

Living Independence Network Corp. (LINC) Information and Referral (I&R) Guidelines

Revised 4/06

The goal of I&R is to provide the caller with the knowledge and referral they need to take action (if any) on their own behalf.

Treat every inquiry as a hard earned gift. Remember how hard it is for some people to call and ask for help. Just calling is a victory to some degree.

- It is **critical** to get the caller's name, address and phone number. Explain to the caller you need this information so you can send them more information about LINC. Don't push it if the caller resists. Be sure to **ask** the referral source.
- Always ask if they or the person they are calling about have a disability. This is important because sometimes we can access disability related resources for folks and if it is anything beyond I&R the person is required to have a disability to receive services.
- When filling out I&R forms, be sure and take time to write down as much information as possible. This will help you to only have to speak with the person once and when they are referred to an advocate, they won't have to be asked the same questions twice. (don't just write down one word here and there that can get confusing and you may end up having to call the person back to get the same information)

Every customer who calls should receive a tangible piece of information.

- Appropriate referrals are our specialty. **Never** say "We don't do that but I can refer you somewhere" or "I can't help you with that". Instead say, "You called the right place, I have a great referral to give you where you will get the help you need." Then make sure it is true!
- Remind callers, if for some reason our referral does not help them, to please call us back. Remember—"the buck stops here;" go the extra mile to help the person find the resources they need. But we do not have to solve people's problems. **Independent Living Philosophy also incorporates personal responsibility.**
- **Never** say "I don't know." It is our job to know. Instead say, "I need to do some research on that to make sure I give you the best information possible, may I call you back?"
- If you must call someone back, tell the person when you will call back (i.e. the afternoon) and then make sure to follow through! We return all calls within 24 hours. We **are not a crisis center so this should provide a reasonable standard for us to follow.**

It is important to always start an I&R for anyone new who calls. We do this so that we can keep track of what people are calling for and to ensure good follow up.

The goal of I&R is to provide the caller with the information, knowledge, and referrals they need to take action (if any) on their own behalf.

When to refer someone to an advocate:

If a person's situation or request requires staff to take any action on behalf of the caller, other than research, it ceases to be I&R and becomes Advocacy. If it requires Staff to:

- **contact someone on their behalf,**
- **to collect documentation,**
- **to prepare paperwork with or for them,**
- **to develop a Consumer Service Record, or**
- **to arrange for a service or services, it is Advocacy.**

Although the Community Resource Specialist is the primary contact person for I&R, all Advocacy staff have the responsibility for I&R on their Job Descriptions. But only the Advocates provide Advocacy.

If a call sounds to the Receptionist that staff will need to take action, rather than answer questions or provide information, the Receptionist should forward the calls to an Advocate. When the receptionist makes the decision to forward a call to an advocate, they are to answer that call.

At the same time, because of the differences in each situation, and to take some of the responsibility to make judgment calls off of the Receptionist, the Advocates will be instructed that when a call is forwarded to them, they are to accept that call.

If it turns out to be an I&R, that's ok, the Advocate will provide I&R as requested, and may follow-up with assistance from the Community Resource Specialist. If it is an Advocacy case, the Advocate can discuss it with their fellow Advocates to determine who can best help in that situation.

If the Community Resource Specialist receives a call that appears to require Advocacy as well as I&R, the CRS will provide assistance with I&R, and refer the caller to an Advocate for further assistance.

All Advocacy cases that come through an I&R call will be forwarded to the entire Advocacy staff, including the Assistant Director. They will then jointly decide which Advocate will take which parts of the case.

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