Certified Caregiving Systems Navigator

Class 4 — The Wheels and Practice

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What We'll Cover Today

- The Wheels — an overview of all 11 Wheels and what they do
- When and how to use the Wheels — matching the right Wheel to the right moment
- Practice Session 1 — 15 minutes, using a scenario you brought
- Practice Session 2 — 15 minutes, using a second scenario
- Debrief — what you noticed, what you learned, what felt hard
- Closing — a recap of our work together

The Wheels

Tools for the moment — from CaringOurWay.com

What Are the Wheels?

The Wheels are visual tools that help family caregivers think through a specific challenge — organized around the Nine Caregiving Domains.

- Each Wheel addresses one situation: a diagnosis, a pressing problem, a discharge, a worry
- The Wheels make an abstract conversation concrete. They give the family caregiver something to work with
- Navigators use the Wheels during the Suggest or Act step not instead of listening, but after
- Available in your training material

All 11 Wheels

Wheel	When to use it	Domain connection
After the Diagnosis	Just received a diagnosis — what now?	Deciding + Planning
Pressing Problem	Something urgent needs to be resolved now	Assessing + Managing
Care Plan	Matching needs to available help	Managing + Planning
Help Inspiration	Family caregiver needs support and renewal	Sustaining + Being
Organize Family & Help	Coordinating family members and paid help	Managing + Communicating
Discharge Plan	Preparing to leave hospital, rehab, or a program	Planning + Managing
Discharge Plan Elements	What needs to be in place for discharge	Managing
Transition Plan	A major change is coming	Planning + Deciding
Communicating Wheel	Navigating a difficult conversation	Communicating
Worry Wheel	Anxiety and uncertainty are taking over	Assessing + Sustaining
Plan Wheel	Building a step-by-step plan	Planning + Managing

How to Choose the Right Wheel

- Listen first. The Wheel you choose comes from what the family caregiver named, not what you assumed
- Match the Wheel to the situation: diagnosis → After the Diagnosis; urgent problem → Pressing Problem
- When in doubt, ask: "What feels most pressing right now?" Tthe answer points to the Wheel
- You can use more than one Wheel in a session but start with the one that fits the confirmed focus
- Introduce the Wheel as a thinking tool: "I have something that might help us work through this."
- Let them guide it. The Wheel prompts questions; they provide the answers.

The Wheels Connect to the Domains

- Each Wheel connects to one or two of the Nine Caregiving Domains
- If you know a family caregiver's wheelhouse and challenge domains, you can anticipate which Wheels will resonate
- Example: A family caregiver with Sustaining and Being as challenges may find the Worry Wheel and Help Inspiration Wheel most useful
- The Wheels are not separate from your domains conversation. They extend it
- Record which Wheel you used in the Session Worksheet and note what it opened up

Introducing a Wheel in a Session

The language of introduction matters.

Opening the Wheel: *"I have a tool that helps family caregivers think through this kind of situation. Would you be willing to take a look at it together?"*

If they seem overwhelmed: *"We don't have to do all of this. Let's just start with what feels most urgent."*

If they light up: *"Let's work through as much as feels useful. We can always pick it up at our next session."*

Closing the Wheel: *"What did this open up for you? What do you want to do with it?"*

Practice

Bringing it all together.

What We'll Do in Practice

- Round 1 — As a group: one scenario, the whole class navigating together
- Round 2 — In pairs: Navigator and client, practicing without notes
- A short break — get your Session Worksheet ready
- Round 3 — In pairs again: Navigator and client, this time using the Worksheet and ending with a recap
- The goal is not perfection. The goal is to practice thinking in the framework

Round 1

As a group — one scenario, all of us as Navigator.

Group Practice

Whole class

One volunteer shares a scenario they brought

How this works:

- One person shares their scenario with the whole class
- The class works together as Navigator — calling out questions, suggestions, and ideas as a group
- Denise takes notes on the Session Worksheet live, so you can see what it looks like in use
- No pressure on any one person. This is a shared warm-up before you practice in pairs

As You Watch, Notice

- How Denise opens. What question invites the scenario open without steering it
- Where validation happens before any suggestion is offered
- How the Domains Check-In gets filled in as the conversation unfolds not all at once at the end
- How the group lands on a Confirmed Focus together, even with many voices offering ideas
- What the Worksheet looks like by the end of the conversation. This is your model for Rounds 2 and 3

Round 2

In pairs — Navigator and client, no notes yet.

Practice Session 2

15 minutes

Scenario: Your scenario, in pairs

Break into pairs. One person is the Navigator; the other is the client, using the scenario they brought. Lead the conversation through the framework without worrying about notes yet.

During this session:

- Navigator: Work through the Ask & Validate → Suggest → Confirm Focus → Act framework
- Client: Respond honestly, as the family caregiver in the scenario
- No worksheet yet. Focus on the conversation itself

Focus on the Conversation

This round is about the conversation, not the paperwork. Practice leading with Ask & Validate → Suggest → Confirm Focus → Act before you worry about writing anything down.

- Navigator: Use the scenario your partner brought. Open with a question, not a suggestion.
- Client: Respond as the family caregiver in the scenario as honestly as you can imagine them responding.
- Work through all four steps: Ask & Validate, Suggest, Confirm Focus, Act.
- When you finish, switch roles if time allows or simply discuss how it felt.

10-Minute Break

Get your Session Worksheet ready.

Round 3 uses it for notes and a recap.

Round 3

In pairs again. This time, with the Worksheet.

Practice Session 3

15 minutes

Scenario: Same or new scenario, with notes

Find a partner — the same one or a new one. One person is the Navigator; the other is the client. This time, the Navigator uses the Session Worksheet to take notes during the conversation and ends with a recap.

During this session:

- Navigator: Work through the framework, this time with the Session Worksheet open
- Everyone: Take notes on the Worksheet as the session unfolds
- After the session: Draft the Session Recap Email together

Notes and Recap

- Navigator: Keep the Session Worksheet open as you talk. Fill it in live, the way Denise modeled in Round 1.
- Ask & Validate: Note the opening question and what you heard.
- Domains Check-In: Check Wheelhouse or Challenge as domains come up in conversation.
- Suggest / Confirm Focus / Act: Record what was offered, what you agreed on, and the next step.
- Recap: Before you finish, draft the Session Recap Email together using what you wrote.

Session Recap Email — Draft Together

- What we talked about, recapped in one or two sentences using plain language and in the family caregiver's voice
- Your next step — the specific first action they agreed to take
- Our next session — date, time, or a placeholder
- Keep it brief, warm, and concrete. This is a working email, not a report
- Read it back to your partner before calling it done. Does it feel right to them?

Debrief

What did you hear? What did you learn?

Debrief — All Three Rounds

What worked	What felt hard	What you'll carry
What did you see work well — in the group round or in pairs?	Where did the framework feel difficult to hold?	What will you do differently in your own sessions?
What moment felt most like real navigation?	Was the Worksheet helpful or did it get in the way?	What do you want more practice with?

Navigator's Reflection

For everyone who served as Navigator:

- What felt natural? What felt awkward?
- Was there a moment when you wanted to jump to a solution — before the focus was confirmed?
- How did it feel to validate before suggesting?
- Did using the Worksheet in Round 3 change how the conversation felt, compared to Round 2 without it?
- What would you do differently — and what felt right?

Our Work Together

A recap of what you've built.

What You've Built Across Four Classes

Class 1	**The Navigator's Foundation** — The Nine Caregiving Domains, wheelhouse and challenge, the Six Caregiving Stages, and how to listen for what matters.
Class 2	**Communication and Navigation** — Communication skills, validation, Medicare Part B services, the GUIDE Model, and how to use the Nine Domains as a conversation guide.
Class 3	**Goals, Referrals and Plans** — How to set SMART goals, make effective referrals, build step-by-step plans, and use the three care plans.
Class 4	**The Wheels and Practice** — All 11 Wheels, how to choose and introduce them, and two full practice sessions using the complete framework.

What You Carry Forward

- The Nine Caregiving Domains — a framework for hearing what family caregivers carry
- The Ask & Validate → Suggest → Confirm Focus → Act framework — a structure for every session
- Goals, referrals, and plans — the three tools of the Act step
- The 11 Wheels — visual tools for specific situations
- The Session Worksheet — your in-session companion and recap tool
- The practice of listening first — always — before offering anything

Your Next Steps for Certification

- Complete the Master Classes and their exams
- Join six hours of live training
- Practice creating System Solutions plans with five individuals
- Review the resources in your training materials: the Wheels, the Recovery Plan, the spreadsheet for carees
- Bring questions to our CaringOurWay.com group as the learning continues after the classes end

A Tool Available to You: Plans4Care

Plans4Care

A technology platform that helps navigators and coaches understand a caree's current abilities — and create strategies that match where they actually are.

- Know when a caree needs more supervision or care
- Understand which stage of dementia they're in and what to expect
- Get clarity on financial, legal, and safety decisions
- Track progress and adjust strategies as needs change

Everyday Function Scale (EFS)

An assessment you complete with your client to understand their caree's current functional level — so every care plan is tailored to where they actually are, not generic advice.

- Drives personalized care plans and strategies
- Replaces guesswork with a clear picture of current abilities
- Completed as part of the Dementia Care Family Support Program

Available to certified program participants · careyearsacademy.com/caregiving-resources/dementia-care-support/

Everyday Function

Ed (Case Study)

Can live alone. Independent with daily activities.

Can be alone for short periods. Requires assistance with daily activities.

Cannot be alone. Requires complete assistance with daily activities.

Based on the statement you chose, it appears Ed (Case Study) **can live alone with someone visiting the home once a day.**

Most likely Ed (Case Study),

- can follow a familiar routine for daily self-care and meals, often taking more than usual time to complete.
- can manage medications and finances with help to fill the pill organizer or review bank statements.
- will not notice common household problems, for example, a burned-out light bulb or water on the floor.

Everyday Function

Ed (Case Study)

Can live alone. Independent with daily activities.

Can be alone for short periods. Requires assistance with daily activities.

Cannot be alone. Requires complete assistance with daily activities.

Based on the statement you chose, it appears Ed (Case Study) **needs 24-hour oversight and can be alone in a room for less than an hour if someone is nearby**.

Most likely Ed (Case Study),

- can perform common daily activities with help when things are in plain sight.
- will need a reminder to start an activity.
- will not notice or react to unsafe situations like a smoke detector alarm.

Everyday Function

Can live alone. Independent with daily activities.

Can be alone for short periods. Requires assistance with daily activities.

Cannot be alone. Requires complete assistance with daily activities.

Based on the statement you chose, it appears Ed (Case Study) **needs 24-hour oversight and cannot be alone.**

Most likely Ed (Case Study),

- can perform activities that involve repetition like wiping a table and folding a towel with simple directions.
- will need reminders and assistance with all self-care activities like getting dressed, eating, and using the toilet.
- will not notice or react to unsafe situations like a smoke detector alarm.

Thank You.

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