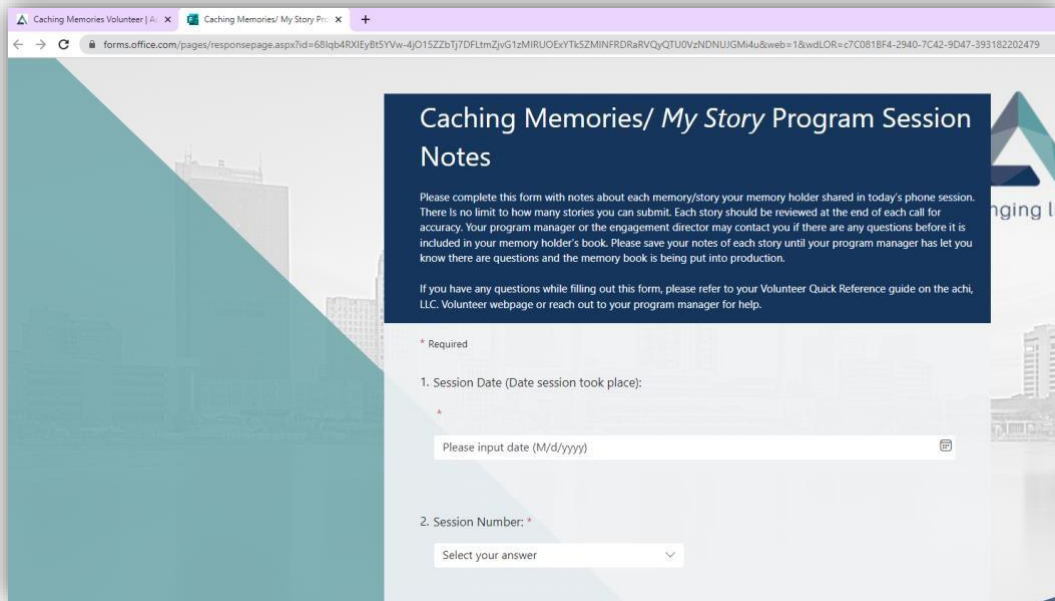
Navigate to the volunteer webpage.

Select the **Submit My Notes** link from the **"Helpful Links"** section.
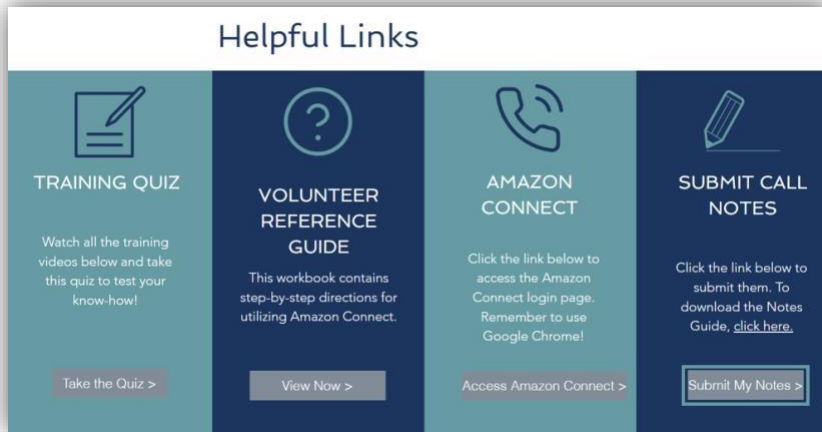
Microsoft Forms will open in another browser tab.

Enter the following information:

1. Enter the **Session Date.**

Tip: *The date entered should be the date the call took place.*

2. Enter the **Session Number.**

3. Select the **Memory Holder's name.**

Tip: *Select their name from the drop-down menu. If it is absent, select the **Other** option, and type their name in.*

4. Select the **Reminiscence Guide's name**.

Tip: *Your name should be listed in the drop-down menu. If it is not, select the "**Other**" option and type your name into the field.*

Scroll through the drop-down options and select the **Session Topic.**

5. Enter the **Setting** of the Memory Holder's story.

6. Enter the **Story Characters.**

7. Enter the **Plot** of the story.

Note: 9 and 10 are optional to fill in.

Select the **Submit** button.

You can print a copy of your answer after you submit

Submit

Never give out your password. Report abuse

A **"Thank You"** message will populate.

Caching Memories My Story Program

✓ Thanks!

Thank you for your efforts as a Reminiscence guide working with the Memory Holder to preserve this story. Please add as many stories as the Memory holder shares with you. You may submit as many as you need.

Thank you for all your efforts,

The achi and MediGold team.

Print or get PDF of answers

Submit another response

Each story should be submitted separately. Select the **Submit another response** option if you have more than one story. A blank form will populate for you to fill out.

Tip: *If you want to print a submission copy, select the **Print or get PDF of answers** button.*
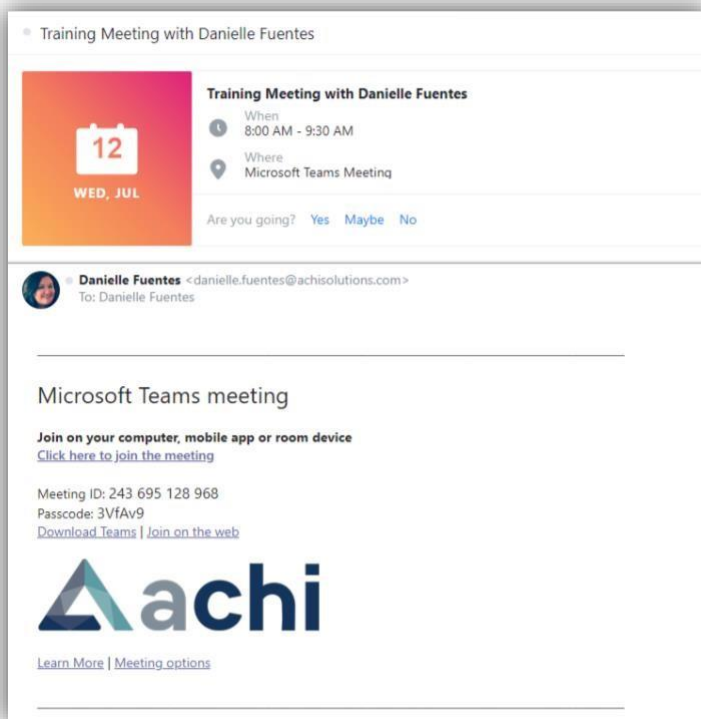
Using Microsoft Teams

In this section, you will:

1. Launch Microsoft Teams Meeting
2. Use the Share option in Microsoft Teams

Microsoft Teams will be used for virtual meetings. The host will send a calendar invite to your preferred email address. Microsoft Teams can also be downloaded onto your smartphone.

Try it: *Locate your meeting invite from your email inbox.*

Tip: Attendees will have the option to join by computer, mobile app, or room device.

Version 1.0
Release Date: 12-22-2022

Proprietary & Confidential Statement: This document and the information disclosed within are confidential and the proprietary property of achi.

Page 16 of 22

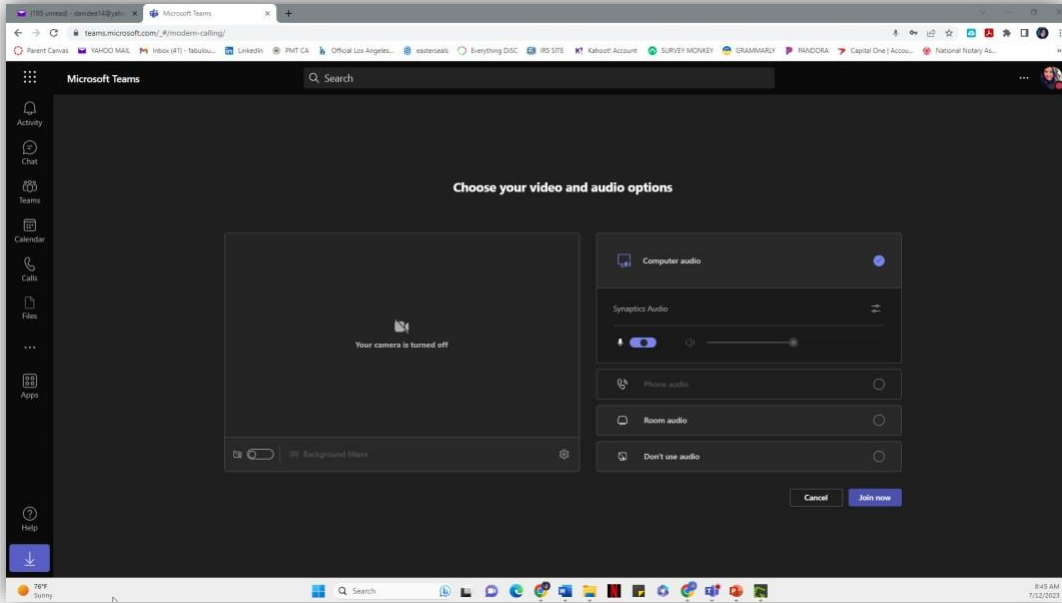Select the **Click here to join the meeting** link.

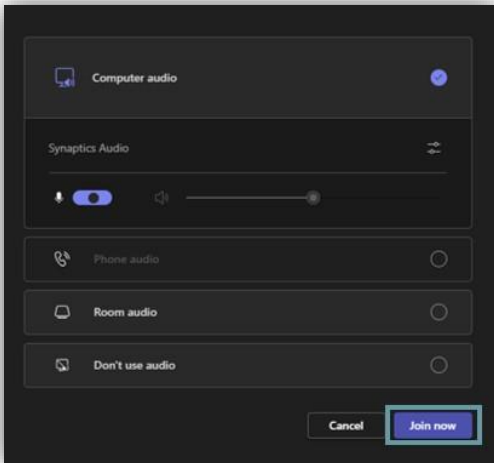A web browser tab will open. Select the **Continue on this browser** option.
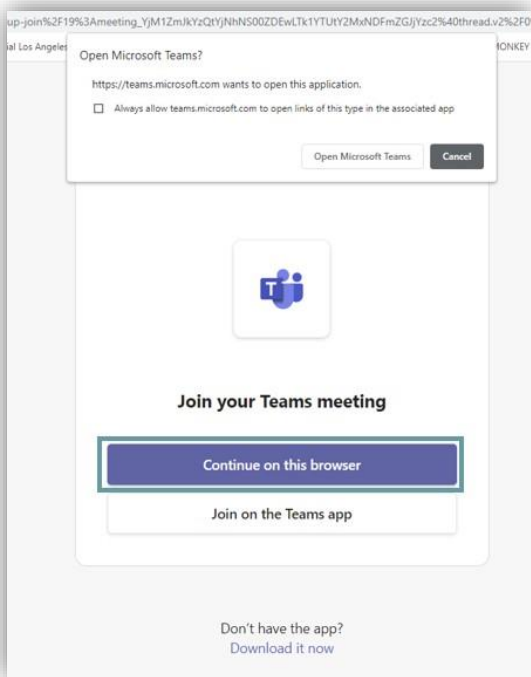
Tip: *Select the **Cancel** button if the **Open Microsoft Teams?** message box is present.*

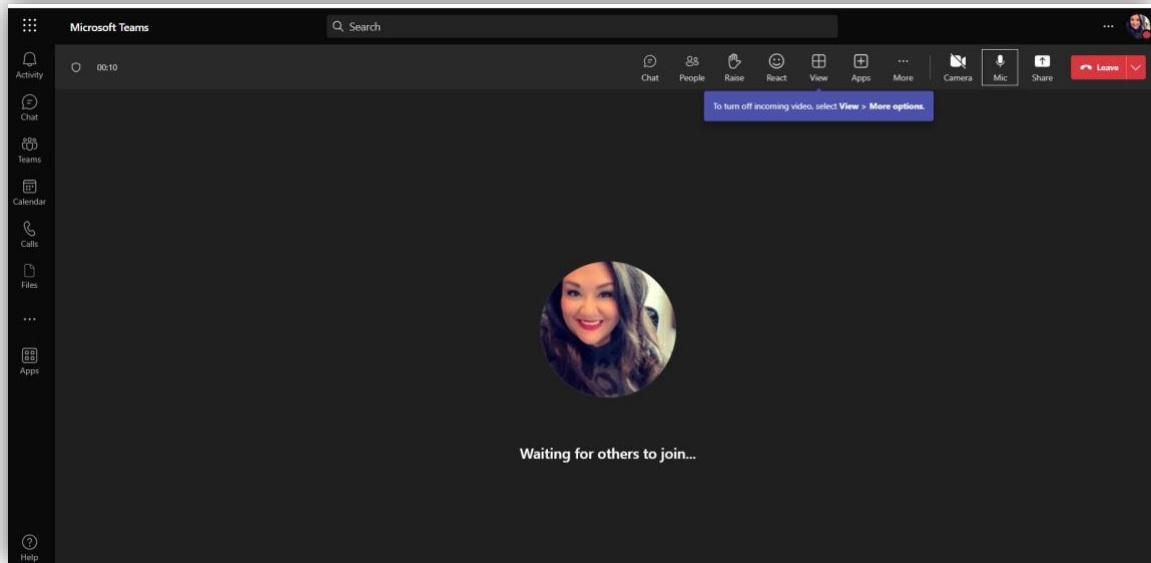Microsoft Teams will open in another browser tab.
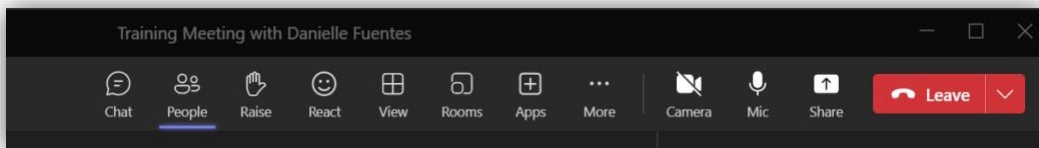

Select the **Join Now** button.

Microsoft Teams will display a **"waiting for others to join"** message until the host joins the meeting.

During the meeting, you can use the icon menu on the upper right-hand side of the screen.

Chat: Use this icon when you would like to send a message to everyone in the meeting.

Raise: If you have a question during the meeting, you can select this icon to notify the host.

Camera: Select this icon if you wish to turn on and off your camera.
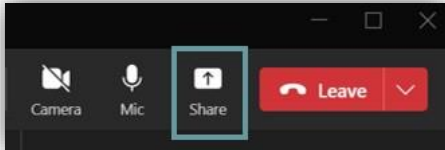
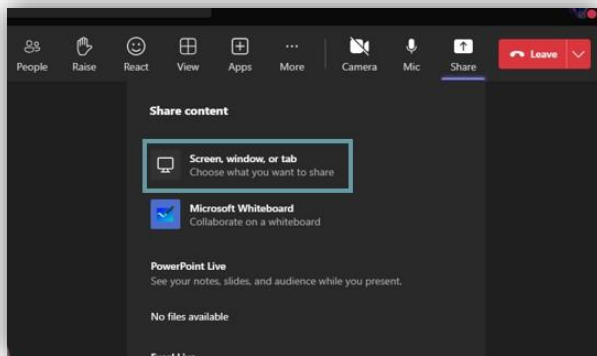**Mic:** Use this icon to mute and unmute your microphone.

Leave: Use this icon to leave the meeting.
During the meeting, the host may ask you to share your screen. To share your screen:
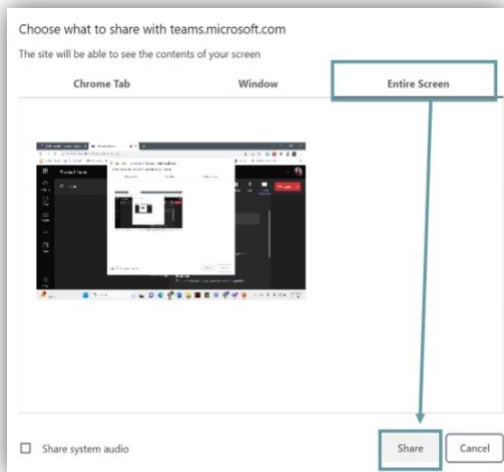
Select the **Share** icon.

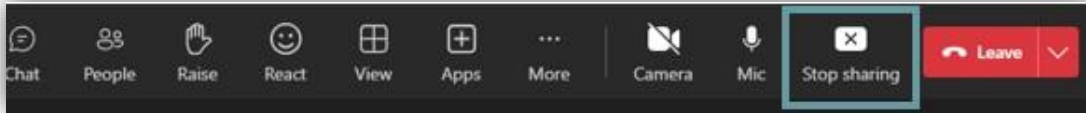Another menu option will open. Select the **screen, window, or tab** option.

Select the **Entire Screen** option, then select the **Share** button.

When you are done sharing your screen, select the **Stop sharing** icon.

Escalation Process

In this section, you will:

1. Report a concern to the program manager
2. Handle a harmful safety concern

While conversing with Memory Holders, there may come a time when they may say something or behave in a way that causes concern for their well-being. It's important to handle situations of this nature calmly and professionally.

To report a concern:

Communicate the concern to program manager Danielle Fuentes.

Email Address: **danielle.fuentes@achisolutions.com**

Tip: *If you receive an "out-of-office" email reply, direct your email to Hunter Reeder. Email:* **hunter.reeder@achisolutions.com**

When sending the email communication, include the following information:

- **Member's first initial and last name**
- **Date of call**
- **Identify the issue/concern – Include all details that were shared on the call**

The achi team will review the concern and report the concerns to the insurance carrier for possible intervention. The Reminiscence Guide is free to continue with the call schedule as planned.

In a situation where the Memory Holder tells you they are going to cause harm to themselves or someone is harming them, and you feel there is a potential threat, Reminiscence Guides should:

- **Remain calm.**
- **Refrain from downplaying or ignoring the situation.**
- **Avoid feeling like you are overreacting.**

The health and safety of the Memory Holder is most important. Your intervention may help the Memory Holder see that other options are available to stay safe and receive treatment.

Reminiscence Guides should <u>immediately</u> contact Danielle Fuentes and Hunter Reeder by text message. Please provide all necessary details of the situation.

Danielle Fuentes 626-543-5539
Hunter Reeder 419-790-9080

The situation will be assessed for a wellness check. If a wellness check is warranted, the achi team will follow up with you regarding the next steps with the Memory Holder.

Note: Please <u>do not</u> contact the Memory Holder until a member of the achi team contacts you.