



Contents

I. Purpose	2
II. Individual I&A responsibilities	2
III. Person-Center Planning	2
IV. Orientation and Observation	2
V. The Stages of the I&R process	2
VI. Confidentiality	4
VII. One Week – Orientation and Observation	5
1. Monday	5
2. Tuesday	5
3. Wednesday	6
4. Thursday	6
5. Friday	7
VII. Two Week – Orientation and Observation	8
1. Monday	8
2. Tuesday	8
3. Wednesday	8
4. Thursday	9
5. Friday	9

- I. **Purpose** AgeOptions provides Information & Assistance services to help older adults, family caregivers, persons with disabilities, and kinship families connect with local services and resources. This resource is open for individuals of all incomes and backgrounds. Information and Assistance specialists assist in providing information and assistance, assessments of needs, counseling on options, and follow-ups to ensure that referrals and services are accessed.
- II. **Individual I&A responsibilities**
 1. Your primary responsibility is to provide quality information and referrals to anyone who wants to know more about services, resources, benefits, or opportunities for older adults, their caregivers, or families. An efficient information and referral system streamlines the I&R process through the production of policies and procedures, creating reporting systems, quality assurance methods, database maintenance, and program initiatives.
 2. To ensure that the I&R system provides clients with the best assistance possible during often difficult times the Information and assistance specialists are trained consistently through education and training. During crises, Information and specialist helplines are often the first to be contacted by people seeking crucial assistance. It is important that your I&R system is reliable, accurate, and efficient.
- III. **Person-Center Planning** The information and assistance team should be trained to provide clients with person-centered planning services. Specialists empower their clients to make informed choices and often walk them through the process. The goal is to serve older adults and people with disabilities the opportunities to have a better quality of life while taking control of their decisions.
- IV. **Orientation and Observation** Orientation should be a process of one to two weeks. This orientation should be a combination of written materials, webinars, observations, and self-reflection. It is important to know that Information and Assistance includes a lot of information that needs to be studied and learned. Additionally, specialists must also take some time to understand the basics of the I&R process to build communication and soft I&R skills. Staff shall participate in a variety of training opportunities, including those offered by IDOA, AgeOptions, and other sources such as INFROM USA.
 1. The Provider should have a standardized training process for current staff, new employees, and volunteers, this training will go over:
 - a. The Stages of the I&R process
 - b. Confidentiality
 - c. Two-week Training Manual
 - d. Attachments
- V. **The Stages of the I&R process** The I&R process can be separated into at least 5 stages

- a) Opening of call (contact) and establishing a rapport (connection)
 - b) Assessment of the situation
 - c) Clarification to ensure an accurate understanding of the situation
 - d) Providing appropriate Information and/or referrals
 - e) Closing the call
1. It is important to know that this process is not linear. The speed in which these stages are completed are largely dictated by the nature of the situation, client's ability to communicate, the specialist's ability to understand the situation, and database search skills of the specialists. Community resources specialists often refer to the big "C's" that are involved in the process:
 - a. Contact: The initial part of the interaction where the objective is to establish rapport, trust, and confidence.
 - b. Clarification: Occurs during assessment and involves ensuring that the specialist understands the client's situation to provide correct information or assistance.
 - c. Closure: The final part of the call, making sure that the client understands the referrals and is empowered to complete the next step.
 2. Stage 1: Contact
 - a. In the early stages of a conversation, how a person feels is often more important than the problem itself.
 - b. Your first words are a greeting. And that greeting should be warm, friendly and encouraging.
 - i. Good morning, thank you for calling (agency), my name is... How can I help you today?"
 - ii. "Good morning, thank you for calling (Agency) My name is... you've reached the I&A helpline I can help you connect to local resources. Should we get started today?"
 - c. The challenge with greeting is to maintain good energy throughout the day. Your 80th call of the day should be treated like the first call of the day.
 3. Stage 2: Assessment
 - a. Getting comfortable with asking questions is important for the I&R process to understand the full picture of a client's situation. These questions might be general, open-ended, close-ended, and at times personal questions. It is important to train specialists to ask questions respectfully to avoid making clients feel uncomfortable or interrogated. Specialists can work on how they ask these questions by establishing rapport with clients and by explaining why some questions might be asked.

- b. Second questions are also very important to ask because with these questions specialists can gather data. Second questions are general questions such as gender, age, race, income, etc.
 - c. Some people may be able to clearly state their situation. Others may struggle to describe why they are contacting the service. The initial stated reason for contacting an I&R service may not even be the real reason for the contact.
 - d. A Community Resource Specialist needs a set of skills to conduct an assessment. Some of these skills come instinctively. Others have to be learned and practiced.
4. Stage 3: Clarification
- a. Clarification within I&R is the process of ensuring specialists have a clear understanding of the client's situation. This is done by paraphrasing what the client has told them and asking clarifying questions.
5. Stage 4: Information and Referral Giving
- a. In order to provide appropriate and quality referrals, Specialists must know the basic structure of the services available in the community and be able to properly search the data base.
 - b. Information giving means providing specific information in response to a client's direct request, such as the phone number to a specific program.
 - c. Referral involves:
 - i. Identifying the organizations and programs capable of meeting and client's assessed needs.
 - ii. Providing enough information about each organization to help a client make informed decisions.
 - iii. Sometimes the appropriate referral does not exist this is when specialist need to use their problem-solving skills to find alternative solutions.
 - d. Stage 5: Closure
 - i. Closure happens when all the other stages have been completed. This final stage is an opportunity to summarize and restate to the client what occurs during the I&R process.
 - ii. Here specialists should verify that the client understands the resources they were given and that they know what next steps they need to take.

Recommended reading: Volume 2: Training Community Resource Specialist: Section one: The I&R Process | From greeting to closure.

VI. Confidentiality means that an I&R service should not disclose information about the personal identity of individual clients, their situations or the resources provided to help them unless: the client has provided explicit permission, legal reasons, or if there is a strong likelihood of harm to self or others.

1. An effective I&R service is based on trust. A service bound by confidentiality ensures that gathering personal information is minimal and only available to those authorized to have access to it.
2. Clients always have a right to refuse to provide personal information.
3. When conducting an I&R assessment, you should only ask questions that are relevant.

Recommended reading: Volume 2: Training Community Resource Specialist: Section 5: confidentiality.

VII. One Week – Orientation and Observation

1. Monday

A. Introductions. The first day of orientation usually includes introductions. As an Information and assistance specialist, it is important to use this time to fully understand the role of your agency and the people in it. Information and assistance is all information based therefore the more you fully understand your agency's services the better information you can provide clients with.

B. Log-ins. It is important to have rapid access to all accounts during calls. Therefore, it is important to fully understand how to access all the accounts your agency will be using.

C. Websites Become familiar with websites that your agency will be using. Some helpful websites are:

- A. IDOA website: <https://www2.illinois.gov/aging/Pages/default.aspx>
- B. Medicare website: www.medicare.gov
- C. AgeOptions website: AgeOptions.org
- D. USA Aging website : www.usaging.org
- E. Inform USA website: www.informusa.org

D. Unit Reports Most agencies have a unit report that will summarize what the agency has been working on. New I&A specialists should take some time to read these to understand what the agency has been working on.

E. Email & H- Drive_ensure quick and clear understanding of your agency's communication and office systems.

- I. Readings: Volume 2 Training Community Resource Specialists- the nature of information and referral. (Attachment 1)

2. Tuesday

A. It is important for the unit leader to continuously meet with the I&A specialist to answer any questions. I&A is loaded with information that needs to be studied and understood. Time should be given to the I&A specialist to study this information.

B. I&A specialist will be given the I&A binder and asked to go over it and create notes and come up with questions. Most Information and assistance specialists create their own creative study materials to condense information. (See Attachment 2)

C. Ensure clear understanding of I&A scheduling and communication systems. Ensure clear understanding of protocols in place and demonstrate clear understanding of phone systems.

D. Specialist will be asked to complete one of the InformUSA online training: [Serving Older Adults](#), (attachment 3).

E. Room for in-between meetings and independent review.

3. Wednesday

- A. Early morning meetings, to go over questions and review study materials.
- B. After getting familiar with the H-drive and communications systems set in place by the agency. The I&A specialists should practice written communication and email correspondence to I&A enquiries, (real or scenario based). This correspondence should match the agency's communication standards, should include any necessary attachments, and should be reviewed for accuracy.
- C. Call recordings are a great way to get future I&A specialists familiar with your agency's call demographic and nature of calls. While listening to these calls future I&A specialists should follow along, take notes, and prepare questions.
- D. Collecting data is very important when it comes to how an I&R system operates because it gives an understanding of clients and their needs. It is important to keep caller demographics in mind while training. As an Aging and disability network, we must be ready to serve older people and people with disabilities. This includes slowing down, speaking up, and empowering clients.
 - I. See attachment 4: Gathering Demographics While Maintaining Rapport
- E. Deep dive into resources. The information and assistance team should be familiar with its most common call topics. Future I&A specialists should dedicate time to becoming familiar with these topics and what resources are available to clients.
- F. Allow for independent study time and questions. Review materials

4. Thursday

- a. In order to become familiar with common call inquiries and what resources are available to clients; future I&A specialists should demonstrate a clear understanding of basic understanding of how these services operate. Future I & A specialists need to know how their agency works with these services and what services are available to clients within their organization.
 - 1. Thursday Housing: understand the difference between affordable housing, subsidized housing, senior housing, integrated housing, supportive housing. Know what resources are available for each housing type and the basic requirements of these. Part of being I&A specialist is knowing these basic requirements to properly refer clients to the right resources.
 - 2. Recommended Webinar: Inform USA - Debt Mitigation and Housing Stability Solutions, (attachment 5).
 - 3. Visit U.S. Department of Housing and Urban Development Website to see all [Housing resources](#) available by area.
- b. Serving difficult callers is a worry of many new I&A specialists. It is important for future I&A specialists to know how to successfully navigate difficult calls.

TRAINING NEW I&A SPECIALISTS

- I. Inform USA Webinar - Managing Difficult Calls: Looking in The Mirror
 - II. Inform Webinar I&R Basics: Wellness and Self-Care
 - III. Inform USA Webinar - The Effectiveness of Active Listening in a Crisis: Why It Works,
 - IV. Volume 2: Training Community Resource Specialist manual | Responding Effectively to Challenging Clients.
 - V. PWP- Suicide Risk in IR Context.
- c. Future I&A specialists must be able to successfully record data and services provided to clients. It is important to have a clear understanding of recording standards for the agency.
 - d. The information and assistance specialists should be provided with more call recordings during this time. It is ideal for this set of calls to be of a difficult nature, so the I&A specialists can see crisis intervention skills in action.
 - e. Allow for independent study time and questions. Review materials.
- ### 5. Friday
- a. Continue to become familiar with common call inquiries and what resources are available to clients. Future I&A specialists should demonstrate a basic understanding of how these services operate. Future I & A specialists need to know how their agency works with these services and what services are available to clients within their organization.
 1. Medicare, Medicaid, and Caregiver Services: Understand the basic components such as eligibility, difference between the two, different parts, and available resources.
 2. US Department of Health and Human Services | [FQA Medicare VS Medicaid](#)
 3. Medicare Beneficiaries Infographic, (Attachment 11).
 4. Medicaid Eligibility Verification Policies, (Attachment 12).
 5. IDOA- Caregiver Services, (Attachment 13).
 - ii. Become familiar with your Information and assistance database. Know it's different functions and how to locate services. The more familiar specialists are with the database the faster they can locate services.
 1. Inform USA Webinar: Using the Resource Database for I&R Referrals, (Attachment 14).
 - iii. Understand your agency's inclusion and exclusion policy, (Attachment 15).
 - iv. Continue to become familiar with data recording standards while creating call logs for call recordings. I&A specialist should complete a call log to their call recordings as if it were them who is taking the call.

- v. Meet for questions then allow for independent study time. Review materials.

VII. Two Week – Orientation and Observation

- A. In this week the I&A specialists should become more familiar with the program standards and services available to clients.
 - B. Additionally, I&A specialists will be shadowing other I&A specialists during their call shift to see how other I&A specialists navigate through their calls.
1. **Monday**
 - A. Meet for any questions and prepare for the upcoming week. Answer any program questions and review submitted materials.
 - B. Continue to become familiar with common call inquiries and what resources are available to clients. Future I&A specialists should demonstrate a basic understanding of how these services operate. Future I & A specialists need to know how their agency works with these services and what services are available to clients within their organization.
 2. Transportation and Nutrition Services: Understand the basic components such as eligibility, different parts, and available resources.
 3. Inform USA Webinar - Connecting Consumers to Community Transportation Information and Resources, (Attachment 15).
 4. Federal Transit Administration FQA: [Transit FQA](#)
 5. IDOA: Nutrition Programs: [Nutrition Programs](#)
 - C. Continue to become familiar with data recording standards while creating call logs for call recordings. I&A specialist should complete a call log to their call recordings as if it were them who is taking the call.
 - D. Use the rest of the day to review information and study services.
2. **Tuesday**
 - A. Future I&A specialists should be given the chance to watch their peers tend to their live calls for them to be able to see what the process is like and get a sense of what to expect. This should be done one-on-one; future I&A specialists should follow along and practice creating call logs while listening to these live calls.
 - B. Allow for independent study time. Review materials. Answer any questions.
3. **Wednesday**
 - A. Continuing to watch peers tend to live calls. This should be done one-on-one; future I&A specialists should follow along and practice creating call logs while listening to these live calls.
 - B. Allow for independent study time. Review materials. Answer any questions.

4. Thursday

- A. Future I&A specialists are now ready to start their own call shift. This should be done with an experienced I&A member so questions may be asked while providing guidance when needed.
- B. Allow for independent study time. Review materials. Answer any questions.

5. Friday

- A. Future I&A specialists are now ready to start their own call shift. This should be done with an experienced I&A member so questions may be asked while providing guidance when needed.
- B. Allow for independent study time. Review materials. Answer any questions.
- C. Administer ADRN Test, (Attachment 17)