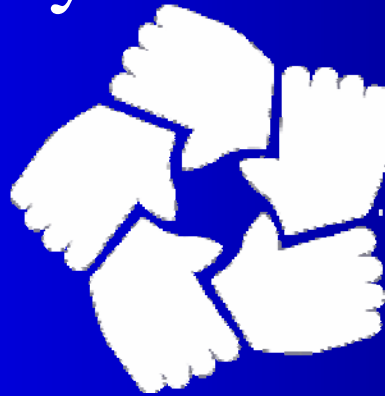


Statewide Database I&R Training

Working Together to build a true
2-1-1 System for Indiana



Provided by Lynn Engel
Connect2Help 2-1-1

Training Outline

- Objectives of Training
- Overview of the IN211 System
- Call Center & Specialist Responsibilities
- I&R Outside of Your Regular Service Area
- Identifying Best Practices
- Handling Crisis Situations
- Supervision
- Dos and Don'ts for Database Managers
- General Holiday Info
- Contact Information

Objectives of Training

At the end of the training, participants should understand:

- The reasons why sharing calls and data is so important to our success
- The responsibilities of each person in the Indiana 2-1-1 system

Overview of IN211

Indiana 211 Partnership is a nonprofit organization dedicated to building the 2-1-1 system for Indiana. IN211 is actively working to implement 2-1-1 service to serve all Hoosiers through linked IN211 Centers.

Objectives of IN211 System

The IN211 system seeks to accomplish two major goals:

- Ensure that the people of the state of Indiana have access to *quality* human service information 24 hours a day, 7 days a week, 365 days a year
- Provide these services to the community in the most efficient, cost effective manner possible.

IN211 Policies, Procedures and Operational Requirements exist to:

- Ensure the quality and consistency of I&R services provided through the 2-1-1 dialing code in Indiana
- Safeguard IN211 database information
- Protect confidential caller information
- Keep the promises made to the IURC, our funders, and the people of Indiana

Call Center Responsibilities

- Maintain a safe, secure and productive environment for staff and volunteers
- Be flexible and willing to help other Centers when able
- Provide the internal training necessary and participate in state training when possible to ensure call center staff are able to provide services, not only to their own communities, but to residents in other parts of the state, as well

I&R Specialists' Responsibilities

- Be open and willing to help other IN211 Centers
- Be flexible when asked to work different or extra hours, when needed
- Participate in the internal and state-wide training necessary to ensure your ability to provide services, not only to your own community, but to residents in other parts of the state, as well

I&R Outside of Regular Service Areas

- **You will have to:**

- rely completely on the data
- know keywords and their definitions
- know the Indiana counties and where they are located
- understand that many social service agencies work differently from what you may be used to in your community

Best Practices

- Efficient searches
- Maps
- Special program information
- Read the entire program record to understand services
- Referrals and ending the call

Tips and Best Practices: Searching

- Double Keywording
 - County, _____
 - Keyword
 - Use “both” button
- Program – “Name contains text” but be careful!
- Keep Looking – *Just because you can't find it right away doesn't mean it doesn't exist*
- Intervention – Outbound call to shelter/meal site/24-hr programs in region, etc.

Tips and Best Practices: Maps, Tools, New Info

Make sure you have a binder:

- **Maps** (Zip Code, AAA, Time Zone, Atlas with indexed list of cities, online site bookmarked for Townships, 211.org locator)
- **Special program information** by Center (flu shots, Holiday assistance dates/process, meals, etc)
- **“update from last shift”** with any media coverage, typical calls, etc

What to Know about Holiday

- Thanksgiving and Christmas MEALS (where, when, description)
- Thanksgiving and Christmas BASKETS (application, deadline, eligibility)
- Gift Matching programs (application process, deadline, and how to say “I am sorry, the deadline has already passed. You can check back on Monday to learn about possible other resources.”)
- The “usual” typical calls – energy assistance, financial, financial, financial, shelter, housing, etc.
- Other typical calls around holidays – Remember that families are together and brings out certain issues (addiction treatment, counseling, Medicare Part D, other Aging issues, etc.)
- Centers that do intake or actual “matching” for Holiday Assistance
 - First Call For Help/United Way of Southwestern Indiana (Evansville)
 - First Call For Help 2-1-1 (Columbus)
 - Vigo County Lifeline (Terre Haute)

Handling Potential Crisis Situations

Crisis situations out of your area are the same:



- Active Listening Skills are critical!
- You must know the location of your caller
- If needed, request that another Specialist or Supervisor contact resources in the caller's community to intervene (EMS, police, therapist, friend)

Handling Potential Crisis Situations

- Crisis situations out of your area are different:
 - Dialing 911 will not work. You must use the 10-digit number to reach assistance in your caller's area (all 92 sheriff's depts and CMHCs are listed)
 - Transportation may not be readily available



Supervision

Supervisors must be knowledgeable about and available to help search for caller locations, resource information, special programs, etc.

Specialists not experienced with using state-wide data will not be able to do this alone – Supervisors must be in the room and available

Dos and Don'ts for Database Managers

- **DO** familiarize yourself with the data before the day you will be taking state-wide calls
- **DO** have a binder or some other way for your phone room staff to have written information, special protocols and training materials readily available
- **DO** make certain that your own data is correctly keyworded and the program descriptions make sense to someone who is not from your area
- **DO** install the disk information with the other center data a few days before covering in case of “bugs”
- **DO** have a training for phone room staff before the day of service

Dos and Don'ts for Database Managers

- **DON'T** import the statewide data into your own IRis – use the resource data on the disk provided
- **DON'T** expect your Specialists to do this perfectly
- **DON'T** forget to be available to your staff on the day of service

Logistics

- 11/3 – All Centers send updated resource data, if applicable
- 11/10 – C2H/IN211 mails Directory on Disk to all Centers
- 11/15 – Thanksgiving Centers install/test
- Standardize “Generic Agency” and Program
- 11/22 – Centers fax “latest” info, if applicable
- 11/23-11/24 – Lucinda re-routes calls
- 11/23-11/24 – Holiday Centers take calls, using DoD for lookup and entering call record in local Iris, marking out-of-area referral to “Generic” program and writing name of program in NOTES
- **ANY** after-hours shift – **REPORT** any quirky resource info or media attention to Lucinda Nord, Lynn Engel and Supervisor on Duty
- Holiday Center End of shift – Holiday Center makes report to Center covering next shift

Remember for EMERGENCIES

Lynn Engel

317-920-4850 ext 222

317-402-9137 (cell)

Lucinda Nord

317-921-7527

317-502-8504 (cell)

**IF AFTER-HOURS OR IF YOU CAN'T
REACH LUCINDA OR LYNN, CALL
CONNECT2HELP AT 317-926-4357
AND ASK FOR SUPERVISOR ON DUTY**

Questions?

- Lynn Engel

317-920-4850 ext 222

- Marci Corbin

317-920-4850 ext 227

- Elizabeth Radcliff

317-920-4850 ext 225

- Joy Owen

317-920-4850 ext 228

317-926-4357

Practice Searches to Demonstrate

- **Holiday Programs AND County, _____**
- **Utility Assistance AND County, _____**
- **Addiction Treatment AND County, _____**
- **Shelter, Homeless AND County, _____**
- **Financial Assistance, Rent AND County, _____**