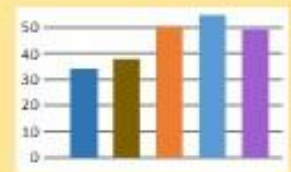# Business Card Activity Module

Activities revolving around a simulated business convention

Comparing name lists, creating lists and tables, organizing
and interpreting tables and charts, complete receipts, invoices, certificates,
calculating expenses and revenues, and more ...

Dave Winfred
Apollo Manufacturing

Vice President   New Hampshire

Sales Receipt

INVOICE
PAID

MultiContext Approach

Joan Toglia, Ph.D., OTR, FAOTA

Contents

Electronic Organization of Files on Flash Drive (inside back cover)

- Level 1
- Level 2
- Level 3
- Lists and Forms
- Supplemental Activities
- Treatment Forms

Electronic Files for Level 1 Activities:

1. Search and Locate

a. Unmarked short name lists that match business cards: 6, 8 or 10 item name lists
b. 13 item name list
c. Answers to questions 1.1-1.3 (dark blue direction cards) for 13 item name list
d. Question 1.3 worksheet (13 item)

2. Search and Locate Card Answers

a. Level 1 directions for short 6,8,10, item name lists
b. Short name lists: Unmarked and with check marks: 6, 8 or 10 item (same list as above)
c. Answers to questions 2.1 and 2.3 (light blue direction cards) for 13 item list

3. Shifting: Direction Card Answers

a. Answers to questions 3.1-3.5 for 13 item name list.

4. Shifting: Sorting

a. Additional business card sorting directions

5. Entering Information into Tables
a. General Directions, Questions 5.1-5.3 and Answers

8. Creating List Questions
a. Answers 8.1-8.3 (1A- 13 item list ans)

Electronic Files for Level 2 Activities

1. Search and Locate: Lists and Answers

a. 22 item name lists (2A and 2B)
b. Answers for questions 1.1-1.3 (dark blue direction cards) for 22 item name list
c. Question 1.3 worksheet (22 item)

2. Search and Locate Card Answers

a. Answers to questions 2.1 and 2.3 for 22 item list (light blue direction cards)

Electronic Files for Level 2 Activities *(continued)*

3. Shifting Direction Card Answers

a. Answers to questions 3.1-3.5 (green direction cards) for 22 item name list

4. Shifting: Sorting

a. Additional Directions: Business card sorting

5. Entering and Organizing Information into Tables

a. Questions and Answers for 5.4 – 5.9

6. Convention Schedule Activities

a. Questions and answers for 6.1– 6.6

7a. Calculating Expenses for Convention

a. Calculation questions and answers

8. Creating Lists: Answers

a. Questions 8,1 -8.9 (red direction cards) and Answers

9. Complex Questions
a. Preparing Receipts and Invoices: Questions 9.1-9.6 and Questions 9.7-9.9

Electronic Files for Level 3 Activities

1. Search and Locate: Lists and Answer

a. 40 item name lists (3A, 3B)
b. Answers for question 1.1-1.3 (dark blue cards) for 40 item name list
c. Question 1.3 worksheet (40 item)

2. Search and Locate Card Answers

a. Answers to questions 2.1 and 2.3 for 40 item name list

3. Shifting Direction Card Answers

a. Answers to questions 3.1-3.5 (green direction cards) for 40 item name list

5. Entering and Organizing Information into Tables

a. Questions and answers to 5.9-5.11 (40 item name list)

9. Complex Questions

9a. Preparing Receipts and Invoices: Questions and answers 9.10 - 9.22, forms
9b. Summary of Attendees: Questions 1-3, files of tables and charts.

Lists and Forms

- Set 1: Short name lists (6,8,10 items) – no distractors
- Set 2: Name lists with distractors (13, 22, 40 items)
- Registration lists 1 to 3
- Ancillary Forms and Materials: price list, region sheet, address list, certificates, invitations

Supplemental Activities

S1. Using name lists to complete certificates.
S2. Compiling items for mailing or folders, addressing letters or mail merge activity.
S3. Using name lists to complete invitations.
S4. Name lists and work schedules.
S5. Using the internet to investigate or compare prices of travel and convention products.
S6. Deductive reasoning using business cards (manual only).

Treatment Forms

Appendices

Appendix A: Example of Search and Locate Activities

- Example of Activity #1: Question 1.1: 13 and 40 item name lists
- Example of Activity #2: Level 1 using short name lists

Appendix B: Sample Shifting and Sorting Activities (#3-4)

- 3. Sample shifting questions 3.3 and 3.5
- 4. Sample sorting directions for level 1 and level 2

Appendix C: Entering information into Tables and Schedules

- 5. Entering information into tables: Question 5.2 (level 1);   5.5-5.9 (level 2)
- 6. Planning convention schedule: Question 6.1 and 6.5

Appendix D: Complex and Supplemental Questions

- 7a. Calculation questions
- 9a. Preparing forms: Invoices and receipts
- 9b. Summary of Attendees

Appendix E: Supplemental Questions

- Supplemental activities S1, S2, S4, S5

Accompanying Materials (described in introduction): 94 small activity cards, 31 direction cards (index card size), and USB flash drive (located in plastic pocket on inside back cover) that contains all worksheets, lists, forms and answers for self-assessment.

About the Author

Joan Toglia, Ph.D, OTR/L, FAOTA has over 30 years of experience in Occupational Therapy as a clinician, researcher and educator. She is recognized internationally as a leader in the rehabilitation of persons with cognitive perceptual deficits as a result of acquired brain injury. She has presented over 300 workshops and lectures around the world on cognitive rehabilitation with a focus on cognitive strategies, metacognitive skills and executive function across different ages and diagnostic groups.

Acknowledgements

1. Introduction

The Business Card Activity Module is a part of a series of functional cognitive activity sets, involving everyday materials that is designed to be used within a cognitive rehabilitation program. This activity set supplements that of the Schedule and Menu Modules. The activity modules share similar activity themes and directions but differ in materials and functional context. Therapists are strongly encouraged to review the Schedule Activity Manual and activities, prior to reviewing these activities.

The functional cognitive activity modules include everyday materials that are presented in a variety of different ways to place demands on different areas of cognitive function. Each activity set includes materials or directions that vary in complexity (detail, number of items, distractors) and cognitive demands, however all activities within an *individual* module uses the same functional context. The activities introduce elements of novelty and challenge that can be tailored to a wide range of cognitive functional abilities.

The main activities in the Business Card Module revolve around use of name lists, a registration list and business cards for an annual business convention or conference. Card sets, lists, question sheets, registration lists, forms, or certificates, answers for self-checking, and other materials accompany the activities. Like the schedule and menu modules, activities within the business card module range from easy to complex. The option to choose and adjust difficulty level of activities within an individual module, so that activities are at an optimal level of challenge (not too easy and not too hard) is an important ingredient of treatment.

Who are the activities appropriate for ?

The activities were originally designed and used with adults with acquired brain injury (ABI) or neurological disorders such as stroke, brain tumor, traumatic brain injury, multiple sclerosis and Parkinson's disease, however they have applicability to other populations (eg. mental health conditions) that experience difficulties in cognitive performance. The activities within this set are appropriate for different levels of cognitive function including adults in an inpatient rehabilitation setting with limited attention span or moderate cognitive impairments as well as higher level individuals with subtle cognitive difficulties. Level 1 activities in this set require basic attention (5-10 minutes), and ability to read names and simple sentences. Level 3 activities involve the ability to shift back and forth between multiple sources of information, keep track of multiple criteria during activities, handle an increased amount of detail and information, read and follow directions and adhere to rule constraints.

Use of Activities within the Multicontext Approach (MC)

The MC Approach integrates functional cognitive activities within a metacognitive strategy framework. It focuses on optimizing strategy use, self-monitoring or self-awareness across functional activities and provides a framework for metacognitive strategy training and generalization of learning. In addition, the Multicontext (MC) approach structures treatment activities in a sideways manner to promote transfer and generalization by helping the person detect and connect similarities between activity experiences. The reader is referred to additional references for a full explanation of the MC approach (Toglia 2010; Toglia, 2018a; Toglia, 2018b).

Although the activities within this module range from basic to complex, the directions and activities share parallel features with directions and activities in the schedule and menu module. Therefore, selected activities at the *same level of difficulty*, can be used in combination with similar activities from other modules and arranged across a horizontal transfer continuum, consistent with the MC approach. Alternate activities at similar complexity levels also provide opportunities for the person to recognize that the same performance error repeatedly emerges across activities. In the early phases of treatment, structured activities, such as those included within this activity set and the schedule or menu modules, can be particularly helpful in enhancing self-awareness or self-monitoring of cognitive performance errors and promoting strategy use.

Exhibit 1.1 below provides an example of a series of basic activities, from different modules, that have been used within inpatient settings or for those with moderate cognitive symptoms. All of the activities place repeated demands on the ability to recall and keep track of information while searching. Since the cognitive demands are similar, the same strategy or task methods are applicable across activities. Practice in tasks that have different functional contexts but require the same cognitive abilities and strategies helps to promote strategy use and generalization.

Exhibit 1.1 Sample MC Horizontal Activities Across Treatment Sessions: Search and Locate

Similar Activity Theme Across Activities: Finding and locating information from a 10-item list.

Typical Performance Error: Loses track of information on the list. eg. forgets items being searched; loses place.

Sample Strategy to Control Performance Error across all activities: Verbal rehearsal of key words during searching (can progress from talking aloud, whispering, internal)

Sample Directions across activities: *Remember the first 3 items from the list and see if they are in or on the....*

Schedule Module	Schedule Module	Menu Module	Business Card Module	Schedule Module Supplemental Activities
Class and activity weekly schedule	TV program schedule	Picture Menu	Business cards	Kitchen cabinets
Sightseeing activities and events schedule	Things to do schedule or calendar	Written Menu	Business letters	Bathroom
				Office supply closet

Initial Task ⟷ *Similar* ⟷ *Different*

Exhibit 1.2 below provides examples of activities from different modules that are combined across treatment sessions to address different functional cognitive skills for higher level clients with mild cognitive deficits. The activities in Exhibit 1.2 involve materials that are detailed and present a lot of visual information at once. They include multi-step tasks that require integration of information from at least 2

different sources, and adherence to criteria or rule constraints. There are many different reasons a person might experience difficulty with these types of activities.

For example, a person that jumps into tasks without preplanning, becomes quickly overwhelmed by large amounts of information or who has difficulty simplifying information or breaking down tasks will likely show this same pattern across all activities. Repeated practice in activities that require planning ahead, breaking down questions or creating a simplified list of steps or criteria can help a person better recognize the types of activities that tend to present task challenges and promote use of strategies.

Exhibit 1.2: Sample MC Horizontal Activity Structure Across Treatment: Complex Questions

Similar Activity Theme Across Activities All activities involve using and synthesizing information from 2 different sources, selecting relevant information and identifying options based on multiple criteria.

Typical Performance Error - jumps into the activity without fully attending to all directions or pre-planning.

Sample Strategy: Planning ahead or breaking down information and creating a list of key information.

Similar Directions: Choose and organize information based on multiple criteria (days, times, preferences, location, price etc).

Schedule Module- Complex Questions	*Schedule Module- Complex Questions*	*Menu Module-*	*Name and Conference organization module*	*Planning a Trip*
Based on criteria, identifies a list of…	Based on criteria, identifies a list of…	Based on criteria, identifies a list of…	Uses business cards and registration lists to identify those needing invoices or receipts	Based on criteria identifies a list of options for travel to a convention
− "Class and Activity" options from schedule and information sheet.	− TV viewing options from schedule and information sheet.	− Restaurant options from cards and information sheet	Uses information from several sources to prepare a list of people that meet selected criteria	Based on criteria, prepare and assemble items for mailing to selected participants.
− "Sightseeing and Event" options from schedule and information sheet.	− "Things to Do" options from schedule and information sheet.	− Meal options from multiple menus		See supplemental activities (level 3) in electronic files.

Initial Task ⟷ *Similar* ⟷ *Different*
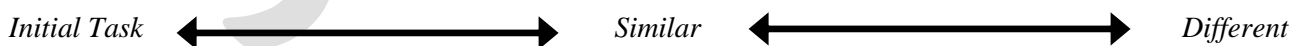
Description of Activities in Business Card Module

The business card activity module includes 11 different activity types, that are organized around 4 main activity themes. These 4 themes, also included within the schedule and menu modules, are: (1) search and locate, (2) shifting, (3) choosing and entering information into tables or schedules and (4) questions. The

search and locate theme involves comparison of information on name lists or business cards to identify matching items or discrepancies. *Shifting activities* involve marking items on the name lists differently according to different rules or changing directions as well as sorting business cards according to different criteria. Activities involving *entering information* into tables or a schedule require selecting relevant items while adhering to specific criteria and constraints. *Question activities* involve finding information on the business cards, calculating the price or budget needed to attend a business convention, entering information into tables, creating name lists based on criteria, or complex questions that require using detailed registration lists, completion of receipts or invoices and interpretation of data in tables or charts.

Within each activity theme, there are numerous activities that include variations in complexity, directions and activity formats. There are 3 difficulty levels (level 1= easiest). These levels represent a means of organizing activities into those with low, medium and high cognitive demands. The difficulty levels overlap and are not absolute categories. Higher level activities include a greater amount of information, detail, and criteria that place increased demands on working memory, inhibition, flexibility, organization and problem solving. Below is a description of the levels of difficulty. Higher numbered questions within each level also represent greater complexity. High numbered questions typically overlap with the next level. For example, many of the higher numbered questions within level 2 can also be included within level 3.

1. *Level 1 or basic activities* (#1, 2, 4, 5, 7, 7a) involve using short name lists (6,8,10 names), without distractor names or name lists 1A or 1B (13 items, with distractors). The set of business cards is reduced to those that match the lists or that only include a few distractor cards. Directions include searching and matching names on lists to business cards, sorting business cards into 2-3 groups or entering information from selected business cards or short name lists into structured tables.

2. *Level 2 activities* generally involve using longer name lists 2A or 2B (22 items) with distractors and all 54 of the business cards. Activities require greater selective attention (eg. choosing people from a certain type of business or location) and working memory. Some level 2 activities (eg. #5 activities) include the 13 item lists due to the complexity of questions. Level 2 activities include calculations, sorting items into 4-6 groups, entering information into tables or schedules, creating name lists based on criteria or creating a convention schedule based on criteria (also could be level 3).

3. *Level 3 activities* (9a and 9b) include high cognitive demands such as multi-tasking skills, adhering to multiple criteria, shifting between different sources of information, searching for information on a detailed registration list while simultaneously keeping track of specific information, and planning or creating organizational structure for information. It includes use of business cards, 40 item name lists (3A or 3B), detailed registration lists, receipts, invoices, tables or charts.

Directions for the same activities vary in the degree of structure, ambiguity and complexity. The activity theme as well as the directions and difficulty levels are chosen according to the client needs or types of problems the client is experiencing. Some activity directions or formats place more demands on working memory or keeping track of information, while others require shifting responses, or greater attention to detail.

Activities can be adjusted in difficulty depending on the type of question or directions chosen, length, type and number of name lists used, amount of business cards or materials used simultaneously, use of distractor materials (materials not needed) and added requirements such as keeping track of time.

Like the schedule and menu module, there are 9 to 11 different activity types to choose from within the 4 main activity themes. Exhibit 1.3 summarizes possible variations in activities and lists the activity numbers and themes. These activity numbers are parallel to the activity numbers in the schedule and menu modules. The assigned activity numbers are consistent throughout the manual and electronic files and are indicated on the back of activity cards or directions as well as on the bottom footer of worksheets or answer sheets. Within each activity number, there are multiple questions or directions. Each activity is designated with the number (1 to 9) as well as with the question #. For example, an activity labeled as 8.5 indicates activity #8, question or direction #5.

Direction or question cards (3½ x 5" card size) and/or activity cards (small 2½ x 3½ card size) accompany most of the activities. The borders of the card are color coded according to the activity theme, for quick identification. This organization parallels that of the schedule and menu module. For example, in both the schedule and menu activity modules, the #1 and # 2 activities are also Search-Locate. The #2 activity in all modules includes the use of small cards, along with direction cards (light blue border). Thus, the same activity numbers (1-9), across modules represent alternate (intermediate transfer) activities within different functional contexts.

Exhibit 1.3: Summary of Business card Activity Themes and Activities

Level	Lists	Activity #	Theme: Color Borders on Cards
1 2 3	List 1A, 1B List 2A, 2B List 3A, 3B Registration List	1. Search-Locate: Name Lists 2. Search-Locate: Business cards 3. Shifting: Direction cards 4. Shifting: Sorting Activities 5. Entering Information: into table 6. Entering: Convention schedules 7. Questions: Finding Information-Red activity cards 7a. Questions: Calculation 8. Questions: Listing Options – Red large cards 9a. Questions: Receipts and Invoices 9b. Questions: Supplemental Activities	*Dark Blue*: Lists Search-Locate (#1) *Light Blue*: Business cards, Search-Locate (#2) *Green*- Shifting (#3-4) *Red* - Questions (#7- 8)

The business card activities are used within the context of people attending a business meeting or convention. Other contexts or scenarios such as an invitation list for a wedding, retirement or birthday party or an attendance list for a training course or event can also be used for many of the activities. The activity kit includes name lists, registration lists, and materials that attendees might pick up at the registration table. Other activities including using name lists and/or business cards to complete receipts, invoices, letters, other certificates (gift certificate, certificate of attendance, employee appreciation certificate) or invitations to a party or event. Table 1.1 provides a brief overview of the activities within this module, followed by a description of materials within this activity set.

Table 1.1. Description of Business card Activities

Activity #	Level	Activity Description	Material
1. Search & Locate: Name List Activities	1-3	Comparison of 2 lists to find matching names or discrepancies. Lists vary in number of items and presence of distractor items.	- Dark blue direction cards 1.1-1.5 - Lists chosen from electronic files, - Optional: Answers for self-checking
2. Search and Locate: Business Cards	1-3	Business cards are compared to 1 or 2 name lists. This can include sorting the business cards into groups (for eg. business cards that are on 1, 2 or both lists or missing from lists).	- Light blue direction cards 2.1-2.6 - Business cards, Lists 1, 2 or 3. - Optional: Structured lists from electronic files
3. Shifting: Direction Cards	1-3	Involves searching, finding and marking items on the name lists differently according to different rules, criteria or changing directions.	- Green Direction Cards # 3.1 to 3.5 - Business cards, Name lists 1,2,or 3 - Electronic answer sheets
4. Shifting: Sorting Activities	1-2	Business cards are used to identify groups or to generate different ways of sorting information.	- Green direction cards # 4.1- 4.6 - Business cards - Optional: worksheets; electronic directions, answer sheets
5. Entering Information: into Tables	1-3	Enter select information from business cards and/or name lists into tables.	- Business cards - Name list - Electronic File questions
6. Entering Information: Convention Schedule	2	Organizing and planning convention schedules. Complete a schedule of sessions to attend based on multiple criteria.	- Questions in electronic files - Convention Schedules
7. Questions: Finding Information	1-2	Short questions that require finding information on the business cards and keeping track of the information found.	- Small red activity cards "finding information cards" (7.1- 7.40) - Business cards
7a. Questions: Calculation	1-2	Questions involving finding and calculating registration and travel costs to attend the convention.	- Electronic Files: questions & ans - Calculator
8. Questions: Listing Options	2	Questions require making a list of names using business cards and registration lists based on multiple criteria.	- Red direction cards 8.1-8.9 - Choose List (s) - Business cards - Electronic Files: questions & ans
9a. Questions: Receipts and Invoices	2-3	*Complex Questions*: Uses business cards, and registration lists, to complete receipts, invoices or tables based on criteria (9a).	- Questions – electronic files - Business cards, Reg Lists - Forms: receipts, invoices
9b. Questions: Interpreting tables charts	3	*Complex Questions*: Create, interpret, and summarize tables and charts (9b)	- Questions – electronic files - Tables and charts
Supplemental Activities (S1-S6)	2-3	Completion of different types of certificates, invitations, letters, mail merge and other activities.	- Certificate templates - Questions electronic files - Business cards - Letters

Materials: The materials in this activity set are listed below and include 54 business cards, 94 small sized cards (2 ½ x 3½)**;** 31 large size cards (3 ½ x 5) and an electronic flash drive (inside back cover of this manual) with files for activities. The electronic files are organized into levels (1, 2 and 3). All of the materials needed for activities are together within the same file or folder. In addition, the name lists, registration lists and ancillary forms are also located in the folder labeled "lists and forms" for quick reference if needed. The table of contents ii -iv outlines the organization of these files and should be used as a guide along with table 1.1.

Four Sets of Large (3 ½ x 5) Direction/ Question Cards (total = 31)

- Activity #1:   5 Dark Blue Direction cards – used with name lists
- Activity # 2:   6 Light Blue Direction Cards - used with business cards and name lists.
- Activity #3-4: 11 Green Direction Cards – used with business cards and name lists
- Activity #8:   9 Red large Question Cards, used with business cards, name lists

Three Sets of Small (2 ½ x 3½) Activity Cards (total = 94)

- Activity #7: 40 Small Red Question cards
- 54 Business cards (used for most activities)

Electronic Files- USB flash drive (see inside back cover)

- Level 1, 2, 3 folders are organized according to activity numbers (see table 1.1, exhibit 1.3)
    - Level 1= questions, answers or materials for Activities 1-5, and 8, as applicable.
    - Level 2= questions, answers or materials for Activities 1-9a as applicable.
    - Level 3 = questions, answers or materials for Activities 1, 2, 3, 5, 9a, 9b.
- Lists and Forms: name lists, registration lists, forms that are used across different activities.
- Ancillary forms and materials: price lists, region sheet, address list, excel tables and charts
- Supplemental Activities and materials (eg. various certificates, invitations, business letters)
- Treatment Forms – therapist worksheets for observation and metacognitive questions

Description of Cards

Business cards (2 ½ x 3½): 54 business cards that include a person's name, type of business, job title and location are included. This information is supplemented by additional information on the registration list. These cards can also be used as name cards that are picked up at a registration table for a conference or placed in a badge holder (not included).

Direction Cards (3 ½ x 5). The direction cards (3 ½ x 5) are double sided and include instructions or questions on one side and additional directions or prompts for the therapist on the back. The back of cards are labeled with the activity number and direction card number. For example, 1.3 and 1.4 indicates activity 1, direction card 3 and 4. Direction cards are numbered according to level of difficulty with higher numbered question cards being more difficult than lower numbered cards. Direction cards are used with activities 1 – 4 and 8 (see below red question cards).

Cards with directions can be presented to the client, so that the person is required to read and figure out the directions themselves. Some directions are purposely less structured than others. This provides

information on how the person handles and follows written directions that vary in structure and clarity. Alternatively, the therapist can also present the directions orally or read the card to the client.

Red Question Cards (small, #7, and large, #8)
Finding Information Cards (2 ½ x 3½): These 40 small cards (red border) include short, questions that involve locating information on business cards (activity #7). Questions range from those that involve keeping track of the number of cards that meet 1 criterion (7.1-7.10) to those that involve identifying and keeping track of information on cards that match 2 or more criteria (higher numbered questions).
Creating List Cards ((3 ½ x 5): These cards, can also be considered direction cards. They instruct the person to prepare a list of names by comparing information sources and adhering to criteria (activity #8). Lower numbered questions (8.1, 8.2) are easier than higher numbered questions (eg. 8.9).

Overview of Materials in Electronic Files

The organization of the electronic files are outlined in the table of contents (iii-v). Within each level (1, 2 or 3), the activities are numbered. The activity number in the electronic files corresponds to that in table 1.1 and exhibit 1.3 and is referred to consistently on corresponding activity cards and across the manual. Within each activity number, there are answers to questions related to the card activities if applicable, as well as name lists or additional materials needed for the activities. In addition, the electronic files include questions for activities #5, 6, 7a, 9a, 9b. These activities do not have accompanying cards and the question and answers are only in the electronic files. Each section in this manual describes the activities (#1-9) and how they are used.

Most activities use either the name lists or registration lists or both. The *name lists* differ according to the number of names on the list as well as the number of distractor names (names that do not have matching business cards). Activities # 1-3, 5, 8 and supplemental questions are used with name lists that are chosen by the therapist. The name lists and registration lists are described below.

Set 1: Short Name Lists without Distractors: Short names lists, containing 6, 8 or 10 names that match the business cards (no distractors), are included for level 1 activities. These lists are presented in 3 formats: 1) Unmarked, 2) Marked with check marks - selected names have checkmarks next to the name. 3) Marked with checkmarks and circles- Selected names are either circled or have checkmarks next to the names. These lists are located are in the electronic files (level 1) as well as the *lists and forms* folder.

Set 2: Name Lists with Distractors – There are a total of 6 name lists. Lists 1A and 1B have 13 names each (level 1 or 2), list 2A and 2B each have 22 names (level 2) and lists 3A and 3B have 40 names each (level 3). These name lists are included with accompanying activities as well as in the separate *lists and forms folder* within the electronic file. Some of the names match those on the cards but some do not.

Registration Lists: There are 3 separate detailed registration lists that are used across different activities. All of the lists include names that match the business cards as well as supplemental information that is not on the business cards such as department or profession, number of days attending the convention, if the person paid, needs a receipt and the assigned group. The lists differ in the presence or number of distractors and whether all names on the registration list have business cards. It is important to note that besides the name, the other information on the business card is not included on the registration lists. Several activities

involve combining information from both the registration list and business cards. The required registration list is included within individual activity files as well as the *lists and forms* folder. A description of each of the registration lists is presented below.

Registration list 1 includes the same exact 54 names on the cards (and no additional names or distractors).

Registration List # 2 – Registration list 2 is similar to registration list #1 because it includes the same 54 names on the cards, but it is different because it also includes 21 distractor names that are not on the cards. In total there are 75 names on registration list #2.

Registration List # 3 – Registration list #3 also has a total of 75 cards (same as registration list #2), however unlike registration list 1 and 2, not all of the people that have business cards are on the registration list. 12 of the names that have business cards have been removed and replaced with distractors. Unlike registration lists 1 and 2, not all of the names that have cards are included on the list.

Additional Forms and Materials

Address List - A list of addresses that matches all of the people on the name cards and registration list#1 is included electronically in an excel file. The address list can be used to prepare invoices and receipts (question 9a), address envelopes or prepare a mail merge with welcome and confirmation letters (supplemental activity, S2). There are 2 address files. One list (used with 9a) does not have the company name and therefore requires use of the business cards to obtain the company name. In addition, a party address invitation list is included with supplemental activity # 3. The address lists can be used for mail merges for letters or mailing labels (Supplemental activities 2-3).

Receipts and Invoice Forms - Preparation of receipts or invoices is required for complex activity # 9. There are 2 types of receipts and invoices that represent different levels of difficulty. The first type of receipt or invoice requires minimal information (obtained from business card only) whereas the second type requires more detailed information including the person's address (address list) and department (registration list). This allows the therapist flexibility in matching activity demands with the person's ability level.

Price List – Price lists that include costs for attending the convention are included. One price list includes travel costs and is used with question # 7a. An abbreviated price list that only includes registration costs for the convention is also included and is used with question 9a.

Region Sheet – This reference sheet can be used to classify the state listed on the business card into a region of the United States. While some states can be easily classified into regions without using a reference sheet, there are some states where the region classification may be uncertain.

Certificates and Invitation Templates – Several certificate templates such as certificate of attendance, employee of the month, employee appreciation certificate, gift certificates and an invitation template are used with name lists and supplemental activities (S1 - S3).

Welcome and Confirmation Letters – Two letters are available that can be used with name lists and supplemental activity S2. Each letter is presented in 2 files: 1) single letter with no date or address. 2) 54 letters with addresses of all those on the address list. The single letter requires the person to insert the correct address or use a mail merge to address letters. The ready-made letters that are fully addressed can be matched with business cards or assembled with other items for a mailing.

Bar Charts, Tables: Charts and tables that summarize the characteristics of people who attended the annual convention are included and can be used for interpretation and summarizing data (9b).

Optional Materials *(not included):* Envelopes, pocket folders or file folders, name holder badges, computer with Microsoft Excel and Word, highlighters.
Envelopes – can be used to place business cards or letters into and prepare for mailing,
Pocket folders or files to place receipts, invoices, certificates or letters in.
Name badge holder – can place business cards in reusable or plastic name badge/ card holders.
*Computer: C*an be used to make tables and charts (9B) or to make certificates, type name lists, letters etc.

Tips for Use of this Activity Module:

The sections in this manual provide an overview of each activity including summaries of the directions and characteristics of questions. This information explains the files and activities in the electronic files and can be used as a guide for selecting questions that match the ability level of the client. Sample activities from the electronic files are included in the appendices.

It is suggested that the therapist try the activities themselves as well as on a healthy person, to best understand the cognitive demands of the activities. To familiarize yourself with the activities it is also suggested that therapists start with one activity or theme (eg. search and locate or complex questions) and use similar types of activities across different clients, when it is appropriate to do so.

Steps Involved in Using Name Activities

1. Choose Level (1-3) and Activity Number (#1-9) or theme based on client abilities and performance errors (see table 1.1 for a quick summary.

   #1-2 Search and Locate: Lists and list directions (blue) and business cards and directions (light blue).

   #3-4 Shifting and Sorting (green): #3 shifting direction cards (green). #4 sorting direction cards (green).

   #5-6 Entering Information: #5 entering information into tables; #6 convention schedule activities.

   #7-9 Questions: (#7) Finding information (red small cards), (7a) Calculating expenses, (8) Listing options and creating lists (red large direction cards), (9a) Complex questions such as preparing receipts and invoices, (9b) Summary of attendees.

   Supplemental Activities 1-6: Completion of certificates, letters, invitations, work schedules, use of internet to compare prices and deductive reasoning game

3. Review the corresponding section in the manual that provides a description of the activity # chosen.

4. Select questions #, corresponding to the 3½ x 5 direction card and/or small (2½ x 3½) activity cards.

5. If applicable, print out corresponding name lists, questions, forms or **answer sheets** from the USB flash drive. The organization of the electronic files is listed on p. iii-v, after the Table of contents in the manual for quick reference.

6. Identify alternate activities that can be used to assess transfer (eg. supplemental activities or other modules).

7. Review and print desired treatment forms in the electronic file (see below description).

The activities were designed to be used within the context of a metacognitive strategy-based approach. The reader is referred to references included on page 52 for additional information on this approach.

During Treatment Session – Metacognitive Framework (see Treatment Forms in electronic files)

1. *Pre-Activity Discussion:* Anticipation and strategy generation (see Treatment form #1)

3. *During Activity* – Guided questions may be used to help the person self-monitor performance (see samples on the back of direction cards).

4. *Self-Checking* with answer key or template *(electronic files for each activity)* – or back of cards.

5. *Post-Activity Discussion* and self-assessment questions *(see Treatment form # 2 – electronic files).*

6. *Optional: Journaling* – Use a notebook or digital journal to summarize and reflect on activity experiences.

Therapist Treatment Forms

There are several therapist worksheets included in the electronic files to help the therapist use a metacognitive framework and structure observations. *This includes*

1. Pre-activity questions focusing on anticipation of challenges and strategy generation.

2. Post-activity questions that encourage a person to self-reflect on the activity experience, self-assess performance, generate alternate task methods or strategies and make connections to other activities.

3. Observation recording sheet for use during activities that involve managing lists.

4. Cognitive Performance Observations – Informal observational worksheet for use during treatment sessions to describe observed cognitive strengths and cognitive performance errors during activity performance.

5. Dynamic Interactional Model (DIM) Performance Analysis – An alternate observational framework for analyzing performance that focuses on the process.