PDA Intervention Plan
Implementing Electronic Memory and Organization Aids

Using this Guide

Use this guide to provide assistance for intervention team members to assess the need for electronic memory/organization intervention, develop an intervention plan, and monitor progress through evaluation forms.

Electronic Memory Organization Aids

PDAs, Smartphones, and cell phones all include personal assistance functions. Cell phones are included since many feature the same functions as PDAs.

PDA stands for personal digital assistant and is the most complex and computer-like of all the devices. In fact, PDAs are often referred to as pocket computers or palmtops. Functions include address books, alarm, calendar, internet, e-mail, and word processing software.

- Examples: Palm Zire™, Dell Axim™

Smartphones combine a full-featured mobile phone with handheld computer functions such as touchscreen, miniature QWERTY keyboards, calendar, address book, and notepad.

- Examples: Blackberry™, Nokia™

Cell phones are portable electronic devices used for mobile communication. Memory aids on cell phones include alarms, calendars, and e-mail access.

- Examples: Motorola™, Nokia™, Samsung™, etc.

Key Concepts

- Increase independence for your client
- Assist with organization and memory
- Provide a means of planning
- Promote increased socialization with peers and family

Tips for Interventionists

- Acquire knowledge and experience about devices to better assist your client.
- Work on your client’s responses using the device and then move to teaching entry if possible.
- Involve the intervention team in the use of device.
- Begin with frequent intervention and gradually increase sessions over time.
- Encourage your client to wear the device, for example on a lanyard, to prevent loss or theft.
- Get feedback from team and your client on a regular basis.
- Encourage exploration of device through use of various functions, including games.
- Remember that the use of device is not limited to work-tasks and can be used for fun.
Memory and Organization Assessment

Answer the following questions in relation to your client to assess for memory/organization intervention.

<table>
<thead>
<tr>
<th>Name of Client:</th>
<th>Date:</th>
</tr>
</thead>
</table>

### Appointments (day, time, event)

- **How well does your client keep track of appointments?**
  - 1
  - 2
  - 3
  - 4
  - 5
  - 6
  - 7
- **Could a device assist with this issue?**
  - Currently
  - In 1 year
  - In 5 years
  - Never
- **What is your client’s current organization method?** (PDA, cell phone, Smartphone, planner, other)
- **Would a device help for keeping track of appointments?**
  - YES
  - NO

### Contacts (name, address, phone, other)

- **How well does your client keep track of contacts?**
  - 1
  - 2
  - 3
  - 4
  - 5
  - 6
  - 7
- **Could a device assist with this issue?**
  - Currently
  - In 1 year
  - In 5 years
  - Never
- **What is your client’s current organization method?** (PDA, cell phone, Smartphone, planner, other)
- **Would a device help for keeping track of contacts?**
  - YES
  - NO

### To Do list (daily, weekly, long-term)

- **How well does your client plan or follow to do lists?**
  - 1
  - 2
  - 3
  - 4
  - 5
  - 6
  - 7
- **Could a device assist with this issue?**
  - Currently
  - In 1 year
  - In 5 years
  - Never
- **What is your client’s current organization method?** (PDA, cell phone, Smartphone, planner, other)
- **Would a device help for planning and following to do lists?**
  - YES
  - NO

### Calculator, Expense List

- **How well does your client keep track of finances or use a calculator?**
  - 1
  - 2
  - 3
  - 4
  - 5
  - 6
  - 7
- **Could a device assist with this issue?**
  - Currently
  - In 1 year
  - In 5 years
  - Never
- **What is your client’s current organization method?** (PDA, cell phone, Smartphone, planner, other)
- **Would a device help for use of a calculator or expense list?**
  - YES
  - NO

### Self-reminders (voice or written memos)

- **How well does your client keep track of reminders/memos?**
  - 1
  - 2
  - 3
  - 4
  - 5
  - 6
  - 7
- **Could a device assist with this issue?**
  - Currently
  - In 1 year
  - In 5 years
  - Never
- **What is your client’s current organization method?** (PDA, cell phone, Smartphone, planner, other)
- **Would a device help for self-reminders?**
  - YES
  - NO

### Camera

- **How well does your client keep track of personal events?**
  - 1
  - 2
  - 3
  - 4
  - 5
  - 6
  - 7
- **Could a device assist with this issue?**
  - Currently
  - In 1 year
  - In 5 years
  - Never
- **What is your client’s current organization method?** (PDA, cell phone, Smartphone, planner, other)
- **Would a device help for a record of personal events?**
  - YES
  - NO

*Independence Rating Scale:*

- 7 = independent (no prompts needed)
- 6 = modified independence (independent with certain partners/opportunities)
- 5 = low assistance (prompts needed in 2/10 attempts)
- 4 = moderate assistance (prompts needed in 4/10 attempts)
- 3 = moderate/high assistance (prompts needed in 6/10 attempts)
- 2 = high assistance (prompts needed in 8/10 attempts)
- 1 = total prompting & assistance
This is a guide to create a projected plan of intervention for a memory/organization device aid. Review the guidelines on the left and create a plan on the right.

Name of Client:

<table>
<thead>
<tr>
<th>Plan Guidelines</th>
<th>Plan</th>
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<tbody>
<tr>
<td><strong>Environment &amp; Partners</strong></td>
<td></td>
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<tr>
<td><strong>In what environments could your client potentially use a memory/organization aid?</strong></td>
<td><strong>Who are potential partners?</strong></td>
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<tr>
<td>o school</td>
<td>o teacher</td>
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<tr>
<td>o work</td>
<td>o classroom aide</td>
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<tr>
<td>o home</td>
<td>o parent</td>
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<tr>
<td>o community/social</td>
<td>o spouse</td>
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<td>o sibling</td>
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<tr>
<td><strong>Opportunities</strong></td>
<td></td>
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<tr>
<td>According to environment, which opportunities might be aided by the use of a device?</td>
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<tr>
<td>o reminders for taking medicine, appointments, meetings, tests/assignments, shopping/shopping lists</td>
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<tr>
<td>o keeping contacts organized and accessible</td>
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<tr>
<td>o to-do/task list at work or school</td>
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<tr>
<td>o planning the day and keeping to that schedule (calendar)</td>
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<td>o financial management</td>
<td></td>
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<td>o healthcare management and maintenance</td>
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<tr>
<td>o interacting with peers/co-workers</td>
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<tr>
<td>o easy access to e-mail, computer functions, Microsoft Office™</td>
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<tr>
<td><strong>Functions</strong></td>
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<tr>
<td>What functions might be helpful for your client?</td>
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<tr>
<td>o calendar</td>
<td>o camera</td>
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<tr>
<td>o contact list (address/phone)</td>
<td>o games</td>
</tr>
<tr>
<td>o task list</td>
<td>o computer functions</td>
</tr>
<tr>
<td>o notes/memos:</td>
<td>o Microsoft Office™</td>
</tr>
<tr>
<td>o written</td>
<td>o oral</td>
</tr>
<tr>
<td>o calculator</td>
<td></td>
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<tr>
<td><strong>Skill Outcomes</strong></td>
<td></td>
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<tr>
<td>What outcomes are initially pertinent for your client?</td>
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<tr>
<td>o You may want to start with recognition of alarms and move to outcomes specific to your client’s needs.</td>
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<tr>
<td>Examples:</td>
<td></td>
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<tr>
<td>o Appointments: responds to one task in a timely manner each day.</td>
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<tr>
<td>o Contacts: Finds and calls 1-2 people when indicated.</td>
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<tr>
<td>o To Do List: Completes a job after alarm reminds to do so.</td>
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<tr>
<td>o Calculator: Adds simple amounts to determine total charge for lunch.</td>
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<tr>
<td>o Self-reminder: Follows through with taking medications on time.</td>
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<tr>
<td>o Camera: Takes pictures to use as a focus for discussion with family members.</td>
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<td>What is the present level and projected level of this skill?</td>
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<tr>
<td>o Refer back to the independence scales on page 2 for present level functioning.</td>
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<tr>
<td><strong>Schedule</strong></td>
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<tr>
<td>When would your client be using the aid?</td>
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<tr>
<td>o What activities?</td>
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<tr>
<td>o What days?</td>
<td></td>
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<tr>
<td>o What times?</td>
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</tbody>
</table>

Customizations Possible:
The following features allow for personalization of the device. Some may be important to your client.
- ring tones, font changes, screen sizes, backgrounds, & color schemes
Name of Client:               Device:
Environmental Support Person:             Date:
Client Self-Assessment
1. How often do you use your device?
   a. daily: ____ times per day                           d. less than once per week
   b. couple times per week                             e. never
   c. once a week
2. If you never use your device, why is that?
   a. forgot how to use it                                   d. I need more help with it
   b. no one helps me with it                           e. technical problems
   c. I don’t like it                                    f. other: (explain)
3. If your client does use the device, what is he or she using it for?
   a. taking photos                                              f. calculator
   b. playing games                                             g. to-do list
   c. contact lists                                                 h. “synching to computer”
   d. calendar for reminders                             i. voice recording
   e. memo pad                                                     j. other: (explain)
4. Where is your client using the device?
   a. home                                                              c. work
   b. school     d. community
5. Who helps your client the most with the device?
   a. self       d. peer
   b. family member    e. other: (explain)
   c. teacher/staff member
6. What other functions would you like to see your client learn to use?
   a. camera     f. create memos
   b. calendar for reminders    g. games
   c. calculator     h. Microsoft Office (if applicable)
   d. create contact list    i. note-taking
   e. task lists     j. other: (explain)
7. Is there anything you would like to share or ask?

Today’s Plan:
Skills established:
Rate skill outcomes on the independence scale of 1-7.

Skills to continue:

Skills to develop:

Instruction
What was the most effective method of instruction (verbal, visual, modeling)?

Did the client require multiple repetitions (if so, how many)?

Was there a need for additional cueing, prompting in addition to directions?

Additional comments:

Device
What features seemed to help/hinder?

Any missing features that could have helped?

Additional comments:

This work is produced in partnership with the Assistive Technology Collaboration on Cognitive Disabilities (University of Akron, Temple University, Spaulding Rehabilitation Hospital, and the Brain Injury Association of America) and was funded by the National Institute on Disabilities and Rehabilitation Research (NIDRR) Project Number H13A030810.