

## **Get to the Core of It: Information & Referral presented on December 11, 2013 by Darrel Christenson and Roger Howard**

**Additional Questions and Answers from the webinar.** Presenters, Darrel Christenson, Roger Howard and Andrew Moody, respond.

We didn't have time to answer all of your questions during the Webinar training. Our presenters have responded to those questions they didn't answer during the Webinar and we've posted their responses below.

- Question from Linda Johnson: When it comes to confidentiality, how should confidentiality apply to assisting I&R callers when contacting agencies on their behalf?
  - Response from Darrel Christenson: We generally don't call other agencies on consumers' behalf as we believe in the IL Philosophy of consumer responsibility. The few times when we do call, we simply state that we have a consumer who would like to know about...
  - Response from Roger Howard: Generally, we do not contact other agencies on an I&R caller's behalf, but leave that up to them. If there is a problem for some reason and they need our assistance, we sometimes ask them to come in and participate with us on the call, so they are right there the whole time and are aware of all of what is being said. Very rarely we will do the same thing, only as a "conference call" if the person can't come into the office to participate. If all that doesn't work, we have the person complete a release of information form that allows us to share very specific information pertinent to the caller's request with an agency.
  - Response from Andrew Moody: I try to encourage consumers to contact other agencies themselves. It falls into our "Independent Living Philosophy." If it comes down to it, and I have to do so, I get verbal permission from my consumer. If the consumer prefers me not giving their information out, I will get the info from the agency and let them know it is for my consumer.
- Question from Rik Romerein: How many hours a week does [Andrew Moody] work?
  - Response from Darrel Christenson: Andrew works full-time in his Information & Referral Program Coordinator's role for ABIL. The volume of calls / requests warrants this staff allocation and our Board feels strongly about this core service.
  - Response from Andrew Moody: I work a full 40 hours per week.
- Comment from Kate Falcon: I think that one way that I and R's can empower people is to keep learning about their community, about new services. Finding service options that are above and beyond the norm should be a part of the grand plan of every ILC.
  - Response from Darrel Christenson: I completely agree with you Kate! Services and resources are always changing and we need to communicate new services (or dropped programs) so that we can be rest assured that the information we pass along to consumers is accurate and up-to-date. There are a few services (such as Benefits Check Up here in AZ) that allows a person to input their information and a list of services they qualify for will kick out for their use. Check out such

programs through your local Area Agencies on Aging. This will help you to break out of the same, familiar referrals you may accustom to making.

- Response from Roger Howard: I agree!
- Response from Andrew Moody: I fully agree. I am on a number of email lists from other agencies within the community which keeps me apprised of what is going on elsewhere. I also hear about other agency information, services and events through fellow staff that is out among the community.
- Question from Pam Davies: How do you mark anonymous or incomplete info calls in your database?
  - Response from Darrel Christenson: Andrew uses an Excel spreadsheet to document his callers so it is no problem. He does not input each caller into our main database. Our database that was designed for ABIL requires a name in order to be entered, so without a name, the caller cannot be entered. All of his contacts are counted and appropriately tallied from his Excel spreadsheet.
  - Response from Roger Howard: I am told anonymous calls are a problem with CIL Suite (which we use at our CIL but I don't use it much), because it requires a name in that field. Our staff tries to engage people to the point where they trust us enough to give their name, but we can totally understand if they wish to remain anonymous. When that happens we will enter them as Unknown 34 or something like that, which makes it hard to keep track of if the person calls back. If the info is incomplete we enter it the best we can, or just don't enter it at all, so we don't take "credit" for that call.
  - Response from Andrew Moody: I take as much information as the consumer is willing to give me. Whatever info I get I count in my reports.
- Question from Mildred Caballero-Ho: How do you count I & R provided through e-mails as a service when we don't have contact information other than an e-mail address?
  - Response from Darrel Christenson: Information is still shared with the person no matter if it's via a phone conversation, TTY, email response, or face-to-face meeting. Writing back and forth with a person via email still constitutes providing information, even if we only have their email address. The same can be said to be true if we only had a phone number and no mailing address.
  - Response from Roger Howard: At our CIL we treat that very much the same as the above situation.
  - Response from Andrew Moody: I count their email address as the form of contact as I would their phone number or mailing address. I can provide as much information via email as I would over the phone or postal mail.
- Question from Winter Cox: What types of software are CIL's using for record keeping?
  - Response from Darrel Christenson: There are a number of software packages available across the country. NCIL can tell you more about some of the more popular ones. We here at ABIL spend money to have a specific database developed just for our usage.
  - Response from Roger Howard: I have found that it is fairly common for CIL's to develop a simple Excel spreadsheet or database program that incorporates the sort

of data elements needed for the 704 report and other data that might be important to the CIL. An important tip for developing such a program is to have a data field for each and every element – such as separate ones for city/state/zip rather than just one “address box”. It makes it much easier to sort by zip code or town for looking at trends. Off-the-shelf software that comes to mind include CIL Suite and MICIL.

- Response from Andrew Moody: ABIL has had database created for specific staff use. I&R have its own information collection arena.
- Response from Richard Petty: ILRU maintains a list of data management packages designed for CILs on the ILRU Web site at [http://www.ilru.org/sites/default/files/resources/utilizing\\_data/Data\\_Collection\\_Software\\_for\\_CILs.pdf](http://www.ilru.org/sites/default/files/resources/utilizing_data/Data_Collection_Software_for_CILs.pdf)
- Question from Lewis Whalen: What data management systems or tools do you use to allow you to easily adapt to changing federal guidelines?
  - Response from Darrel Christenson: Along with the database system that was developed expressly for ABIL, we are fortunate to have an in-house IT person who assists staff to modify our system to meet our ever changing needs (and those of the Federal 704 Report).
  - Response from Andrew Moody: We at ABIL use a database called BRIDGIT which was specifically created for our staff.
- Question from Dennis Fitzgibbons: What kind of quality assurance programs are effective for ensuring that an agency you have referred a consumer to is doing good work?
  - Response from Darrel Christenson: When referring callers we always remind them that if they need additional assistance, please do not hesitate to call us back. While some would say, “No news is good news” meaning that if you don’t hear back from the caller after referring them somewhere, they must have gotten their question answered there. However, we all know better and therefore we use a Peer Mentor volunteer to do follow-up calls. There, we ask if they got their questions answered, if they have any more questions of us, or if they would like to receive additional services from us. All are means to providing quality customer service.
  - Response from Roger Howard: When we get feedback from people that an agency is doing a good job, we let them know. When we get feedback that an agency is not doing a good job, we let them know! If it is a constant or recurring problem, we try to figure out if there is a pertinent place to refer them to - like if they are having trouble with Vocational Rehabilitation, and it can’t be resolved, we would refer the person to the Client Assistance Program, or if there is a problem with and Area Agency on Aging, we might refer the person to the state Office on Aging.
  - Response from Andrew Moody: On a monthly basis, we have volunteers contact the people who have contacted me for I&R. during this process they check to see the outcome of the information I have passed on to them. If the agency they were

referred to did provide the necessary services, I contact them on behalf of the consumer.

- Question from Mildred Caballero-Ho: What system do you use for tracking specific I&R issues like number of energy assistance calls during the year?
  - Response from Darrel Christenson: We use the categories requested of us in the 704 Reports. Andrew does his program report monthly and turns it in to me, his Supervisor, and to our Executive Director and the Board of Directors. In his report he comments on emerging trends that he sees so that we can respond accordingly to the community needs.
  - Response from Roger Howard: We use the kind of system described above in the response to a question from winter Cox. Before we used software, we had a volunteer come in at the end of every month and tally all the paper forms by hand.
  - Response from Andrew Moody: Microsoft Excel
- Question from Mary Robinson: If you have repeat consumers calling with questions, why would these consumers not have their cases opened? And can you count I/R from consumers that are opened with the center?
  - Response from Darrel Christenson: Good questions Mary! If a caller has a few questions during a given month, they could still be considered merely as I&R questions and each one is documented accordingly (a single call can be considered to have multiple content area questions such as housing, transportation & employment). Once we feel that the caller has “crossed the line” into something more where additional time is required to meet their needs, we will then open them up as a CSR (Consumer Service Record) and as an open case. Now, once they are open, they can still ask additional questions that only require a short amount of time that are not necessarily germane to their IL goals and objectives and thereby be considered I&R questions to be documented as such.
  - Response from Roger Howard: We might encourage repeat callers to open a CSR so that their issues might be more effectively addressed, but the decision to do so is always up to them. Sometimes explaining that opening a CSR would save them time and effort helps, but if they want to continue as a do-it-yourself-er, more power to them. When a person has a CSR opened, we track contacts that fit the stated goals in the CSR as whatever service it might be (Individual Advocacy, Assistive Tech, etc), and if it is outside the goals, we treat the contact as a separate I&R.
  - Response from Andrew Moody: If the consumer who contacts me repeatedly is contacting me with the same issue constantly, then I will refer them to our IL Skills Advocate to open them. I do count open consumers as I&R contacts if they contact me for further assistance.
- Question from HCIL KAUAI: What is the population of the area that ABIL serves?
  - Response from Darrel Christenson: Arizona Bridge to Independent Living (ABIL) services both Maricopa County (the Phoenix Valley of the Sun) with a population of nearly 4 million residents, and Pinal County (a more rural county that is the

geographic size of the state of Pennsylvania. Very different than the beautiful island of Maui where you are located.

- Response from Andrew Moody: ABIL serves all of Maricopa County which has over 3.9 million residents per [www.maricopa.gov](http://www.maricopa.gov)
- Question from Charlene Ota: We have a staff person who does I&R as well as advocacy. As a result of his disability, he has difficulty with speech and it is very difficult to understand him especially on the phone. It has been suggested that he use a device that would use electronic speech to speak for him. There's been a lot of debate on both sides of this issue and he doesn't want to use it because he feels he wants to speak passionately. Andrew spoke about the importance of communicating clearly and effectively. I'd like to ask the presenters for their feedback on this situation.
  - Response from Darrel Christenson: A very interesting question Charlene! I would say it all depends on the feedback he, and you, have received from callers to this point. I greatly respect the person's right to speak passionately in their own words, but I also know that customer service is a huge element that needs to be set as a Center standard. If there have been numerous times when callers complain that they have to constantly ask the staff person to repeat what they are saying, and then perhaps callers are not being served well? If there are no problems, then fine. I'd suggest that you can use an independent Peer Mentor to do follow-up calls to gauge the level of satisfaction of your callers. Perhaps your staff person has "more energetic, articulate times of the day", then maybe he/ she needs to adjust back and forth with the electronic speech format to factor in this change? There may be a compromise between the two too.....??
  - Response from Roger Howard: This is a complex personnel issue (not really an I&R issue) that has a lot to do with reasonable accommodation and essential job functions under the ADA, and is of a nature that it can't be addressed adequately in this format. I would recommend that both the employer and employee seek guidance from the title I Technical Assistance Manual published by the EEOC, the Job Accommodation Network (JAN), and the local Disability and Business Technical Assistance Center (DBTAC) to determine if there is a reasonable accommodation acceptable to the employer and employee that would permit performance of the essential functions of the job. It might also be possible to locate a peer who has addressed a similar situation successfully and get some advice.
  - Response from Andrew Moody: I see the importance of both sides of the coin. It is important for your staff member to portray passion for his work, but at the same time I feel that conveying the proper information is of higher importance. Speech software may not reflect expression, but it will reflect your staff member's knowledge which is why the caller is contacting him in the first place.