Digital Navigator Training Appendix

Table of Contents

CONTENT SUMMARY

Tools	Skills	Steps
Module 1 Part 1		
Wifi and Cellular	Understanding difference between wifi and cellular data	N/A
	Connect to wifi	1. Open the Settings app. 2. Select the Wifi tab. 3. Select the network of interest. 4. If applicable, enter the network password. 5. Select "Join."
Apps	Downloading an app	1. Open the App Store. 2. Select the search. Bar. 3. Type search criteria. 4. After deciding upon an app to download, select "GET." 5. Type in your ID password or use fingerprint to confirm purchase.

Calls	Making a call	By dialing a telephone number
		  1. Select the Phone app.
		  2. Confirm "Keypad" is selected
		  3. Dial the number of interest and select the green phone icon.
		By selecting a contact
		  1. Select the Phone app.
		  2. Confirm "Contacts" is selected.
		  3. Select contact of interest.
		  4. Select "call."

	Answering a call	When your phone is locked
		  1. Slide the phone icon from left to right across the screen
		When your phone is unlocked
		  1. Select the green icon to answer the call.

	Ignoring a call	1. Select the red icon to decline a call.
Text messaging	Creating a new message	1. Open the Messages app. 2. Select the draft icon in the top right corner 3. Type the number or contact information of interest 4. Type your message into the text bar. 5. Select the up arrow to send your message.
	Responding to a message	1. When a message appears on your screen, open the Messages app. 2. Select the unread message. 3. Type your reply in the text box 4. Select the up arrow to send your message.

	Sending pictures and videos	1. Open the Messages app. 2. Select the message of interest 3. Select the photos icon. 4. Select a recent photo or video or select "All Photos" to view your entire library. 5. Select the up arrow to send the photo.
	Sending messages to a group	1. Open the Messages app. 2. Select the draft icon in the top right corner. 3. Type the number or contact information of the first person of interest. 4. Type the number or contact information of the second person of interest. Repeat steps 3 and 4 until all individuals have been added. 5. Type your message and select the up arrow to send.
Internet	Performing internet searches	1. Open the Safari app. 2. Select the search bar. 3. Type search of interest. 4. Select "Go."
	Navigating to a specific address	1. Open the Safari app. 2. Select the address bar. 3. Type website of interest. 4. Select "Go."
	Viewing history	1. Open the Safari app. 2. Select the book icon. 3. Select the clock icon to view history.
Listening to music	Different music apps	N/A
	Playing a specific song	1. Open Spotify. 2. Select "Search." 3. Select the search bar. 4. Search for a song, artist, or podcast, 5. Select a song to play it.
	Creating a playlist	1. Open Spotify. 2. Select "Your Library." 3. Select "Create Playlist." 4. Name your playlist and select "CREATE." 5. Select "Add Songs." 6. Search for songs to add them to your playlist.
Camera	Taking a photo	1. Open the Camera app. 2. Make sure "PHOTO" is selected. 3. If necessary to flip the camera, select the camera icon in the bottom right hand corner. 4. Select the white circle to take the photo. 5. To view the photo, select the box in the lower left-hand corner.
	Taking a video	1. Open the Camera app.

		2. Make sure "VIDEO" is selected. 3. If necessary to flip the camera, select the camera icon in the bottom right hand corner. 4. Select the red circle to take the video 5. Select the red square to stop the video. 6. To view the video, select the box in the lower left-hand corner.
Notes and reminders	Creating a new note	1. Open the Notes app. 2. Select the draft icon in the bottom right hand corner. 3. Type your desired text. 4. To save your note, select "Done" in the top right-hand corner.
	Editing a note	1. Open the Notes app. 2. Select the note of interest from your list. 3. Edit the note as you wish. 4. Select "Done" to save your note.
	Setting a reminder	1. Open the Reminders app. 2. Select "New Reminder 3. Type in your reminder 4. Select the information icon to customize reminder settings. 5. Customize settings as you see fit. 6. Select "Done" to save your reminder.
Clock	Setting an alarm	1. Open the Clock app. 2. Select "Alarm." 3. Select the + in the top right-hand corner. 4. Set the time for the alarm. You can also customize alarm sound and other settings. 5. Select "Save" to save your alarm. 6. Toggle the switch to turn the alarm on and off.
	Setting up Bedtime	1. Open the Clock app. 2. Select "Bedtime." 3. Select "Set Up." 4. Select y our wake-up time and select "Next." 5. Select your alarm sound and select "Next." 6. Select your bedtime and select "Next" to save your settings.
	Using a timer	1. Open the Clock app. 2. Select "Timer." 3. Set the desired amount of time for your timer. 4. Select "Start."
Calendar	Creating an event	1. Open the Calendar app. 2. Select the + in the top right-hand corner. 3. Type the name of your event. 4. Customize your event time and notification settings. 5. Select "Add" to save your event.

	Creating an alert	1. Open the Calendar app. 2. Create a new event as seen in the previous skill. 3. Select "Alert." 4. Select time of notification for your event.
	Editing an event	1. Open the Calendar app. 2. Find your event by tapping on the corresponding date. Then, tap the event to view event details. 3. Select "Edit." 4. Edit your event as necessary and select "Done."
Health apps	Viewing step count	1. Open the Health app. 2. Select "Steps." 3. You can view your step count by day, week, month, or year.
	Tracking walking or running distance.	1. Open Health app. 2. Select "Show All Health Data." 3. Select "Walking + Running Distance." 4. You can view walking and running distance by day, week, month, or year.
	Viewing sleep data	1. Open the Health app. 2. Select "Show all Health Data." 3. Select "Sleep analysis." 4. You can view sleep data by week or month.
Module 1, Part 2		
Calls	Guided meditation by Phone	There are meditation and wellness hotlines that are available 24 hours per day. Individuals may call these hotlines anytime or anywhere. No smartphone is required.
	Talking to Loved Ones	Keeping in contact with loved ones and support systems on a regular basis can be influential in one's mental health. Further, phone calls may provide a substitution for in person therapy or other appointments when unavailable.
Text messaging	Talking to support systems	Keeping in contact with loved ones and support systems on a regular basis can be influential in one's mental health.
Internet	Watching videos	Videos can be used to search for mindfulness exercises, information around mental health, or used as a grounding or distraction technique.
	Finding mindfulness exercises	There are abundant mindfulness exercises available online from written articles, to guided meditation, to short tips and tricks. The variety of mindfulness activities available allow for individuals to find activities that work for them.
	Researching accurate information	Many resources exist around mental health from general wellness tips to more in-depth information about specific

		diagnoses. Patients can use the internet to search for resources that may be education and beneficial.
Listening to music	Finding Podcasts	Podcasts can both provide wellness and reference information around mental health.
	Creating a playlist	Creating a playlist of relaxing or positive music and podcasts can be used easily at any time.
Camera	Photos and videos for mental health	Both the act of taking photos and photos themselves can promote creativity and emotional wellness.
Notes and reminders	Notes for mental health	The notes and reminders apps can function as a mobile journal. Reminders can be used to send motivational sayings or tips throughout the day. Notes can be used to store positive messages or a place to write down thoughts. Further, both the reminders and notes app can be used to aid in routine. Notes can be used to create a schedule, and reminders can be used to prompt daily habits or routine.
Clock	Creating a routine	Clock can be used to promote healthy habits and create routine. A timer or alarms can be used to keep these routines.
Calendar	Setting a schedule	Calendar can be used to create a schedule and keep a regular routine.
Health apps	Exercise and mental health	Exercise is proven to be beneficial for mental health. Tracking exercise, sleep, and other facets of physical health can provide exercise insight and motivate an individual to make physical activity a part of their regular routine
Email	Setting up an email account	An email account if often necessary to log into telehealth accounts. It is also useful for accessing online services.
Module 2		
Complications downloading an app	Checking connections	If an app will note download, the first step is to ensure the smartphone has sufficient connection to either cellular data or wifi. • If using cellular data and connection is weak, connect to a wifi network. • If connected to a wifi network and connection is weak, switch to a new network or disconnect from wifi to use cellular data.
	Deleting apps	Ensure there is enough space for the app to be downloaded. • You can check the amount of available storage by navigating to iPhone: Settings>General>iPhone storage Android: Settings>Storage

		• If there is not enough storage, select an app with a smaller download size or delete currently installed apps • To delete an app iPhone: Hold down the app of interest until a menu appears. Select "Edit Home Screen" and then select the X in top left-hand corner of the apps you wish to delete. Android: Hold down the app of interest until a menu appears. Select "Uninstall" to delete the app.
Unknown account ID or password	Recovering passwords	If the patient doesn't remember their ID and/or password, follow the "Forgot Password?" prompt accordingly. They may be required to answer security questions or log into the email address associated with the account to reset their ID and password. *If the patient is unable to answer their security questions or log into their email, they will need to seek assistance from Apple or Google.*
Lack of storage space	Deleting apps	• You can check the amount of available storage by navigating to iPhone: Settings>General>iPhone storage Android: Settings>Storage • If there is not enough storage, select an app with a smaller download size or delete currently installed apps • To delete an app iPhone: Hold down the app of interest until a menu appears. Select "Edit Home Screen" and then select the X in top left-hand corner of the apps you wish to delete. Android: Hold down the app of interest until a menu appears. Select "Uninstall" to delete the app.
	Download size	• You can view the download size of an app from its description of the app store. If too large, you can select a smaller app for download: iPhone: When viewing the app's description, scroll down to Information. Size should be the second item listed. Android: When viewing the app's description, scroll down to "Additional Information". Size should be the second item listed.
App compatibility issues	Updating software	If the smartphone's software is out of date, certain apps may be incompatible. To view the smartphone's current software model: iPhone: Settings>General>About. Software Version should be the second item listed. Android: Settings>About Phone>Software Information

Complications with wifi or cellular data connection	Switching networks	If the network does not have a strong connection, switch to another for improved speed and processing. • To switch from data to wifi, navigate to the Wifi page under settings and turn wifi on. Select network as seen in Module 1 • To switch from wifi to cellular data, navigate to the Wifi page under settings and turn wifi off. Cellular data will automatically be used. • To switch wifi networks, navigate to the Wifi page under settings and select a new network.
	Changing locations	If the network is still not strong, move closer to wifi router or to a room with stronger cellular signal.

Notification issues	Updating notification settings	If an app is not displaying notifications properly, the digital navigator can change notification settings both within the app and on the smartphone. Changing an app's notification settings will vary depending on the app itself. Adjusting the smartphone's notification settings is as follows:
		    iPhone: Settings>Notifications>Select app of interest
		    Android: Settings>Apps and Notifications>Notifications

App crashing	Closing and reopening apps	If an app freezes or crashes, reboot the app.
		    iPhone: If iPhone 8 or below, double click home button. Swipe app of interest up to close. If iPhone X and above, swipe up and then select apps to swipe away.
		    Android: Select tabs button and swipe app of interest away.

Bluetooth connections with wearables	Update apps	Apps are frequently changing and updating. Outdated versions of apps may no longer be compatible with connectable technologies. • To update, visit the app's page on the Apple App Store or Google Play Store. If an update is available, there will be an option to update at that time.

	Disconnect and reconnect the wearable	Wearable devices may need to be reconnected if they are no longer functioning properly.
		• To disconnect the wearable
		    iPhone: Settings>Bluetooth>Information symbol next to device of interest>Disconnect
		    Android: Settings>Connected Devices>Settings icon>Unpair
		To reconnect the device, follow its specific connection instructions.

	Reset the wearable	The device may need to be rebooted if it is not functioning properly. • To reset a Bluetooth connected device, follow the device's specific instructions for doing so.
Resting Password	Reset a telehealth account password	This will vary based on the telehealth program used, but will often involve sending a reset request to an email account

Module 3

Gather Background Information	App costs	One-time cost, in app purchases, subscription required, totally free
	Developer	Who is the developer?
	Platforms	iOS vs Android
	Last update	Within 180 days
	Reviews	Average rating, number of reviews
Risk/Privacy & Security	Privacy policy	Is there a privacy policy?
	Data collection	Does the app declare data use and purpose? What security measures are in place?
	Opt-out	Can you opt out of data collection?
	Deleting data	Can you delete your data?
	Data sharing	Is PHI shared? Is de-identified data shared?
	HIPAA-compliance	What security measures are in place? Is it HIPAA compliant?
Evidence	What does the app do?	Does the app appear to do what it claims to do?
	Peer reviewed evidence	How many evidence/efficacy studies?
	Red Flags	Can this app cause harm?
Ease of Use	Customizability	What features does this app offer? How can they be customized to the individual's needs?
	Accessibility	Is the app available in other languages? Does it have accessibility features (adjusting text size, text to voice, etc.)?
	Easy to use	Can the individual easily use the app?
Interoperability	Data sharing	How can the clinician/digital navigator access the data?
	Exporting/downloading data	Can data be downloaded or emailed from the app?
	Integration with other platforms	Does the app integrate with wearables or other devices?

Module 4		
Diagnoses	Depressive disorders	Establishing core definitions for digital navigator to understand (can vary based on clinic needs)
	Anxiety disorders	Establishing core definitions for digital navigator to understand (can vary based on clinic needs)
Clinical Red Flags	Warning signs	Establishing core definitions for digital navigator to understand (can vary based on clinic needs)
	When to seek help	Establishing core definitions for digital navigator to understand (can vary based on clinic needs)
HIPAA Compliance and Confidentiality	Adhere to HIPAA regulations	Establishing core definitions for digital navigator to understand (can vary based on clinic needs)
	Understand and practice program specific compliancy and confidentiality protocols	Establishing core definitions for digital navigator to understand (can vary based on clinic needs)
Data Streams	Active Data	Data collected when patient is using app (surveys, journaling, games, etc.)
	Passive Data	Data collected in background regardless of whether patient is using the app (GPS, Call/text logs, etc.)
Module 5		
Interviewing Methods	Asking for clarification	Case scenarios
	Open ended questions	Case scenarios
Communication Methods	Refer patient to appropriate sources	Case scenarios
Convening Trust and Transparency	Acknowledge role limitations which conveys honesty and trust	Case scenarios

MODULE 1

Content Summary

Tools	Skills Part 1	Skills Part 2
Wifi and cellular data	Understanding difference between wifi and cellular data. Understand privacy risks	None
	Connect to wifi	
Apps	Downloading an app	None
Calls	Making a call	Guided meditation by Phone
	Answering a call	Talking to Loved Ones
	Ignoring a call	
Text messaging	Creating a new message	Talking to support systems
	Responding to a message	
	Sending pictures and videos	
	Sending messages to a group	
Internet	Performing internet searches	Watching videos
	Navigating to a specific address	Finding mindfulness exercises
	Viewing history	Researching accurate information
Listening to music	Different music apps	Finding Podcasts
	Playing a specific song	Creating a playlist
	Creating a playlist	
Camera	Taking a photo	Photos and videos for mental health
	Taking a video	
Notes and reminders	Creating a new note	Notes for mental health
	Editing a note	
	Setting a reminder	
Clock	Setting an alarm	Creating a routine

	Setting up Bedtime	
	Using a timer	
Calendar	Creating an event	Setting a schedule
	Creating an alert	
	Editing an event	
Health apps	Viewing step count	Exercise and mental health
	Tracking walking or running distance	
	Viewing sleep information	

MODULE 1 PART 1 - APPLE

Tool 1: Wifi and Cellular Data
Skill 1.1: Understanding difference between wifi and cellualr data. Understand privacy risks

What is the difference between Wi-Fi and Data?

Wi-Fi
- Free
- Can't access everywhere
- Available at the library, Starbucks, Dunkin' Donuts, etc.

Data
- Costs money
- Can have pre-paid plans or contracts
- Usually need data to make calls

Skill 1.2: Connecting to wifi

1. Open the Settings app.

2. Select the Wifi tab.
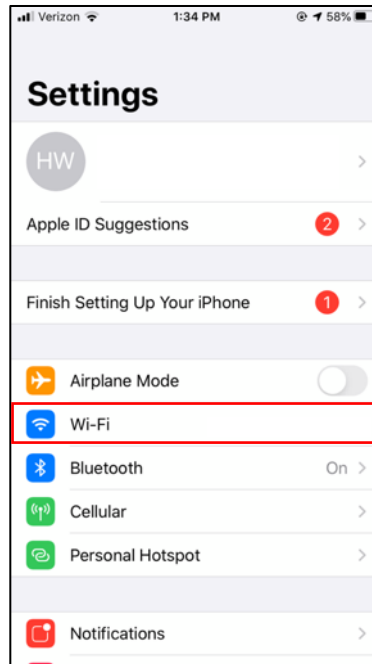
3. Select the network of interest
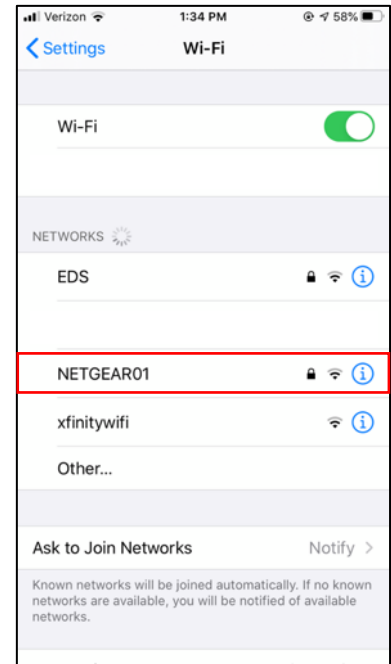
4. If applicable, enter the network password.
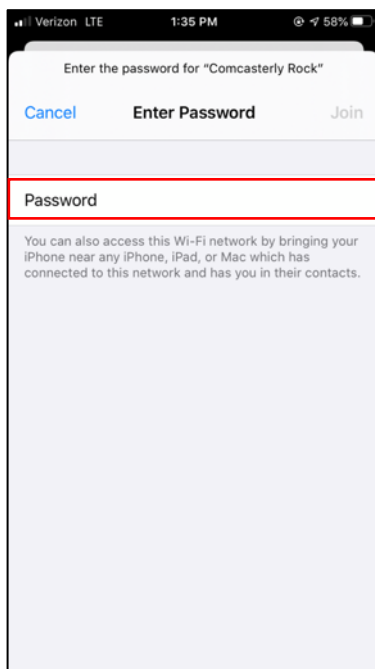
5. Select "Join."
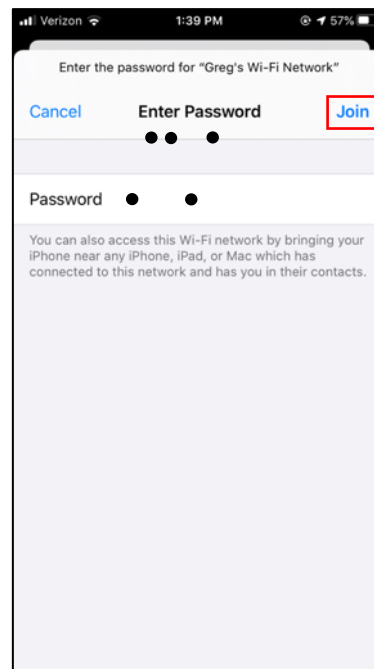
Tool 2: Apps
Skill 2.1: Downloading an app

1. Open the App Store.

2. Select the search bar.
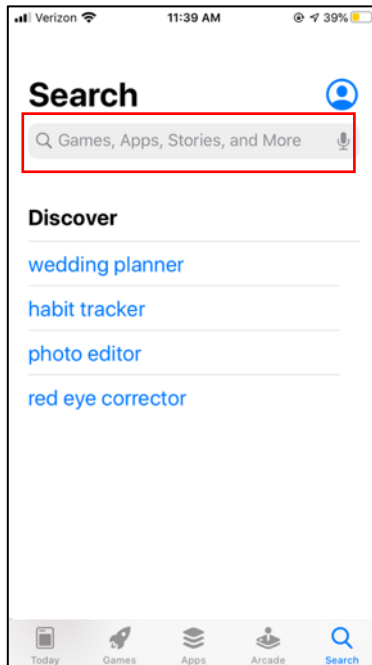
3. Type search criteria.
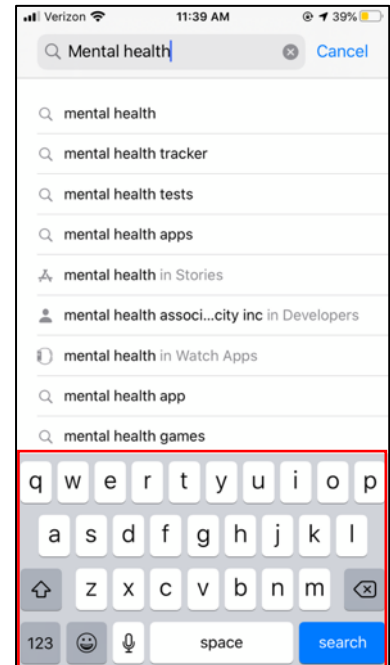
4. After deciding upon app to download, select "GET."
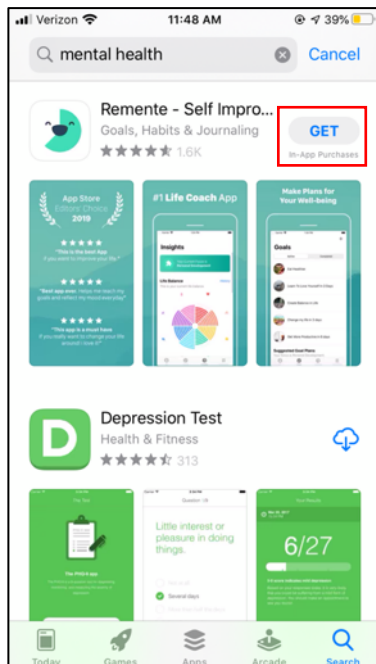
5. Type in your Apple ID password or use your fingerprint to confirm your purchase.
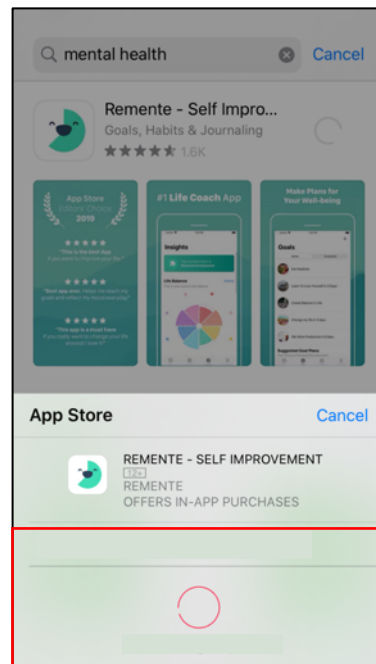
Tool 3: Calls
Skill 3.1: Making a call by dialing a telephone number

1. Select the "Phone" app.

2. Confirm "Keypad" is selected.

3. Dial the number of interest and select the green phone icon.
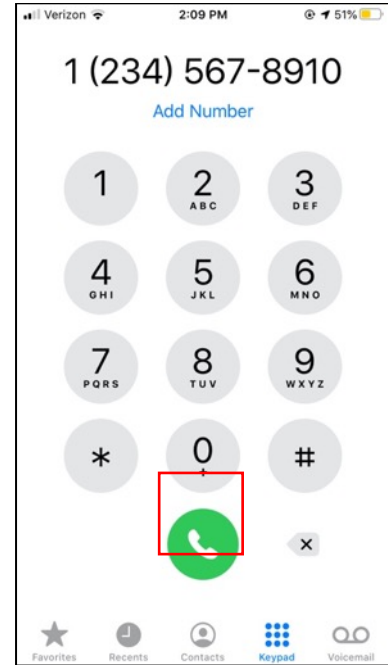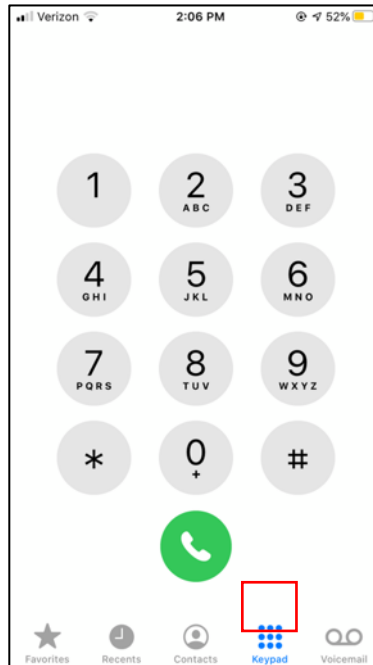
Skill 3.2: Making a call by selecting a contact

1. Select the "Phone" app.

2. Confirm "Contacts" is selected.

3. Select the contact of interest.
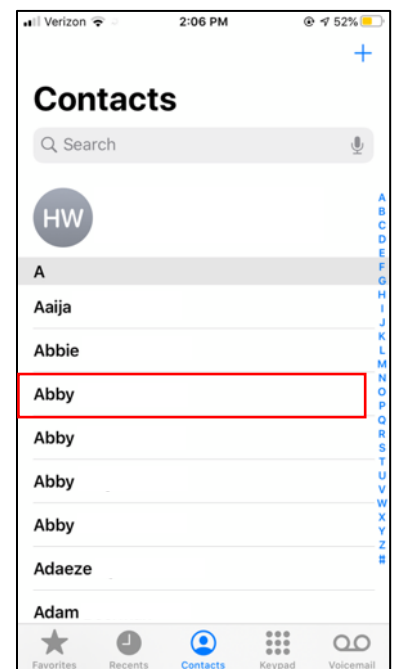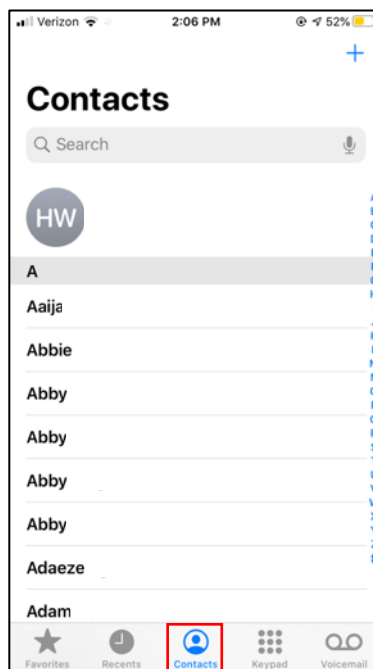
4. Select "call."
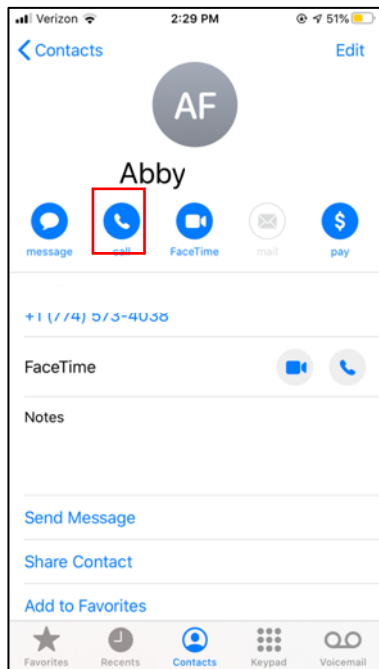
Skill 3.3: Answering a call when your phone is locked.

Slide the phone icon from left to right
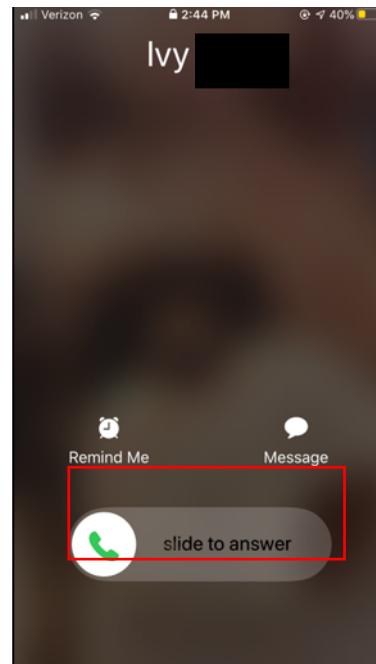
Skill 3.4: Answering a call when your phone is unlocked.

Select the green icon to answer the call.
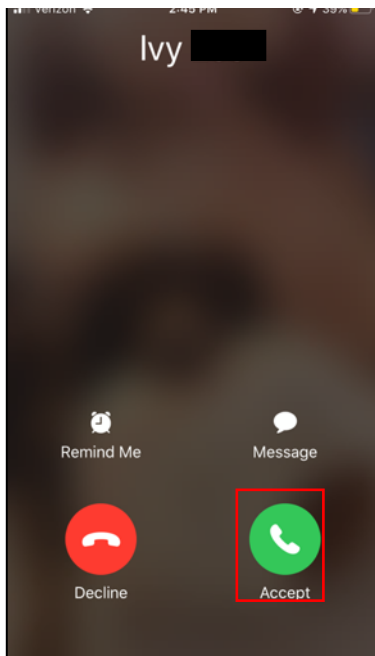
Skill 3.5: Ignoring a call

Select the red icon to decline the call.

Tool 4: Text messaging
Skill 4.1: Creating a new message

1. Open the "Messages" app.

2. Select the draft icon in the top right corner

3. Type the number or contact information of interest.

4. Type your message into the text bar.

5. Select the up arrow to send your message.

Skill 4.2: Responding to a message

1. When a message appears on your screen, open the "Messages" app.

2. Select the unread message.
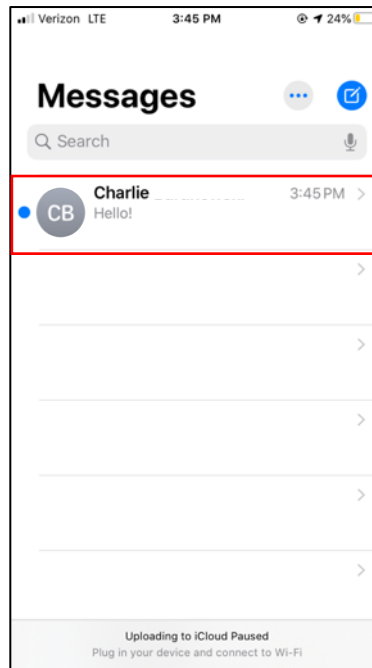
3. Type your reply in the text box.

4. Select the up arrow to send your message.

Skill 4.3: Sending pictures and videos

1. Open the "Messages" app.

2. Select the message of interest.

3. Select the photos icon.

4. Select a recent photo or video or select "all Photos" to view your entire library.

5. Select the up arrow to send the photo.

Skill 4.4: Sending messages to a group

1. Open the "Messages" app.

2. Select the draft icon in the top right corner
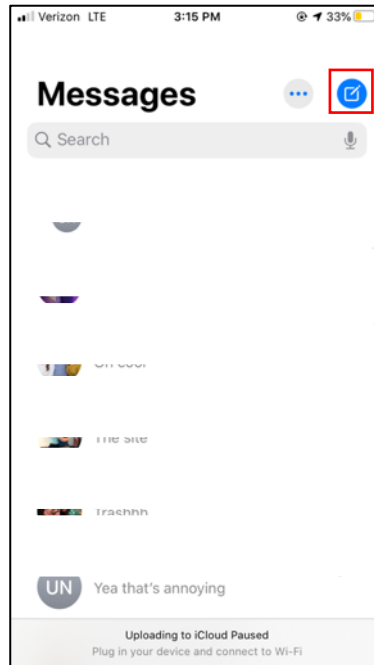
3. Type the number or contact information of the first person of interest.
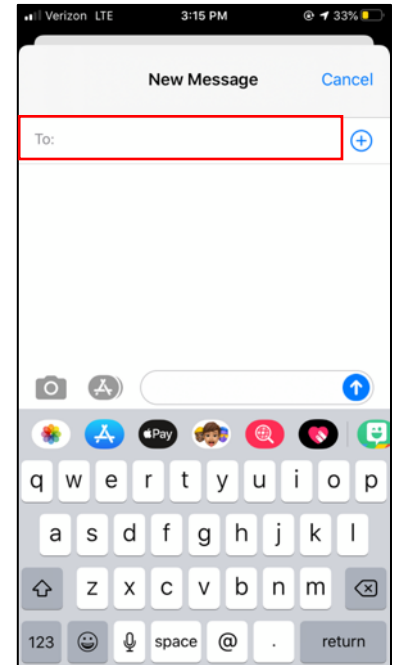
4. Type the number or contact information of the second person of interest. Repeat steps 3 and 4 until all individuals have been added.
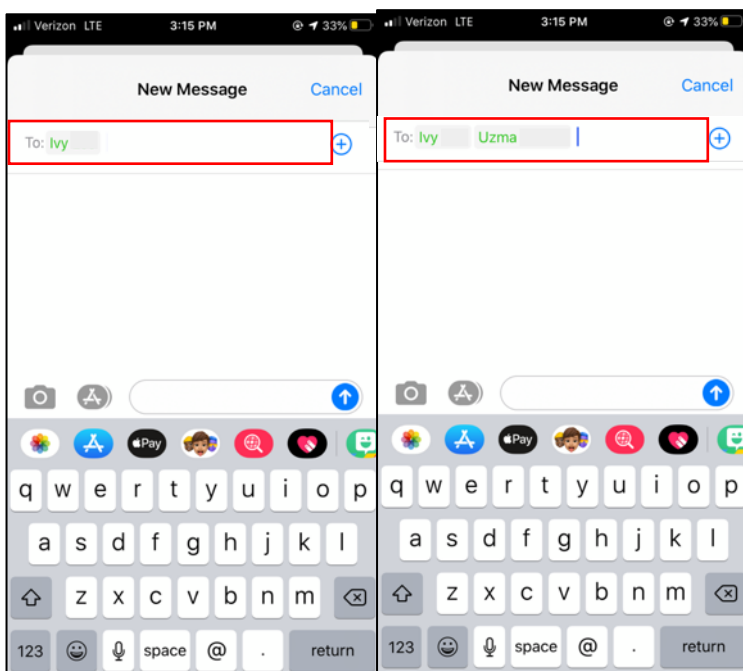
5. Type your message and tap the up arrow to send.
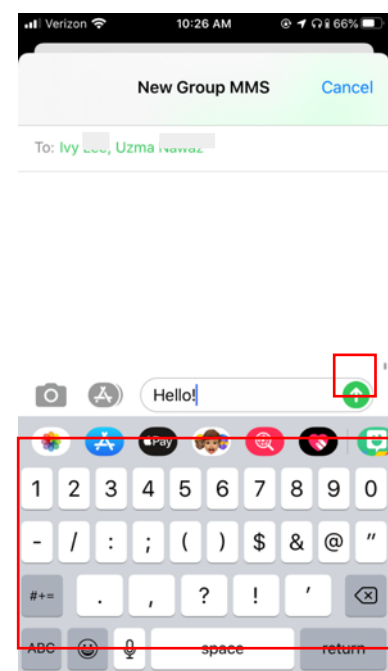
1. Open the "Safari" app.

2. Select the search bar.
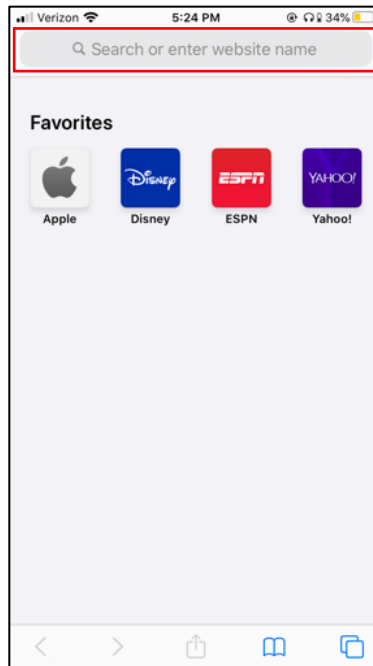
3. Type search of interest.
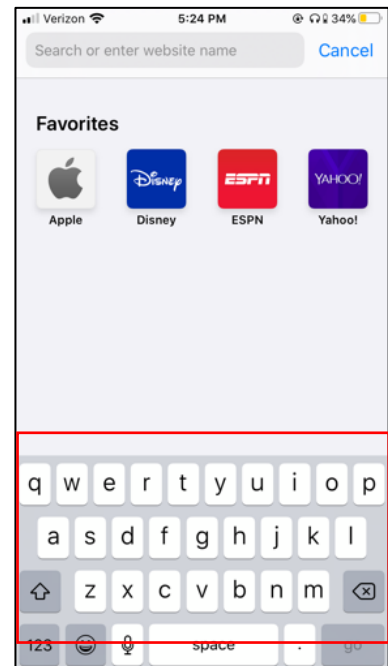
4. Select "Go."

Skill 5.2: Navigating to a specific address

1. Open the "Safari" app.

2. Select the address bar.
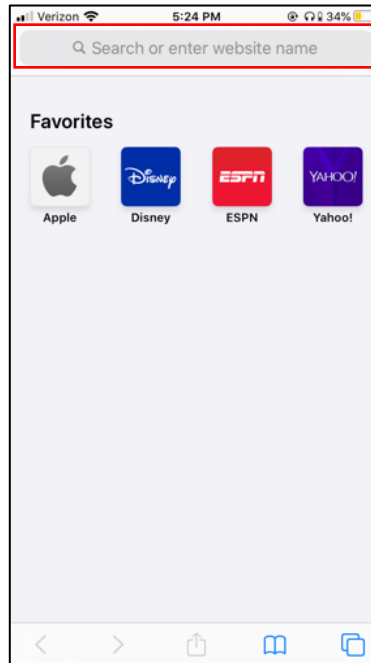
3. Type website of interest.
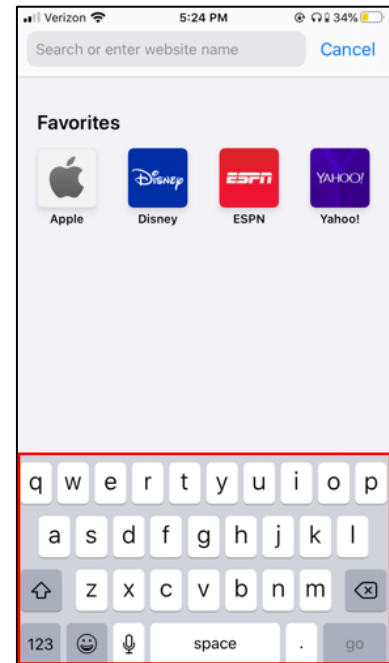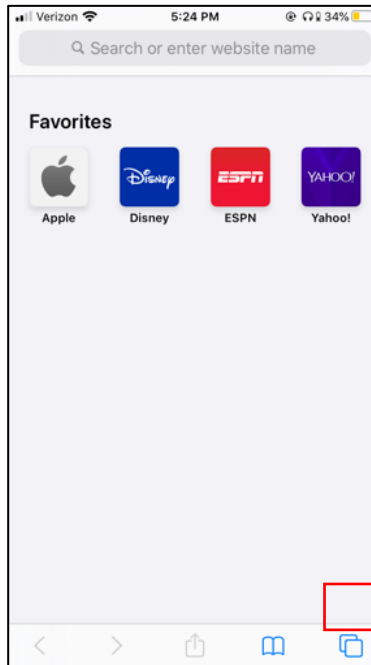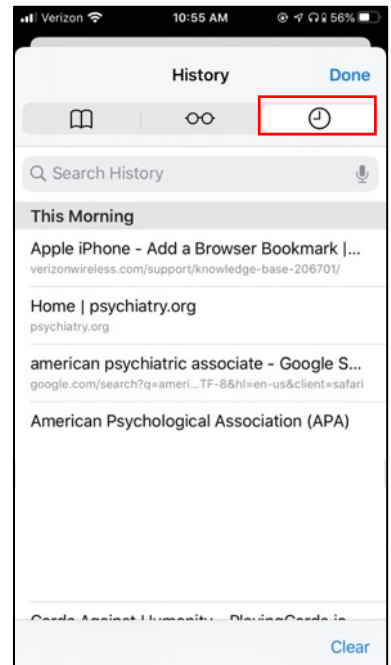

4. Select "Go."
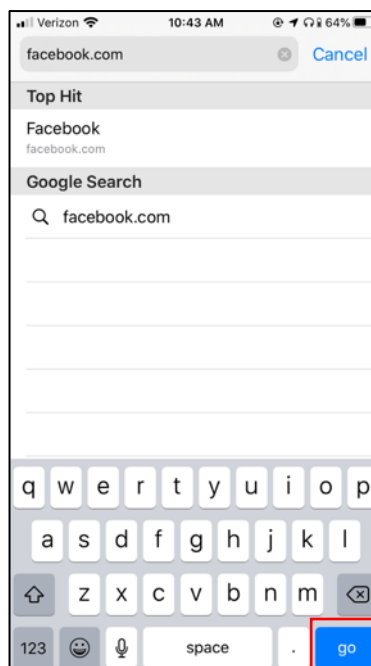
Skill 5.3: Viewing history

1. Open the "Safari" app.

2. Select the book icon.

3. Select the clock icon to view history.

Tool 6: Listening to Music
Skill 6.1: Music Apps

There are several music apps available that offer free streaming service. We will use Spotify to demonstrate these skills. However, there are other options available, including Apple Music and Pandora.
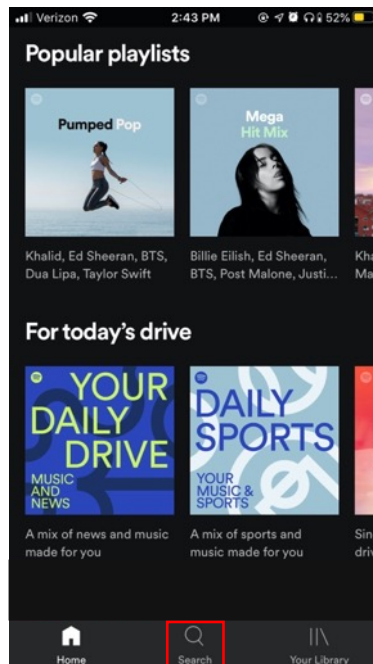

Spotify

Apple
Music

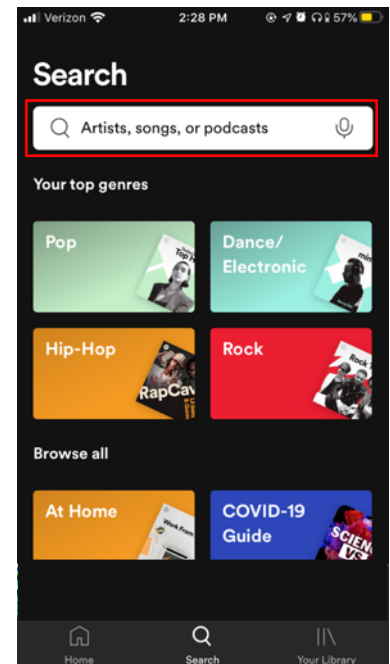Pandora

Skill 6.2: Playing a song
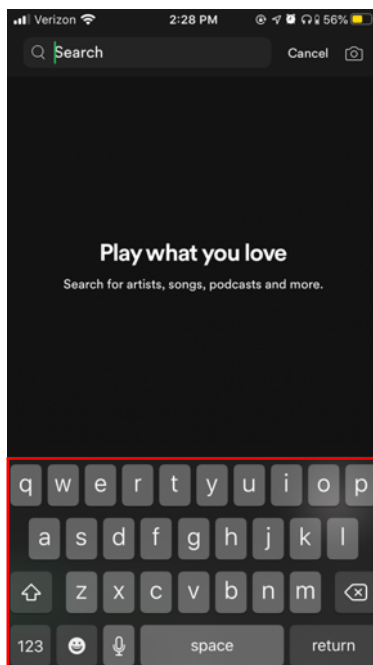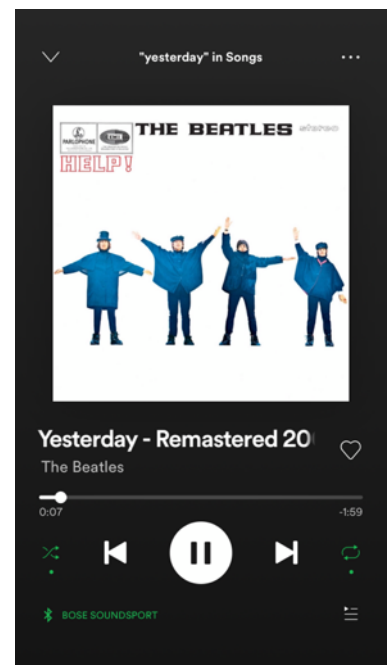
1. Open Spotify.
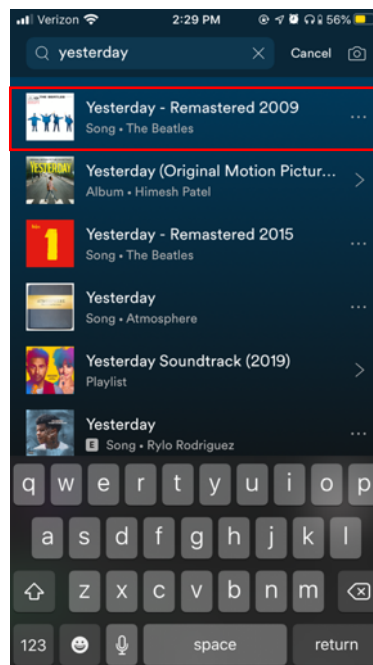
2. Select "Search."

3. Select the search bar.

4. Search for a song, artist, or podcast.
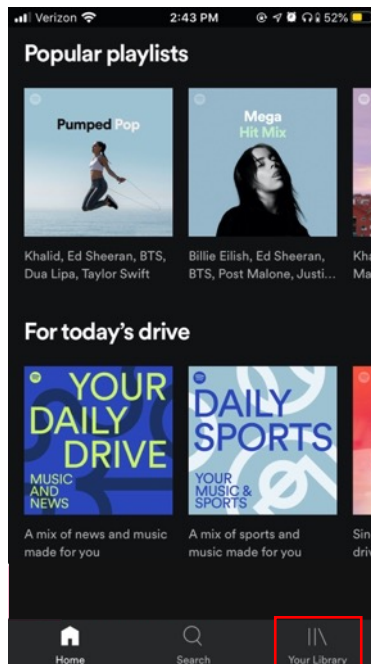
5. Select a song to play it.
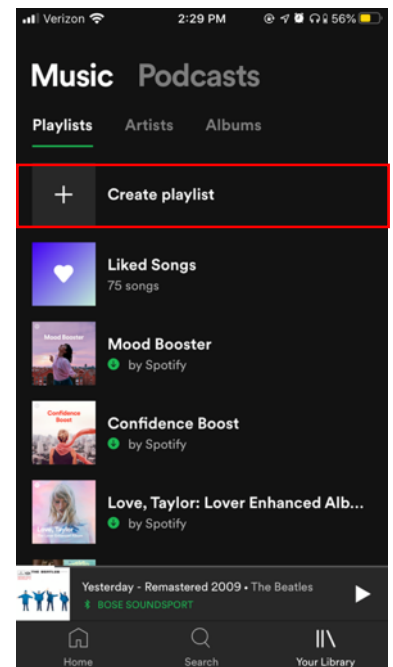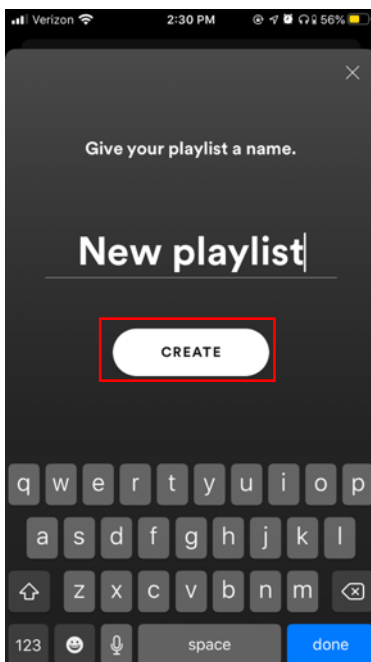
Skill 6.3: Creating a playlist
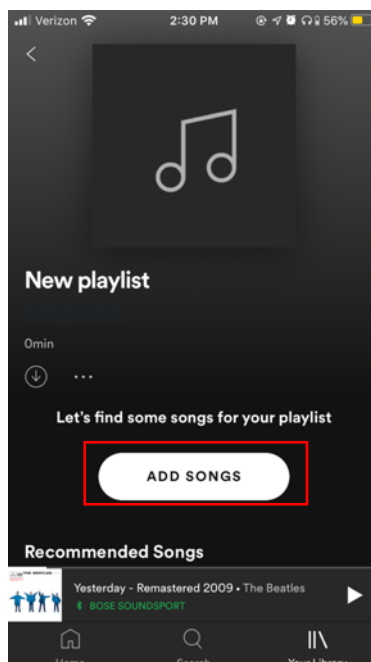
1.   Open Spotify.

2. Select "Your Library."

3. Select "Create Playlist."

4. Name your playlist and select "CREATE."

5. Select "Add Songs."

6. Search for songs to add them to your playlist.
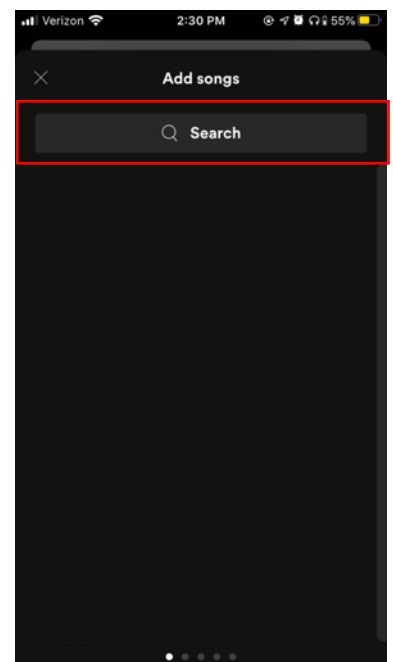
Tool 7: Taking photos and videos
Skill 7.1: Taking a photo
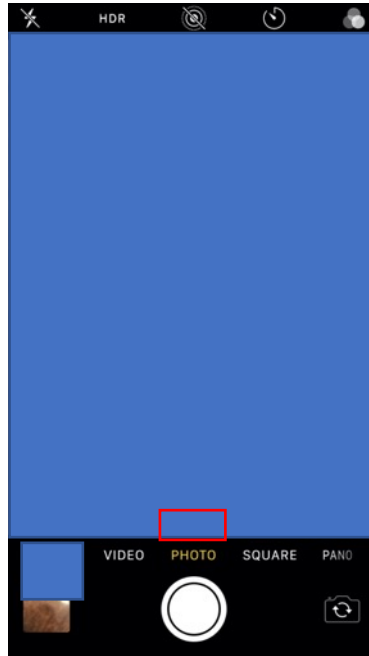
1. Open the "Camera" app.

2. Make sure "PHOTO" is selected.

3. If necessary to flip the camera, select the camera icon in the bottom right-hand corner.
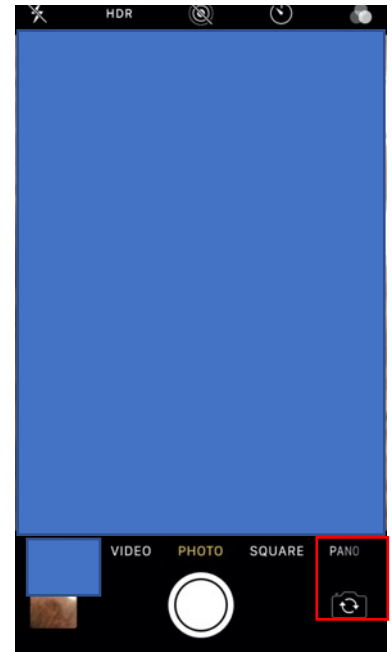
4. Select the white circle to take the photo.
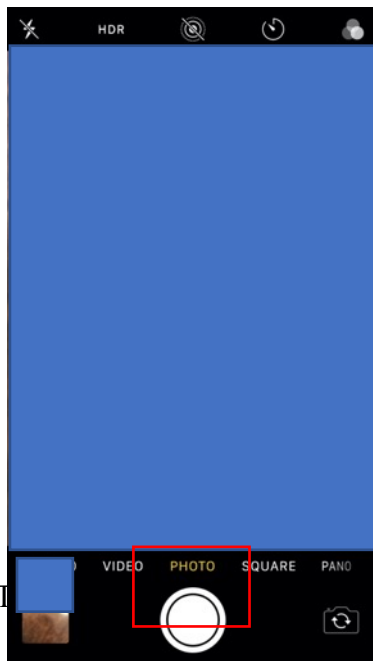
5. To view your photo, select the box in the lower left-hand corner.

Skill 7.2: T

3. If necessary to flip the camera, select the camera icon in the bottom right-hand corner.

1. Open the "Camera" app.

2. Make sure "VIDEO" is selected.
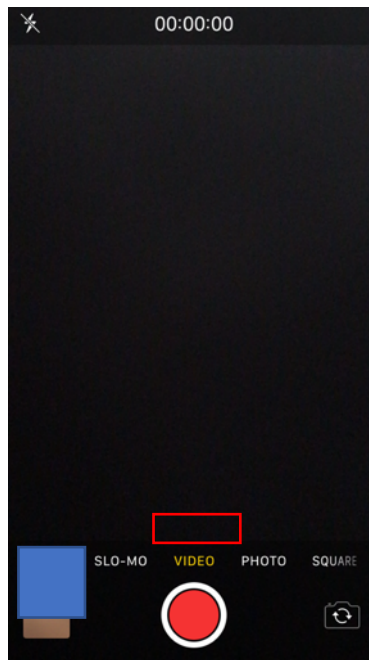
2. Make sure "VIDEO" is selected.
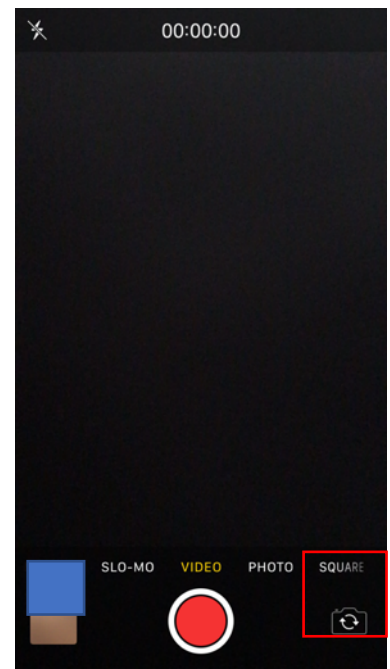
4. Select the red circle to take the video.
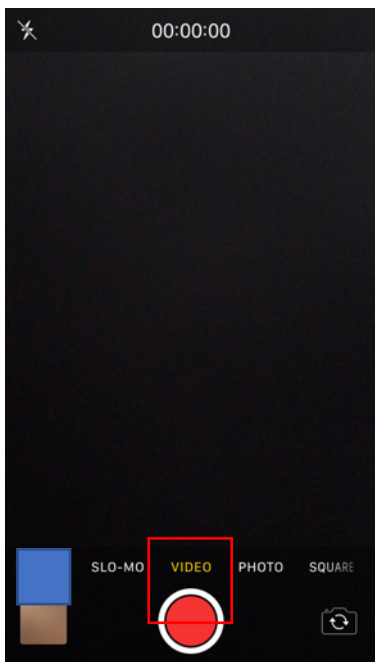
5. Select the red square to stop the video.
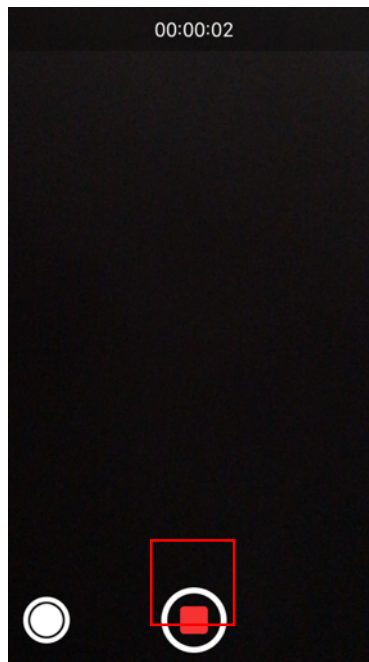
6. To view your video, select the box in the lower left-hand corner.

nders
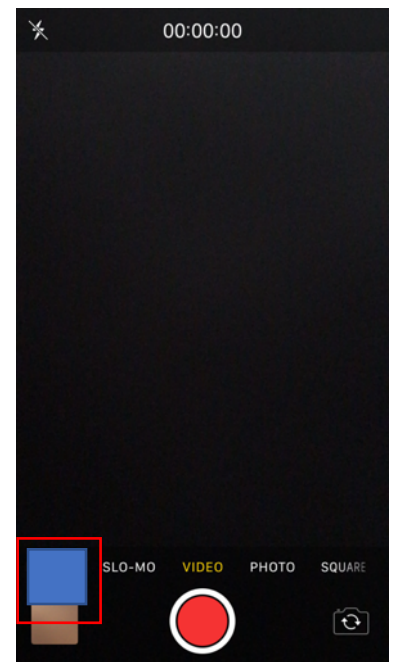
Skill 8.1: Creating a new note

1. Open the "Notes" app.

2. Select the draft icon in the bottom right-hand corner.
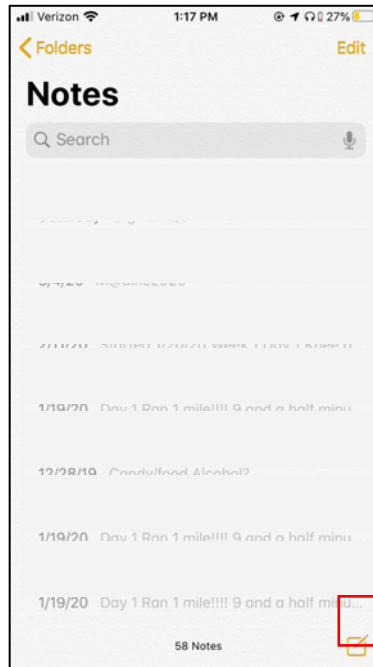
3. Type your desired text.
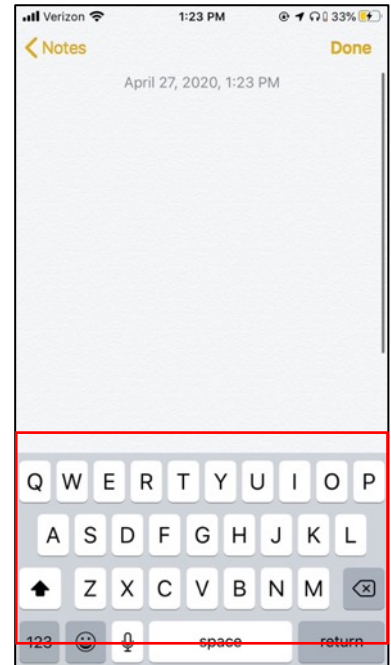
4. To save your note, select "Done" in the top right-hand corner.
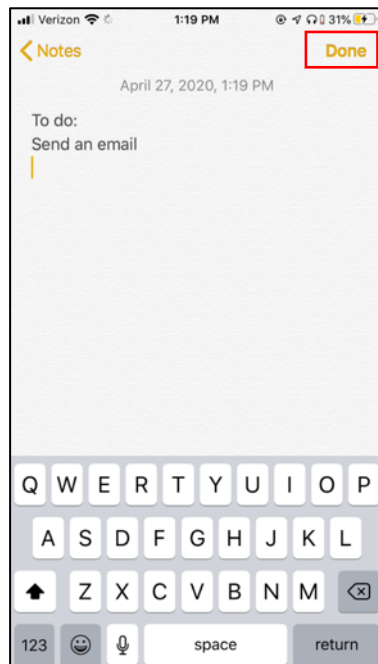
Skill 8.2: Editing an existing note

1. Open the "Notes" app.

2. Select the note of interest from your list.
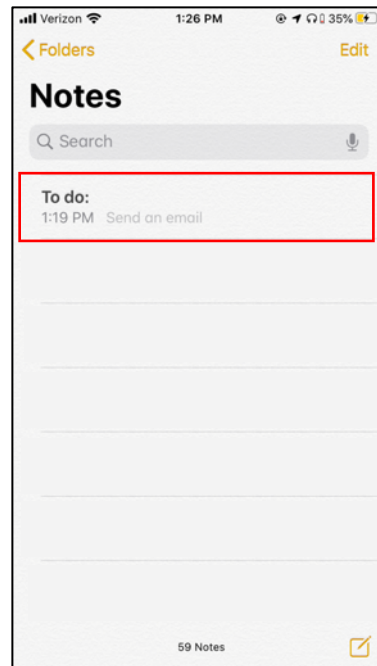
3. Edit the note as you wish.
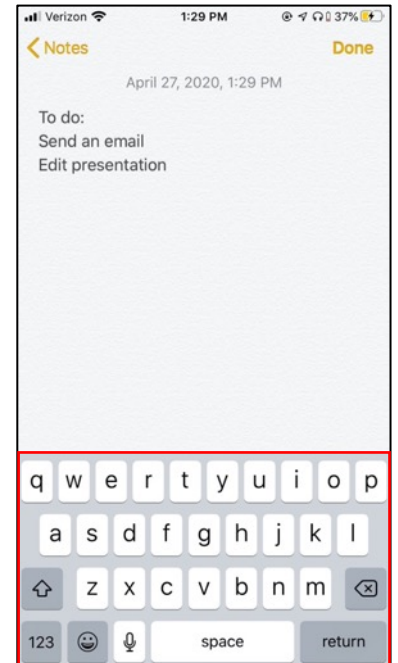
4. Select "Done" to save your note.

Skill 8.3: Setting a reminder
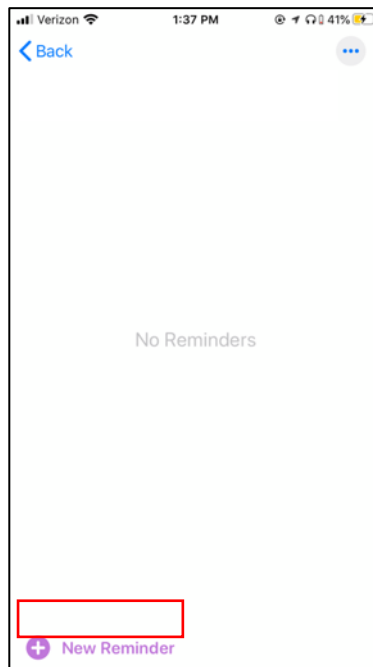
1. Open the "Reminders" app.

2. Select "New Reminder."

3. Type in your reminder.

4. Select the information icon to customize reminder settings.

5. Customize settings as you see fit.

6. Select "Done" to save your reminder.

Tool 9: Clock
Skill 9.1: Setting an alarm

1. Open the "Clock" app.

2. Select "Alarm."

3. Select the + in the top right-hand corner.

4. Set the time for the alarm. You can also customize alarm sound and other settings.

5. Select "Save" to save your alarm.

6. Toggle the switch to turn the alarm on and off.

Skill 9.2: Setting up Bedtime

1. Open the "Clock" app.

2. Select "Bedtime."

3. Select "Set Up."

34
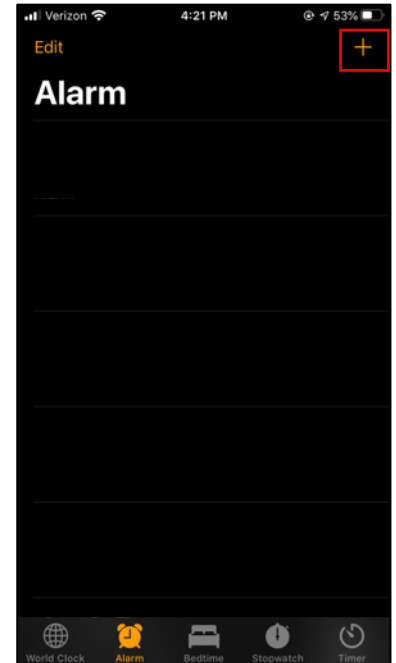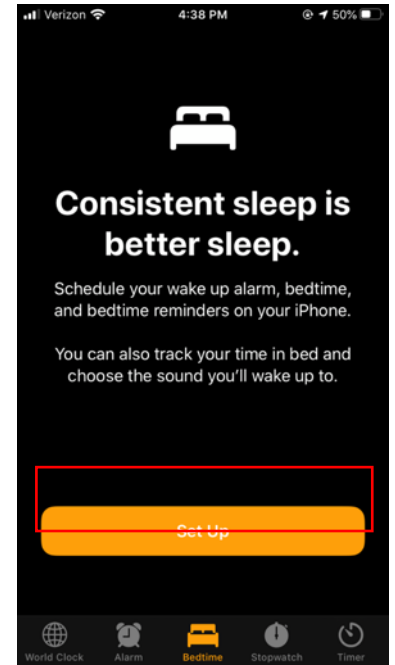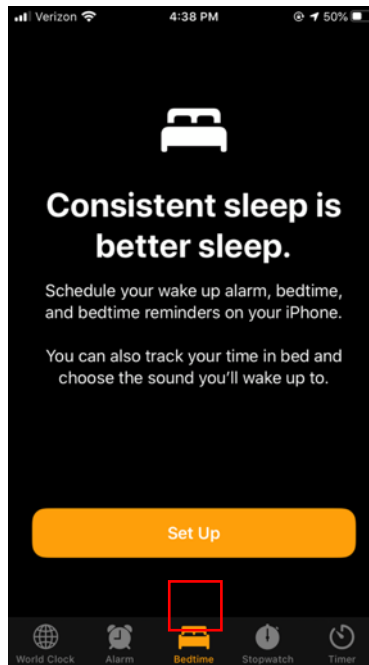
4. Select your wake-up time and select "Next."

5. Select your alarm sound and select "Next."

4. Select your bedtime and select "Next" to save your settings.
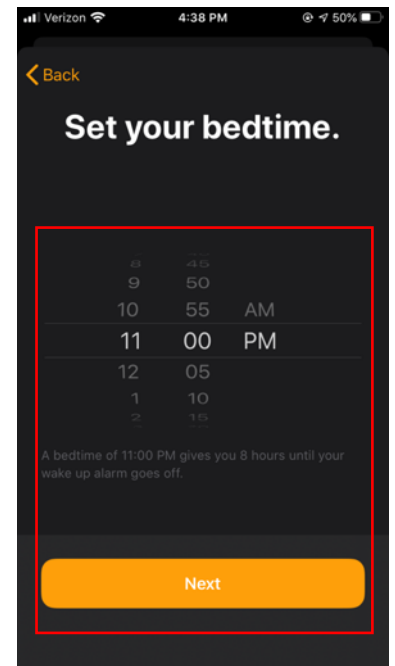
Skill 9.3: Using a timer

1. Open the "Clock" app.
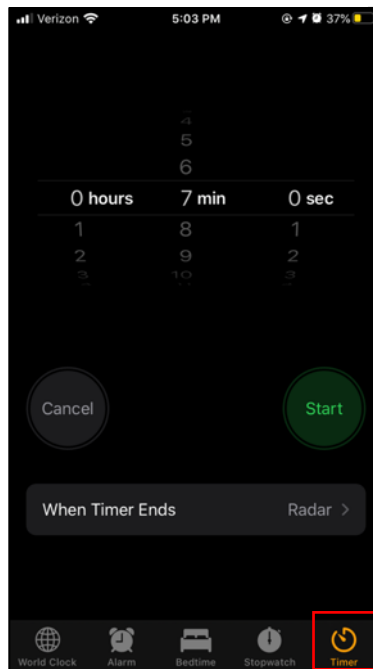
2. Select "Timer."

3. Set the desired amount of time for your timer.
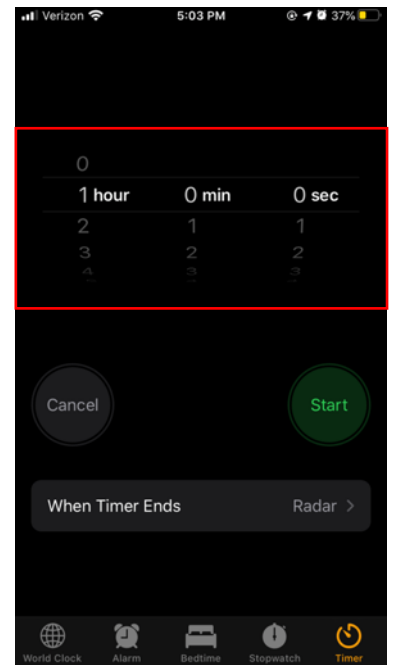
4. Select "Start."
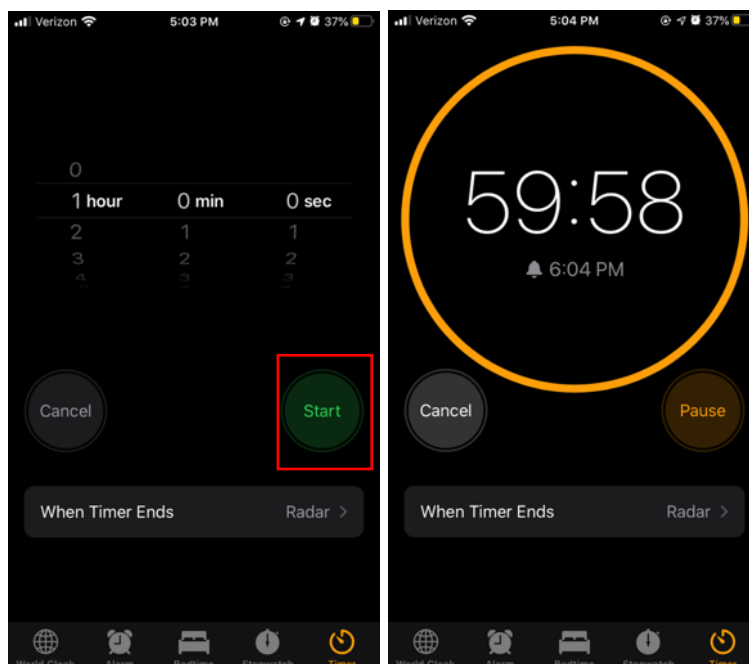
Tool 10: Calendar
Skill 10.1: Creating an event

1. Open the "Calendar" app.

2. Select the + in the top right-hand corner.
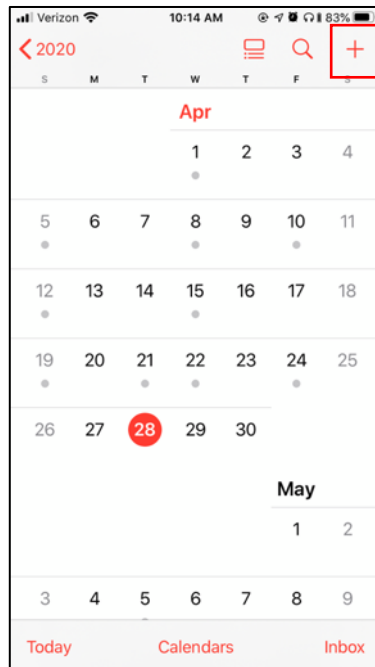
3. Type the name of your event.
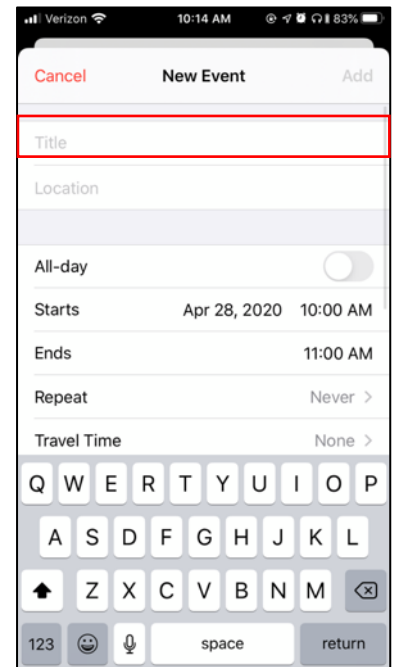
4. Customize your event time and notification settings.
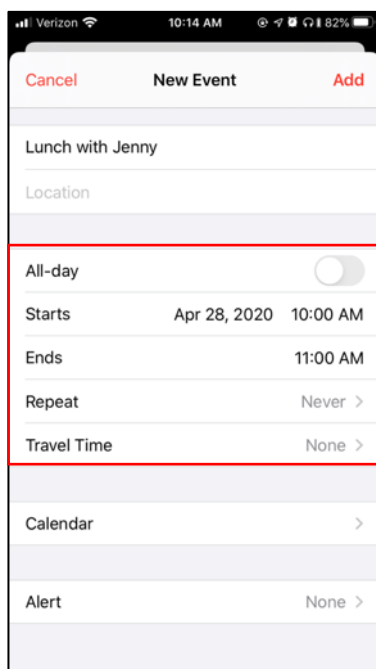
5. Select "Add" to save your event.
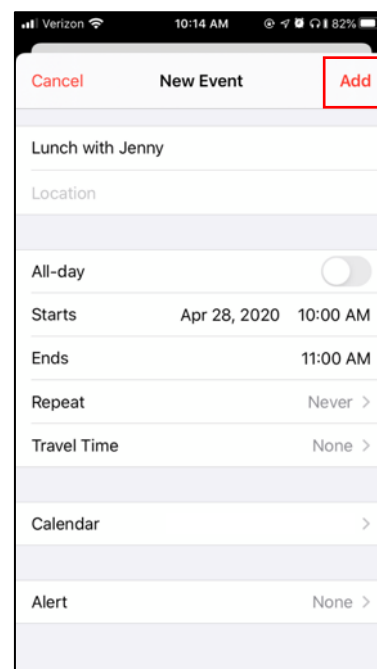
Skill 10.2: Creating an alert

1. Open the "Calendar" app.

2. Create a new event as seen in Skill 1.
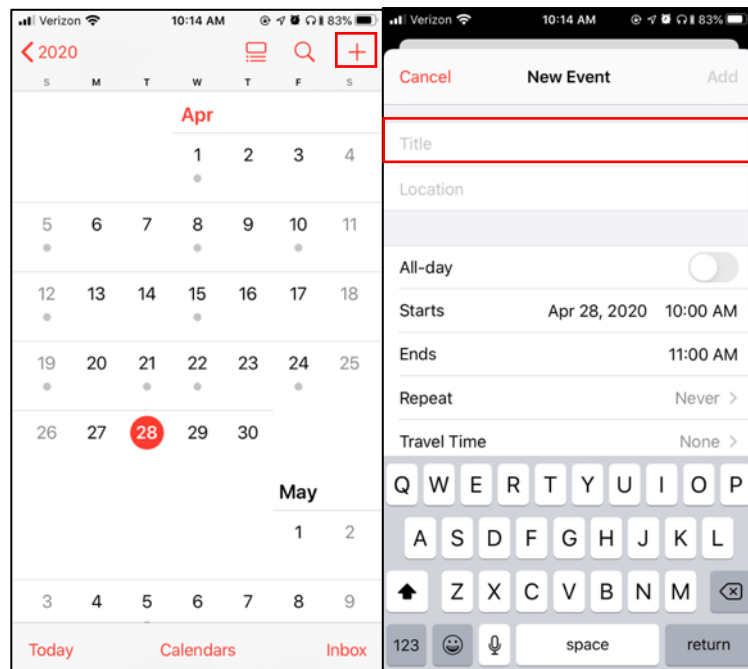
3. Select "Alert."
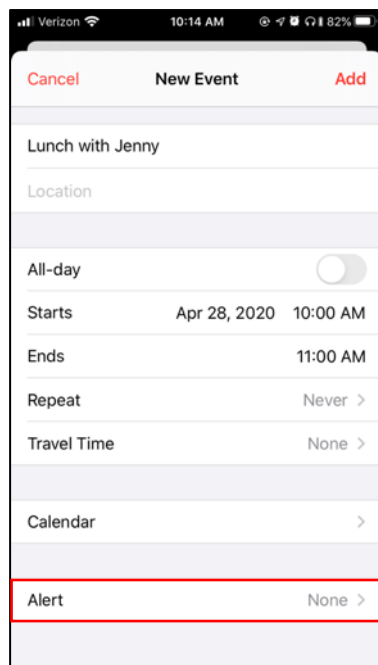
4. Select time of notification for your event.
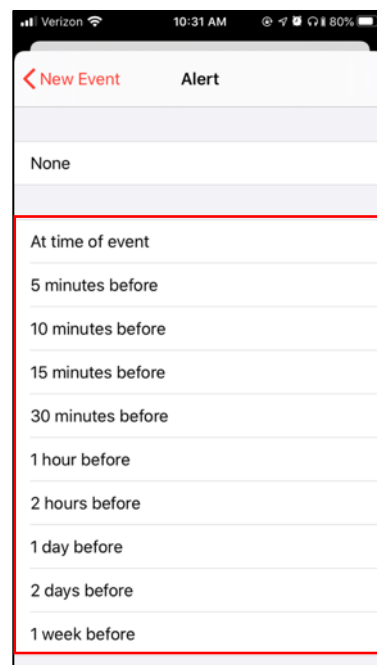
Skill 10.3: Editing an event

1. Open the "Calendar" app.

2. Find your event by tapping on the corresponding date. Then, tap the event to view event details.
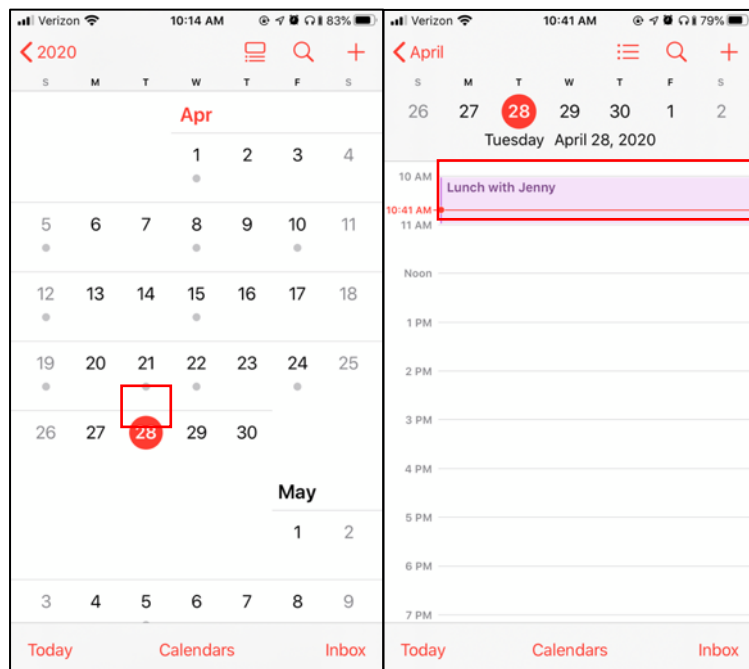
3. Select "Edit."
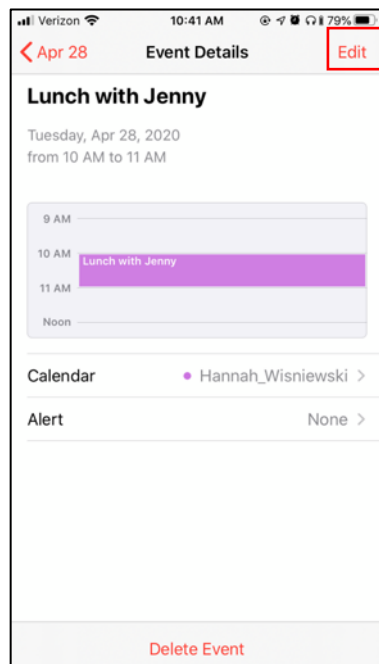
4. Edit your event as necessary and select "Done."
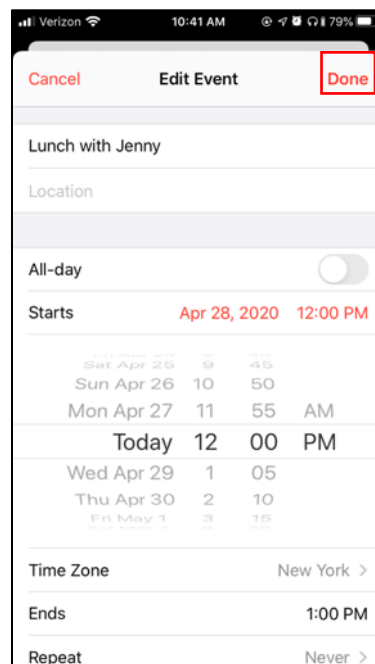
Tool 11: Health apps
Skill 11.1: Viewing step count

3. You can view step count by day, week, month, or year.

1. Open the "Health" app.

2. Select "Steps."
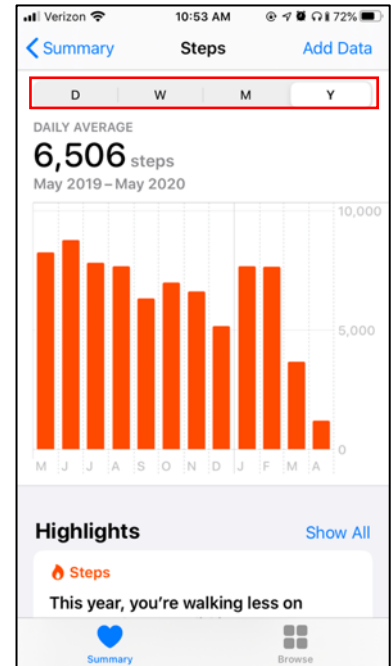
Skill 11.2: Tracking walking or running distance

1. Open the "Health" app.
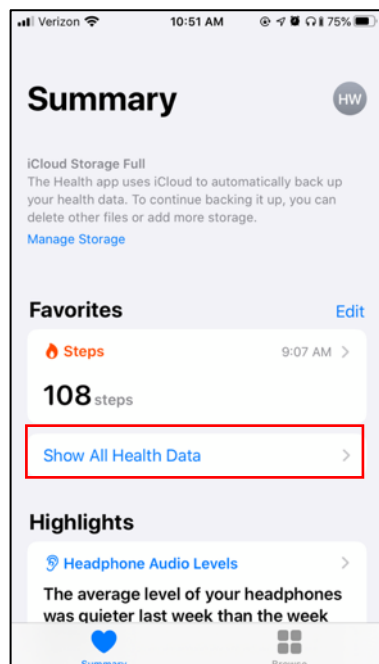
2. Select "Show All Health Data."

3. Select "Walking + Running Distance."
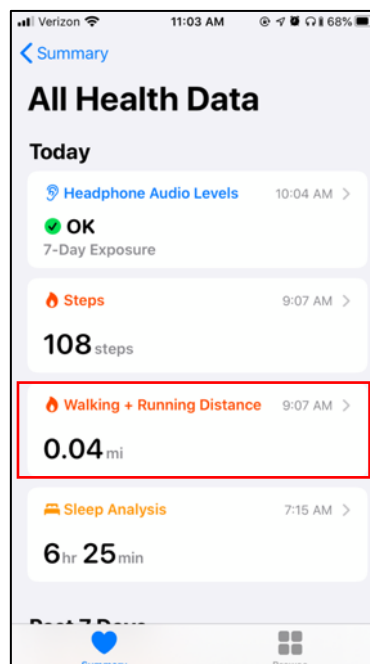
4. You can view walking and running distance by day, week, month, or year.

Skill 11.3: Viewing sleep data

1. Open the "Health" app.

2. Select "Show All Health Data."
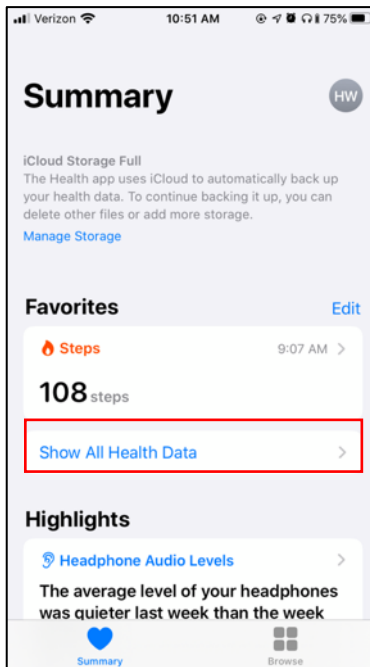
3. Select "Sleep Analysis"
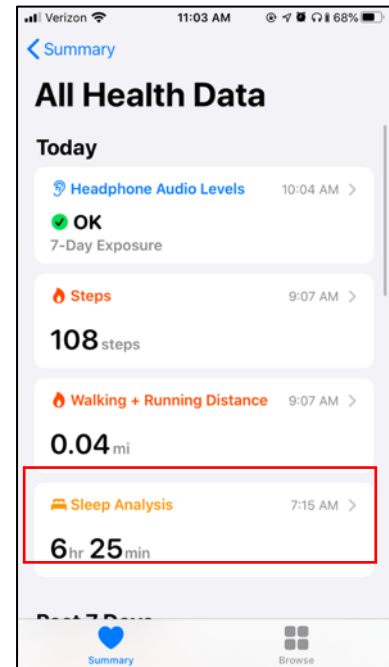
4. You can view sleep data by week or month.
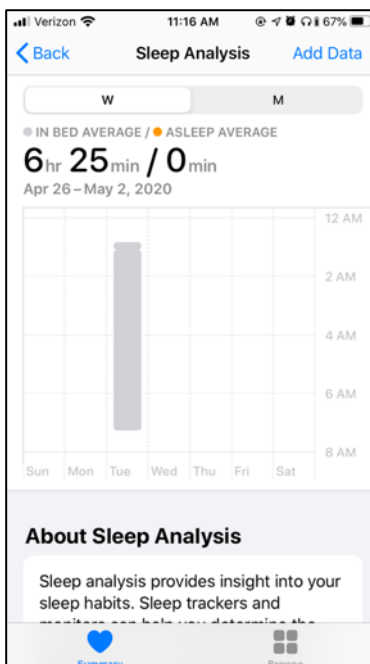
MODULE 1 PART 1 - ANDROID

Tool 1: Wifi and Cellular Data
Skill 1.2: Connecting to wifi

1. Open the Settings app.

2. Select the Network & Internet tab.
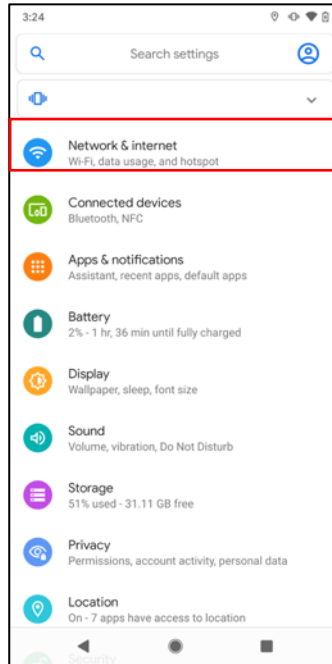
3. Select the Wi-Fi tab.
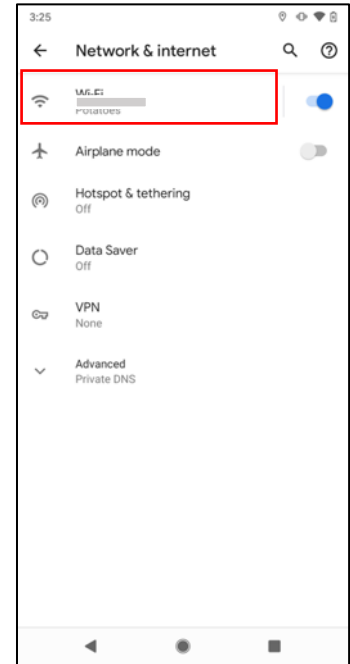
4. Select a network to join.
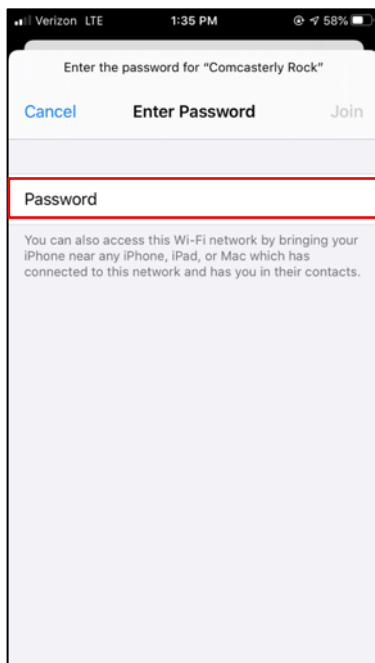
5. Enter the password and press Connect
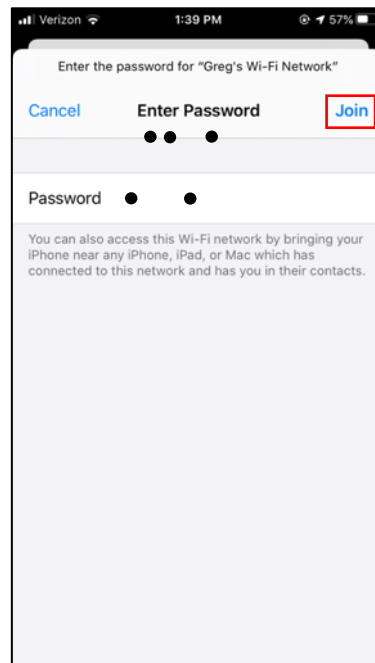
Tool 2: Apps
Skill 2.1: Downloading an app

1. Open the Google Play Store.

2. Select the search bar.
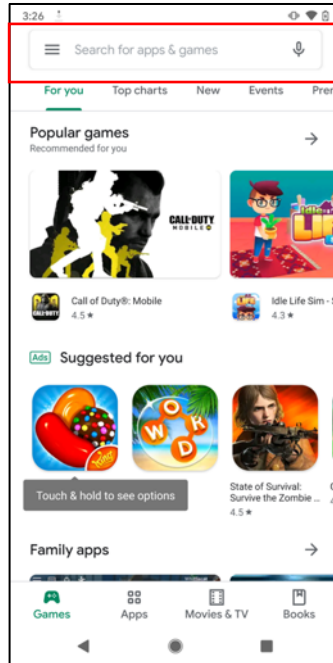
3. Type search criteria.
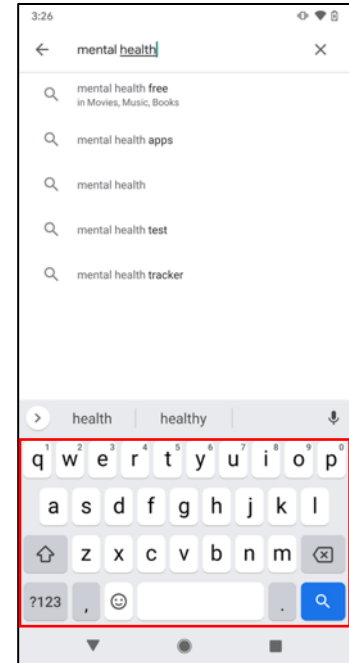
4. After deciding upon app to download, select "Install."
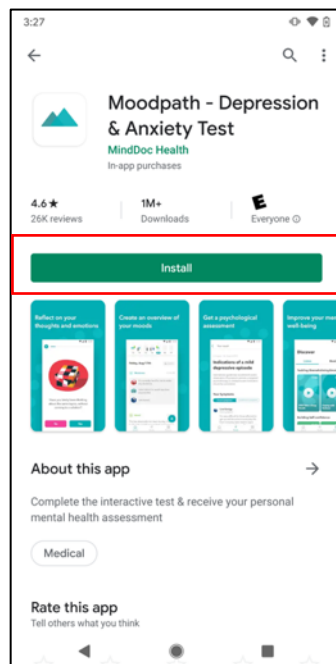
5. Wait for the installation to complete.
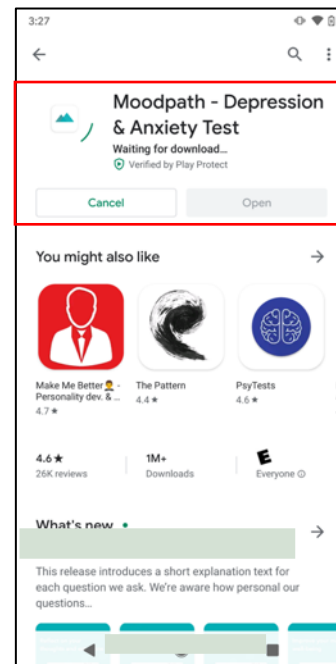
Tool 3: Calls
Skill 3.1: Making a call by dialing a telephone number

1. Select the "Phone" app.

2. Select the "Keypad" button.

3. Dial the number of interest and select the green phone icon.
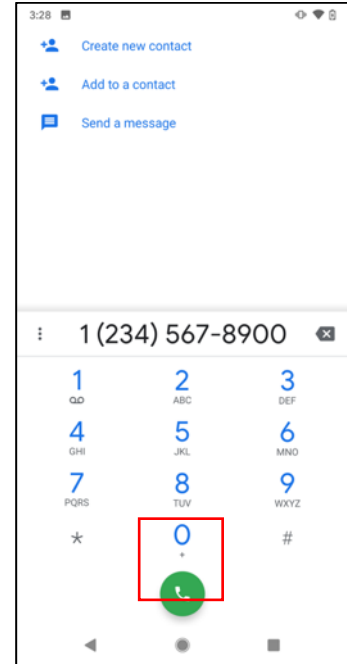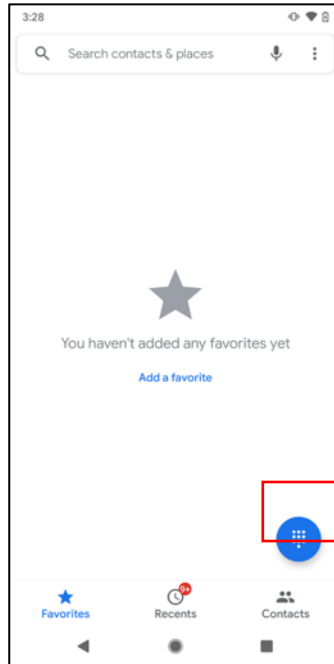
Skill 3.2: Making a call by selecting a contact

2. Select the "Phone" app.

2. Confirm "Contacts" is selected.

3. Select the contact of interest.
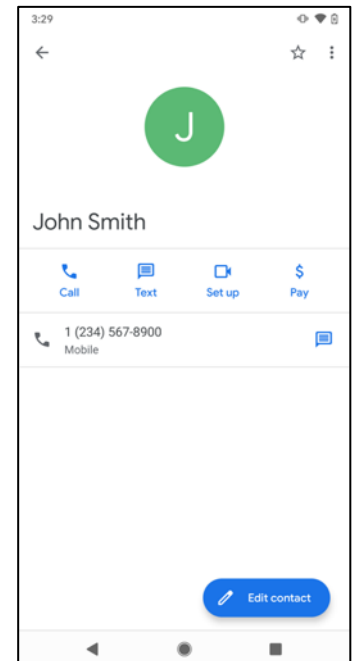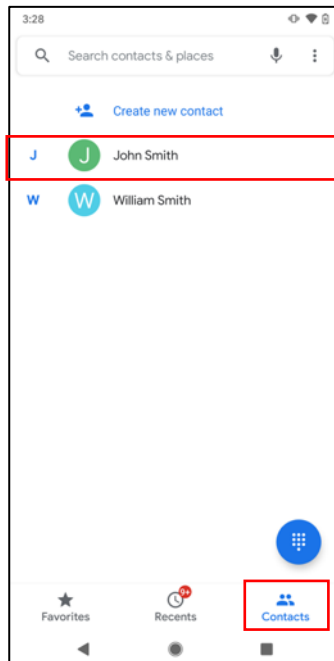
4. Select "call."
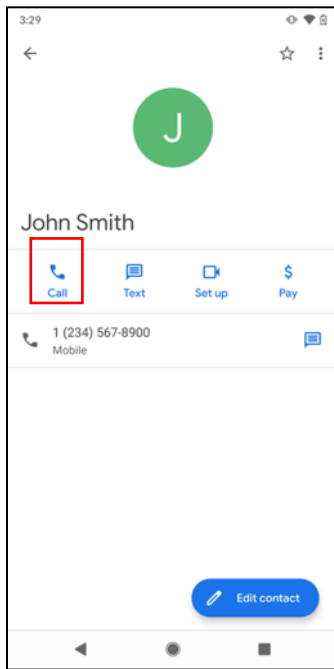
Skill 3.3: Answering a call

Select the green phone icon to answer a call.
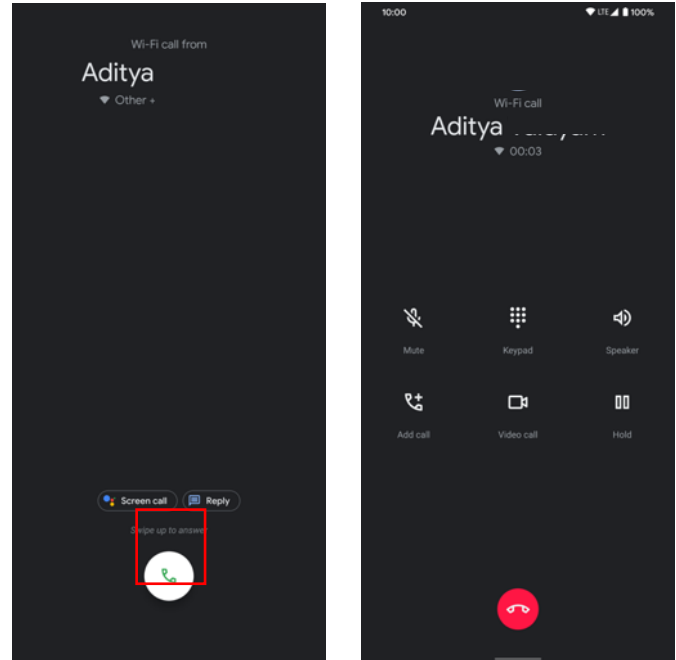
Tool 4: Text messaging
Skill 4.1: Creating a new message

1. Open the "Messages" app.

2. Select the "Start chat" button in the bottom right corner.
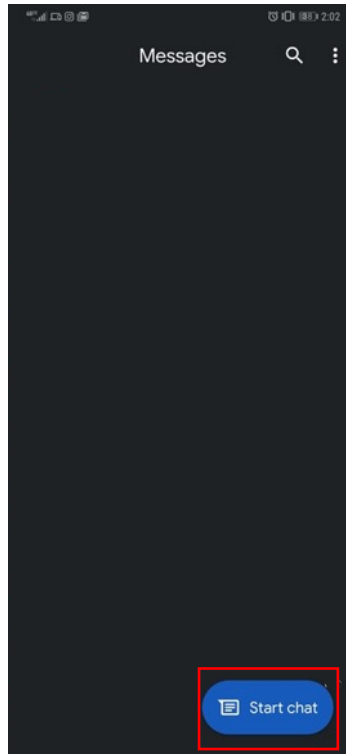
3. Type the number or contact information of interest.
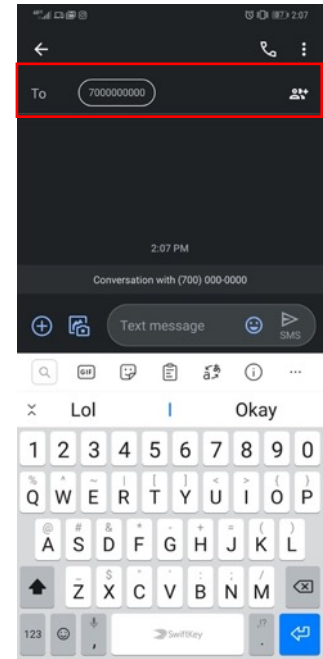
4. Type your message into the text bar and select the arrow to send your message.
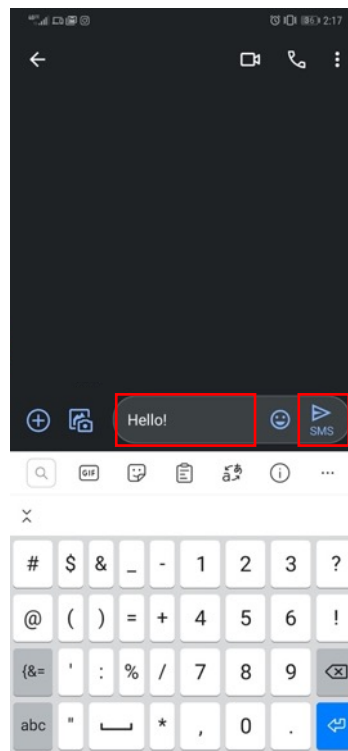
Skill 4.2: Responding to a message

1. When a message appears on your screen, open the "Messages" app.

2. Select the unread message.
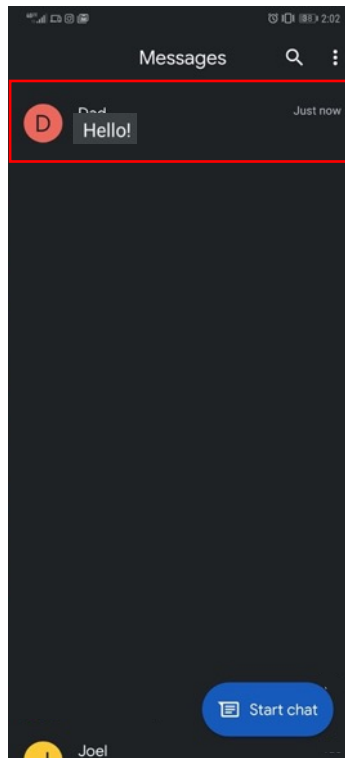
3. Type your message into the text bar and select the arrow to send your message.
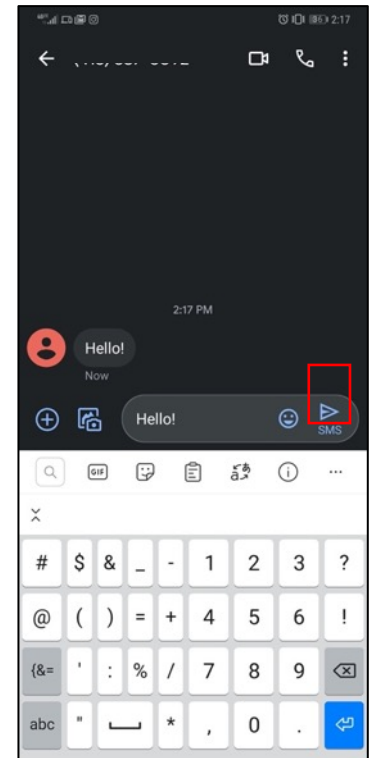
Skill 4.3: Sending pictures and videos

1. Open the "Messages" app.

2. Select the image icon to select an attachment.
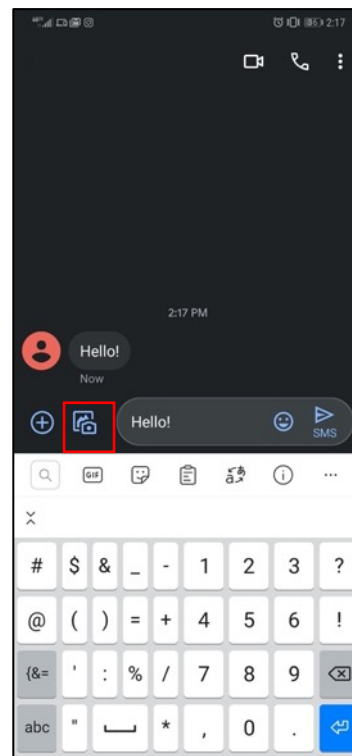
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Skill 4.4: Sending messages to a group

1. Open the "Messages" app.

2. Select the "Start chat" button in the bottom right corner.
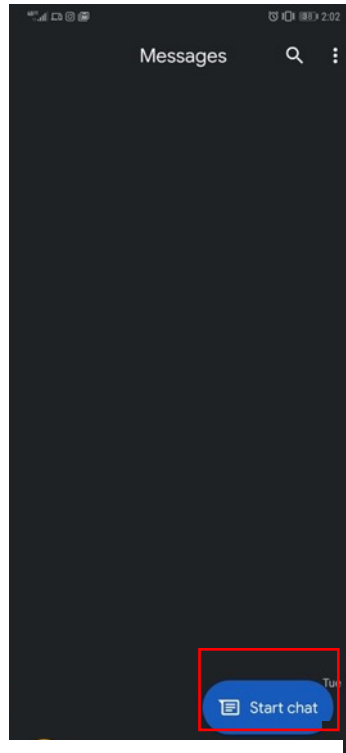
3. Type the number or contact information of interest. Repeat until all parties have been added.
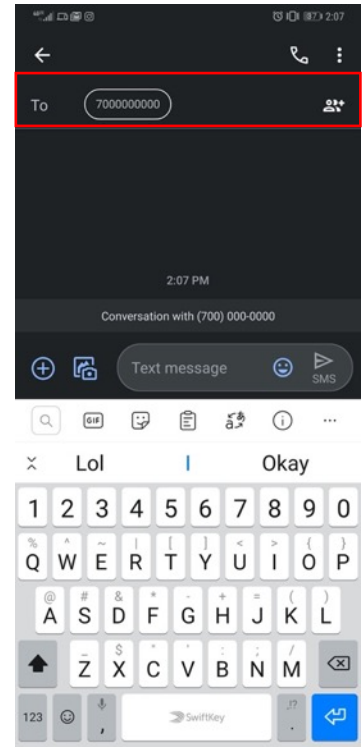
4. Type your message into the text bar and select the arrow to send your message.
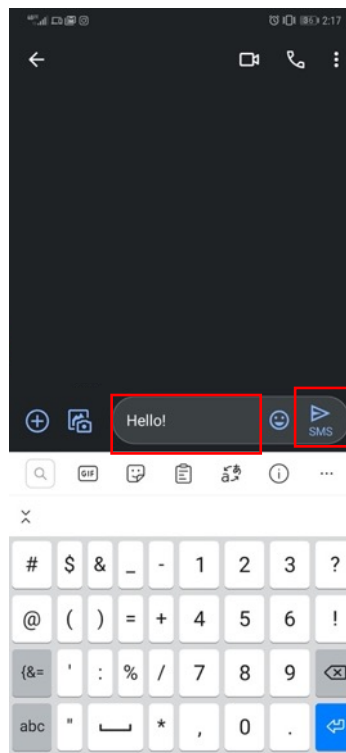
Tool 5: Internet
Skill 5.1: Performing internet searches

1. Open the "Chrome" app.

2. Select the search bar.
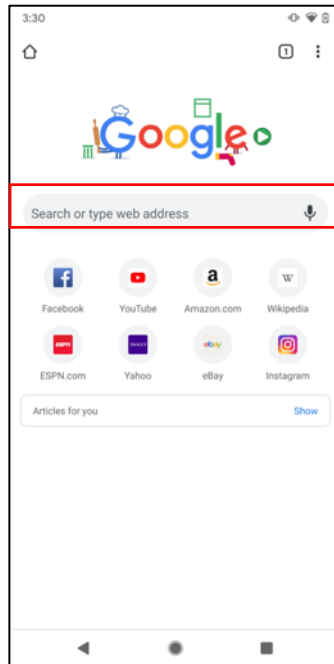
3. Type search of interest.
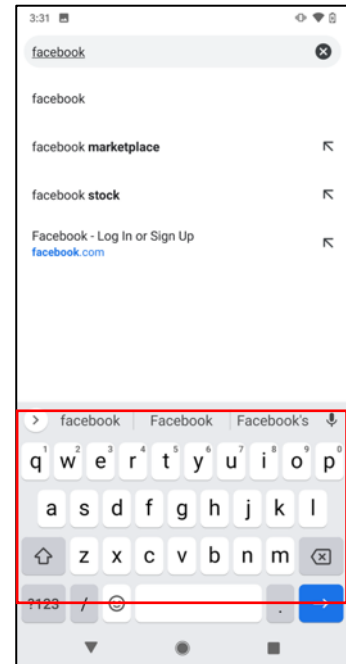
4. Select the arrow to complete your search.
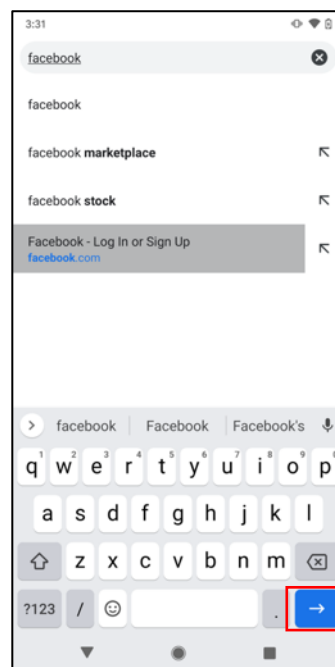
Skill 5.2: Navigating to a specific address

1. Open the "Chrome" app.

2. Select the address bar.
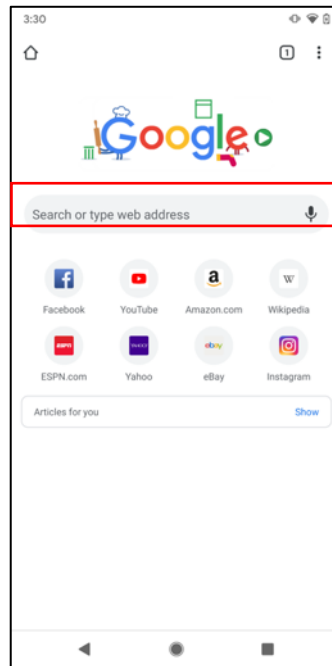
3. Type website of interest.
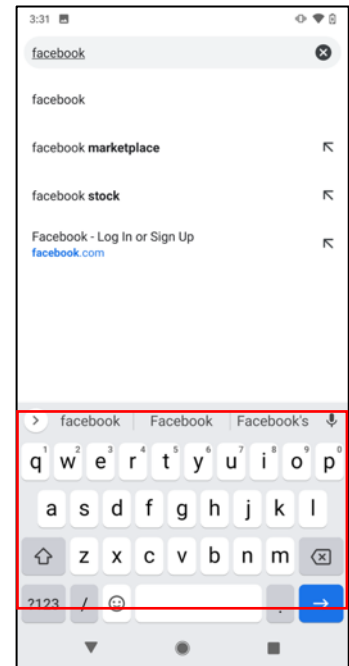
4. Select the arrow to navigate to that web address.
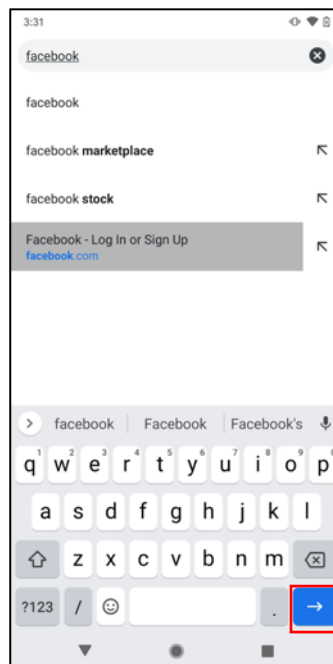
Skill 5.3: Viewing history

1. Open the "Chrome" app.

2. Select the menu icon and click "History.
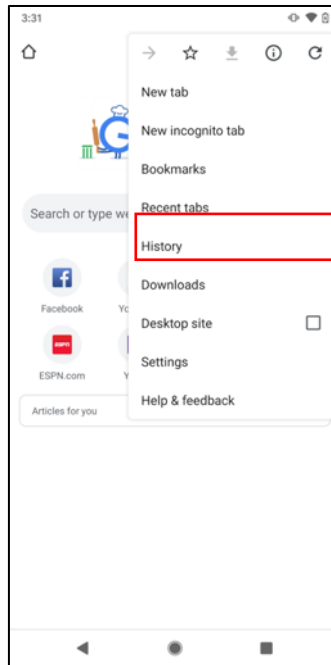
Tool 6: Listening to Music
Skill 6.1: Music Apps
There are several music apps available that offer free streaming service. We will use Spotify to demonstrate these skills. However, there are other options available, including YouTube Music and Google Play Music.

Spotif

YouTube Music

Google Play Music

Skill 6.2: Playing a song
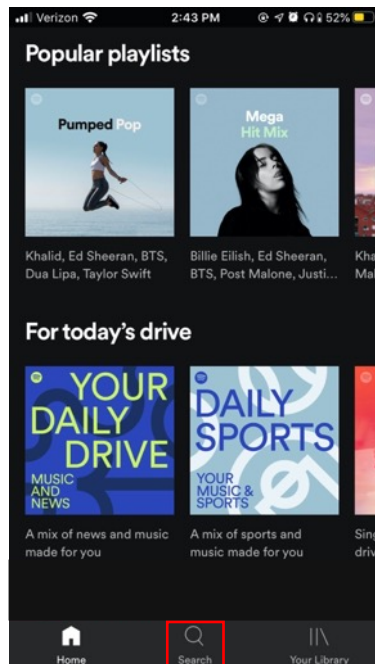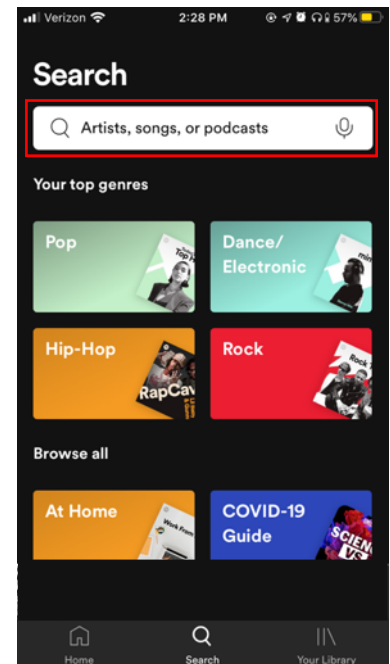
1. Open Spotify.

2. Select "Search."

3. Select the search bar.

4. Search for a song, artist, or podcast.
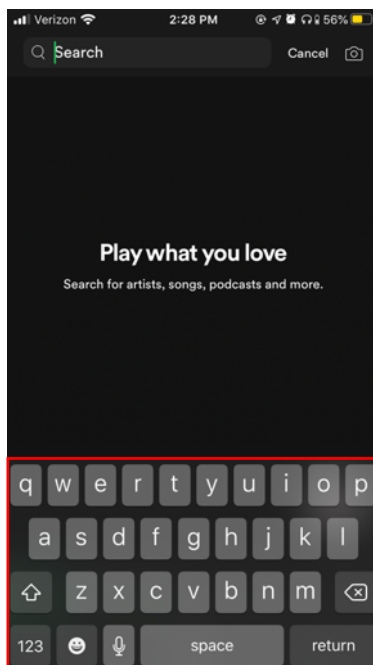
5. Select a song to play it.
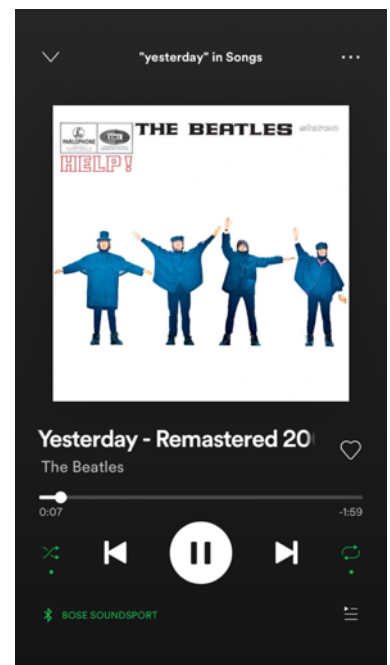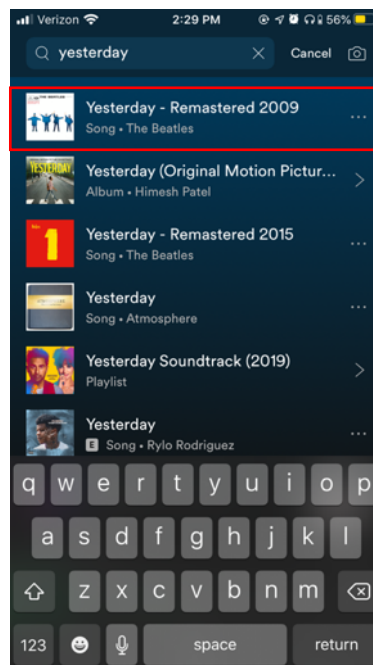
Skill 6.3: Creating a playlist

1. Open Spotify.

2. Select "Your Library."
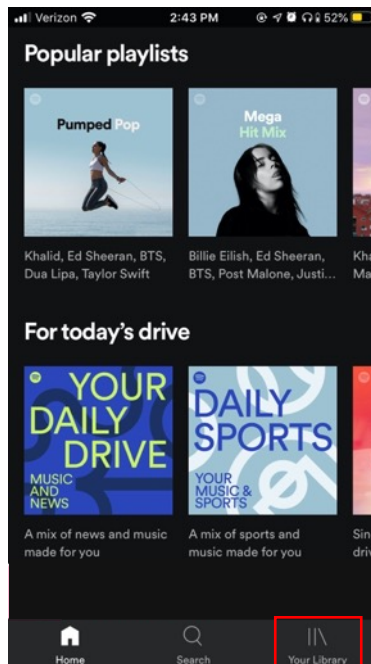
3. Select "Create Playlist."
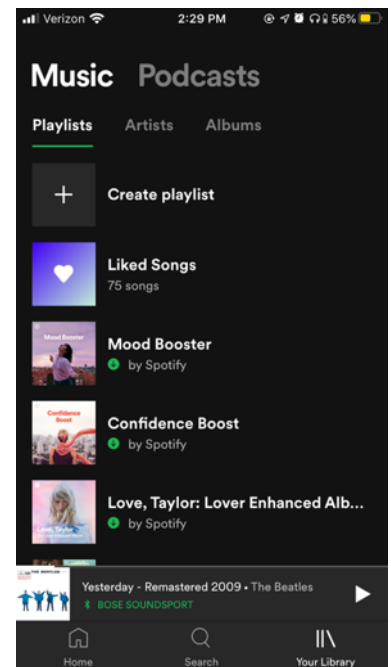
4. Name your playlist and select "CREATE."
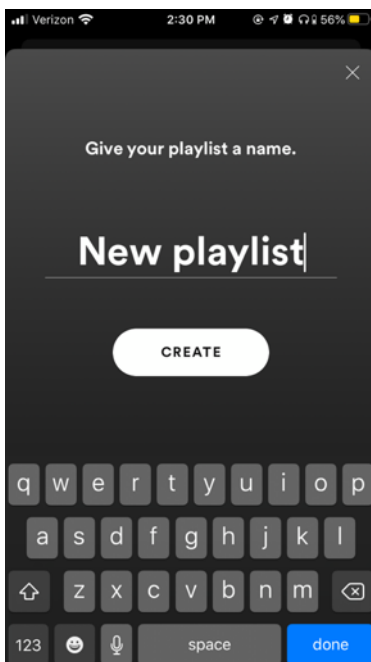
5. Select "Add Songs."
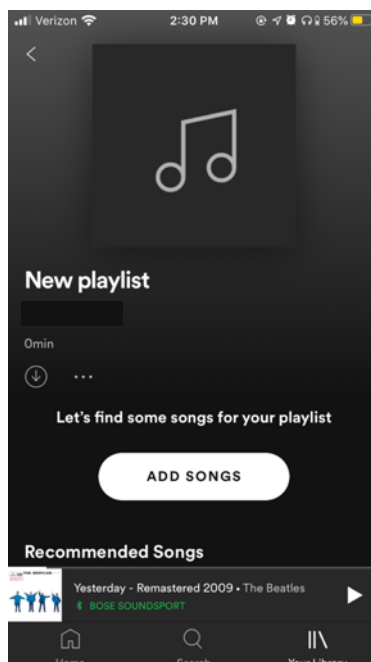
6. Search for songs to add them to your playlist.
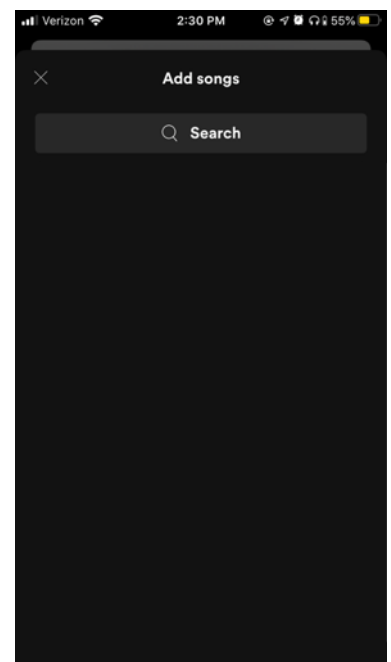
Tool 7: Camera
Skill 7.1: Taking a photo

1. Open the "Camera" app.

2. Make sure "Camera" is selected.
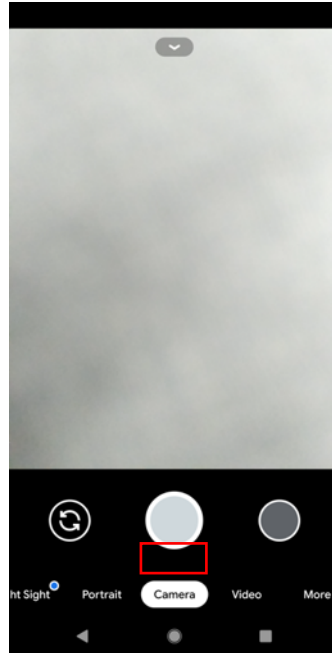
3. If necessary to flip the camera, select the camera icon in the bottom left-hand corner.
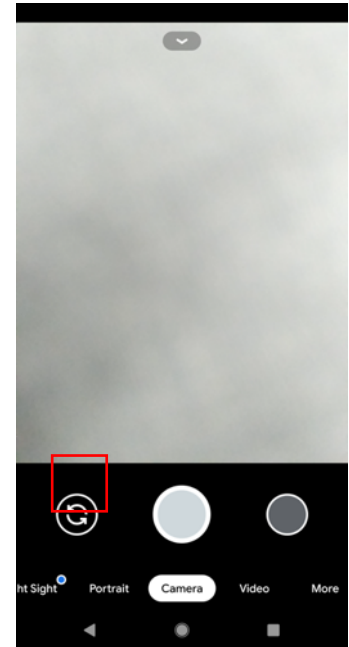
4. Select the white circle to take the photo.

5. To view your photo, select the circle in the lower right-hand corner.
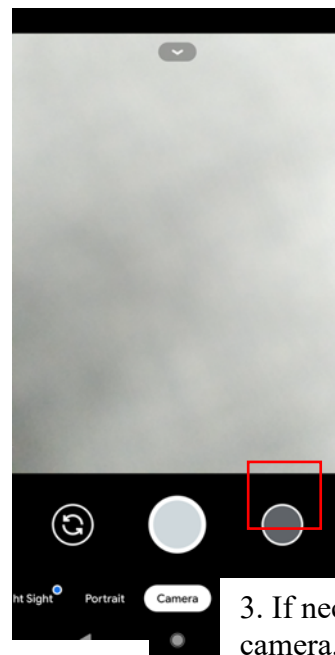
Skill 7.2: Ta...

1. Open the "Camera" app.

2. Make sure "VIDEO" is selected.

3. If necessary to flip the camera, select the camera icon in the bottom left-hand corner.
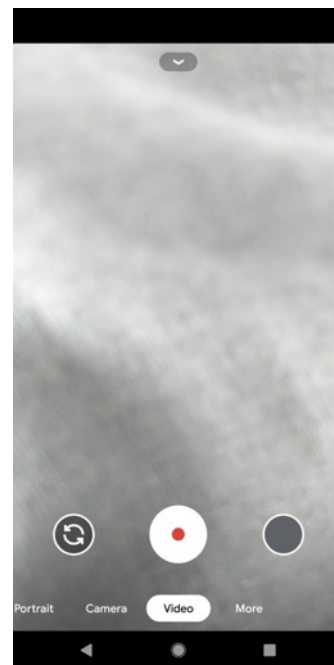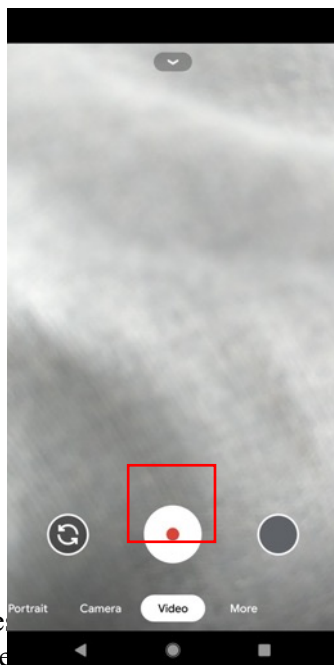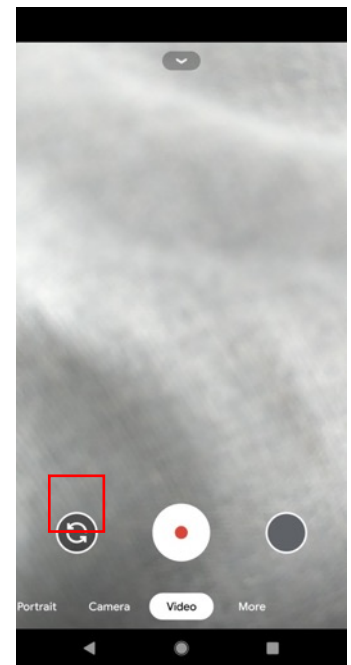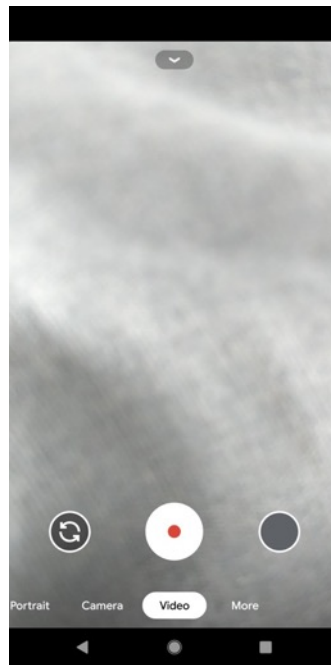
Tool 8: Note
Skill 8.1: Cre

1. Open the "Keep" app.

2. Select the + icon in the bottom right-hand corner.

3. Type your desired text.
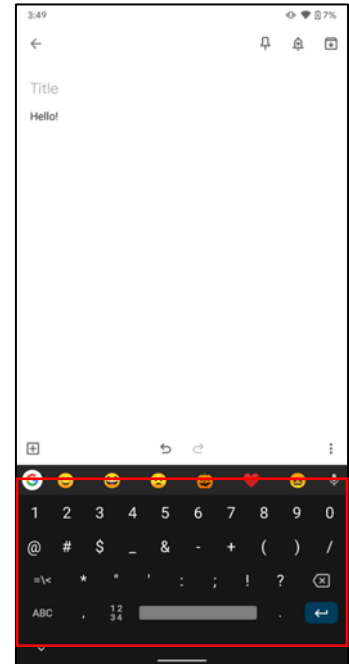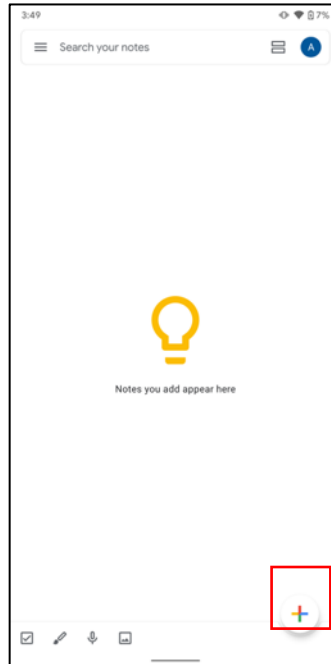
4. To save your note, select the arrow in the top left-hand corner.
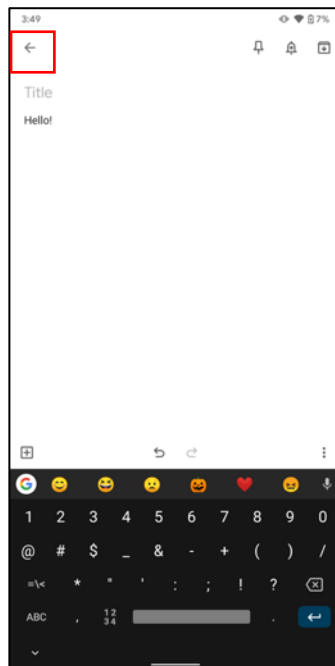
Skill 8.2: Editing an existing note

1. Open the "Keep" app.

2. Select the note of interest from your list.

3. Edit the note as you wish.
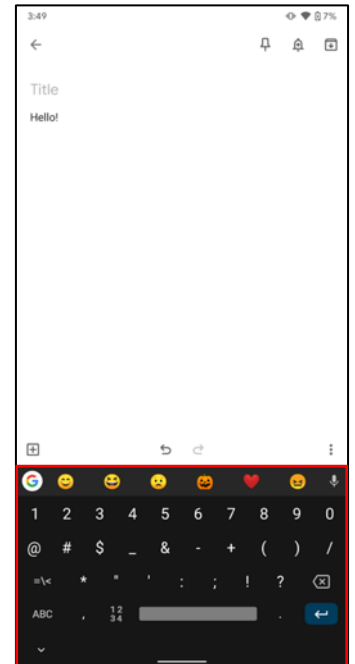
4. To save your note, select the arrow in the top left-hand corner.
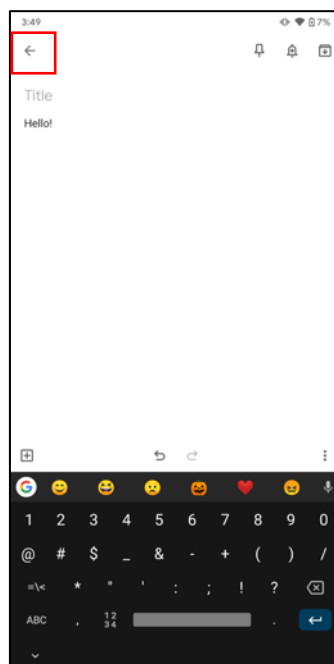
Skill 8.3: Setting a reminder

1. Open the "Keep" app.

2. Select the + icon in the bottom right-hand corner.
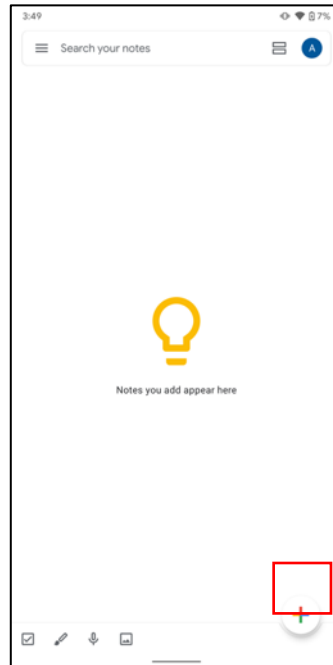
3. Type in your reminder.
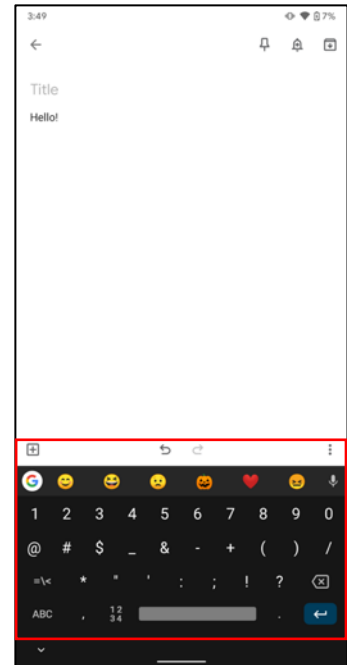
4. Select the bell icon to customize reminder settings.
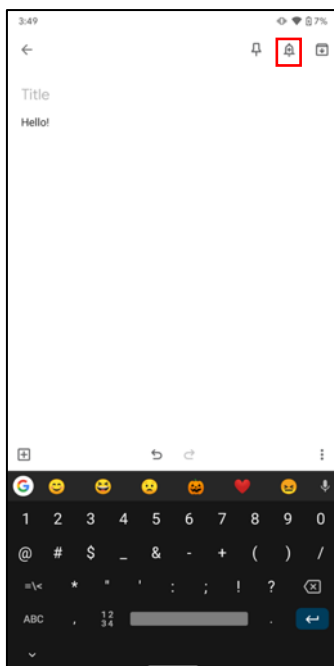
5. Customize settings as you see fit.
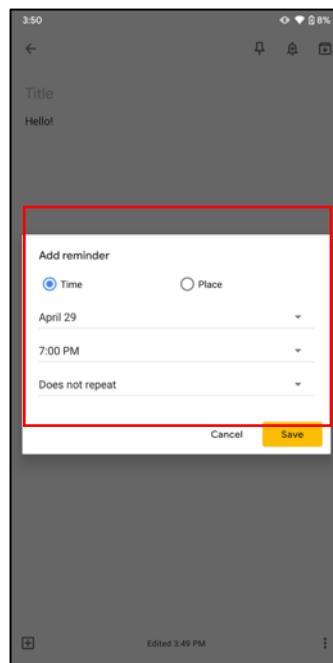
6. Select "Save" to save your reminder.
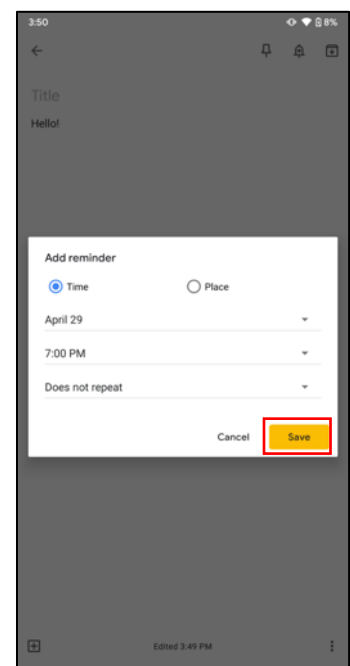
Tool 9: Clock
Skill 9.1: Setting an alarm

1. Open the "Clock" app.
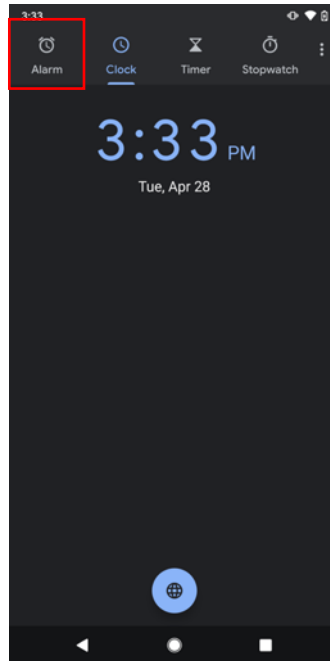
2. Select "Alarm."

3. Select the + icon.
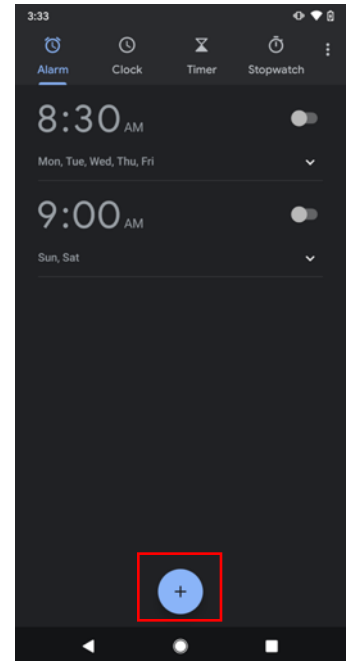
4. Set alarm time and select "OK."
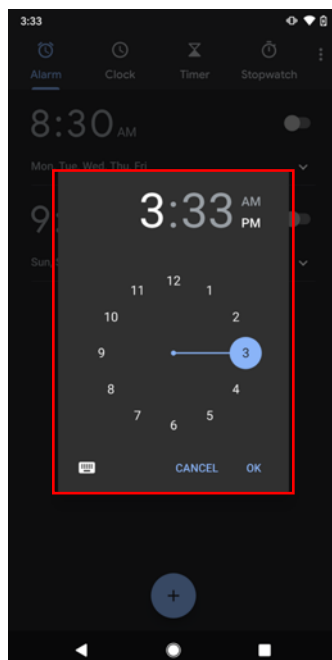
5. Choose alarm settings.
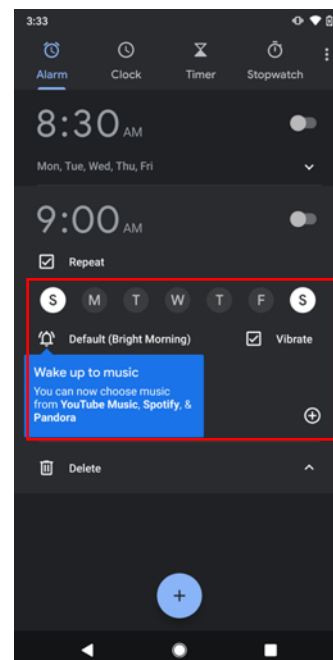
Skill 9.2: Setting a timer

1. Open the "Clock" app.
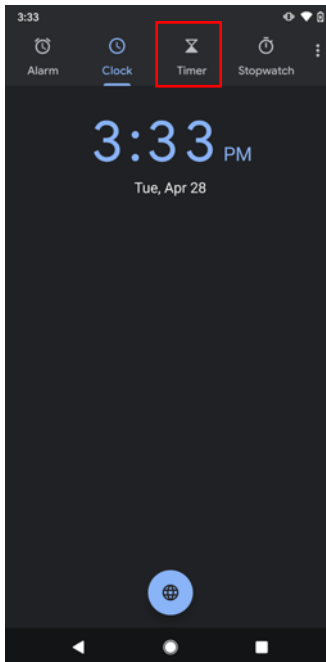
2. Select "Timer."

3. Set the desired amount of time for your timer.
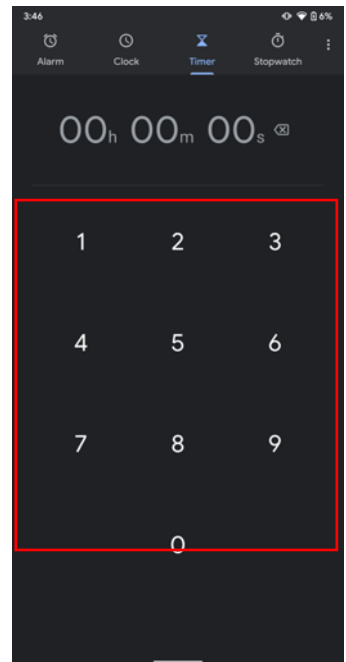
4. Select "Delete" to stop your timer.
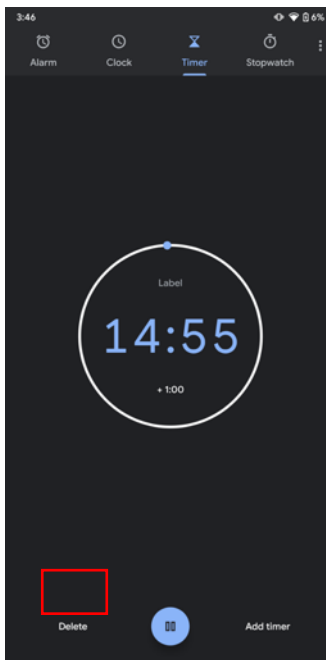
Tool 10: Calendar
Skill 10.1: Creating an event

1. Open the "Calendar" app.

2. Select the + icon in the bottom right corner.
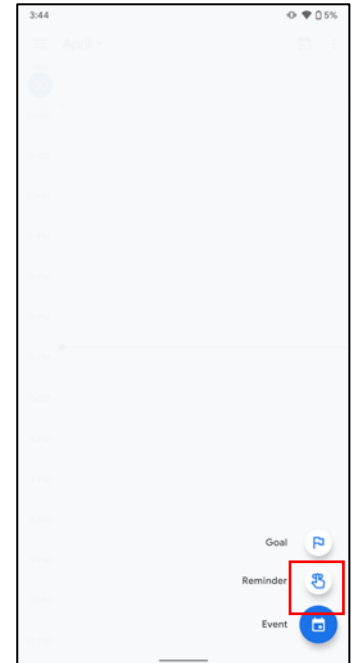
3. Select "Event."

4. Edit your event details as you wish. To save your event, select "Save."
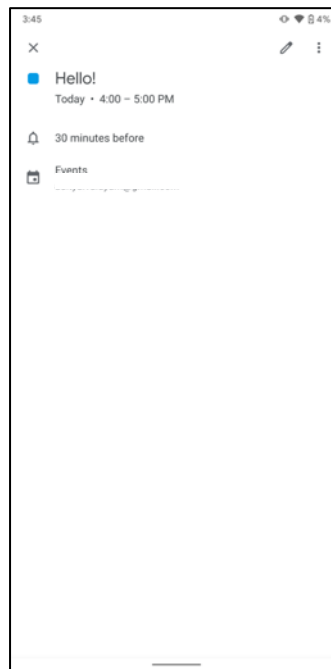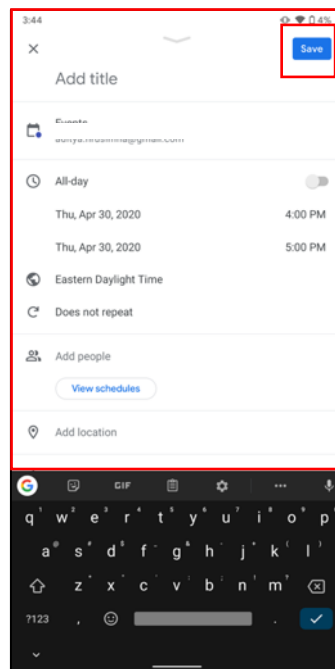
Skill 10.2: Creating an alert

1. Open the "Calendar" app.

2. Select the + icon in the bottom right corner.
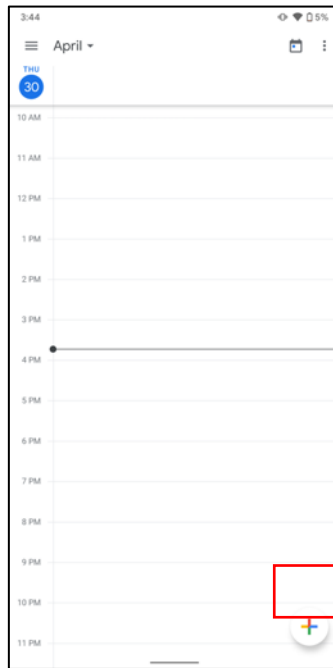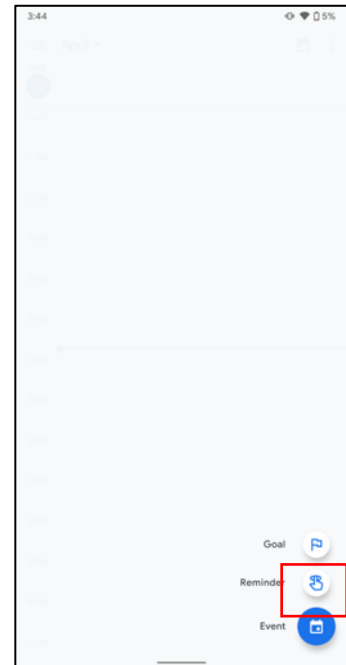
3. Select "Event."

4. Select "Add Notification."
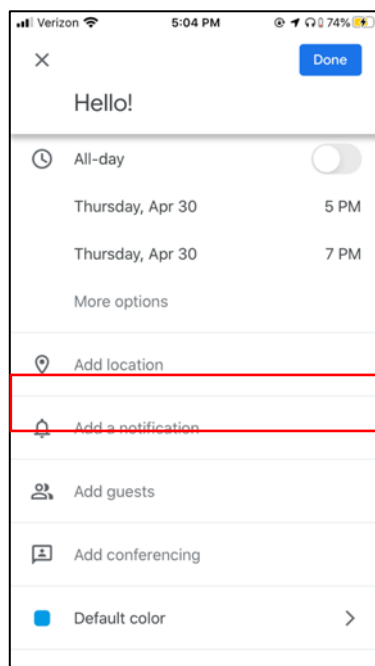
5. Select your preferred alert time and select "Done."
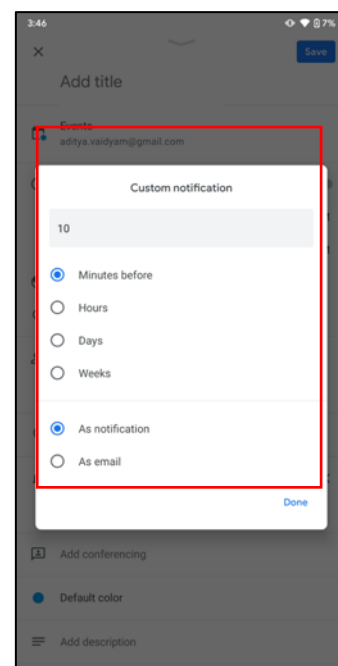
Skill 10.3: Editing an existing event

1. Open the "Calendar" app.

2. Select the event of interest.

3. Select the pencil icon.
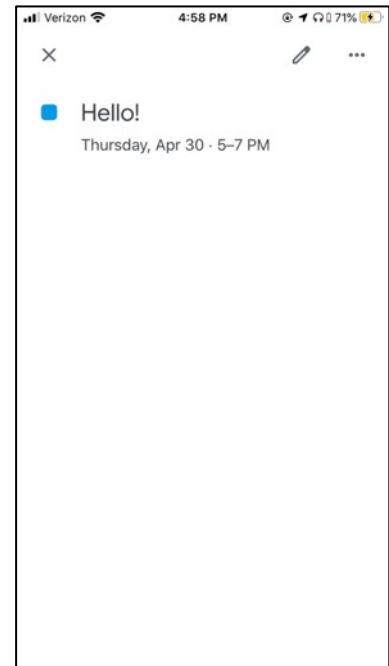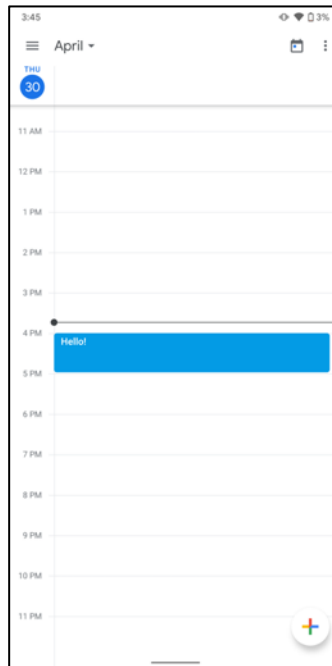
4. Edit your event details as you see fit.
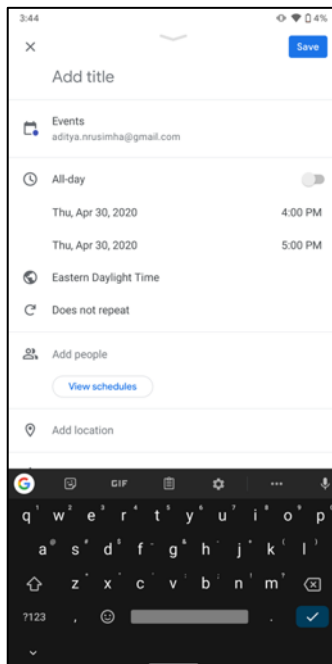
Tool 11: Health Apps
Skill 11.1: Viewing step count

1. Open the "Fit" app.

2. Select the activity circle.
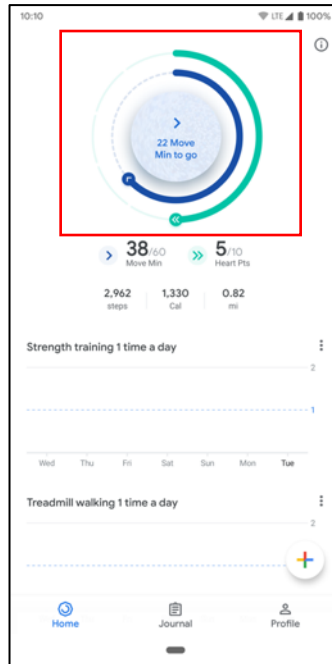
3. Select "Steps."
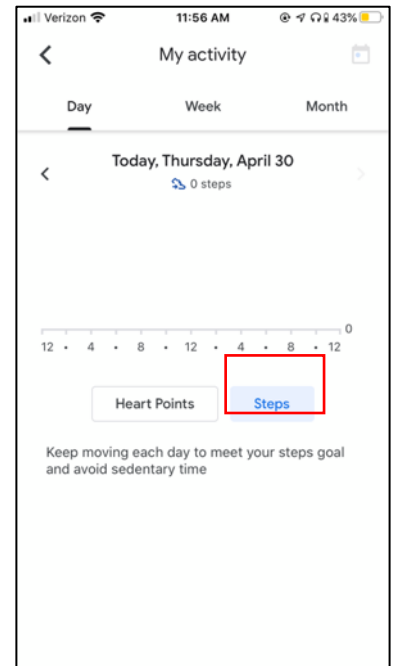
4. View step count by day, week, or month.
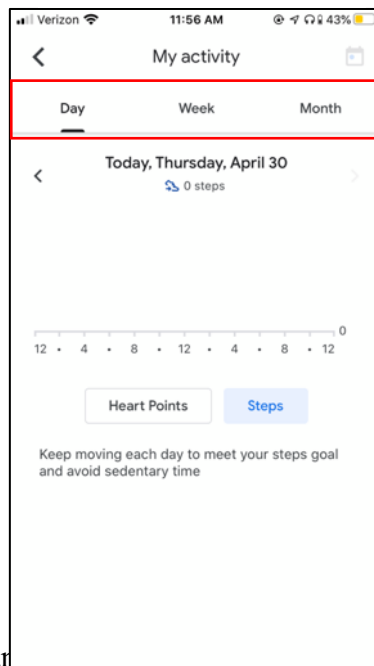
Skill 11.2: Viewing walking and running

4. View walking and running distance by day, week, or month.

1. Open the "Fit" app.

2. Select "mi"
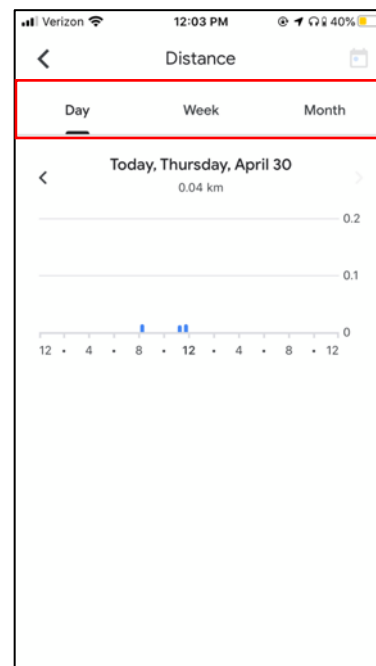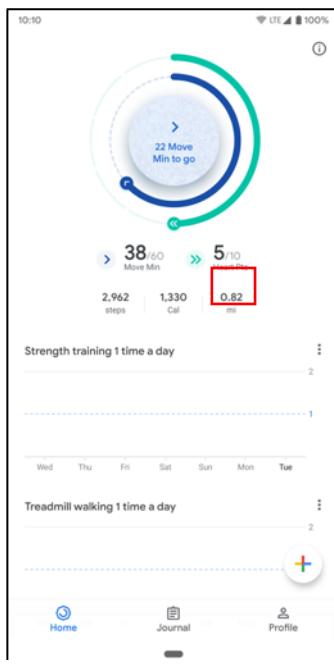
Skill 11.3: Viewing sleep information

1. Open the "Fit" app.
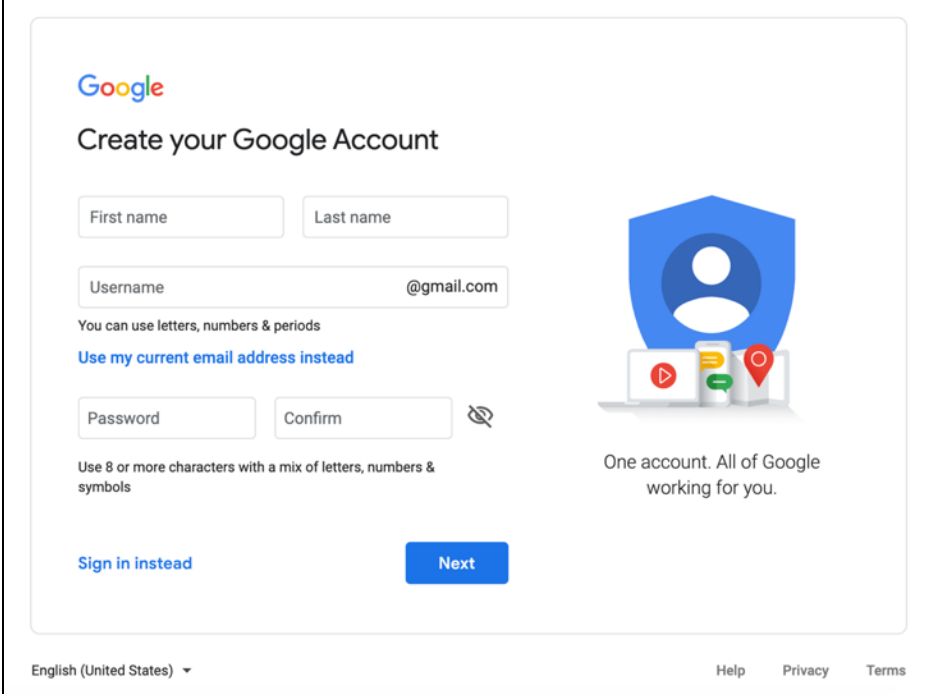
2. Scroll down to view sleep data.
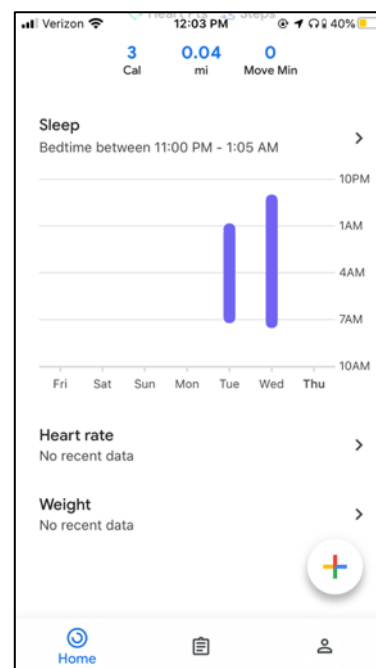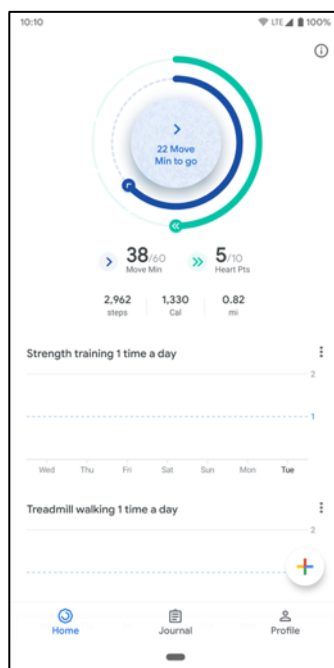
Tool 12: Email
Skill 12.1: Setting up an email address

1. Navigate to
   https://accounts.google.com/signup/v2/webcreateaccount?hl=en&flowName=GlifWebSignIn&flowEntry=SignUp (note there are other free email accounts you can use and no endorsement is implied)

2. Have a phone number ready as you may be asked to verify your identify with a phone number.

Skill 12.2: Using an email address to log into an account

1. Navigate to https://www.google.com/gmail/about/#

2. Enter the username and password created in skill 12.1

Skill 12.3: Using an email address to log into a video / telehealth program

1. This skill will depend on the video visit / telehealth program used by your team

MODULE 1, PART 2

Tool 1: Calls
Calling allows individuals to connect with others and can be used for guided meditation.

Skill 1: Guided meditation by phone
Required Part 1 Content: Skill 3.1
Description: There are meditation and wellness hotlines that are available 24 hours per day. Individuals may call these hotlines anytime or anywhere. No smartphone is required.

Skill 2: Talking to loved ones
Required Part 1 Content: Skill 3.1, 3.2
Description: Keeping in contact with loved ones and support systems on a regular basis can be influential in one's mental health. Further, phone calls may provide a substitution for in person therapy or other appointments when unavailable.

Tool 2: Text Messaging
Text messaging allows individuals to connect with others.

Skill 1: Talking to support systems
Required Part 1 Content: Skill 4.1, 4.2
Optional Part 1 Content: 4.3, 4.4
Description: Keeping in contact with loved ones and support systems on a regular basis can be influential in one's mental health

Tool 3: Internet
Internet browsing allows individuals to look up information and access self-guided exercises.

Skill 1: Watching videos
Videos can be used to search for mindfulness exercises, information around mental health, or used as a grounding or distraction technique.
Required Part 1 Content: Skill 5.1, 5.2
Optional Part 1 Content: Skill 5.3
Optional Resources: www.youtube.com or www.vimeo.com

Skill 2: Finding mindfulness exercises
Required Part 1 Content: Skill 5.1
Optional Part 1 Content: Skill 5.3
Description: There are abundant mindfulness exercises available online from written articles, to guided meditation, to short tips and tricks. The variety of mindfulness activities available allow for individuals to find activities that work for them.

Skill 3: Researching accurate information
Required Part 1 Content: Skill 5.1, 5.2
Description: Many resources exist around mental health from general wellness tips to more in-depth information about specific diagnoses. Patients can use the internet to search for resources that may be education and beneficial.

Tool 4: Listening to Music
Music is often used as a relaxation or grounding mechanism.

Skill 1: Finding podcasts
Required Part 1 Content: 6.1
Description: Podcasts can both provide wellness and reference information around mental health.

Skill 2: Creating a playlist
Required Part 1 Content: 6.2
Description: Creating a playlist of relaxing or positive music and podcasts can be used easily at any time.

Tool 5: Taking photos and videos
Photos or videos that comfort an individual can be used in times of stress.

Skill 1: Photos and videos for mental health
Required Part 1 Content: Skills 7.1, 7.2
Description: Both the act of taking photos and photos themselves can promote creativity and emotional wellness.

Tool 6: Notes and Reminders
Setting reminders or writing in notes can be a grounding or relaxing exercise.

Skill 1: Notes and reminders for mental health
Required Part 1 Content: Skills 8.1, 8.3
Optional Part 1 Content: Skill 8.2
Description: The notes and reminders apps can function as a mobile journal. Reminders can be used to send motivational sayings or tips throughout the day. Notes can be used to store positive messages or a place to write down thoughts. Further, both the reminders and notes app can be used to aid in routine. Notes can be used to create a schedule, and reminders can be used to prompt daily habits or routine.

Tool 7: Clock
Having a daily routine helps create healthy habits.

Skill 1: Creating a routine

Required Part 1 Content: Skills 9.1, 9.2, 9.3
Description: Clock can be used to promote healthy habits and create routine. A timer or alarms can be used to keep these routines.

Tool 8: Calendar
Setting and keeping a regular schedule can help reduce stress.

Skill 1: Setting a schedule
Required Part 1 Content: Skills 10.1, 10.3
Optional Part 1 Content: Skill 10.2
Description: Calendar can be used to create a schedule and keep a regular. Routine.

Tool 9: Health apps
Exercising regularly improves mood.

Skill 1: Exercise and mental health
Required Part 1 Content: Skills 11.1, 11.2, 11.3
Description: Exercise is proven to be beneficial for mental health. Tracking exercise, sleep, and other facets of physical health can provide exercise insight and motivate an individual to make physical activity a part of their regular routine.

Tool 10: Email
Email unlocks us of many digital health resources

Skill 1: Logging into a telehealth visit
Required Part 1 Content: Skills 12.1, 12.2, 12.3
Description: Having an email address that is accessible is important for accessing many online services today like telehealth, patient portals, and even mental health apps. Some social services also only avaliable online now.

MODULE 1 ASSESSMENT
Additional assessment criteria are as follows:

Trainer: The clinician has stated the patient is looking to begin exercising more. Since the patient mentioned they used to walk regularly, it was recommended the patient take 8,000 steps per day to start. Now the patient is seeking help toto track their step count.
Possible answers the digital navigator may give include:
- Recommend utilizing their smartphone's "Health" app. The trainee should then demonstrate how the app works and explain how to pair wearable devices, if applicable.

Trainer: The patient is interested in completing mindfulness activities more often and wants to know how they can access free activities online.
Possible answers may include:
-Recommend and demonstrate how to use the internet to find mindfulness-based activities. This may also include podcasts or other music streaming services

MODULE 2

Content Summary

Tools	Skills	Relevance
Complications downloading an app	Checking connections	The ability to download apps is essential for using technology for health. Occasionally, apps may be slow to or unable to download.
	Deleting apps	
Unknown account ID or password	Recovering passwords	Accessing your account is required to download an app. An individual may not remember their account username or password necessary to download an app
Lack of storage space	Deleting apps	Storage space is necessary to download an app. Some patients may not have available storage to download a new app.
	Download size	
App compatibility issues	Updating software	The ability to download apps is essential for using technology for health. Some apps may not be able to run on an individual's phone.
Complications with wifi or cellular data connection	Switching networks	A wifi or cellular data connection is necessary to download an app and often to use an app after it has been downloaded. An inadequate connection can hinder this process.
	Changing locations	
Notification issues	Updating notification settings	Notifications remind patients to use the app regularly. Although an app is set to provide notifications, it is possible they may not appear.
App crashing	Closing and reopening apps	The ability to download apps is essential for using technology for health. Apps may be unable to load or quit unexpectedly.
Bluetooth connections with wearables	Update apps	Wearables can provide additional insight about fitness and environment data. Some may have trouble connecting or disconnect spontaneously.
	Disconnect and reconnect the wearable	
	Reset the wearable	
Forgot Password	Resetting passwords	It is easy to forgot passwords. Being able to reset them via email ensures that telehealth appointments will not be missed and there will always be access to important accounts and records.

Tool 1: Complications downloading an app

Skill 1.1: Checking connections

If an app will note download, the first step is to ensure the smartphone has sufficient connection to either cellular data or wifi.

- If using cellular data and connection is weak, connect to a wifi network.
- If connected to a wifi network and connection is weak, switch to a new network or disconnect from wifi to use cellular data.

Skill 1.2: Deleting apps

Next, ensure there is enough space for the app to be downloaded.

- You can check the amount of available storage by navigating to
  iPhone: Settings>General>iPhone storage
  Android: Settings>Storage
- If there is not enough storage, select an app with a smaller download size or delete currently installed apps
- To delete an app
  iPhone: Hold down the app of interest until a menu appears. Select "Edit Home Screen" and then select the X in top left-hand corner of the apps you wish to delete.
  Android: Hold down the app of interest until a menu appears. Select "Uninstall" to delete the app.

Tool 2: Unknown account ID or password

Skill 2.1: Recovering ID/Password

If the patient doesn't remember their ID and/or password, follow the "Forgot Password?" prompt accordingly. They may be required to answer security questions or log into the email address associated with the account to reset their ID and password.

If the patient is unable to answer their security questions or log into their email, they will need to seek assistance from Apple or Google.

Tool 3: Lack of storage space

Skill 3.1: Deleting apps

- You can check the amount of available storage by navigating to
  iPhone: Settings>General>iPhone storage
  Android: Settings>Storage
- If there is not enough storage, select an app with a smaller download size or delete currently installed apps
- To delete an app
  iPhone: Hold down the app of interest until a menu appears. Select "Edit Home Screen" and then select the X in top left-hand corner of the apps you wish to delete.
  Android: Hold down the app of interest until a menu appears. Select "Uninstall" to delete the app.

Skill 3.2: Download size

- You can view the download size of an app from its description of the app store. If too large, you can select a smaller app for download:

iPhone: When viewing the app's description, scroll down to Information. Size should be the second item listed.

Android: When viewing the app's description, scroll down to "Additional Information". Size should be the second item listed.

Tool 4: App compatibility issues

Skill 4.1: Updating Software

If the smartphone's software is out of date, certain apps may be incompatible.

To view the smartphone's current software model:

iPhone: Settings>General>About. Software Version should be the second item listed.

Android: Settings>About Phone>Software Information

Tool 5: Complications with wifi or cellular data connection

Skill 5.1: Switching networks

If the network does not have a strong connection, switch to another for improved speed and processing.

- To switch from data to wifi, navigate to the Wifi page under settings and turn wifi on. Select network as seen in Module 1
- To switch from wifi to data, navigate to the Wifi page under settings and turn wifi off. Cellular data will automatically be used.
- To switch wifi networks, navigate to the Wifi page under settings and select a new network.

Skill 5.2: Changing locations

If the network is still not strong, move closer to wifi router or to a room with stronger cellular signal.

Tool 6: Notification issues

Skill 6.1: Updating notification settings

If an app is not displaying notifications properly, the digital navigator can change notification settings both within the app and on the smartphone. Changing an app's notification settings will vary depending on the app itself. Adjusting the smartphone's notification settings is as follows:

iPhone: Settings>Notifications>Select app of interest

Android: Settings>Apps and Notifications>Notifications

Tool 7: App crashing

Skill 7.1: Closing and reopening apps

If an app freezes or crashes, reboot the app.

iPhone: If iPhone 8 or below, double click home button. Swipe app of interest up to close. If iPhone X and above, swipe up and then select apps to swipe away.

Android: Select tabs button and swipe app of interest away.

Tool 8: Bluetooth connections with wearables

Skill 8.1: Updating apps

Apps are frequently changing and updating. Outdated versions of apps may no longer be compatible with connectable technologies.

- To update, visit the app's page on the Apple App Store or Google Play Store. If an update is available, there will be an option to update at that time.

Skill 8.2: Disconnecting and reconnecting wearables
Wearable devices may need to be reconnected if they are no longer functioning properly.

- To disconnect the wearable
  iPhone: Settings>Bluetooth>Information symbol next to device of interest>Disconnect
  Android: Settings>Connected Devices>Settings icon>Unpair

To reconnect the device, follow its specific connection instructions.

Skill 8.3: Resetting wearables
The device may need to be rebooted if it is not functioning properly.

- To reset a Bluetooth connected device, follow the device's specific instructions

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Tool 9: Forgot password

Skill 9.1: Resetting the password via email
It is easy to forget passwords. Often to reset a password, it is necessary to verify identity via email. With a working email address, it is simple and easy to reset passwords

- For the telehealth program being used (or app if there is not a telehealth program), identify the forgot password link
- Follow the instructions and send a password request to email
- Check email and reset the password
- Ensure it is possible to login with the new password.

MODULE 2 Assessment Scenarios

1. Scenario: "I am looking to download this app, but the download won't start."
   Solution: Trainees should connect to wifi or switch wifi networks.

2. Scenario: "When I go to download an app, it asks for a password."
   Solution: Trainees should be able to provide the instructions for recovering Apple ID or Google password.

3. Scenario: "It says there is not enough room for me to download this app."
   Solution: Trainees should show the patient how they can download unused apps.

4. Scenario: "It says this app cannot be downloaded onto my phone."
   Solution: Trainees should be able to check for available software updates.

5. Scenario: "This app is taking a long time to load."
   Solution: Trainees should be able to switch wifi networks or turn wifi off to utilize data connection.

6. Scenario: "The notifications for this app aren't working."
   Solution: Trainees should be able to navigate to notification settings and update them accordingly.

7. Scenario: "This app keeps closing automatically."
   Solution: Trainees should be able to quit and reopen the app.

8. Scenario: "My wearable isn't working anymore.
   Solution: Trainees should check the battery and be able to disconnect and reconnect wearable.

MODULE 3

Content Summary

Tools	Skills
Gather Background Information	App costs
	Developer
	Platforms
	Last update
	Reviews
Risk/Privacy & Security	Privacy policy
	Data collection
	Opt-out
	Deleting data
	Data sharing
	HIPAA-compliance
Evidence	What does the app do?
	Peer reviewed evidence
	Red Flags
Ease of Use	Customizability
	Accessibility
	Easy to use
Interoperability	Data sharing
	Exporting/downloading data
	Integration with other platforms

Background Information	
Does it work on Apple(iOS)?	Does the app have an entry on the iOS app store?
What is the Apple version?	(from Apple store link)
What is the oldest iOS version supported?	(from Apple store link)
What was the Apple release date?	(from Apple store link)
When was the last Apple (IOS) update?	(from Apple store link)
Has the apple version been updated in the last 180 days?	(from Apple store link)
Number of reviews on Apple store?	(from Apple store link)
Rating (number of stars) on Apple store?	(from Apple store link)
App size on iOS?	(from Apple store link)
Does it work on Android?	Does the app have an entry on the Google Play Store?
What is the Android version?	(from Google Play store link)
What is the oldest Android version supported?	(from Google Play store link)
What was the Google play store release date?	(from Google Play store link)
When was the last Android update?	(from Google Play store link)
Has the android version been updated in the last 180 days?	(from Google Play store link)
Number of reviews on google play store?	(from Google Play store link)
Rating (number of stars) on google play store?	(from Google Play store link)
App size on android?	(from Google Play store link)
Does the app work offline?	Does the app work in airplane mode?
Does it have at least one accessibility feature (like adjust text size, text to voice, or colorblind color scheme adjuster)?	Does the app work with adjustable text size setting of the phone? Or text to voice features? Does the app have an internal setting for incresing text size?
Does it work with Spanish?	This information is available on the app store.
Does it work with a language other than English or Spanish?	This information is available on the app store.
Is the app totally free?	An app is totally free if there are no costs up front and no in-app purchases.
What is the cost up front?	Some apps may be free up front but have in-app purchases.
Are there in-app purchases?	Are there any functionalities of the app that are inaccessible without payment?
Is it a subscription (recurrent/monthly/annual)?	Does full use of the app depend upon a subscription?

Risk/Privacy & Security	
Is there a privacy policy?	The following questions involve reading the privacy policy, which will be linked to the app store if the app has one.
Does the app declare data use and purpose?	What information is the app collecting and for what purpose?
Does the app report security measures in place?	How is data protected? Does the app claim to collect and share data securely?
Is PHI shared?	PHI refers to personal health information that is entered into the app (name, birthday, content of messages, mental health information). Data is shared if it leaves the app in any way.
Is de-identified data shared?	De-identified data is information that has been stripped of personally identifiable attributes.
Is anonymized/aggregate data shared?	Most apps collect and share aggregate use data. This anonymized data has no traceable link to an individual.
Can you opt out of data collection?	Is there a way for a user to indicate that they don't want to app to collect or share their data?
Can you delete your data?	Can user data be deleted? Some apps may retain data permanently.
Is the user data stored only on the device?	User data is either stored locally (exclusively on the device) or on a server.
Is the user data stored on a server?	If the data is stored only on the device, then it won't be stored on a server.
Does the app have a crisis management feature?	The presence of a crisis management feature is often indicated in the privacy policy. A crisis management feature refers to an app's emergency response: does the app provide a hotline number that can be called if user input suggests a crisis?
Does the app claim it meets HIPAA?	The vast majority will not, although this does not mean they are insecure. Likewise meeting HIPAA does not mean data is guaranteed to be kept private
Reading level of the privacy policy (what grade reading level)?	Flesch-Kincaid reading grade level: https://readabilityformulas.com/free-readability-formula-tests.php (just copy and paste privacy policy in).
Does the app use 3rd party vendors (i.e. google analytics, etc)?	Does the app mention use of third parties?

Evidence

Does the app appear to do what it claims to do?	If the app claims to offer CBT, for example, is there evidence that CBT is provided on the app?
Is the app patient facing?	This will depend on the terms of the search. Is the app relevant for an individual with the condition specified in the search? Is it intended for patient use (some apps, for example, may be diagnosis guides and intended for use by healthcare providers but not patients).
How many feasibility/usability studies?	How many studies about the feasibility of this specific app's use have been published?
What is the highest feasibility impact factor?	What is the impact factor of the journal in which the feasability study is published? This can easily be found with a quick google search. If it's not immediately evident, put "0" (assume the journal doesn't have an impact factor.
How many evidence/efficacy studies?	How many studies about the efficacy of this app to accomplish what it claims to do have been published?
What is the highest efficacy impact factor?	What is the impact factor of the journal in which the efficacy study is published? This can easiliy be found with a quick google search. If it's not immediately evident, put "0" (assume the journal doesn't have an impact factor.
Can the app cause harm?	Does the app make recommendations or suggestions that directly defy clinical guidelines? Does it include overtly false information, like a suicide hotline number that doesn't actually work?
Does the app provide any warning for use?	Is there any warning for a user that the app is not intended to replace medical care?

Ease of Use	
Input: surveys?	Does the app enable a user to enter surveys such as mood or symptom surveys?
Input: Diary?	Does the app have a journaling, diary, or free writing feature?
Input: Geolocation?	Does the app enable location services from the phone?

Input: contact list?	Can a user connect their contact list to the app?
Input: Camera?	Do any features of the app utilize camera input? So profile picture? Or photo diary features? Or video chat?
Input: Microphone?	Does the app allow a user to record using the phone microphone?
Input: step count?	Does the app utilize step tracking?
Input: external devices (e.g. a wearable sending direct data)?	Does the app connect with an external device such as a smart watch or heart rate monitor?
Input: social network?	Connection to social media. Does the app allow you to input social media information? For example, do you connect it to your facebook to log in? Or do you connect with social media contacts through the app?
Features: mood tracking?	Does the app provide surveys where a user can enter their mood data?
Features: medication tracking?	Designated medication tracking feature?
Features: sleep tracking?	Does the app track sleep, either in conjunction with a wearable or through user-entered information?
Features: physical exercise tracking?	Does it allow a user to track duration or content of physical exercise?
Features: psychoeducation?	Does it provide definitions, explanations of different diagnoses? Is it didactic?
Features: journaling?	Is there a place for the user to journal or free write?
Features: picture gallery/hope board?	Does the app allow a user to curate a gallery of saved and searched images and quotes?
Features: mindfulness?	Any mindfulness exercises? May include deep breathing but not necessarily.
Features: deep breathing?	Does the app offer exercises in deep breathing?
Features: iCBT or sleep therapy?	Doe the app offer sleep therapy of any kind (including iCBT, a targeted sleep intervention)?
Output: notifications?	Does the app send notifications? These notifications could be incoming messages, reminders from the app, or alerts.
Output: psychoeducational references/information?	Does the app provide psychoeducational references or information? (Note: this means the exact same thing as the question about features: psychoeducation).
Output: social network?	Can you post information from the app to social media? Does the app connect to social media for posting purposes?
Output: reminders?	Does the app allow you to set reminders? (Oftentimes these reminders will then generate notifications)
Output: graphs of data?	Does the app allow a user to see graphically depicted data?

Output: summary of data (in text or numbers)?	Does the app provide written summaries of data (description of data apart from a graph)?
Output: link to formal care/coaching?	Does the app connect a user with a healthcare provider? A licensed therapist or clinician?
Features: CBT?	Does the app provide cognitive-behavioral therapy?
Features: ACT?	Does the app provide Acceptance and Commitment Therapy?
Features: DBT?	Does the app provide dialectical behavior therapy?
Features: peer support?	Does the app offer connection to peer specialists or individuals with lived experience?
Features: connection to coach/therapist?	The app has a built-in way to connect with a provider or coach.
Features: biodata?	Does the app collect heart rate or skin conductance?
Features: goal setting/habits?	Productivity feature allowing user to set and check in on goals.
Features: physical health exercises?	Something like 7 minute workout that actually gives a workout (this is a recommendation of exercises, NOT tracking.
Features: Bbot interaction (like with virtual character)?	The app allows a user to interact with a virtual character.
Features: Biofeedback with sense data (eeg, HRV, skin conductance, etc)?	The app uses biodata to provide feedback/recommendations (an app that will recommend more breathing exercises to respond to high heart rate, for example).
Engagement style: chat/message based?	User can send and receive messages.
Engagement style: is it a screener/assessment?	Examples include PHQ9, GAS7, etc.
Engagement style: real time response?	Someone will reply to your chat right away.
Engagement style: Asynchronous response?	There are no immediate responses to chats; responses come at predetermined intervals (once a day; every four hours; etc)
Engagement style: gamification (points, badges)?	User can win points and prizes for engaging with the app.
Engagement style: videos?	App includes videos user can view.
Engagement style: audio/music/scripts?	Does the app provide music or audio experiences? Some meditation apps, for example, utilize audio sessions.
Engagement style: AI support?	Interaction is not with a real person but with a bot.
Engagement style: peer support?	Peer is defined as a person with lived experience and support involves actually communicating (so not just watching a video).
Engagement style: network support?	Network is defined as someone (like family or friend) who is actually known.by the user outside the app. An example is an app that allows a user to communicate with family members about relevant health information.

Engagement style: Collaborative with provider/other?	Does it allow for direct collaboration with a provider or clinician? Beyond just being able to share your data.

Interoperability and Data Sharing	
Is it a self-help/self-management tool?	Provides activities that can be used for self-help and self-management, such as mood or symptom tracking or mindfulness exercises.
Is it a reference app?	Provides information and references but not necessarily activities. psychoeducation first.
Is it intended for hybrid use with a clinician in conjunction with treatment plan?	Is the app intended to be used as an adjunct to care? Apps that have built-in methods of connecting with a provider meet this criteria. However, a teletherapy app would not be intended for hybrid care, as the app replaces in-person care.
Interoperability & Data Sharing	
Do you own your data?	This can be found in the privacy policy of the app but is relevant for data sharing capacity. Can a user see and access their data from the app?
Can you email or export your data?	Can data be downloaded or exported, or emailed straight from the app?
Can you send your data to a medical record?	Does the app sync with EMR? (most apps are not currently equipped with connections to medical record, so this will likely be no)

MODULE 3 ASSESSMENT

Scenario: A patient is interested in using an app to log their symptoms every day. They want the app to have secure privacy measures, but they do not feel the need to delete their data after they are finished using the app. They also want the app to be customizable to their specific symptoms.

Scenario: A patient is interested in using an app for mindfulness activities. Privacy is not a main concern as they will not be entering any personal information into the app. However, they are interested in an app that has some proven effectiveness. This person would also prefer an app that is relatively simple to use and only offers a few features.

Scenario: A patient would like to use an app to log the events of their day and their mood corresponding with those events. They are willing to spend more time learning a more complex app if that app has multiple useful features. They are open to journaling, surveys, and mindfulness activities. However, they do not want to pay for the app or any in app features.

MODULE 4

Content Summary

Tools	Skills
Diagnoses	Depressive disorders
	Anxiety disorders
	Schizophrenia
Clinical Red Flags	Warning signs
	When to seek help
HIPAA Compliance and Confidentiality	Adhere to HIPAA regulations
	Understand and practice program specific compliancy and confidentiality protocols
Data Streams	Active Data
	Passive Data

MODULE 4 Part 1

Examples of Determining Key Phrases

<u>Depression:</u> According to the American Psychiatric Association, Depression (major depressive disorder) is a common and serious medical illness that negatively affects how you feel, the way you think and how you act. Fortunately, it is also treatable. Depression causes feelings of sadness and/or a loss of interest in activities once enjoyed. It can lead to a variety of emotional and physical problems and can decrease a person's ability to function at work and at home. Depression symptoms can vary from mild to severe and can include:

- o Feeling sad or having a depressed mood
- o Loss of interest or pleasure in activities once enjoyed
- o Changes in appetite — weight loss or gain unrelated to dieting
- o Trouble sleeping or sleeping too much
- o Loss of energy or increased fatigue
- o Increase in purposeless physical activity (e.g., hand-wringing or pacing) or slowed movements and speech (actions observable by others)
- o Feeling worthless or guilty
- o Difficulty thinking, concentrating or making decisions
- o Thoughts of death or suicide

Symptoms must last at least two weeks for a diagnosis of depression.

Also, medical conditions (e.g., thyroid problems, a brain tumor or vitamin deficiency) can mimic symptoms of depression so it is important to rule out general medical causes.

Depression affects an estimated one in 15 adults (6.7%) in any given year. And one in six people (16.6%) will experience depression at some time in their life. Depression can strike at any time, but on average, first appears

during the late teens to mid-20s. Women are more likely than men to experience depression. Some studies show that one-third of women will experience a major depressive episode in their lifetime.

 You can learn more at: https://smiadviser.org/tag/depression and https://www.psychiatry.org/patients-families/depression/what-is-depression

Anxiety: According to the American Psychiatric Association, anxiety disorders differ from normal feelings of nervousness or anxiousness and involve excessive fear or anxiety. Anxiety disorders are the most common of mental disorders and affect more than 25 million Americans. But anxiety disorders are treatable and a number of effective treatments are available. Treatment helps most people lead normal productive lives.

Anxiety is a normal reaction to stress and can be beneficial in some situations. It can alert us to dangers and help us prepare and pay attention. Anxiety disorders differ from normal feelings of nervousness or anxiousness, and involve excessive fear or anxiety. Anxiety disorders are the most common of mental disorders and affect nearly 30 percent of adults at some point in their lives. . But anxiety disorders are treatable and a number of effective treatments are available. Treatment helps most people lead normal productive lives.

Fear is an emotional response to an immediate threat and is more associated with a fight or flight reaction – either staying to fight or leaving to escape danger. Anxiety disorders can cause people into try to avoid situations that trigger or worsen their symptoms. Job performance, school work and personal relationships can be affected.

You can learn more at: https://www.psychiatry.org/patients-families/anxiety-disorders and https://smiadviser.org/

Schizophrenia: According to the American Psychiatric Association, zchizophrenia is a chronic brain disorder that affects about one percent of the population. When schizophrenia is active, symptoms can include delusions, hallucinations, disorganized speech, trouble with thinking and lack of motivation. However, with treatment, most symptoms of schizophrenia will greatly improve and the likelihood of a recurrene can be diminished.

While there is no cure for schizophrenia, research is leading to innovative and safer treatments. Experts also are unraveling the causes of the disease by studying genetics, conducting behavioral research, and using advanced imaging to look at the brain's structure and function. These approaches hold the promise of new and more effective therapies.

The complexity of schizophrenia may help explain why there are misconceptions about the disease. Schizophrenia does not mean split personality or multiple-personality. Most people with schizophrenia are not any more dangerous or violent than the general population. Most people with schizophrenia live with their family, in group homes or on their own.

You can learn more at: https://www.psychiatry.org/patients-families/schizophrenia and https://smiadviser.org/category/schizophrenia

Clinical Red Flags: A clinical red flag is a warning sign that something is not right and urgent help is needed. For example, it may be a person endorsing thoughts of suicide with intent and a plan – something that requires immediate attention and help. Or it may be a person reporting they are being abused by their partner or caregiver. While clinical red flags will vary based on the population you work with and the services your team provides, it is important to ensure there is training on all emergency situations. This training should include warning signs, immediate action necessary, and next steps to consider.

HIPAA: HIPAA stands for the Health Insurance Portability and Accountability Act. It offers regulations around how personally identifiable information must be protected, maintained, and when it may (and may not) be shared by

healthcare workers and others. You can learn more at https://www.hhs.gov/hipaa/for-individuals/guidance-materials-for-consumers/index.html and https://smiadviser.org/?s=hipaa

Active Data: Active data refer to digital data that a patient fills out such as a survey. For example, if you ask a person to log onto a website or app and fill out a survey – they must 'actively' engage in taking the survey for data to be generated. One example of active data is taking the PHQ-9 or GAD-7 surveys on the SMI Adviser app: https://smiadviser.org/getapp

Passive Data: In contrast to active data, passive data is data generate from digital devices that takes no active engagement. Examples could be steps counted by a fitness tracker or smartphone. Some people may also use their phone to track sleep as another example of passive data. The most common uses of passive data include tracking steps, sleep and sometimes screen time.

Case Scenario:
You are a digital navigator in an adult outpatient mental health clinic, all patients are assigned a clinician and digital navigator (you) as part of their mental health care team. One of the clinicians you work with reports they are looking for an app to use with their client and have requested your assistant.

Client information (via Clinician):
Client is a 31-years-old, female identified, fully employed, and was voluntarily seeking services with the encouragement of her long-time and 'supportive' husband. Client reported difficulties staying asleep, decrease in appetite, and constantly worried about her family's wellbeing. Client reported she enjoyed using smartphone technology in her personal life but never used apps for health care. Client stated she was open to trying apps but stated her privacy was 'a high priority.' Client also reported she enjoyed outdoor activities, journaling, and watching movies. Client disclosed this was her first time seeking mental health treatment and no one in her immediate family had ever undergone mental health treatment before. Lastly, client stated her mother and sister were reclusive and only left their homes when required (ex. work or appointments).

Clinician reported the following co-created goals were established during the first meeting.
1. Learn about anxiety and depression symptoms
2. Learn to identify triggers of stress
3. Exercise more

Practice exercise:
1. Identify three clinically relevant terms from the client information above:
    a. Difficulties staying asleep
    b. Decrease in appetite
    c. Constantly worrying about family's wellbeing
2. Identify any relevant information provided which may help you select an app
    a. Client stated her privacy was 'a high priority.'
3. Enjoy phone feature you may immediately suggest to the patient?
    a. Step count
4. List one activity the client likes to do.
    a. Journaling
    b. Watching movies
    c. Outdoor activity

MODULE 4 Part 2
Example Evaluation

Anxiety | Mood

October | October
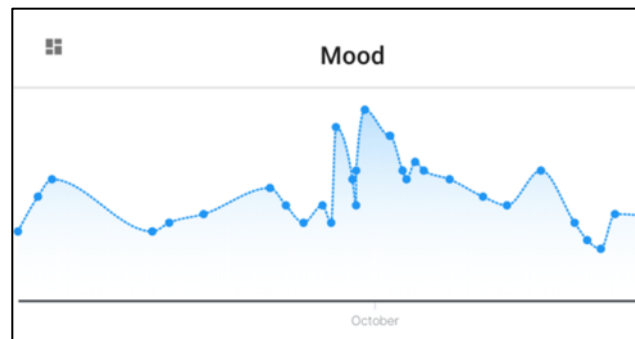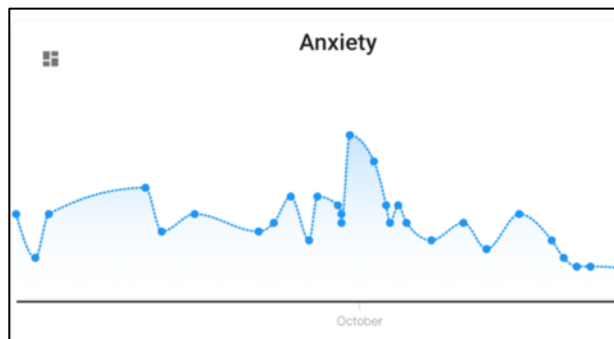
In the graphs above, a patient was asked to take an anxiety and mood survey (GAD-7 and PHQ-9, respectively) each day. There is an apparent increase in both anxiety and mood scores that correspond with each other. The digital navigator should be able to identify this increase of scores and report this information to clinician so that the clinician may discuss this with the patient during their visit.

Additional Examples

Example Figure 1:
Trainee should be able to identify this is a correlation matrix, where red indicates a positive correlation and purple indicates a negative correlation. They should also be able to identify a larger, darker circle indicates a stronger correlation. The trainee should be able to note that when this person reports better sleep, they report lower anxiety and depression scores. They should also note that psychosis levels correlate strongly with both anxiety and depression levels.
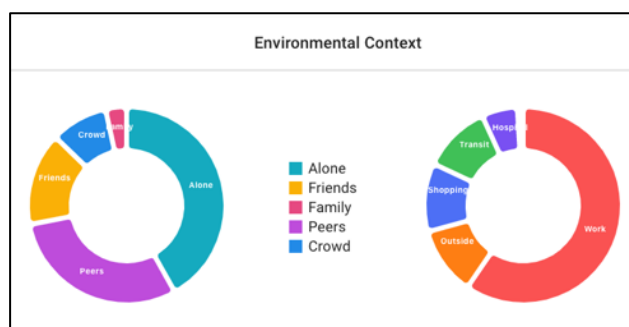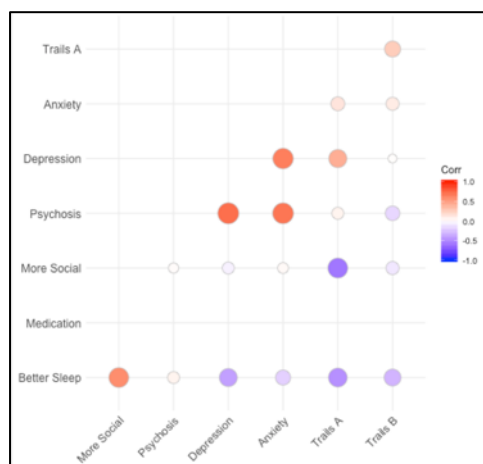
Example Figure 2:
Trainees should be able to identify these graphs as pie graphs that provide context about a patient's environment. Trainees should also be able to indicate this patient spends most of their time at work and alone, followed by with peers.
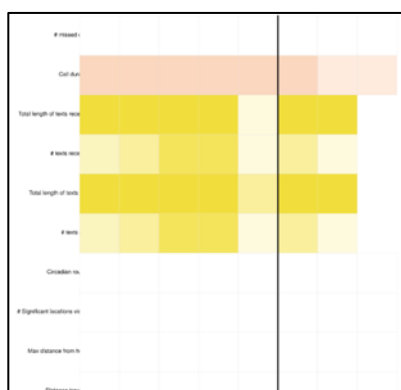
Example Figure 3:
Trainees should be able to identify this is a sensor adherence heat map. A darker square corresponds with a high amount of data from the given stream. Trainees should be able to identify they have not received any data from circadian routine, # of significant locations, max distance from home, distance traveled, home location, or GPS amount recorded. They should be able to identify the strongest streams as total length of texts sent and total length of texts received. Finally, they should note at the start of week 2, they stopped receiving information from call and text message logs, indicating a technical error may have occurred.

MODULE 5

Content Summary

Tools	Skills
Interviewing Methods	Asking for clarification
	Open ended questions
Communication Methods	Refer patient to appropriate sources
Convening Trust and Transparency	Acknowledge role limitations which conveys honesty and trust
Treating Patients in Need of Additional Support	Knowing when more help is needed and helping support
Working with a Team	Understanding the role on the team
Trauma Informed Care	Knowing of it influences care
Digital Health Navigator Operations	Documentation and ensuring communications are clear

Examples of Determining Key Phrases

The broad clinical definitions used were taken from the Diagnostic and Statistical Manual of Mental Disorders: DSM 5[1]. Also see Module 4 for further definitions.

Depressive Disorders, which include Major Depressive Disorder
Symptoms can include:

"presence of sad, empty, or irritable mood, accompanied by somatic and cognitive changes
that significantly affect the individual's capacity to function. What differs among them
(other diagnoses in this category) are issues of duration, timing, or presumed etiology."

(APA, pg. 155., 2013)

Anxiety Disorder, which include, Social Anxiety Disorder, Panic Disorder, Generalized Anxiety Disorder, Substance/Medication-Induced Anxiety Disorder
Symptoms can include:

"features of excessive fear and anxiety and related behavioral disturbances…
anxiety disorders differ from one another in the types of objects or situations
that induce fear, anxiety, or avoidance behavior, and the
associated cognitive ideation."

(APA, pg. 189., 2013)

Trauma Informed Care: Being Trauma-informed means to:
- Recognize the prevalence of adverse childhood experiences (ACEs) / trauma among all people
- Recognize that many behaviors and symptoms are the result of traumatic experiences
- Recognize that being treated with respect and kindness – and being empowered with choices – are key in helping people recover from traumatic experiences

The goal of trauma-informed care is to avoid re-traumatizing someone. "Re-traumatizing refers to inadvertently recreating some conditions of a persons' previous trauma, causing them to relive it in the moment." Trauma-informed care aims to help people find meaning and purpose in their lives, fulfill valued roles and engage in a life in a community of their choosing, see themselves as more than their trauma(s), help people identify and pursue avenues to reducing distress and problems in their lives and exercise personal autonomy and self-determination in making choices. Trauma-informed care means shifting from the medical question of "What's wrong with you?" to the trauma-informed question of "What's happened to you?".

Learn more at https://smiadviser.org/tag/trauma-informed-care and https://smiadviser.org/knowledge_post/what-does-it-mean-to-be-trauma-informed where this definition was taken from.

Example Case Scenario

You are a digital navigator in an adult outpatient mental health clinic and all patients are voluntarily seeking mental health services. You and the clinician have been working with the patient for a month and during clinical rounds, you and the clinician noticed a sudden decrease in app use by the patient. The patient meets with the clinician weekly and meets with the digital navigator as needed.

> Digital Navigator (DN): How is the app working for you? Any questions?
> Patient: No, everything seems to be okay.
> DN: Have you had a chance to look at your data from the past week?
> Patient: No, I couldn't really figure it out.
> DN: Okay, let's spend a few minutes looking at it together. Does that sound okay?
> Patient: Sure.
>
> *Digital Navigator opens app platform on a computer and shows the patient a graph. The graph shows the patient was engaging with the app several times for the first few days. The patient was taking surveys describing their moods, logging their sleep, and their step count was tracked. However, after several days, there were no moods surveys completed or sleep patterns logged, but the step count remained steady.*
>
> DN: Okay, let's look at the graph. It shows lots of activity for the few first days and as you can see here (points to screen) the activity seems to suddenly stop. Was there a problem with the app or your phone?
> Patient: Oh yes, I like the app overall but when I couldn't see my results, I stopped using it because I didn't know how my data was being used.
> DN: That's understandable. Let me show you everything the app tracks and show you how you can independently view your data on your own.

In the given scenario, there were many engagement techniques the digital navigator used. The digital navigator begins the conversation with an open-ended question:

Digital Navigator (DN): How is the app working for you?

An open-ended question is a question in which yes or no is not a sufficient answer. The digital did not ask 'Are you using the app?' or 'Have you used the app?' but rather asked a broader question of 'How' is the app working. Open ended questions do not always lead to a non-one or two-word answer but can be helpful to start a conversation.

Later in the conversation when it has been established the patient is no longer actively using the app the digital navigator states:

Was there a problem with the app or your phone?

This is a crucial point in the conversation as the digital navigator is asking for clarification on why the app has stopped being used and is not making assumptions. The patient then discloses their apprehension for using the app. If the digital navigator had made assumptions surrounding low app engagement, the navigator could have assumed incorrectly and possibly negatively impacted their working relationship. The second part of the case scenario has been provided below:

> DN: Okay, now that you have accessed your data independently a few times do you think you'll be able to do that when you are by yourself?
> Patient: Yeah, I think so.
> DN: Okay, and if you have any questions then we can set up another meeting.
> Patient: Okay, that sounds good… actually, I have one more question. How long do you think I'll have to use the app? When will I start to feel better?
> DN: These are excellent questions. As we discussed in our initial meeting with your clinician, the app is a tool, and we are collecting data to learn more about what works and what may not work for you. I do not know how long you will have to use the app or when you will start to feel differently. I am only here to help with the technology side of things but that seems like a great discussion to have with your clinician. That being said, if you would like to try a different app or track other areas of your life, let's say concentration, we can talk to your clinician and figure out something that works.

Another important exchange took place. When the patient asked:
> How long do you think I'll have to use the app? When will I start to feel better?

The digital navigator could have asked a clarifying question, but did not because the navigator is not equipped to provide clinical feedback. Rather the digital navigator reminded the patient of the app's purpose (a tool), restated their role (I am only here to help with the technology), and encouraged the patient to seek feedback from their clinician (…that seems like a great discussion to have with your clinician). Finally, the digital navigator ended the discussion by reminding the patient they had power and autonomy in the clinical relationship by stating
> …if you would like to try a different app or track other areas of your life, let's say concentration, we can talk to your clinician and figure out something that works

Throughout the entire case scenario, the digital navigator remained true to their role limitations (stating 'I do not know when you will start to feel differently. I am only here to help with the technology side of things) while also referring the patient back to the clinician (stating: …that seems like a great discussion to have with your clinician…. We can talk to your clinician and figure something that works).

Additional Examples

Case Example 1

In the following case scenario, you are a digital navigator in an adult outpatient mental health clinic and you and the clinician have been working with the patient for over a month. The patient meets with the clinician weekly and meets with you as needed. The patient is a 30 something individual who has sought treatment due to feelings of worthlessness and states "I don't enjoy things anymore… I can't remember the last time I felt motivated to accomplish anything."

The following example will highlight how a digital navigator can communicate concerns and make referrals to appropriate channels. The exchange took place toward the end of a technology meeting.

DN: Okay, during our meeting today we have reviewed how to access data inputs, where to locate surveys, and how to log your sleep patterns. Are there any questions you have?

Patient: Just one…. My clinician mentioned they believe my low energy levels and lack of motivation are symptoms of depressive. I looked online and I don't think I am depressed. I have a great life I am just stuck right now. What does the data tell you?

DN: Thanks for the question. As a digital navigator it is my responsibility to help pick out an app that would work best for your lifestyle and to help teach you ways in which you and your clinician can track some data trends. However, since I am not your clinician I cannot make interpretations of what your data points say, I can only communicate what I am seeing. Does that make sense?

Patient: No…

DN: Okay, let's take your sleep patterns. Now that you will begin logging when and for how long you sleep I can show you any trends that may develop. For instance, maybe you sleep in on the weekends. However, I cannot say that your sleeping patterns are caused by stress, depressive symptoms or other mental health reasons. That is a discussion you can have with your clinician as they will most likely discuss the effects of your sleeping patterns with you. Does that make sense?

Patient: A little.

DN: I can help you learn how to utilize an app and how to find that data, but I cannot give you any clinical reasonings for the data inputs.

Patient: Okay, I get it.

In the following exercise the digital navigator will be asked to select the referral statement and explanation given for referral.

1. Please select the best referral statement from the options below.
   a. As a digital navigator it is my responsibility to help pick out an app that would work best for your lifestyle and to help teach you ways in which you and your clinician can track some data trends
   b. …since I am not your clinician I cannot make interpretations of what your data points say, I can only communicate what I am seeing.
   c. However, I cannot say that your sleeping patterns are caused by stress, depressive symptoms or other mental health reasons. That is a discussion you can have with your clinician as they will most likely discuss the effects of your sleeping patterns with you. (Correct Answer)

2. Please select the best referral explanation from the options below.
   a. Are there any questions you have?
   b. I can help you learn how to utilize an app and how to find that data, but I cannot give you any clinical reasonings for the data inputs. (Correct Answer)
   c. Now that you will begin logging when and for how long you sleep I can show you any trends that may develop.

Case Example 2

In the following case example, you are a digital navigator in an outpatient mental health clinic and you are working with a new patient. He is 18 years old and his functioning has declined over the past 2 years, with dropping out of high school. More recently he has withdrawn socially and spends much of his time in his room. He was brought to the clinic by his grandmother.

At the patient's first visit, his doctor asked you to help him track his mood and anxiety on his smartphone. He used the app very little between his two clinic visits. At the end of this patient's second visit to the clinic, this exchange took place.

DN: What did you think of using the app to log your symptoms?

Patient: It was fine.

DN: Did you have any technical difficulties with it?

Patient: No.

DN: Okay, I see you've taken a few surveys, which is a really great start! Is there anything you'd be interested in adding to the app?

Patient: I haven't been sleeping well lately. Is there a way I could use the app to track that?

DN: Sure. I can add a survey that you can take in the mornings to log your sleep.

Patient: Okay.

DN: Is there anything you dislike about this app?

Patient: No. I am just getting used to it. I don't always remember to use it.

DN: I can help you set up notifications on the app so it will remind you once per day to use it. Will that help?

Patient: Yes, definitely.

In this example, the digital navigator was able to gain a better understanding of how the patient would like to customize the app to boost engagement.

References

1. American Psychiatric Association, American Psychiatric Association, eds. *Diagnostic and Statistical Manual of Mental Disorders: DSM-5*. 5th ed. Washington, D.C: American Psychiatric Association; 2013.