



Lessons learnt from navigators

First time phone contact: Engaging with vulnerable callers

Who this is for and why

This resource may be helpful for the care finder line manager and the care finder as an additional resource to their existing expertise and knowledge. It is based upon experiences and reflections of Aged Care System Navigators and COTA Australia as part of the Australian Government funded Aged Care System Navigator Trial Measure (ACSN).

These lessons could be of assistance to care finder organisations and their teams. The official operation of the National Care finder program is governed by [care finder policy documentation](#).



Background

Phone-based communications can be difficult for a vulnerable, older person and requires a practiced and client-centred engagement approach. The call-taker can assist the caller to articulate their need and thereby provide the most appropriate information and/or referral pathway. Care finders will have a Referral Pathway resource to access and use.

Some of the complications experienced by navigators when attending to phone call queries were:

- **Hearing** can be difficult. Many older callers have trouble with audio clarity.
- **Medical conditions** that make speaking difficult. Many older callers have chronic medical conditions that impact on their ability to verbalise – call takers should be alert to this and ensure they create pauses in the conversation. Many older callers with chronic conditions may also speak very slowly and those with **dementia** can experience cognitive impairment and confusion.
- **Memory problems:** Many older callers experience memory problems and confusion. For example, they may have asked for a call-back but cannot remember doing so and may even forget why they called.
- **Lack of confidence:** Many vulnerable seniors lack the confidence to undertake a complicated phone conversation, they fear they don't know what to ask or they won't understand the responses.
- **Strong emotion:** Many vulnerable seniors reach out for help when they are in crisis and are looking for immediate support. They can be anxious, crying or sometimes even angry.

It was important for navigators to practice client-centred engagement from the commencement of the phone call. Building trust and rapport from the first phone call had the following practical benefits:

- Preventing confusion or misunderstanding
- Resulting in the right outcome for the caller
- The caller felt heard, understood and supported
- The caller had increased trust in the service/system.

The following are practical examples of communication challenges and responses from ACSN navigators that helped support the customer.

Common issue Navigator response

Caller unable to articulate what assistance they need

In many instances, first-time callers are unsure of why they are calling you OR why they have been referred to you. Often, they cannot recall the organisation who referred them.

Callers will need guidance and direction to help articulate their need.

Many vulnerable seniors lack the confidence, the knowledge of systems and associated vernacular to clearly frame their position and what they are seeking. The call-taker should be expecting this and be prepared to guide the conversation. Many first-time callers need your help to understand why **they** have called **you**.

They may struggle to remember who gave them your number. Often, they believe they are calling My Aged Care or a Provider. It is not uncommon for a caller to say “I was talking to you people yesterday and you said such and such.”

Often a caller will leave a message on voicemail asking for a call back and then have no memory of calling. The call-taker can help the caller by prompting and guiding for example e.g: “You left a message for us to call, we help people understand the aged care system, could it be related to a problem you’re experiencing arranging aged care services at home?”

Sometimes, you will uncover that the person thinks they have called the cleaner, pharmacist, etc. It is your job to help the caller articulate what they need.

You can say “I’m sorry Mr Smith I think you’ve called the wrong number but perhaps I can help you find the right number.”

It may transpire that Mr Smith was just trying to cancel his cleaner for the day and you were able to find out that Uniting Care provides his cleaning in Wagga – you can Google it while you’re chatting to him and provide him with the number.

Caller unsure of your service

The caller might be able to tell you how they were referred, and what they are having trouble with – but they will still be unsure of your service and your role

A big part of managing first-time calls is being able to explain:

- who you are
- the role of the Navigator service
- the Organisation you work for
- where that all fits in the bigger picture

People will have had dealings with MAC, RAS/ACAT, providers calling to arrange services and workers delivering services in their homes. They may lose track of who they are communicating with and whom that person represents.

Often the caller will say “Who are you?” as their opening statement when calling you.

In addition to using the name of the organisation you represent, you need to explain it in simple terms “I’m from an organisation called X and we have a service where we help people to understand the aged care system”.

You might also say “I think you may have been referred to us because you are having trouble with your aged care services.”

Additionally, callers will be confused about the structure of the aged care system, the program they are receiving support under and/or use terminology they have heard but apply it incorrectly. The call-taker should be alert for incorrectly phrased questions which could lead to further misunderstandings.

For example, a caller might say “I need help with my Home Care Package” when they are receiving CHSP services.

Many callers will not be familiar with the acronym CHSP even when they are using it to access services. Often, saying Commonwealth Home Support Programme in full does not help or improve their understanding.

It could take a few questions to get an understanding of their current MAC status. You may need to ask questions such as:

- “What level Home Care Package are you on?”
- “So you have been assessed and approved for a HCP but you haven’t chosen a provider yet?” “So you are currently getting transport and social support although you don’t yet have an assigned package?”

Was the caller within the target population for navigator support?

Note: The Care finder target audience is provided in [the Care finder policy documentation](#).

Target population

Through the establishing conversation, you can gather the type of information that will help determine whether the caller is within the Target Population for Navigator support. For example:

- Is the caller a Carer or Customer (carers can often be more business-like, younger, more confident).
- Age, illness (some callers sound very frail; people with Parkinson's typically have long pauses and need you to be patient).
- Memory, cognitive impairment, comprehension (the caller sounds confused, unsure of the answers to your questions).
- Hearing (you have to yell down the phone).
- Language (hesitant English, may need interpreter).
- Lives alone / not much support.

Where the caller was not eligible for the navigator service, they were referred to other services.

The caller was eligible for navigator services¹

Eligible for ACSN Trial navigator services

Where the caller was eligible for Navigator services the caller's location determined the referral pathway.

While talking to the caller, the call-taker searched online for navigator services. Where there was a service nearby, the call-taker offered to have the navigator contact the customer.

Where there was not a navigator service nearby to the caller, the options were:

- Call-taker provided information and support over the phone, by email and/or mail.
 - Navigator provided information and support over the phone, by email and/or mail.
 - Customer referred to nearest ACSO contact at Services Australia (if the location is conveniently located).
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The caller was not eligible for ACSN Trial navigator services

Referring outside the navigator service

If the caller was **not** within the target population for navigator service, the options were:

- Call-taker provides information and support over the phone, by email and/or mail.
 - Referred to nearest ACSO at Services Australia.
 - Referred to Carers Gateway (if a carer).
 - Referred to My Aged Care.
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Endnote

- ¹ Note: The specific referral pathway below applied to available ACSN Trial locations. There were 28 trial sites across Australia. Care finder will be a national network of support established during 2023. Care finders should consult the Referral Pathways resource for guidance on pathways and referrals.