Appendix A: I&R Procedure Template

The following template can be used to create your own I&R procedures. Areas that you may need to change to suit your CIL are in parenthesis and in bold italics.

**Information and Referral Specialist Role**

***(Information and Referral Specialists serve a dual role as front desk administrators and the primary staff for information, referrals, and assistive technology. As such, they are typically the first face or voice seen by the public and serve as ambassadors to the community.)***

In this guide, you will find information on day-to-day operations, what to do when a consumer is unhappy, key contacts, the process of working with I&R consumers, background on typical I&R topics, expectations for front desk activities, and additional information to assist consumers.

**Front Desk Responsibilities and Expectations**

The I&R staff serve as the point of contact for our organization and are in full view of many of our consumers. The following expectations should be observed:

**Consumer Personal Identifiable Information**

We are required to keep consumer personal information confidential. While at the front desk make sure any consumer folders are kept locked out of sight while not in use. Also, make sure that your computer is locked when not in use at the front desk.

**Intake forms**

If a paper intake form was used when working with a consumer, it should either be shredded once put in your database or locked away with the consumer’s other information. Completed intake forms should not be left in unlocked drawers or out in the open.

**Cleanliness**

Since the front desk is responsible for greeting consumers and visitors it is important that the desk remains organized and clean. Please make sure that the desk is ready for another staff member to use when you leave each day.

**Incoming Calls**

Front desk staff are responsible for routing calls to the appropriate party

It is appropriate to screen calls, especially when they are sales calls. If someone calls asking to speak to the CEO or COO politely ask their name and reason for the call. If they are trying to sell something, tell them we will take their contact information and forward it to the appropriate party.

**Responding to Visitors and Consumers**

Consumers and visitors will be coming to the office location often. It is expected that the front desk staff will display warmth and professionalism when someone visits our office.

If a consumer comes to our office in distress or demands to speak to someone specifically, please keep the following in mind.

* Give the individual your attention and make sure they feel heard.
* Let them know that we are not an emergency service, but we will do everything we can to get them what they need.
* If after talking through the issue and discussing our services they are still in distress and need to speak to someone more in-depth please get in touch with a ***(consumer-focused staff member)***
* If they need to speak to a specific ILS or staff member check with that staff member before sending them anywhere. They may not be able to meet with a walk-in.
* If they are not satisfied with our services or getting more upset, reference our grievance policies from the IL Services Manual. The relevant information is included in this document here.

**Grievance Procedures**

There will be times that a consumer or their family members will be upset with the staff or services of ***(CIL Name)***. In these situations, all staff should first try to de-escalate the situation by working with the consumer to identify the issues, actively listening to the complaints, and explaining what (***CIL)*** can do to rectify the situation. Many problems can be defused this way before they need to be addressed by the ***(Designated Staff member)***

If you are unable to deescalate the situation or the individual asks to speak to a manager or supervisor, follow the below consumer grievance procedure:

1. Validate the consumer's request and let them know that they can speak to the (***designated staff member)*** to share their concerns.
   1. The consumer should not be transferred automatically to the ***(designated staff member)*** before assessing their availability and ability to take the call. We do not want to transfer the consumer to a voicemail.
   2. If the ***(designated staff member)*** is not available, inform the consumer that they will be contacted by them as soon as they are able and confirm their preferred form of contact.
   3. Record all the information you can remember from the call and email it to the ***(designated staff member)*** with the individual’s contact information.
   4. If the individual demands to speak to someone that is there or another Director, calmly let them know that we can do that if they prefer, but that the ***(designated staff member)*** is really the best person on our staff to address their concerns. If they persist, connect them with the ***(designated staff member).***
   5. If there was a situation of harassment (further explained below), then your supervisor should be informed immediately, and include that information in the email to the ***(designated staff member)***.
2. The ***(designated staff member)*** will contact the consumer and address the situation.
   1. The ***(designated staff member)*** will record the outcome of the conversation, obtain an overview from other staff, and summarize the information in CIL Suite if the caller has a record in the system.
3. If the individual is not satisfied with the resolution given by the ***(designated staff member)***, the staff member will contact ***(CEO or designated staff member)*** to request a follow-up with the individual.
4. If the individual is still not satisfied, the ***(CEO or designated staff member)*** will direct them to either the state's Client Assistance Program (CAP) or another appropriate resource such as the board of directors.

Harassment by an individual

There are times where an individual’s anger with the organization or individual can cross the line to harassment of an employee or another individual at the office. ***(CIL)***’s priority in this situation is staff and volunteer safety, and any instance of harassment should be reported to their supervisor immediately. Staff should also record an account of the harassment in writing, making sure to be as detailed as possible.

Indicators of harassment may include but are not limited to, the following:

* Profanity or name-calling aimed at the staff member
* Intimidation
* Ill-intentioned questions about race, gender, age, or disability. Examples could be questions about race or accusations of sexism.
* Threats of physical violence

Consult page 30 of the employee handbook for further information about harassment.

Important Contacts

|  |  |  |
| --- | --- | --- |
| Contact Type | Contact Name | Information |
|  |  |  |
|  |  |  |
|  |  |  |

Phone Operating Instructions

Routing Calls

Voicemail Passwords

Changing Voicemail Message

Default Message:

Thank you for calling ***(CIL)***. Our office hours are ***(Insert Hours)***. If you know your party’s extension, you may dial it at any time. ***(how to reach extensions, if applicable).*** If you would like more information about ***(CIL)***, please visit us online at [***(***](http://www.able-sc.org/)***Website)***.

I&R Flow of Services

When a consumer contacts ***(CIL)*** the case will typically go through the following steps.

1. Intake: A consumer will contact our organization requesting information, referrals, assistive technology, or services. An intake will be done for anyone we give information to. The process for completing an intake can be found in the IL Services Manual
2. Determine the appropriate service the consumer will need.
   1. If a consumer needs information, referral, or assistive technology they will remain with the IRS.
      1. Information and referral can also encompass giving the information necessary to access and use systems. If you are unsure if the consumer should stay as an I&R or be assigned to an ILS, then please send the case to the ***(staff that assigns cases)*** for assignment.
   2. If a consumer needs one-on-one assistance with skills they will be assigned to an ILS
   3. If the I&R needs information, referral, or assistive technology the IRS will address their needs following all documentation requirements.
3. Once the information, referral, or assistive technology has been provided, the I&R Specialist will also follow up with the consumer after the resources are provided. After following up with successful I&R’s, an I&R Satisfaction Survey will be given to the consumer either by mail, email, or phone.

Responses to Common I&R Requests

The following topics are frequently addressed with callers. Staff should attempt to explain our services and limitations clearly as follows:

**Affordable Housing**

*We can provide you with resources for affordable housing. However, we cannot determine if you are eligible, and we can’t assist you with the waiting list. We also do not own or manage any apartments or “place people into housing.” We have staff members who can assist you with finding affordable, accessible housing. Would you like to work with someone?*

**Applying for Benefits/Appealing an Agency Decision**

*We are a separate agency from Social Security, and we do not determine if you are eligible for benefits. If you need assistance filling out paperwork for an application or appeal, we may be able to assist you. Do you need assistance with the application process?*

**Assistive Technology (AT)**

*Depending on the item you need, we may be able to assist you. We keep a supply of assistive technology in storage that was donated from the community. Typically, we have walkers, bedside commodes, manual wheelchairs, shower chairs, and other small items. We are also connected with agencies that work together to get people the items they need, such as wheelchairs, hospital beds, and other large items. Would you like to work with us to get the equipment you need?*

**Financial Assistance**

*We do not offer financial assistance, but if you are having difficulty with budgeting or need help finding a job to increase your income, one of our specialists may be able to help you. Are you interested in speaking with someone regarding Independent Living Skills Training?*

**Home Modifications/Ramps**

*We do not provide funding to assist with home modifications or wheelchair ramps. However, we can give you contact information for agencies that may be able to help. Would you like us to send you the information?*

I&R Resources

Information and Referral staff are responsible for maintaining accurate and updated information and referral resources. To organize the information, ***(insert a description on how you organize information at your CIL. )***

I&R Closing Procedures

It is essential to make sure that I&R callers do not feel like we did the bare minimum to assist. We need to take the time to thoroughly explain resources and other services we can offer to support utilizing those resources. Once you have provided the resources and no further assistance has been requested, close the case the same as you would a consumer case. ***(Detail your organization procedure.)***

If the I&R is closing due to loss of contact, make sure you recorded two calls and sent an I&R Loss of Contact Letter by mail or email.

Flow of I&R Closing

1. Determine if I&R is ready to close
   1. Typically, this will be because the information was given to them or you lost contact.
   2. If there is uncertainty about closing the I&R, please consult your supervisor.
2. Add a summary if services were provided
3. Send an I&R closing letter and survey

*Assistive Technology*

*Below you will find our procedures for AT, if you have an AT program you could adapt this to your organization.*

*Able SC runs an assistive technology reuse program. Able SC receives community donations and distributes AT back to the community. Generally, we accept any durable medical equipment or unused incontinence supplies. We do not accept medicine.*

*Flow of AT Request and Delivery:*

1. *Consumers contact Able SC for Assistive Technology*
2. *Staff confirms with the consumer that the AT is available by checking CILsuite*
   1. *If the AT is available, the staff will perform an I&R intake and reserve the equipment in CILsuite. Staff will see when they plan to pick up the equipment and note it in CILsuite.*
   2. *If it is not readily available they will inform the consumer that they will be contacted when the AT is at the office to schedule a pick-up time by staff.*
   3. *If the AT is at the storage unit, staff members will inform either Annie (Greenville) or the front desk (Columbia) who will schedule AT retrieval within 72 hours if possible.*
   4. *If AT is unavailable, staff will perform a quick I&R (log closed) because they gave information about Able SC and add the consumer to the AT waiting list*
3. *Complete AT Signed Paperwork*

*Walk-in AT Request:*

*Sometimes a consumer may request AT during a visit to Able SC. If the consumer contacted us about AT already, the staff member will check CIlsuite to see if the consumer has contacted us before. If so, CILsuite will detail which piece of AT was reserved and its location*

*If they are not in CILsuite*

* *Staff will perform an Intake on the Consumer and note what AT was requested*
* *Staff will check CILsuite about the availability of the AT. If it is available and not reserved then staff will give the consumer the AT or set up a time when it can be given (if in a storage unit)*
* *Staff will have the consumer sign* [*AT paperwork*](https://drive.google.com/open?id=1XIN3sCHtWZ2W3JGNZma21qiu6em_fznc)
* *If AT is not in Able possession the consumer will go on the AT waitlist.*
* *All documents should be given to the IRS to close out the case.*

*AT Donations*

*Able SC accepts durable medical equipment or unused incontinence supplies. We do not accept medicine. Any donated equipment should be in good and working condition. If in doubt, check with the Director of Quality Assurance before accepting an item. For larger equipment such as hospital beds that we do not have room to store or transport, check to see if there have been any requests for the items recently. If so you can try to connect the donor directly with the consumer.*

* *Ask the individual who is making the donation if they would like a Tax Receipt.*
* *Provide information on donation to the Director of Development.*