



## Staff guidance for introducing and administering the CAT and CAT-S as part of a pilot study

Thank you for your interest in using the CAT or CAT-S and taking part in the pilot. Below are some short notes to guide you in identification, recruitment, administering of the CAT or CAT-S and returning information to the team. The term CAT is used below to indicate whichever tool you are using.

### Eligibility Criteria

The CAT is designed to be used with:

- Unpaid carers, often friends or family members, who are supporting a patient at home,
- Adults aged 18+ years old.

### Procedure

#### **STEP 1: IDENTIFICATION**

If you identify an unpaid carer who fulfils the eligibility criteria, give them a copy of the pilot information pack which includes the Participant Information Sheet, FAQ for carers and consent form. Explain that the CAT is designed to identify the needs of people in relation to their caring role and for their own well-being, and you would like to complete the CAT with them as part of the pilot. You can give them the pack and CAT to review before your next visit or proceed, depending on their response. If they wish to proceed, please sit together to take consent and complete the CAT.

The consent form should be scanned and returned to the CAT team at [CAT@edgehill.ac.uk](mailto:CAT@edgehill.ac.uk).

#### **STEP 2: COMPLETION OF THE CAT**

The CAT should be completed in a collaborative manner with the carer, following the instructions on the front page.

**Section 1: Complete together with the carer.**

**Section 2: Complete the question 1 to 11 together.** Carer and staff/volunteer to discuss each question, even if no needs or concerns are identified at Q1, and circle the carer's level of perceived need has for any alerts using levels of NONE (Score of 0), LOW need (Score of 1), MODERATE need (Score of 2), or HIGH need (Score of 3). **Please provide ONLY one response for all questions.**

**Section 3: Add up the total score for alerts from Q2 to Q10 and note it on the or below the thermometer.**

**Section 4: Make a plan with the carer; prioritising the top four alerts for action and noting the agreed next steps for the priority alerts identified;**

**Section 5: Set a review date and person responsible for follow up.** All questions to be revisited during a review, to monitor the support provided and any change in the alerts. **It is recommended that monitoring and review dates are more frequent for carers with alerts which are considered 'MODERATE' (amber) or 'HIGH' (red).** The carer should tick the appropriate boxes and sign the consent section.

#### **STEP 3 – IMMEDIATE ACTION**

If any of the alerts can be supported immediately, such as provision of information or signposting to sources of support, these should be completed. During the implementation pilot of the CAT, the provision of written information with sources of support for carers was highly valued by carers and is encouraged where possible. Local resources and information about local carer centres can be used where available. All other alerts should be included in the action plan indicating the appropriate action and review date. If any of the alerts can be supported immediately, such as provision of verbal or written information or signposting to sources of support, these should be completed. **Please refer to any appropriate safeguarding policy if required.**

**STORAGE AND SHARING OF THE CAT:** Unless it has been decided by your organisation, discuss with the carer their preferences for storage of the CAT. Typically, it is recommended that the CAT remains with the carer and that the staff member/volunteer make brief notes of the alerts and agreed actions to guide their next steps. However, the carer

may choose for the staff member/volunteer to keep it. Discuss with the carer use of their anonymous information to inform service development e.g. types of alerts identified and any gaps in service provision to meet them.

**SHARING ANONYMISED PILOT DATA:** If you are part of a pilot study with the CAT team and the carer has ticked the consent box to share anonymised data on the completed CAT, please put the carer initials at the top of each page of the CAT and cover Section A of the carer details to anonymise the CAT. Then scan the two sides of the CAT into a pdf file so it can be emailed to the research team at [CAT@edgehill.ac.uk](mailto:CAT@edgehill.ac.uk). If you have any questions about anonymising or sending the CAT to the team please get in touch.

**CAT RESEARCH TEAM CONTACT DETAILS:** If you would like more information about the CAT study or have any questions or comments about completing the CAT please contact the team at [CAT@edgehill.ac.uk](mailto:CAT@edgehill.ac.uk). There is also information available on the project website at [www.edgehill.ac.uk/carers](http://www.edgehill.ac.uk/carers) Please note this is for guidance about conducting the CAT, not advice on the next appropriate action in response to alerts.