

# Positive Wellness Participant Session Guide

This manual provides detailed, step-by-step instructions for conducting the *POSITIVE WELLNESS* linkage to care intervention. There are seven different sessions, as listed below. All sessions are individual, one-on-one sessions and are intended to be delivered as mutually agreed upon by the PW Counselor and the participant.

- Session 1: Engagement: Foundations of Trust
- Session 2: Exploring What it Means to Live with HIV
- Session 3: Living in Balance: Health and Wellness
- Session 4: Linking to Care
- Medical Appointment: Walk with Me
- Session 5: New Journey: Final Session
- Follow-up

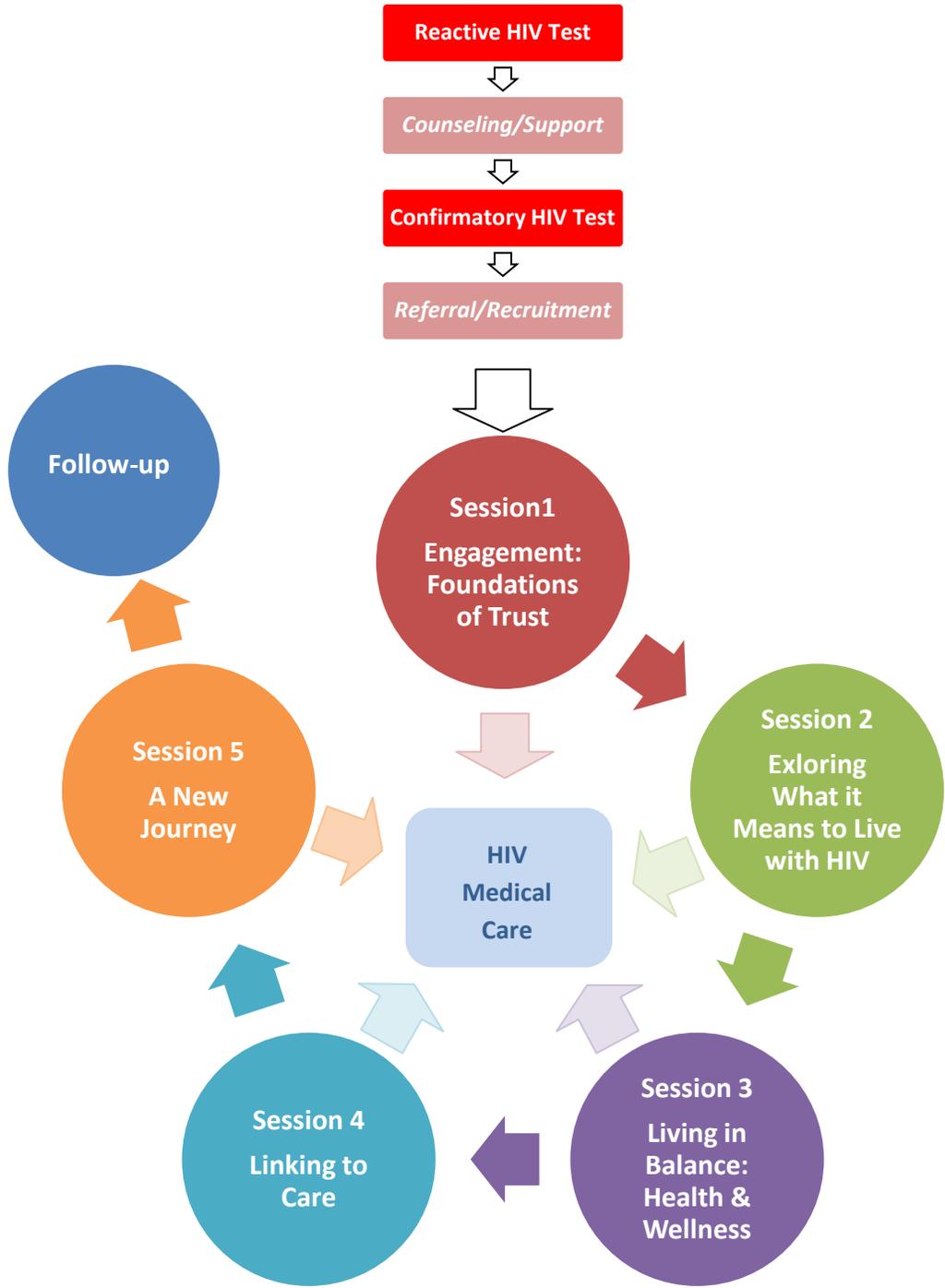
During each session, the participant is encouraged to link to appropriate HIV care, and therefore helping the client schedule an appointment, making introductions to the care provider/physician and/or attending an initial medical appointment with the participant at their request are potential outcomes for any of the *POSITIVE WELLNESS* sessions.

Worksheets and documentation forms used in each session are shown at the end of the program manual.

Please note although the Participant Session Guide represents the flow from introductions to linking to care and follow-up, it is meant as a guide, and individual considerations will influence agenda, timeframe and content of sessions.

When we educate ourselves, address important health needs and respond compassionately, we honor our traditions of sharing what we know, helping others and respecting all life.

Matt Ignacio  
(Tohono O'odham)



*POSITIVE WELLNESS*

Session Overview

## Getting Started

### Who conducts the sessions?

An experienced counselor, such as a behavioral counselor, mental health professional, experienced risk reduction counselor, or experienced group PW Counselor should conduct Session One. This person must be comfortable building rapport, and putting the participant at ease in what is probably a very uncomfortable situation. This person should pay careful attention to details to assure correct information is recorded, questions are being addressed fully, and that the session remains as participant centered as possible. The PW Counselor should be able to explain the intervention and answer the participant's questions about it.

### When do sessions occur?

*Session 1: Engagement: Foundations of Trust* can occur any time after a person receives a confirmed HIV reactive test result – this can be the same day or two months later. Knowing the sooner people enter care the better the health outcomes, then delaying Session 1 is not beneficial to the person. Session 1 could also be conducted with somebody who is seeking re-entry into care – in which case they may have been living with HIV for a longer period of time.

Sessions 2-5, can occur every 1-4 weeks after Session One. The meeting times should be mutually agreed upon by the PW Counselor and the participant. The length of time for any given session should be flexible and mutually agreed upon to respect both the PW Counselor's schedule and that of the participant. ***The Session Times listed with each module are estimated times***, and factors such as communication styles, activity engagement, travel time and the potential linking to care process can affect the amount of time needed.

### Where do sessions take place?

Because of the sensitive and personal nature of the topic and the potential relative newness of the diagnosis, Session One must be conducted in a private enclosed room, where confidentiality can be assured and interruptions avoided. It could be in an office, clinic, at a home, coffee shop, or even a park, as long as the participant feels comfortable.

Sessions 2-5 can be held in a place that both the PW Counselor and participant feel most comfortable in. Community-based active counseling approaches are recommended where possible.

### Delivery and Facilitation

*POSITIVE WELLNESS* is dependent on its culturally appropriate delivery. Many of the subtle nuances that are important to the culturally appropriate delivery of a structured intervention will be put into practice by a culturally aware and sensitive agency, clinic, and PW Counselor. Successful facilitation of the sessions will also require individuals to draw upon their counseling skills and techniques (such as active listening, reframing, offering options and not directives, and participant centered techniques). ***It is highly recommended any interactions with the participant be positive, non-judgmental and accepting.***

As with any participant-centered or strengths-based approach, the participant should be involved in every step of their care and treatment and is entitled to as much information as possible to make sound decisions about the course of their care.

Because many Native people are not familiar or comfortable with the structure of the medical system, some time may be needed to focus on navigating a maze of services outside of HIV care – diabetes care, housing, food assistance, transportation, social services or self-care needs.

### **Introductions**

Introductions are an important cultural practice for many Native people. It is a time for individuals to share a variety of essential personal information pertaining to their Native identity. Exactly what information is shared varies based upon the setting and tribal customs, however it is common to explain family affiliation, ancestry, heritage and any other pertinent information. The reasons for these lengthier introductions also vary from tribe to tribe. Most importantly, these introductions establish rapport and trust between the PW Counselor and the participant. Establishing relationships and interpersonal connections is vital before any work can begin. For Native communities this is a critical step to establish trust as our communities have experienced a legacy of mistrust.

Another important part of introductions is to establishing pronoun preferences (he/him/his, she/her/hers, ze or another term). When you introduce yourself, it is recommended that you also let the participant know what your preferences are, so they can feel more comfortable sharing theirs. You may be the first person they've encountered to include this part of introductions, and the client may be hesitant or awkward expressing their preferences. However, it is a positive way to express openness to the variety of gender identities in different communities, and it is one more way to engage participants who gender identify in non-conforming ways. ***It is vitally important that you strive to use their preferred pronouns and name, since it shows respect and understanding.***

The *POSITIVE WELLNESS* intervention has time built into the sessions for introductions and check-ins. More time should be given during these portions so participants have the time and space they need to feel comfortable with their environment, the PW Counselor, and the program. The PW Counselor should also be prepared to introduce themselves in a similar way as how participants are introducing themselves. Being genuine and comfortable with who you are is important, whether you are Native or not, gender non-conforming or not.

### **Referrals**

As with all referral relationships, you should research partnering agencies to discover information to make the connection seamless and confident, and to make sure their services are Native appropriate. One of the ways to do this is to ask your Peer Advisory Board or Community Advisory Board members, counselors, Tribal Council members, tribal or urban AI/AN/NH health board members and tribal or county health department staff to become part of your referral network by identifying appropriate HIV, substance abuse, and health services for AI/AN/NH participants. You should know the following information about any referral organizations, agencies, or clinics that may be potential partners in your network. Ask:

- Is the staff diverse, i.e. is the staff familiar or interested in AI/AN/NH health issues?
- Do participants have positive experiences with the agency overall?
- Are they respected in the community?
- Do they have a reputation for high quality, confidential services?
- Does the agency have Native-specific programming?
- Is the agency knowledgeable and sensitive to Native IDU, addiction, and/or LGBTQ/Two Spirit issues?

The answer to these questions should for the most part be “yes” for any agencies to which you plan to refer your participants. There is some room for flexibility however, i.e. participant may be comfortable seeing a non-Native clinician. However participant eligibility, high participant satisfaction, high quality and confidential services should be “given” characteristics for all referral agencies you endorse and use as part of your *POSITIVE WELLNESS* services.

### **Spiritual and Traditional Advisers**

As noted in Bouey & Duran (2000), participant satisfaction surveys showed high levels of engagement and positive perceptions of HIV treatment and case management services that have Native-centric aspects, such as traditional healers, ceremonies, talking circles and other cultural/spiritual activities. It is highly encouraged to include Native referral sources, who can lead or provide these important components of a holistic circle of care for participants who may want to participate in them. Where possible, include more than one person (preferably of more than one gender), and individuals from local tribes. Any traditional resource adviser should be comfortable and knowledgeable about HIV, LGBTQ and two spirit issues, and confidentiality policies of your agency. They may also be helpful in tailoring your program to the needs of your participant base.

### **Confidentiality Safeguard Recommendations**

Because of its impact on healthcare perceptions and engagement in care for Native peoples, it is of the utmost importance that safeguards be put in place to protect the identity of participants in *POSITIVE WELLNESS*. Listed below are some specific issues and suggested precautions you and your agency will need to consider when dealing with personal participant information:

- Locating a safe space for sessions
- Using codes in lieu of using names on documentation
- Confidentiality agreements for staff
- Using PW Counselors who are not related to participants, when possible.
- Providers should always make sure the participant understands their rights and the permissions they are granting by participating in a program.
- Be certain participant files are locked at all times unless an authorized staff member is in the room.
- Treat documents containing names of participants and identifying and personal information, with the same care you do primary patient records—keep such lists under lock and key.
- If someone calls your agency and asks about a participant in the program, do not give out any information about the participant, even whether they is enrolled in *POSITIVE WELLNESS*.

- When leaving messages for a participant, follow the participant's preferences. These preferences may be documented on the intake forms to provide clear instructions for any staff who have access to that information.
- Store particularly sensitive participant information in a separate locked space apart from other participant data if your funding agency encourages or requires this, or if you believe the extra security may be indicated.
- Obtain a signed release from participant before providing assisted referrals to other agencies where you will need to be communicating about the participant to the other agency. Even though a participant may give verbal permission, written authorization is preferable because it eliminates the possibility of misunderstanding on your part or the part of the participant.

# SESSION ONE: FOUNDATIONS OF TRUST

## POST-TESTING ENGAGEMENT

### SESSION OBJECTIVES

- Present an overview of *POSITIVE WELLNESS*
- Determine willingness of the prospective participant to participate in the *POSITIVE WELLNESS* program.
- Build a trust relationship and establish confidentiality
- Obtain demographic and personal contact information from the new participant.
- The participant sets a personal goal
- Have the participant return for Session Two

### POTENTIAL OUTCOMES

- Participant chooses to not participate in *POSITIVE WELLNESS* – is ready to link to care immediately and does not need assistance
- Participant chooses to not participate in *POSITIVE WELLNESS* and is not ready to link to care. Leave the door open, current situation may change.
- Participant chooses to participate – may schedule next session

### SUMMARY OF SESSION ACTIVITIES

In Session One, the PW Counselor or PW Counselor discusses the nature of *POSITIVE WELLNESS* with the participant in order to see if they are interested in participating. Eligibility is generally not an issue, as anybody who is referred to the counselor at this point should have a recent HIV positive diagnosis and that is the only criteria for participation. As a part of this process, the Program Enrollment Form is completed, and a description and overview of the *POSITIVE WELLNESS* intervention are provided to the prospective participant. The counselor will also review the stages of change continuum with the participant, work with the participant to identify some feasible goals, and take the time to answer any questions or address concerns the participant may have.

**Suggested Session Time:** 1 hour 30 minutes

## **PRE-SESSION**

**Review Potential Participant Documentation.** If any documentation is available on the participant, such as sexual history, lab results, referral forms, etc., the PW Counselor should review them in advance, so they are ready to talk to the participant openly and honestly about their participation in *POSITIVE WELLNESS*.

## **DURING SESSION**

1. **Introductions** (15 minutes). A time for the PW Counselor to help the participant feel comfortable with the enrollment process. This may include having the staff person who made the referral to be present for the first few minutes to help with introductions.
2. **Description and Overview of *POSITIVE WELLNESS*** (10 minutes). Using the *POSITIVE WELLNESS* Session Overview, the PW Counselor describes the intervention, including its objectives, number of sessions, activities, potential duration, and expectations regarding the participant's participation.
3. **Confidentiality** (10 minutes). The PW Counselor explains the protections in place to safeguard the participant's identity and HIV status, and also explains the consequences should any health care personnel involved in the process breach that confidentiality.
4. **Complete the Participant Enrollment Form** (10 minutes). The PW Counselor should work with the participant to complete the Participant Enrollment Form (collecting contact information, emergency contact information, etc.), and completes the Individual Participation Record for the new participant immediately after the session.
5. **Introduce Stages of Change** (10 minutes). Because this intervention is designed to increase willingness, intention and preparation, it uses the stages of change approach. The PW counselor will introduce the idea of gradual behavior change by reviewing the process.
6. **Participant Goal Setting** (10 minutes). The PW Counselor should ask the participant what they hope to accomplish by the end of five sessions, and then work with them to create a single goal focused on their new HIV diagnosis. This could be reducing a behavior, beginning or increasing a new behavior, accomplishing a task or anything the participant may want to work toward.
7. **Closing** (10 minutes). The PW Counselor should continually check in with the participant to see if they have questions throughout the session, but this is a specific time set aside to answer and discuss questions or concerns about the program. The PW Counselor welcomes the new participant into *POSITIVE WELLNESS* and

acknowledges the positive steps taken during this first session. The Counselor should remind them when the second session is, and provide any incentive.

## **POST SESSION**

8. **Session Documentation.** The PW Counselor completes the Individual Participation Record for the new participant immediately after the session – recording thoughts, impressions, any identified goal and the next date for the second session.

## **PREPARATION AND SETUP**

**How do I prepare?** The PW Counselor should take the time to review in advance, if available, any existing documentation on the participant. This could be information collected from the HIV test counseling session, information from a disease investigation specialist, documentation from CHRs on participant history, or anything related to their state of health. The PW Counselor will need to be completely familiar with the information asked for on the Program Enrollment Form in order to avoid fumbling and making errors. It would be useful to practice asking the questions with other staff members until you are comfortable with them.

Although the PW Counselor will focus on strengths, and even help participant identify strengths from different sources, it is not advisable to focus on an assessment process or form in this initial session, so as to not overwhelm the participant with paperwork.

**What should I have ready?** You will need the following *POSITIVE WELLNESS* materials for this session:

- Available Existing Participant Documentation
- POSITIVE WELLNESS* Session Overview
- Roles and Responsibilities
- Program Enrollment Form
- Participant Goal Card
- Stages of Change Overview
- Individual Participation Record
- Personal care items: tissues, water, etc.

In addition, you may need the following materials and supplies:

- Incentive
- Bus or subway token

## TIPS FOR CONDUCTING THE SESSION

- The Engagement Session needs to be personalized to reach the participant at a level that is appropriate. The session needs to be thorough and individualized, and to involve the participant in beginning to think about their own health.
- In most cases, your HIV test counselors will refer potential participants for enrollment in *POSITIVE WELLNESS* and will refer them directly to the staff person responsible for engagement in your agency or clinic. If possible it may be appropriate to provide a ride for the participant and if this is the case, schedule a pick up time.
- Many participants can feel confusion, frustration or a sense of powerlessness. Whenever possible, give them options, discuss the pros and cons, and let the participant decide what course of action (or no action) they will take.
- It is best not to lead with too many questions, which can be seen as aggressive, nosy or even hostile by some Native individuals.
- During this session, as during any of the sessions, the client may express a desire to become a part of a traditional, ceremonial or creative cultural circle, or identify these as strengths. Please be sure to include culturally appropriate social supports and resources in discussions, activities and resource lists.

# STEP-BY-STEP PROCEDURES

## Review Potential Participant Documentation

- A. **Begin a Participant File.** By collecting and compiling available and relevant documentation on the participant (e.g., sexual history, lab results, referral forms, HIV test results, etc.), create a participant file.
- B. **Review the Participant File.** The PW Counselor should review the information in advance of Session One, so they are ready to talk to the participant openly and honestly about their participation in *POSITIVE WELLNESS*. And this way, the PW Counselor will not have to ask questions that have already been answered by the participant. This will also prevent the PW Counselor from being “surprised” by anything that may come up.

### 1. Introductions (15 minutes)

- A. **Welcome the prospective participant** and introduce yourself.
- B. **Thank them** for coming in and taking time out of their day to talk to you.
- C. **Introduce yourself.** The PW Counselor should model an introduction by offering a name and little bit about themselves (such as how you have been doing this line of work, what brought you to do this work, etc.). Be comfortable with introduction, but not talk too much about yourself. You don’t want to make the session appear to be more about you than the potential participant.
- D. **Participant Introduction.** Express to the participant that you would like to know a little about them. Let them know they can have the time and space to introduce themselves in any way they would like to, but at the very least you need to know what they would like to be called, and their pronoun preferences (he/him/his, she/her/hers, ze or another term). *It is vitally important you strive to use their preferred pronouns and name, since it shows respect and openness.* If not recorded elsewhere, it may be helpful to ask the participant to share their tribal affiliation.
- E. **Probe.** If the participant doesn’t want to offer any more than just a name, that is okay. You may ask them some probing questions (about innocuous topics, like weather, plans for the summer, etc.) to help start conversation, build rapport, and get to know them better. If they do not want to share, then do not force it. Thank them for any sharing what they did do, and let them know you look forward to getting to know them better.
- F. **Review what will happen during the session** and how long it will take. This is a good opportunity to let the participant know you are aware some topics and terminology may be unfamiliar or cause embarrassment. Ask permission to use direct language.

## 2. Description and Overview of *POSITIVE WELLNESS* (15 minutes)

- A. **Provide an overview of *POSITIVE WELLNESS*.** Use the *POSITIVE WELLNESS* Session Overview sheet to guide the discussion. Walk through the entire program from start to finish.
- B. **Confirm that the prospective participant understands *POSITIVE WELLNESS*** is a structured program with specific expectations for participation.
- Place the *POSITIVE WELLNESS* Session Overview on the table, facing the participant. Use the diagram as a guide to talk through the *POSITIVE WELLNESS* program with the participant.
  - Point out much of the program revolves around ultimately connecting to medical services in some manner and so the Medical Appointment sits in the center of the circle.
  - State the general objectives of *POSITIVE WELLNESS*
  - Describe the gifts/incentives, if any, participants will receive for participating in the intervention.
  - Talk about the kinds of referrals *POSITIVE WELLNESS* participants can receive. Emphasize *POSITIVE WELLNESS* staff will be actively involved in the referral process and won't just hand the participant a list of names. Mention all referrals will be to agencies that are Native-friendly, and that traditional/spiritual advisers and drug and/or alcohol treatment are also available for those participants who want it.
- C. **Review Participant and Counselor Role and Responsibilities. What does this look like?** Use the Roles and Responsibilities handout to review these with the client. Let them know that this is an informal commitment on both of your parts to do the best work you can for the health of the participant. There is nothing to sign. There are empty spaces on the form that the PW Counselor and participant can use to fill in additional responsibilities that they feel are appropriate. This is important to cover not just to establish the parameters of the working relationship between the PW Counselor and the participant, but it also conveys to that they have the ability to hold their service provider accountable. This is an important message to send to the participant and will help when it comes time to preparing for a medical appointment.
- D. **Explain *POSITIVE WELLNESS*** is at most a five session program, but their participation is completely voluntary, and the sessions can even be customized to meet their needs.
- E. **Obtain the prospective participant's reaction:** "So what do you think about it? Do you have any questions?" Answer questions as completely as possible.

- F. **Obtain commitment:** “Do you think *POSITIVE WELLNESS* is something you would be interested in?”
- If “Yes,” move on to the rest of the session.
  - If the participant says “No”, but they are ready to link to care (they just do not need a structured program to assist them with that), then help them make an appointment with an appropriate medical provider.
  - If the participant is unsure or says “No”, ask “What about this is causing you to hesitate?” Process their response with them – addressing any issues around confidentiality, flexibility of scheduling, fear of goal-making, or personal readiness. If they are still not sure, then suggest not enrolling in the program now. The last thing you want to do is force somebody to do something they are not ready for. Say: “We do not have to do this today. Maybe you need some more time to think about it. Can we meet again next week to continue this conversation?” Set up a time to chat next week and continue the conversation about what is preventing them from engaging in the program.
  - If the participant does not want to come back, then provide the name of the local doctor or clinic and let them know that you are always available to talk.

### 3. Confidentiality (10 minutes)

- A. **Assure the participant all personal information provided will remain confidential.** It is essential you take additional time to explain all confidentiality measures and to reassure participants of the measures your agency will take to keep all information private. You may say something like this:
- B. **Explain what is meant by confidentiality.** Explain their identifying information such as name and address, and health information (e.g. HIV diagnosis, lab results, and any information providing regarding their behaviors) is confidential information and cannot be openly shared or discussed.
- C. **Explain who can access the information.** The only people who can see the participant’s file are the PW Counselor, supervisor, and program staff (including evaluators), and they may not even see it. It is only viewed on an as needed basis. Doctors, family, friends or other employees are not allowed to see this file or listen in on anything we talk about. Tell participants where and how information is stored securely. Explain that from time to time, your agency is required to make reports about the program to organizations that provide funding, but the participant’s name will not be used and will not otherwise be personally identified
- D. **Review the consequences of breach of confidentiality.** Let participants know any breach of their identifying and medical information is against the law and can result in disciplinary action or even firing of a person. Reinforce how serious the maintenance of confidentiality, and how it is a matter of respect, not just protocol. Share your own commitment to this policy. Emphasize they have control over how, when and to whom personal information is shared, and will have the opportunity to sign a release or otherwise give consent before information is shared.

E. **Answer any questions the participant may have about confidentiality.**

#### 4. **Complete Program Enrollment Form** (10 minutes)

- A. **Obtain the demographic, personal contact, and location information** asked for on the Program Enrollment Form.
- If the new participant has a nickname, street name or other preferred title, be sure to record it, along with their pronoun preferences.
  - Remember to get information about hangouts, which can be important for locating the participant for session attendance and follow-up contacts.
  - Obtain the name and phone number, and address if possible, of someone who can be contacted who usually knows how to locate the participant. Be sure to find out whether it will be okay to leave a message with this person and whether it is okay to mention your agency's name.
  - If not mentioned earlier, ask about tribal affiliation. This is optional for those who wish to identify with a specific tribal group or community. Not every Native feels comfortable sharing this information for various reasons, but keep the option open to them for later in the program as it may be very helpful in identifying their strengths and potential resources for them.

#### 5. **Introduce Stages of Change** (10 minutes)

- A. **Introduce the concept of incremental behavior change.** Using the Stages of Change outline, explain to the participant that in order to make changes in our lives, we go through stages, and that the process is not the same for everyone for the same behavior (e.g. quitting smoking, starting a new exercise routine, etc.), and that not every behavior change process is the same for the individual. It is highly recommended this activity, as with any interactions with the participant, be positive, non-judgmental and accepting.
- B. **Explain the steps.** With the Stages of Change outline, explain each step in an example change, using yourself as the imagined person who is seeking change. This does not have to be an actual example from your own life, but you can do that if you wish. Describe what it would be like before, during and after the changes were made, and what might happen if you were to move in between the stages, or need another chance to make your goal.
- C. **Tie in.** Explain to the client they will be looking at similar changes in their lives from the past, identifying strengths and creating and working toward a personal goal during the course of their *POSITIVE WELLNESS* participation.

## 6. Create Participant Goal (10 minutes)

- A. Explain you would like to work with them to **establish a single goal focused on** their HIV status and health care.
- B. **Explain goals help to motivate us to take action**, and *POSITIVE WELLNESS* is all about taking positive action to sustain wellness.
- C. **Explain that as *POSITIVE WELLNESS* is a short term program**, it is appropriate to establish a single goal that can be achieved within a short amount of time, and this goal should be centered around moving the person closer to entering in continuous health care for their HIV disease.
- D. **Provide** some examples of some viable goals:
  - Attend one doctor's appointment to discuss my HIV status
  - Schedule an appointment with a doctor to discuss my HIV status
  - Go with the PW Counselor to meet with a doctor
  - Talk with the local pharmacist about HIV
- E. **Ask the participant what they would like to see happen** and what goal they would like to set for themselves.
- F. **Examine other goals.** If they would like to develop other goals, that is fine as well (such as disclosing their HIV status to a friend or partner), but remind them much of your time spent together will be used to address the healthcare goal.
- G. **Progress may be gradual.** Reinforce progress towards that goal may be gradual, as the stages of change suggest, and it is okay to set their own pace and challenge themselves as desired.
- H. **Encourage** them to refer to their Goal Card as needed.

## 7. Closing (10 minutes)

- A. **Welcome the participant into the *POSITIVE WELLNESS* program.** Acknowledge the participant for taking a positive step toward promoting and protecting their health, and that of their partner(s) and family as well.
- B. **Discuss questions or concerns.** Take time to discuss any questions the participant may have about the program. If there are questions about HIV or care, that can be briefly answered, then do so, but if they are more complex either provide some written information or let them know which future session will deal with that issue. You really want the participant to leave feeling good about the session and themselves, so try to not let any questions linger if possible.
- C. **Provide a gift/incentive** for participating in this session (if available).

- D. **Schedule the next session with the participant. Select a time and place of Session Two** and write this down on an appointment card. The participant does not need to take anything written with them when they leave, but if they would like to, they can have the appointment card to take with them. They may also take a copy of their participant goal sheet, if they would like.
- E. **Offer bus or subway tokens**, if available, for transportation home that day and/or to the next session, or pre-arrange a pick-up time and location if your agency is providing transportation.

## **8. Session Documentation**

Immediately after the participant leaves, document the participant's participation in the session on the Individual Participation Record. Record any questions the participant may have had, and the responses given. Record the participant goal, as well as any impressions or case notes you would like to add. Record the time and date of Session Two.

# SESSION TWO: EXPLORING WHAT IT MEANS TO LIVE WITH HIV

## SESSION OBJECTIVES

- Continue to build a trust relationship and rapport with participant
- Clarify and address questions, concerns and/or fears
- Complete a Holistic Strengths Assessment to help participant identify areas of skills, knowledge and resources to reach desired goal(s)
- Examine progress towards individual goal, and problem solve barriers using identified strengths

## POTENTIAL OUTCOMES

- Participant links to care – may schedule a closeout session and follow-up
- Participant not ready to link to care – may schedule next session

## SUMMARY OF SESSION ACTIVITIES

In the Session Two, the PW Counselor reviews the participant's goal, conducts a more formal Holistic Strengths Assessment, and begins to engage the participant in a deeper discussion of their concerns and questions around the day-to-day realities of living with HIV.

**Suggested Session Time:** 1 hour 30 minutes

### PRE-SESSION

**Review** previous Individual Participant Record, especially noting any identified strengths and goal. The PW Counselor will also review any other documents that may have been added to the participant's file.

### DURING SESSION

1. **Welcome** (5 minutes). Review the last session and answer any questions or concerns the participant may have about *POSITIVE WELLNESS* or immediate needs they may have.

2. **Diagnosis Exploration** (15 minutes). Using participant centered and responsive counseling approaches, engage participant in discussion on how they feel about their diagnosis
3. **HIV Education** (10 minutes). Provide appropriate information on HIV and HIV transmission. The content of this activity will depend on the participant's previous experience with risk reduction counseling and HIV.
4. **Complete a Holistic Strengths Assessment** (15 minutes). Review support systems and sources of strength for participant using a holistic model. Encourage participant to use their strengths and assets to link to medical care through the development of a Holistic Strengths Assessment to provide support and encouragement for participant successes.
5. **Review Stages of Change** (15 minutes). Discuss with the participant and review the stages of change model to outline progress towards goal. Note any challenges or barriers in reaching their goal.
6. **Closing** (10 minutes). The PW Counselor should continually check in with the participant to see if they have questions throughout the session, but this is a dedicated time to answer and discuss questions or concerns about the program. The PW Counselor should keep interactions positive and acknowledge the steps taken during this second session. The PW Counselor should remind them when the third session is, if scheduled, and provide any incentive.

### **POST SESSION**

7. **Session Documentation.** The PW Counselor completes the Individual Participation Record for the new participant immediately after the session – recording thoughts, impressions, any identified goal and the next date for the third session.

## **PREPARATION AND SETUP**

**How do I prepare?** You will need to review the *POSITIVE WELLNESS* Session Overview from Session 1. The PW Counselor may begin to think about where they might stage the participant along the stages of change in order to help facilitate that discussion during this session.

**What should I have ready?** You will need the following *POSITIVE WELLNESS* materials for this session:

- A new Participant Goal Form to track progress
- Holistic Strengths Assessment Worksheet
- HIV 101 materials, such as fact sheets and brochures
- Stages of Change Handout
- Individual Participation Record
- Personal care items: tissues, water, etc.

In addition, you may need the following materials and supplies:

- Incentive
- Bus or subway token

## **TIPS FOR CONDUCTING THE SESSION**

- Because this session will focus on education and some self-reflection it needs to be personalized to reach the participant at an appropriate level. The session needs to involve the participant processing their own health and the changes that may come with an HIV diagnosis.
- During this session, as during any of the sessions, the client may express a desire to become a part of a traditional, ceremonial or creative cultural circle, connect with a spiritual leader or identify these as strengths. Please be sure to include culturally appropriate social supports and resources in discussions, activities and resource lists.

# STEP-BY-STEP PROCEDURES

## 1. Welcome (5 minutes)

- A. **Affirm the participant's attendance.** Welcome the participant back. Acknowledge the time and travel commitment to make it to the appointment..
- B. **Do a brief check-in** with them on how they are doing and feeling.
- C. **Review the last session** and answer any questions or concerns the participant may have about *POSITIVE WELLNESS* or immediate needs they may have

## 2. Diagnosis Exploration (15 minutes)

- A. This portion of the session is designed to be a **free flow discussion with the participant about how they are feeling or coping with their new diagnosis.** This portion can become very difficult and emotional for the participant, so the PW Counselor should be prepared to handle these emotions and roll with any conflict that may arise. Adequate time (including additional time) should also be allowed to finish this conversation.
- B. The purpose of this discussion is really to **identify their level of coping** and where they are in the process of accepting their diagnosis.
- C. **The PW Counselor can use the following questions to elicit discussion** (it may be a good idea to explore the topic in a sequence, starting with when they learned of their diagnosis to where they are now, and affirm their ability to work through such a stress time):
  - “What did you feel when you first heard your test results?”
  - “How have your feelings changes since then?”
  - “How do you think your life might change now?”
  - “What is the scariest part of this diagnosis for you?”
  - “What kind of support have you found for yourself since you learned of your HIV status?”
  - “What strategies have you tried to ease some of your stress?”
  - “What questions do you have regarding HIV?”

## 3. HIV Education (10 minutes)

- A. Use the last question from Diagnosis Exploration to bridge into what they do or do not know about HIV or AIDS. **This portion is designed to raise their level of knowledge about the disease.**
- B. **The PW Counselor can use the following questions to elicit discussion:**

- “What do you know about HIV?”
  - “What have you heard about HIV that frightens you?”
  - “What research on HIV have you already done?”
  - “What do you hear people in the community saying about HIV?”
  - “Explain to me the difference between HIV and AIDS?”
- C. “What strategies do you know of that can keep you and your partners safe and healthy at this point?” **The PW Counselor should feel free to use any HIV education materials they may have** or can access online to help the discussion. If the participant is comfortable, the PW Counselor may send the participant home with materials for further reading.

#### 4. Complete a Holistic Strengths Assessment (15 minutes)

- D. **Introduce the Holistic Strengths Assessment Worksheet.** Using a holistic view of strengths represented on the filled-in copy of the worksheet, explain everyone has strengths and resources to help overcome adversity and add to overall health and wellness, and that these strengths can be from personal, family, community or cultural experiences. Native people have distinct and unique viewpoints, worldviews, and cultures that can serve as sources of strengths as well that other people may not have. Explain they may be spiritual, emotional, physical or mental. Let the participant look over the diagram. Explain this is not a checklist or expectation, but provide examples of different kinds of strengths. *(If the four quadrants [medicine wheel] framework does not align with the worldview of the Native community with which you are working, then please take the time to create a tool that identifies existing sources of strength that align with local Native traditions and culture).*
- E. **Discuss and generate a list of participant strengths.** Using the blank diagram page as a reference, ask the participant to list some of their strengths. They may choose to write, or have you write, their ideas on the page. The PW Counselor will inevitably have to help the participant identify strengths in each area. Ask questions such as: “What makes you feel strong or connected?”, “Who provides you help?”, “What activities do you do that make you feel good about yourself?” These can be people, activities, practices, beliefs, pets, etc. The PW Counselor can refer to the completed example if they need assistance in drawing out sources of strength from the participant. It is important that the participant puts at least one source of strength in each quadrant in order to create a balanced view of their health and wellness, and not to create the appearance of a deficiency. The *POSITIVE WELLNESS* program can be included as a source of strength to fill in a gap.
- F. **Tie strengths into challenges, barriers, and goals.** Recall with the participant their goal and let them know that you will be talking about how they can tap into these strengths to help them reach their goal. Remember, strengths-based approaches take a realistic view and do not minimize challenges or create strengths in order to avoid perceived negativity. The strengths narrative should help the participant feel empowered and foster a sense of hope.

## 5. Review Stages of Change (15 minutes)

- A. **Retrieve the Participant Goal Form from Session One.** Ask the participant what their goal was from Session One. If they do not remember, then remind them and show them the card.
- B. **Ask them if they still think that this is a good goal for them.**
- C. If they want to keep the goal, then ask if they have made any progress towards that goal. **Record any progress made.** Review the progress in terms of the stages of change and ask where they think they are now in relation to the goal. If you need to use the stages of change handout to remind them of the continuum, that is fine.
- D. If they have encountered barriers, **explore what they were and problem solve overcoming those barriers.** Use identified strengths as strategies to overcome barriers. Ask them to reflect on the list of strengths, or relate new strengths that can help them attain, or take another step toward their goal. This activity may also be used to identify strengths to address challenges or barriers to linking to medical care.
- E. **The goal may need some adjustment.** Record any changes to the goal on a new Goal Card and give a copy to the participant and keep one for yourself.

## 6. Closing (10 minutes)

- A. **Affirm the participant's attendance and level of participation.** Acknowledge how difficult it can be to come in and talk about these things with a stranger, and that they are doing a great job.
- B. **Discuss questions or concerns.** Take time to discuss any questions the participant may have about the program. If there are questions about HIV or care that can be briefly answered, then do so, but if they are more complex either provide some written information or let them know which future session will deal with that issue. You really want the participant to leave feeling good about the session and themselves, so try to not let any questions linger if possible.
- C. **Provide a referral for any outstanding need.** Write down the referral for the participant or make the contact personally and schedule a time and date with the participant there.
- D. **Provide a gift/incentive** for participating in this session (if available).
- E. **Schedule the next session with the participant. Select a time and place of Session Three** and record the time and place. The participant does not need to take anything written with them when they leave, but if they would like to, they can have the

appointment card to take with them. They may also take a copy of their Holistic Strengths Assessment, if they would like them.

- F. **Offer bus or subway tokens**, if available, for transportation home that day and/or to the next session, or pre-arrange a pick-up time and location if your agency is providing transportation.

## **7. Session Documentation**

Immediately after the participant leaves, document the participant's participation in the session on the Individual Participation Record. Record any questions the participant may have had, and the responses given. Record any impressions or case notes you would like to add. Record the time and date of Session Three.

## SESSION THREE: LIVING IN BALANCE HEALTH AND WELLNESS

### SESSION OBJECTIVES

- Continue to build a trust relationship and rapport with participant
- Clarify and address questions, concerns and/or fears
- Increase understanding of medical care and medication adherence
- Increase awareness of a holistic approach to health and wellness by examining health and wellness strategies
- Identify social support
- Discuss how strengths and social support can help progress towards personal goal

### POTENTIAL OUTCOMES

- Participant links to care – may schedule a closeout session and/or follow-up
- Participant not ready to link to care – may schedule next session
- Participant no longer wishes to participate in *POSITIVE WELLNESS* – Leave the door open, current situation may change.
- Will depend on outcomes of previous sessions

### SUMMARY OF SESSION ACTIVITIES

In the Session Three, the PW Counselor introduces medication adherence and consistent care as a health and wellness strategy, and the importance of balance in health and wellness. The PW Counselor also continues to build a trust relationship using strengths-based counseling strategies, and acknowledges progress toward the participant-identified goal(s).

**Session time:** 1 hour, 15 minutes

## **PRE-SESSION**

**Review** previous Individual Participant Record, especially noting any identified strengths and goal. The PW Counselor will also review any other documents that may have been added to the participant's file. The PW Counselor may need to have a referral or resource guide to facilitate connecting the participant to additional resources

## **DURING SESSION**

1. **Welcome** (5 minutes). Affirm the participant's attendance. Do a brief check-in and review the last session and answer any questions or concerns the participant may have about *POSITIVE WELLNESS* or immediate needs they may have.
2. **Health and Wellness Strategies** (20 minutes). Identify strategies participant is using to maintain health and wellness
3. **Medical Care as a Wellness Strategy** (20 minutes). Discuss the importance of medical adherence and consistent medical monitoring as a wellness strategy.
4. **Revisit Goal** (10 minutes). Review the goal, progress towards the goal, and any barriers encountered.
5. **Discuss Social Support** (10 minutes). Revisit the idea of social support and identify existing sources of support and if they have been explored fully.
6. **Closing** (10 minutes). The PW Counselor should continually check in with the participant to see if they have questions throughout the session, but this is a dedicated time to answer and discuss questions or concerns about the program. The Counselor should remind them when the third session is, and provide any incentive.

## **POST SESSION**

7. **Session Documentation.** The PW Counselor completes the Individual Participation Record for the new participant immediately after the session – recording thoughts, impressions, any identified goal and the next date Session Four.

## **PREPARATION AND SETUP**

**How do I prepare?** The PW Counselor should take some time in advance to study HIV medicines so that you have a good general knowledge of the nature of medicines, how they operate, some common side-effects, and common regimens (especially the popular one-a-day, combination regimens). The PW Counselor might have online access just in case they are not knowledgeable enough to answer questions, then the participant and PW Counselor together can look up the answers online.

**What should I have ready?** You will need the following *POSITIVE WELLNESS* materials for this session:

- Participant Goal Sheet
- Holistic Strengths Assessment Worksheet
- Social Support Worksheet
- Resource List and contact information
- Individual Participation Record
- Personal need items: tissues, water, etc.

In addition, you may need the following materials and supplies:

- Incentive
- Bus or subway token

## **TIPS FOR CONDUCTING THE SESSION**

- This session is really getting to the heart of the intervention by identifying how this person takes care of themselves –physically, mentally, emotionally, and spiritually. The PW Counselor should be open to having honest discussion about health and wellness with the participant – and how living with HIV means an increased focus on individual health.
- The PW Counselor should be prepared to work with the participant to identify sources of social support. They may not feel like they have anybody, and if this is the case, be creative with them, and if still nobody arises, then the PW Counselor should offer themselves as a source of social support for the participant.
- During this session, as during any of the sessions, the client may express a desire to become a part of a traditional, ceremonial or creative cultural circle, connect with a spiritual leader or identify these as strengths. Please be sure to include culturally appropriate social supports and resources in discussions, activities and resource lists.

# STEP-BY-STEP PROCEDURES

## 1. Welcome (5 minutes)

- A. **Affirm the participant's attendance** as in other sessions.
- B. **Do a brief check-in** with them on how they are doing and feeling.
- C. **Review the last session** and answer any questions or concerns the participant may have about *POSITIVE WELLNESS* or immediate needs they may have.

## 2. Health and Wellness Strategies (20 minutes)

- A. There are many wellness strategies that can be used by a person living with HIV. This part of the program is designed to **discuss specific strategies** a person will identify and hopefully implement to sustain their health and wellness.
- B. **Reintroduce the Holistic Strengths Assessment Worksheet**, which the participant completed during Session Two. Review the worksheet pointing out that Native people have a distinct and unique set of strengths and a way of viewing sources of strength in a holistic way that other communities may not have.
- C. **Ask the participant if they did any of these things since the last session.** Talk about how those made them feel. Have a discussion about what sources of strength in their life they consistently draw upon.
- D. **Have the participant conceptualize these not simply as sources of strength but as strategies for pursuing and/or maintaining health.** Talk with them about their sources of strengths. Some of them may be sources or things, and not actions. Get the participant to think about taking the tangible things and using them actively for their own health. For example, if they listed their parents as an emotional source of strength, perhaps a strategy could be to talk to their parents about their HIV or their concerns about their medical care. Strategies can be developed around anything – it is simply turning things into a course of action or potential course of action.
- E. These new strategies should be **written down on the Holistic Strengths Assessment Worksheet** under the Notes and Strategies section at the bottom of the page.

## 3. Medical Care as a Wellness Strategy (20 minutes)

- A. This session is extremely important and it is a good follow up to the Holistic Strengths Assessment activity. This is where you are going to **discuss how HIV medicines support health and wellness.**

- B. **Provide an overview of HIV medicines.** This does not need to be a detailed or complicated description of the biology or pharmacology of HIV replication or medicine; however, participants should know how HIV medicines help their body fight off HIV. Feel free to use any visual aids you may have or videos you have found online to help you describe how HIV medicines (all classes) help to 1.) prevent HIV from replicating in your body, 2.) preserve the CD4 cells that already exist in the body.
- C. **Ask the participant how they feel about taking HIV medicines.** Have a frank discussion about their thoughts on HIV medicine. The PW Counselor should focus on the positive aspects of the HIV medicines (do not ignore the downsides like side-effects or having to take pills everyday), but reframe these so as they do not become the central point of the conversation. The PW Counselor can use questions like the following to move the discussion:
- “What do you know about HIV medicines?”
  - “What have you heard about HIV medicines that frightens you?”
  - “What research on HIV medicines have you already done?”
  - “What do you believe HIV meds do to your body?”
  - “What do you hear people in the community saying about HIV medicines?”
- D. **Discuss the value of taking HIV medicine.** Review with the participant how much longer life can be extended with HIV medicines. Review with them the research on how HIV medicines suppress the virus in the body and make it significantly less likely to transmit the virus to another person, so taking HIV will keep both them and their partner(s) safer and healthier.
- E. **Ask the participant if they would like add HIV medicines to the physical quadrant of their Holistic Strengths Assessment Worksheet (or any quadrant that they feel comfortable with).** They should agree of their own accord (and they may have already listed it). If they would, then discuss with them a strategy they would like to write down in that quadrant. Any of the following might be recorded.
- Take HIV medicines
  - Exploring taking HIV medicines
  - Talk about HIV medicines with doctor
  - Make an appointment to talk to doctor about medicine options
  - Talk to my traditional adviser about taking HIV medicines

#### 4. **Revisit Goal** (10 minutes)

- A. Based on the discussion around the Holistic Strengths Assessment Worksheet, **ask the participant if they are still comfortable with their goal and steps to reach the goal.** They may want to adjust it based on the previous activity, which is fine.
- B. If the goal is adjusted, then be sure to **create one or two steps to reaching the goal.** If the goal remains the same, then take some time to **talk about progress reaching it**, what barriers were encountered, and how to overcome any barriers.

- C. **Write down any new versions of the goal** if necessary and give a copy to the participant if they want it.

## 5. Discuss Social Support (10 minutes)

- A. **Social support is a primary piece of long-lasting behavior change.** Ask the participant what individuals in their lives provide social support for them. Feel free to use the Holistic Strengths Assessment Worksheet to help guide the discussion or generate ideas. Have them generate a list and record these names on the Social Support Worksheet.
- B. **Ask the participant which of the sources of support they believe would provide support for them in relation to HIV.** This may be different than other people in their lives, since it is going to require them to disclose their HIV status to them, and then talk about it. Support related to HIV can mean a person whom they turn to when they are feeling lonely or marginalized, need somebody to talk to, want somebody who can help remind them to take their meds or take them to medical appointments, etc.
- C. **Record the name of that person in the Individual Participation Record.** If the participant hasn't already disclosed their HIV status to that person, then let them know it might be a good goal to explore for them in the future (near or longer term). If the client cannot identify anybody, then the PW Counselor should volunteer themselves as viable source of support for them.

## 6. Closing

- A. **Affirm the participant's attendance and level of participation.** Acknowledge how difficult it can be to come in and talk about these things with a stranger, and that they are doing a great job.
- B. **Discuss questions or concerns.** Take time to discuss any questions the participant may have about the program. If there are questions about HIV or care, that can be briefly answered, then do so, but if they are more complex either provide some written information or let them know which future session will deal with that issue. You really want the participant to leave feeling good about the session and themselves, so try to not let any questions linger if possible.
- C. **Provide a referral for any outstanding need.** Write down the referral for the participant or make the contact personally and schedule a time and date with the participant there.
- D. **Provide a gift/incentive** for participating in this session (if available).

- E. **Schedule the next session with the participant. Select a time and place of Session Four** and write this down on an appointment card. The participant does not need to take anything written with them when they leave, but if they would like to, they can have the appointment card to take with them. They may also take a copy of their strengths assessment, if they would like them.
  
- F. **Offer bus or subway tokens**, if available, for transportation home that day and/or to the next session, or pre-arrange a pick-up time and location if your agency is providing transportation.

## **7. Session Documentation**

Immediately after the participant leaves, document the participant's participation in the session on the Individual Participation Record. Record any questions the participant may have had, and the responses given. Record any impressions or case notes you would like to add. Record the time and date of Session Four.

# SESSION FOUR: LINKING TO CARE

## SESSION OBJECTIVES

- Continue to build a trust relationship
- Increase self-efficacy to talk with a medical provider
- Schedule an appointment with a medical provider
- Help participant identify challenges to linking to care and strengths to address them

## POTENTIAL OUTCOMES

- Participant links to care – may schedule a medical appointment and final session up
- Participant not ready to link to care – may schedule next session
- Participant not interested in PW – Leave the door open, current situation may change

## SUMMARY OF SESSION ACTIVITIES

In Session Four, the PW Counselor reviews the participant's goal and strengths assessment, and schedules a medical appointment with the participant.

**Suggested Session Time:** 1 hour 15 minutes

### PRE-SESSION

**Review** previous Individual Participant Record, especially noting any identified strengths and goal. The PW Counselor will also review any other documents that may have been added to the participant's file. The PW Counselor may need to have a referral or resource guide to facilitate connecting the participant to additional resources

### DURING SESSION

1. **Welcome** (5 minutes). Affirm the participant's attendance. Do a brief check-in and review the last session and answer any questions or concerns the participant may have about *POSITIVE WELLNESS* or immediate needs they may have.
2. **Review Progress** (10 minutes). Review the participant's current goal and check in progress and barriers to achieving the goal.

3. **Prepare for Doctor's Appointment** (20 minutes). Set goals for meeting with a doctor. Generate a list of questions participant would like to have answered
4. **Role Play** (20 minutes). Role play a doctor appointment with the participant.
5. **Medical Appointment Logistics** (10 minutes). Explore local medical resources. Assist participant with making a doctor's appointment.
6. **Closing** (10 minutes). The PW Counselor should continually check in with the participant to see if they have questions throughout the session, but this is a dedicated time to answer and discuss questions or concerns about the program. The PW Counselor should remind them when the medical appointment, if scheduled, and provide any incentive.

### **POST SESSION**

7. **Session Documentation.** The PW Counselor completes the Individual Participation Record for the new participant immediately after the session – recording thoughts, impressions, any identified goal and the next date for the third session.

## **PREPARATION AND SETUP**

**How do I prepare?** The PW Counselor should be ready to talk seriously to the participant about making and keeping a medical appointment. Even if this has not been a goal listed for them each week, this is one of the goals of the program. The Counselor should mentally prepare for that discussion, as well as research viable local options for a medical appointment.

The PW Counselor should practice some role plays with co-workers so that they are prepared to act out scenarios in a realistic, yet comprehensible and brief way.

**What should I have ready?** You will need the following *POSITIVE WELLNESS* materials for this session:

- Participant Goal Sheet
- Stages of Change Handout
- Holistic Strengths Assessment Worksheet
- Individual Participation Record
- Contact information for local medical resources
- Pen and paper; or a computer and printer
- Tips to Make a Medical Appointment Successful handout
- Role Play Guidelines
- Social Support Worksheet
- Personal needs items: tissues, water, etc.

In addition, you may need the following materials and supplies:

- Incentive
- Bus or subway token

## **TIPS FOR CONDUCTING THE SESSION**

- The PW Counselor should be prepared with existing knowledge of medical providers in the area with whom the participant can meet. The provider can be local or can be in a nearby city. The provider can be a knowledge nurse, physician's assistant or a doctor – but they should be a person knowledgeable to answer questions for the participant. This may not be the provider the participant will see for long term monitoring as geography, etc. may not allow that to happen at this time, but this sets the stage to create comfort with the medical system and to talking with providers. So the PW Counselor should know who is willing to meet with them and talk with them if a qualified infectious disease doctor is not in the area of available to meet.
- The PW Counselor should have some scenarios in their head to role play a medical appointment with the participant. This should be a positive role play and the Counselor should be prepared to reframe and keep the role play moving in a good direction.
- During this session, as during any of the sessions, the client may express a desire to become a part of a traditional, ceremonial or creative cultural circle, connect with a spiritual leader or identify these as strengths. Please be sure to include culturally appropriate social supports and resources in discussions, activities and resource lists.

## STEP-BY-STEP PROCEDURES

### 1. **Welcome** (5 minutes)

- B. **Affirm the participant's attendance.** Welcome the participant back. Acknowledge the time and travel commitment to make it to the appointment. Also thank the participant for their continued attentiveness. It can be hard to stay focused after so many sessions.
- C. **Do a brief check-in with them on how they are doing and feeling.** The PW Counselor may engage in some friendly small talk to put the participant at ease and do a 'check-in' with them.
- D. **Review the last session** and answer any questions or concerns the participant may have about *POSITIVE WELLNESS* or immediate needs they may have

### 2. **Review Progress to Goal** (10 minutes)

- A. **Ask the participant if they remember their current goal.** If they do not, do not make them feel bad. Simply review it with them. You may provide them a new goal form, if you feel like they need it.
- B. **Ask about what progress they have made towards reaching the goal.** Affirm any small, incremental steps towards the goal. Ask them what stage of change they believe themselves to be in. You may need to remind them of the stages of change (feel free to bring out the stages of change handout).
- C. **Ask them what would help them move to the next stage,** and then problem solve around any barriers that participants may have encountered while working towards their goal. If participants are stuck and do not know how to move forward, bring out the Holistic View of Strengths Worksheet and Social Support Worksheet to help them tap into some of their strengths to move forward.
- D. **Write down any new versions of the goal** if necessary and give a copy to the participant if they want it.

### 3. **Prepare for Doctor's Appointment** (20 minutes)

- A. Let the participant know that as Positive Wellness is a linkage to care program that you have to spend some time talking about doctors and the medical community. Remind them that one of the outcomes that you as a PW Counselor is hoping for is for every participant to make and keep an appointment with a doctor – and whether that happens while they are currently enrolled in *POSITIVE WELLNESS* or later is not that important. However, in preparation for that first appointment, you would like to spend some time talking about how to interact with a doctor and prepare the participant for talking and meeting with the doctor.

- B. Spend some time talking to the participant about their thoughts and feelings about meeting with a medical provider. You can use some of the following questions to elicit discussion.
- “Tell me about the last time you talked to a medical provider about HIV?”
  - “When I say doctor’s appointment, what do you think of?”
  - “What have you heard from some of you friends who might be seeing a doctor for HIV?”
  - “What about meeting with a medical provider scares you the most?”
  - “What about meeting with a medical provider makes you excited?”
  - “What thought have you given to what provider you would like to see?”
- C. **Ask the participant what they think about what they want to learn from an appointment with a medical provider.** Remind them that as a patient of any medical provider they have rights, and that they should feel comfortable exercising those rights – it is their body, their care, and they have a say in what happens. An important part of those rights, is the right to ask questions and have them answered. Acknowledge the participant has done a good job asking questions during the PW sessions, but that some questions are more appropriate to ask directly to a medical provider. Spend some time generating a list of questions the participant would like to pose to a medical provider.
- D. **Brainstorm a list of questions.** Write these down with pen and paper, or type them on the computer as the participant comes up with them. Don’t limit the number of questions – write them out until the participant can come up with no more. The PW Counselor should feel free prompting the participant if they cannot generate any questions themselves. Some common topic areas for questions include:
- Cost of appointments and consistent monitoring
  - Treatment options
  - Timeframe to start treatment
  - Cost of HIV medicines
  - HIV prescription fulfillment
  - Side-effects of HIV medicines (diarrhea, fatigue, weight loss)
  - Interactions of HIV medicine with alcohol, tobacco, other drugs, other prescribed medicines, and traditional medicines
  - HIV and other diseases (Hepatitis C, diabetes, etc.)
  - Frequency of appointments
  - Interpreting lab results
  - Diet and lifestyle changes
  - Life span
  - Sexual options (can they still have sex?)
  - What happens if a person misses a dose of medicine
  - Transportation to appointments

- E. **Print out the list of questions that were generated (or make a copy of the handwritten version).** Thank the participant for generating such a wonderful list. Give them a copy of the questions (original or copy does not matter), but be sure to keep one yourself to place into their participant file. Remind them that this list of questions is a tool and that they should strongly consider taking it with them to their first appointment with a medical provider.
- F. **Review a list of skills and suggestions that can help to make an appointment with a provider go more smoothly.** Provide the participant a copy of the Tips to Make a Medical Appointment Successful handout. Review the tips with them, and explain where they might see this kind of behavior (this includes patients rights and providers responsibilities)

#### 4. **Role Play** (20 minutes)

- A. **Ask the participant to indulge you because you want to do a role play with them.** State there is no way to be 100% prepared for a medical appointment and for many people it can bring out a lot of anxiety. So in order to help ease the discomfort and increase the preparation level, we are going to do a couple of role plays together.
- B. **Acknowledge that role plays can be awkward,** but that they are one of the best tools we have to practice interacting with people.
- C. **Let the participant know you are going to do two role plays** – one with a “bad” doctor and one with a “good” doctor. Let them know you don’t know who they are going to see and how they are going to be, but this is just for the sake of practice and preparation.
- D. **Role play** with the PW Counselor being the ‘bad’ doctor, and the participant being the patient. Remember that you do not want to make this a negative experience for the participant, you just want to show how some doctors can be non-attentive and busy.
- E. **Debrief the role play** to highlight what made them feel uncomfortable, what made them feel good and what they would like to have done differently. Remind them of their strengths that they can draw upon to ensure their appointment is successful (this includes their strengths assessment, Holistic View of Strengths handout and the Tips sheet.

- F. **Conduct the second role play** with the PW Counselor being the “good” doctor and the participant being the patient. You do not want to overdo it, but you want to demonstrate some doctors will make time to answer questions, will help explain lab results, and generally care for the health of their patients.
- G. **Debrief the role play** to highlight what made them feel uncomfortable, what made them feel good and what they would like to have done differently. Remind them of their strengths they can draw upon to ensure their appointment is successful (this includes their strengths assessment, Holistic View of Strengths handout and Tips sheet).
- H. **Close out this activity**, but stating you hope this will help them think about how they would like: 1.) to act themselves when they meet with a medical professional, and 2.) what traits they would like to see in a medical professional that would encourage them to continue to work with them.

## 5. Medical Appointment Logistics (10 minutes)

- A. **Ask the participant if they would like to spend some time making an appointment** with a medical provider right now. Remind them it doesn’t necessarily have to be the doctor they will be working with continuously in the future, but it might just be somebody local who can help to answer questions. Let them know you can work with them to find a doctor and make an appointment, or to make an appointment with somebody local who may not do infectious disease work, but who could answer some questions.
  - a. If not, then state that you can revisit the idea during the next session. Skip to number 6: Closing
  - b. If yes, then continue with this section.
- B. **Review the medical providers** who are available to see a person living with HIV. Ask the participant if they have a preference of a person they would like to see. Or if there is nobody close by, and the participant is not ready to drive to the nearest city to see an infectious disease doctor, then ask if there is somebody local (like a registered nurse, public health nurse, physician’s assistant, or doctor) whom they would like to see (this can be a Tribal clinic, IHS clinic, community health center, or local hospital).
- C. The PW Counselor should feel free to **offer their opinion** and personal experience with any of the medical providers.
- D. **Schedule the appointment.** Let the participant know you are more than willing to work with them right there to call and schedule the appointment (this is the preferred option). If the participant agrees, then examine the process for scheduling an appointment (online, phone, etc.), and proceed to make the appointment. If not, then make sure that the participant has all of the information they need to make the appointment themselves.

- a. Be sure you are fully aware of the costs associated with the medical appointment, including if contract services are being used to pay for the appointment, the proper referrals, authorizations, and paper work must be in place. Make sure the participant is fully informed as well.
- E. Let the participant know you are **willing to go with them or meet them there** for the appointment if they would like. If they would like you to attend, then make the necessary logistical arrangements (when and where to meet, if they need transportation, what to bring, etc.)
- a. If the participant does not want you to come along, strongly encourage them to invite somebody from their list of social supporters to accompany them. Tell them that it can be an emotional appointment, and that it might bring up feelings that they are not expecting, and that it could be helpful to have a partner, friend or family member there to provide support.
- F. **Write down all appointment information for the participant.**

## 6. **Closing** (10 minutes)

- A. **Affirm the participant's attendance and level of participation.** Acknowledge how difficult it can be to come in and talk about these things with a stranger, and that they are doing a great job.
- B. **Discuss questions or concerns.** Take time to discuss any questions the participant may have about the program. If there are questions about HIV or care, that can be briefly answered, then do so, but if they are more complex either provide some written information or let them know which future session will deal with that issue. You really want the participant to leave feeling good about the session and themselves, so try to not let any questions linger if possible.
- C. **Provide a referral for any outstanding need.** Write down the referral for the participant or make the contact personally and schedule a time and date with the participant there.
- D. **Provide a gift/incentive** for participating in this session (if available).
- E. **Schedule the next session with the participant.** Select a time and place of Session Five and give write this down on an appointment card (you could put it on the same card as the medical appointment, if that is okay with the participant. The participant does not need to take anything written with them when they leave, but if they would like to, they can have the appointment card to take with them. Be sure they have a copy of the list of questions to as a medical provider with them before they leave, as well.

- F. **Offer bus or subway tokens**, if available, for transportation home that day and/or to the next session, or pre-arrange a pick-up time and location if your agency is providing transportation.

## **7. Session Documentation**

Immediately after the participant leaves, document the participant's participation in the session on the Individual Participation Record. Record any questions the participant may have had, and the responses that were given. Record any impressions or case notes you would like to add. Record referrals made and contact information for follow-up if needed or desired by the participant. Arrange for Follow-up visit if desired or requested.

# Doctor's Appointment: Walk With Me

## TIPS FOR CONDUCTING THE SESSION

This session is of course, conducted on an as-needed basis. Some participants will not want their PW Counselor attending an appointment with them, while others would welcome the opportunity. Below are some general tips for walking with a participating during a doctor's visit

- Contact the participant two days before the appointment by phone to confirm with them.
- Ask them if they have any worries or concerns they would like to talk about before the appointment
- Remind them to bring any insurance information, tribal enrollment card, valid ID, co-payment, information on current medications, the list of questions generated during PW Session Four, or any print out of existing lab results with them.
- Arrange transportation or a pick up time with them, if it is needed
- If you as a PW Counselor are going with the participant:
  - Plan on arriving to the clinic/hospital 15 minutes prior to the appointment (so make sure any arranged transportation takes that into account).
  - Keep your cell phone with you and on, in case your participant needs to contact you.
  - Meet the participant in the waiting room.
  - You may participate in a prayer before the appointment
  - Affirm their attendance.
  - Do a check-in with them in the waiting room. Help to ease their anxiety through relaxation techniques or simply making small talk.
  - Revisit what the goal for the medical appointment is.
  - Wait in the waiting area while they are seen by the provider.
  - It is alright if at any time the participant wishes you to come with them into the room with the provider.
  - After the appointment, make some time to debrief the appointment quickly by asking, "How did it go?" "Did you get your questions answered?" "How did you feel you did?" and/or "How did the medical provider act?"
  - Reconfirm the time and date for PW Session 5.
  - Record notes on the Individual Participation Record

walking, I am  
listening  
to a deeper way.  
Suddenly, all my  
ancestors are  
behind  
me.  
Be still, they say.  
Watch and listen.  
You are the result of  
the  
love of thousands.

-Linda Hogan  
(Chickasaw)

# SESSION FIVE: NEW JOURNEY

## FINAL SESSION

### SESSION OBJECTIVES

- Discuss participant's visit with medical provider
- Review participant's progress towards goal
- Discuss how skills learned apply to the future
- Schedule a time for follow up
- Graduate the participant from *POSITIVE WELLNESS*

### POTENTIAL OUTCOMES

- Participant links to care (with PW Counselor assistance)
- Participant accepts responsibility to link to care on own
- Participant not ready to link to care

### SUMMARY OF SESSION ACTIVITIES

**Session time:** 1 hour, 25 minutes

#### **PRE-SESSION**

**Review** Individual Participant Record, especially noting any identified strengths and goals. The PW Counselor will also review any other documents that may have been added to the participant's file, including Holistic View of Strengths, list of potential social support, and the list of questions for a medical provider. The PW Counselor may need to have a referral or resource guide to facilitate connecting the participant to additional resources

#### **DURING SESSION**

- 1. Welcome** (5 minutes). Affirm the participant's attendance at the final session. Do a brief check-in and review the last session and answer any questions or concerns the participant may have about *POSITIVE WELLNESS* or immediate needs they may have.

- 2. Review Medical Appointment** (20 minutes). Review medical appointment and troubleshoot any barriers using stages of change and strengths-based approach. Set next steps for medical follow-up.
- 3. Review Participant Goal** (15 minutes). Revisit participant's goal, and gauge progress to meeting the goal.
- 4. Discuss Social Support** (15 minutes). Revisit the list of social support and strengths the participant provided, and inquire how they are going to be used in the future.
- 5. Offer Final Referral** (10 minutes). Provide final referrals to address any outstanding needs.
- 6. Discuss Skills for Continued Success** (10 minutes) Review holistic strengths and social support with participant and remind them that these are tools for them for the future.
- 7. Closing** (10 minutes). The PW Counselor schedules a time and place for a follow up session (which can be by phone).

## **POST SESSION**

- 8. Session Documentation.** The PW Counselor completes the Individual Participation Record for the new participant immediately after the session – recording final thoughts, impressions, and progress towards goal.

## **PREPARATION AND SETUP**

**How do I prepare?** The PW Counselor should mentally and emotionally prepare to graduate the participant. This can be a hard time for both the participant and Counselor, but the PW Counselor should celebrate it, not lament it.

Be prepared with final referrals.

Think about and prepare a meaningful final incentive, and, if appropriate, a completion certificate with the participant's name printed on it (but do not make it obvious that this was an HIV linkage to care program).

**What should I have ready?** You will need the following *POSITIVE WELLNESS* materials for this session:

- Participant Goal Card
- Individual Participation Record
- Personal care items: tissues, water, etc.

In addition, you may need the following materials and supplies:

- Social Support Worksheet
- Holistic Strengths Assessment Worksheet
- Final Incentive
- Completion Certificate

## **TIPS FOR CONDUCTING THE SESSION**

- This is the last formal session of POSITIVE WELLNESS. As such it can be a sad or gloriously fun event – depending on the nature of the relationship with the participant and level of accomplishment. The PW Counselor should be prepared to deal with these feelings, all the while making sure that the participant feels good about their participation, and that you are not abandoning them, but they are graduating.
- In some communities, you may be called upon to be an advocate or person of trust for a past participant. For instance, you may be a person the long term case manager calls to help locate the individual if they miss an appointment. Long term involvement with the community is a choice you must decide for yourself, based on your relationships with those you serve and others you associate with.

# STEP-BY-STEP PROCEDURES

## 1. Welcome (5 minutes)

- A. **Affirm the participant's attendance at all sessions.** Welcome the participant back. Acknowledge the time and travel commitment to make it to the final appointment. Acknowledge that you have enjoyed your time together and really appreciated their commitment. Also thank the participant for their continued attentiveness. Acknowledge that they saw this through from start to finish.
- B. **Do a brief check-in** with them on how they are doing and feeling. The PW Counselor may engage in some friendly small talk to put the participant at ease and do a 'check-in' with them.
- C. **Review the last session** and answer any questions or concerns the participant may have about *POSITIVE WELLNESS* or immediate needs they may have

## 2. Review Medical Appointment (20 minutes)

- A. **Start off by simply asking, "How did your medical appointment go?"** You may have an idea already, especially if you accompanied the participant to the appointment. If you have already spoken about the appointment, then you may start off by asking, "Now that you have had more time to think about the appointment, what other thoughts do you have?"
- B. **It is vital that the participant debriefs their experience with their medical appointment.** Any negative experiences should be processed and problem solved and positive experiences should be explored and understood.
- C. **The PW Counselor should begin by exploring the positive experiences** by asking questions such as:
  - "What went well during the appointment?"
  - "What questions did you get answered?"
  - "How did those answers make you feel?"
  - "What did you do that made you proud of yourself?"
  - "What strengths did you really draw upon to make this a positive experience?"
  - "What did the doctor say that made you feel good?"
- D. **The PW Counselor should then explore what either didn't go well or left the participant with an uneasy feeling** by asking questions such as:

- “What didn’t go so well during the appointment?”
  - “What questions did you not get answered?”
  - “How did that make you feel?”
  - “How did the doctor act towards you?”
  - “What do you think that you could’ve done differently?”
- E. **End this portion of the session by exploring their next steps.** If the appointment did not appear to go well, focus on reframing that experience (“Not everybody finds a good doctor on their first time looking, you should be proud of yourself for taking the risk.” or “It might be better that you found out now when you have the resources and support to help you search further rather than years from now.”) The ultimate goal is to frame the experience as an overall positive one, and get them to commit to a second appointment or for making an appointment with an infectious disease doctor or another provider. We want to ease their comfort and raise their sense of self-efficacy, so there is no such thing as too much positive feedback during this section. Ask questions such as
- “How do you feel about yourself now that you have been through your first appointment?”
  - “Are you ready to see a doctor (again or for the first time)?”
  - “Does this affect your opinion of HIV medicine at all?”
  - “Are there any new strengths or supports you would like to add to your list?”
  - “What are your next steps now that you have kept your first appointment?”

### 3. Review Participant Goal (15 minutes)

- A. **Ask the participant if they remember their current goal.** If they do not, do not make them feel bad. Simply review it with them.
- B. **Ask the participant if they accomplished what they set out to do.** They may not have actually accomplished what was written on the card, but they may have succeeded at achieving one or two small steps leading up to that goal. Give them positive feedback for whatever successes were realized. Ask them what stage of change they believe they are currently in for that goal. You may need to remind them of the stages of change (feel free to bring out the stages of change handout).
- C. **Ask them what they are planning to do moving to the next stage,** and then problem solve around any barriers the participant may have encountered while working toward their goal. If participants are stuck and do not know how to move forward, bring out the Holistic View of Strengths Worksheet and help them tap into some of their strengths to move forward.
- D. **Remind them that they now have the skills and knowledge to move through this goal on their own,** and to set other goals for themselves. Other such goals might be:

- To take their HIV medicine 100% of the time
- To disclose their HIV status to my partner
- Disclose my status to my friends
- Advocate on behalf of people living with HIV
- Return for my second medical appointment
- Maintain all of my lab appointments for one year.
- Talk to my spiritual adviser about helping me with my treatment

E. **Write down any new iterations of the goal** if necessary and give a copy to the participant if they want it.

#### 4. **Discuss Social Support** (15 minutes)

- A. **As you finish your discussion about the goals, remind the participant that they now have a list of people in their life that can support them** in the goals they seek to pursue, any changes they wish to make, and on their path to wellness.
- B. **Encourage the participant to use them for support any time they need a person to talk to.**
- C. **Remind participants that you are an ongoing source of support for them as well,** and that they can reach out to you in the future should they need to talk.

#### 5. **Offer Final Referrals** (10 minutes)

- A. Referrals have been offered throughout the program, so this is just one **last opportunity to see if the participant would like any final referrals for any outstanding needs** (can be medical, prevention, education, housing, food, childcare, welfare, substance use, mental health, etc.). The PW Counselor should also feel free to offer a referral that they feel like the participant might need (if the participant does not request any themselves).
- B. **Write the referral information down and assist in making an appointment** if necessary and requested.

#### 6. **Discuss Skills for Continued Success** (10 minutes)

- A. **This is a final opportunity to remind the participant of everything they have accomplished during the time you have spent together,** which could include all of some of the following:

- Created a list of people that can support them
  - Set a personal goal and worked towards
  - Achieved a personal goal
  - Made an appointment to see a medical professional about HIV
  - Kept the first medical appointment to talk about HIV
  - Created a list of sources of strength that exist within themselves
  - Learned about HIV
  - Learned about HIV medicines
- B. Give positive feedback to the participant for doing so much work.** Tell them they should be proud of themselves, as well.
- C. Ask if they have any questions** about any of the work that you did together.
- D. Ask if they need any copies of anything (Holistic Strengths Assessment, Holistic View of Wellness, etc.).** If so, then prepare an envelope of manila folder of papers for the participant.
- E. Remind the participant to not be afraid to do these activities again at any time in the future** when they are tackling a new challenge in their life, need to make a tough decision, are going through an emotionally trying time, or just need to regroup.

## 7. Closing (10 minutes)

- A. Schedule a time or day (at least) for a follow-up session.** Ask the participant if they would like to do it in person or over the phone. If they do not have a phone or feel like an in-person meeting is more appropriate, then choose a location and time as well. The participant may not want to do a follow up, and that is fine.
- B. Remind the participant they can also turn to you as a source of support in the future,** and should they ever need to chat or have some questions, that they should feel free to call.
- C. Provide a final thank you** to the participant for all of their hard work.
- D. Provide the participant with a final incentive,** which should ideally be something larger and more significant than incentives provided for previous sessions. Providing the participant with a formal completion certificate with their name and the name of the program (not identifying that it was an HIV specific linkage to care program) may also be a nice gesture.
- F. Offer bus or subway tokens,** if available, for transportation home that day

## **8. Session Documentation**

Immediately after the participant leaves, document the participant's participation in the session on the Individual Participation Record. Record any questions the participant may have had, and the responses given. Record any impressions or case notes you would like to add. Record referrals made and contact information for follow-up if needed or desired by the participant.

## Follow-Up

### TIPS FOR CONDUCTING THE SESSION

- The purpose of the follow up session is to check in with the past participant to see how they are doing maintaining their health.
- The session should be held 2-4 weeks after Session Five
- The follow up session is optional – especially if the participant made and kept their doctor’s appointment previously.
- Ideally, the day and time of the session should be scheduled, if not, it can be spontaneous.
- This session can be conducted in person, in the field, over the phone, or even online (via web conference, Skype, or a chat feature)
- During the session, the PW Counselor should be prepared to:
  - Check in on general health
    - “How are you feeling after you completed *POSITIVE WELLNESS?*”
  - Remind participants of long term goals
    - “How is your progress towards your goal going?”
  - Check in on continued medical care
    - “When was the last time you saw the doctor?”
    - “Have you talked about medication at all, yet?”
  - Check in with referral follow-up
    - “Have you followed upon the final referral we provided you?”
    - “How did the referral work out for you?”
  - Check in on social support
    - “Have you continued to use the social support you identified?”
    - “How do you feel about the support you are receiving?”
  - Close out
    - “What help do you need from me to help continue on this road?”
    - “You know we are a continual source of support for you. If you need us, you know how to reach me.”
- Let participants know this is the last time they will be hearing from you, unless they reach out to you.
- Affirm their commitment to their health, and wish them best of luck. Congratulate and thank them.
- Record the session on the Individual Participation Record.

Go forward with  
courage.

When you are in doubt,  
be still, and wait;  
when doubt no longer  
exists for you, then go  
forward with courage.

So long as mists  
envelop you, be still;  
be still until the  
sunlight pours through  
and dispels the mists  
-- as it surely will.

Then act with courage.

-Chief White Eagle  
(Ponca)