

Par. 1. Material Transmitted and Purpose – Transmitted with the Manual Letter are changes to Service Chapter 650-50, North Dakota Aging and Disability Resource-LINK Policies and Procedures Manual. The old language is struck through, and the new language is highlighted and underlined in red. The manual is being revised to update existing policies.

Effective Date: October 17, 2018

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To provide current information on known opportunities and services available statewide and connect people to services to help them maintain or improve their quality of life. ~~provide individuals with current information on opportunities and services available to older individuals, persons with disabilities, and caregivers within their community.~~

To maintain a statewide and nationwide toll-free phone service (1-855- 462-5465) for the provision of services. Services are also provided through the use of using e-mail (carechoice@nd.gov) and the Internet (<https://carechoice.nd.assistguide.net/> www.carechoice@nd.gov).

Legal Reference and Authority 650-50-05

- Public Law ~~89-73~~ 114-144, Older Americans Act of 1965, as amended in 2006 2016

Definitions 650-50-10

~~“Information and Assistance/Referral (I & R)” means a service for older individuals that (a) provides individuals with current information on opportunities and services available to them within their respective community, including information relating to assistive technology; (b) links individuals to the opportunities and services that are available; (c) to maximum extent practicable, ensures that individuals receive the services they need, and are aware of the opportunities available to them, by establishing adequate follow-up procedures; and (d) serves the entire community of older individuals and persons with disabilities~~ a one-on-one service that (a) assesses problems and capabilities of the individuals; (b) provides consumers with information on opportunities and services available within their communities; (c) links the consumers to the services and opportunities that are available; and (d) to the maximum extent practicable, establishes adequate follow-up procedures.

Staffing Requirements 650-50-15

I & R staff will complete an orientation session with the I & R Program Administrator to discuss job responsibilities and expectations. Staff will be required to read the policy and procedure manual for Aging and Disability Resource-LINK, “ABC’s of I & R” manual, and user guide for the Department’s designated web-based data collection system. ~~Social Assistance Management System (SAMS) I & R Provider Manual and SAMS I & R Caller Manual.~~

Staff will have the communication skills to meet the needs of special populations; i.e., caregivers including caregivers of children with special needs, older adults and persons with disabilities. Communication skills include establishing a rapport or connection with the consumer caller, assessing the situation, clarifying to ensure an understanding of the situation, providing appropriate information and referrals, and closing the call.

Staff will be required to seek ~~Certified Information and Referral Specialist-Aging (CIRS-A)~~ Community Resource Specialist Aging/Disabilities (CIRS-A/D) status through the Alliance of Information and Referral Systems (AIRS) IRS Certification Program. ~~Alliance of Information and Referral Systems~~

{AIRS} is a national organization created to improve access to human services.

I & R staff are eligible for initial ~~CIRS-A~~ CIRS-A/D certification if they are currently engaged in the provision of I & R services. According to the AIRS standards, eligibility requirements for staff to take the ~~CIRS-A~~ CIRS-A/D exam are:

Provision of Information & Referral Services 650-50-20

When calls are received on the Aging and Disability Resource-LINK, I & R staff will:

1. Answer the phone with "Aging and Disability Resource-LINK, how may I help you?" by identifying self and division.
2. Establish rapport with the caller consumer and use active listening skills to discern the presenting problem.
3. Ask the caller consumer how they learned about the Aging & Disability Resource- LINK and document the response in the SAMS Call Log call log as outlined in the manual.
4. Respond to each caller consumer in a professional, non-judgmental manner.
5. Listen sensitively to what the caller consumer is saying, while also being attuned to what the caller consumer does not say.
6. Assess the caller's consumer's problems and needs by asking relevant questions to obtain information necessary for an accurate referral.
7. Not assume the responsibility of diagnosing the caller's consumer's problem, but listen intuitively.
8. Reflect back to the caller consumer their understanding of the concerns the caller consumer has verbalized.
9. Remain patient during calls, speak slowly and clearly, and be prepared to repeat the information as often as needed to insure the caller consumer obtains the correct information.
10. Transfer consumer to appropriate entity if attempting to make a report of abuse.

Provision of Referral Information 650-50-25

I & R staff will provide telephone, e-mail, or ~~walk-in~~ online information and

referral services in which the caller consumer has one-to-one, human contact with I & R staff.

Once the needs of the caller consumer have been identified, I & R staff will:

1. Assure the caller consumer that all calls requests for assistance are handled confidentially, and no information will be released to the Department of Human Services and its contractors without the caller's consumer's verbal or written permission, as allowed by federal and state consent regulations.
2. Inform the caller consumer certain information may be kept on file for the Aging and Disability Resource-LINK records.
3. If caller consumer agrees, staff will obtain as much information on the ~~SAMS Call Summary~~ call summary as the consumer is willing to provide. If caller consumer refuses to provide information, staff will affirm the caller consumer has that option.
4. Explore what other resources and services the caller consumer is currently receiving or if they have received information from any other source.
5. Where possible, provide a minimum of three referrals to give the inquirer consumer a choice. Callers Consumers will be responsible for choosing which, if any, resources they wish to access.
6. Refrain from recommending any one service over another.
7. Explore with the caller consumer if they will be able to follow up on referral information provided without further assistance.
8. If the situation requires, complete the referral(s) on behalf of the caller consumer:
 - I & R staff will explain what information will need to be released and to whom the information will be released ~~in order to~~ to complete the referral.
 - I & R staff will ask for the caller's consumer's verbal permission to release the information to make the referral ~~on behalf of the caller~~ to each specified agency or program.
 - I & R staff will document the caller's consumer's verbal agreement ~~on the SAMS Call Summary in the computer caller screen~~ in the call summary. Access to the ~~SAMS~~-call log is restricted to Program Administrators and I & R staff within the Aging Services Division.
9. Respect caller consumer confidentiality always. Information shared must be kept within the limits agreed upon with the caller

consumer:

- An exception to this would be a situation where the caller consumer may be in danger of hurting himself or herself self-harm. In this situation, staff will release information as needed to obtain emergency services for the caller consumer.
10. Before terminating calls communication with consumers, I & R staff will inquire if the caller consumer has any further questions about the information provided; and thank the caller consumer for using the Aging and Disability Resource-LINK.
 11. Staff will inform callers consumers they may receive a follow-up call from I & R staff to determine if the caller consumer was linked to the services he or she needed.
 12. A "soft warm transfer" of the call will be completed when staff determines that a direct transfer would be appropriate; i.e. caller consumer deemed unable to make the call themselves or is having difficulty understanding the referral and service process. "Soft Warm transfer" is when staff connects the caller consumer to another party or agency and stays on the line until connection is made. When a soft warm transfer is deemed appropriate, I & R staff obtain the caller's consumer's verbal permission to transfer the call to the appropriate agency. I & R staff will announce the caller consumer to the agency and remain on the line until assured parties have been connected.
 13. When completing referrals, I & R staff will approach agencies in a courteous manner, speak with the appropriate personnel, and have all known relevant information for the referral at hand. Relevant information may include the caller's consumer's name, phone number, address, age, as well as their identified needs.
 14. When a referral has been completed, the Aging and Disability Resource-LINK staff will document completion of the referral on the ~~SAMS Call Summary~~ call summary in the database, noting the date and the name of the person who received the referral information in order to to complete follow-up calls.

Caller Consumer Confidentiality 650-50-30

Aging Services Division is governed by the written confidentiality policies of the Department of Human Services, Service Chapter 110-01 and federal, state and local laws. No caller consumer information will be shared

outside of the Department of Human Services and its contractors without first obtaining the caller's consumer's verbal permission.

If I & R staff make a referral on the behalf of the caller consumer, staff must explain the information that would need to be released and to whom it will be released ~~in order to~~ to complete the referral. I & R staff will ask permission to release that information to ~~the each~~ each specified agency or program. The caller's consumer's verbal agreement to release the information will be recorded in the call summary ~~SAMS Call Summary~~, on the computer caller screen. (See ~~SAMS~~ manual.)

An exception to this would be in situations where the caller consumer may be in danger of self-harm or hurting himself or herself or someone else. In these situations, I & R staff will release information as needed to obtain emergency services for the caller consumer.

Emergency/Crisis Calls 650-50-35

Caller Consumers who appear to be in a situation where it seems likely to result in harm to ~~themselves~~ themselves or others are considered Emergency or Crisis calls. To handle such calls, Aging and Disability Resource-LINK staff has access to mental behavioral health professionals at the Regional Human Service Centers. I & R staff will provide empathy and support to the caller consumer, while also informing the caller consumer that they will have the opportunity to talk with a mental behavioral health professional. Staff will obtain the caller's consumer's name, address and phone number as quickly as possible and will transfer the caller consumer to the respective regional Human Service Center Crisis Line. I & R staff will stay on the line until the call is answered by crisis line staff. In cases of immediate physical danger to the caller consumer, staff may find it necessary to notify emergency services in the caller's consumer's home area.

Relay North Dakota Calls 650-50-40

The service is free within the caller's consumer's local area. Long distance calls are billed at a reduced rate. Direct dial, collect calls, third-party calls, credit card and calling cards can be used through the service.

Both voice and TTY users may use Relay North Dakota to place calls by using these numbers:

TTY: 800-366-6888 or 711

Voice: 800-366-6889 or 711

Translators 650-50-45

In the event a caller consumer speaks a language other than English, I & R staff will attempt to explain to the caller consumer a translator will be contacted that can converse with the caller consumer. If possible, staff will elicit the caller's consumer's native language and phone number so an appropriate translator can be contacted. The Department of Human Services has a contract with CTS LanguageLink to provide ~~telephone-based~~ telephone-based interpretation services Interpretation Services for the state of North Dakota. This service can be accessed by calling 888-338-7394 ~~877-650-8027~~ and providing the Call Center Service Representative with the following information:

- Account # 16194 9823

Voice Mail Callers Consumers - Response 650-50-50

For callers consumers who reach the Aging and Disability Resource-LINK after hours or when staff is on another call, a voice mail system is in place that allows the caller consumer to leave their name and phone number, as well as a brief message.

1. Record the caller's consumer's name and phone number in the call summary ~~SAMS Call Summary~~. Record the time of the voice message.
3. Every attempt to return the call will be documented in the call summary ~~SAMS Call Summary~~. After three unsuccessful attempts within a two-business day timespan, staff will discontinue calling.

Internet and E-Mail Request for Information - Response 650-50-55

I & R staff have access to the Internet and the use of electronic-mail e-mail to facilitate the provision of quality services to individuals seeking information or services. E-mail requests through the Aging & Disability Resource-LINK e-mail account will receive a response by the end of the

next business day at a minimum. E-mail inquiries are subject to the same guidelines regarding confidentiality as inquiries received via telephone.

Inquiries for Services in Other States - Response 650-50-60

For callers consumers seeking information on services for older individuals, caregivers or persons with disabilities in other states, staff will refer the caller consumer to the national Eldercare Locator or the National Council on Independent Living the local Aging and Disability Resource Center or entity best able to provide information and resources. If the caller consumer is asking for information that is readily available, staff may use their discretion to supply the requested information.

Eldercare Locator is a nationwide public service of the U.S. Administration on Aging providing state-by-state information on services available for older adults and their families. Eldercare Locator can be reached ~~THE~~ toll-free number at is 800-677-1116 or online at <https://eldercare.acl.gov/Public/Index.aspx>. I & R staff should inform callers consumers they will need to provide the zip code for the area in which they are seeking services when they use the Eldercare Locator.

The National Council on Independent Living (NCIL) is a national organization that advances independent living and the rights of people with disabilities through consumer-driven advocacy. Statewide information on disability services is available by calling toll-free ~~877-525-4300~~ 844-778-7961 or online at <https://www.ncil.org/>.

The Child Welfare Information Gateway is a national organization that promotes the safety, permanency, and well-being of children, youth, and families by connecting child welfare, adoption, and related professionals as well as the public to information, resources, and tools covering topics on child welfare, child abuse and neglect, out-of-home care, adoption, and more. Information is available toll-free at 1-800-394-3366 or online at https://www.childwelfare.gov/.

Autism Speaks is a national organization that promotes solutions, across the spectrum and throughout the life span, for the needs of individuals with autism and their families through advocacy and support; increasing understanding and acceptance of people with autism spectrum disorder; and advancing research into causes and better interventions for autism

[spectrum disorder and related conditions. Information is available toll-free at 1-888-288-4762 or online at https://www.autismspeaks.org/.](https://www.autismspeaks.org/)

Aging and Disability Resource - Link Marketing 650-50-65

Resource-LINK staff will participate in statewide senior events whenever possible. Resource-LINK staff will keep a written record of the events attended and the promotional items disseminated at each event.

Advocacy Services 650-50-70

At times staff may need to provide advocacy services for callers consumers. Providing advocacy services means a Resource-LINK staff will take an active role in assisting the caller consumer with obtaining services. Staff may need to make phone calls, write letters, or speak to other agencies or programs on behalf of callers consumers. Situations where advocacy may be required include but are not limited to:

1. Callers Consumers who may lack assertiveness in pressing for needed services.
2. Callers Consumers who may lack awareness or knowledge of their rights.
3. Callers Consumers who may lack knowledge of, or who are confused about, existing services and application processes.
4. Callers Consumers who may have a difficult time communicating their needs or concerns.
5. Callers Consumers who may find it difficult to ask for help, who perceive asking for help as a weakness or dependency.
6. Callers Consumers who may experience language difficulties in dealing with agencies or programs.
9. Agencies that callers consumers identify as not being respectful or helpful.
10. When advocating for callers consumers, I & R staff must obtain verbal permission from the caller consumer to release information. If the caller consumer does not approve the release of information, staff may still complete advocacy attempts, but will proceed in a "generic" manner without providing identifying information about the caller consumer.

Referrals for Options Counseling Services 650-50-75

Aging and Disability Resource-LINK staff will make referrals for options counseling services whenever appropriate. Situations where a referral for options counseling might be appropriate are, but not limited to:

- When the caller consumer is in need of needs assistance with futures planning or benefits counseling
- When a long-distance long-distance caregiver has concerns about the increased frailty or care needs of a family member
- When it becomes evident the caller consumer would be best served by more individual staff time and attention

It is the policy of the Aging and Disability Resource-LINK to make all possible referrals to options counseling staff to assist callers consumers in their local community.

Aging and Disability Resource-LINK staff maintains a list of the options counseling ~~contact agencies and~~ staff for each region to access options counseling services.

Follow-up Calls 650-50-80

Follow-up calls provide a second opportunity to assist caller consumers with obtaining needed services. Additional assistance in locating or using service may be necessary. I & R staff may will conduct follow-up within two weeks of the call with consumers inquirers in situations where I & R staff believe the inquirer consumer does not have the necessary capacity to follow through and resolve their problem.

For quality assurance purposes, I & R staff will conduct follow-up calls on 10% of other inquiries ~~on a monthly basis~~ monthly to the extent possible.

Follow-up shall consist of contacting the inquirer consumer and or organization to which a referral has been made to find out if service is being provided and the need is being met, and if the service is not being provided, why not.

Follow-up may also be used to determine if the inquirer consumer is satisfied with the I & R service as a means of ~~ascertaining~~ determining the effectiveness of the I & R services provided.

If the inquirer consumer has not received services, or the need has not been met, I & R staff shall determine whether there is still a need and make additional appropriate referrals and consider a referral for options counseling services. I & R staff will document [follow-up results](#) in the [Department's designated web-based data collection system](#) ~~SAMS follow up results~~ (that the service was not received) for future reference.

Aging and Disability Resource - LINK Database 650-50-85

Information contained in the Aging and Disability Resource-LINK database is maintained in the [Department's designated web-based data collection system](#) ~~Social Assistance Management System (SAMS) computerized record keeping system managed by Harmony Information Systems and Assist Guide Information Systems (AGIS).~~

Data Elements 650-50-85-05

A profile shall be developed on each organization and agency that shall include but is not limited to:

9. [Fee structure](#) ~~Sponsorship~~
10. [Website address and general e-mail address](#)

Classification System 650-50-85-15

Taxonomy additions will be updated and integrated into the I & R database as they occur. A complete review and update of the Resource-LINK version ~~T~~taxonomy will be conducted at least once every 18 months.

Verification of Information 650-50-85-25

It is important all information added to the database be verified for accuracy. Verifying information will be done by following these steps:

2. If the resource is already listed, any written material such as an Update Form or a Provider Information Form should be carefully compared to existing information. Any changes or corrections should be made in the database as needed. If questions arise about conflicts between new information and information existing in the database, staff will contact the agency or program by telephone [or e-mail](#) to clarify any concerns.
4. When the information is received, or the Provider Information Form is completed and returned to the Aging and Disability Resource-LINK, it

will be added to the Resource-LINK database in the [Department's designated web-based data collection system](#) SAMS.

Updating the Database 650-50-85-30

~~In order to~~ [To](#) provide callers [consumers](#) with accurate and comprehensive information, a 100% update rate within a 12-month cycle of records in the resource database will be accomplished by the Resource-LINK staff.

2. As updated information is returned from agencies and programs, it will be entered into the Provider section of the [Department's designated web-based](#) SAMS database. (See ~~SAMS I & R Provider Manual~~ [user manual](#) for specific instructions.)
4. Providers may also request an update of their information through the Aging & Disability Resource-LINK website page. Resource-LINK staff will receive an e-mail containing the updated information and will make the requested changes. (See ~~SAMS I & R Provider Manual~~ [user manual](#) for specific instructions.)

Inclusion/Exclusion Criteria 650-50-85-40

Included in Resource File

2. Organizations (such as churches, [or](#) social clubs) which offer a service to the community
6. Hospitals, health clinics, ~~nursing homes~~ [skilled nursing facilities](#), assisted living facilities, [or](#) basic care facilities within the state of North Dakota
9. Agencies that provide ~~mental~~ [behavioral](#) health services and counseling services (must be licensed by the state of North Dakota, if required)
15. [Agencies that provide services to children with special needs](#)
16. Toll-free phone services, if they offer information, services, support, community service

Excluded from our Resource File

1. Agencies that deny services ~~on the basis of~~ [based on](#) race, sexual orientation, religious belief, or national origin or that violate Title VI of the Civil Rights Act, Section 504 of the Rehabilitation Act, the Age Discrimination Act, the Americans with Disability Act, and the North Dakota Human Rights Act

Alternative Formats of Aging and Disability Resource- LINK Database 650-50-85-45

For consumers who request material in alternative formats, staff may utilize the following resources:

North Dakota [Vision Services](#)/School for the Blind
500 Stanford Rd
Grand Forks, ND 58203
1-800-421-1181

The ND [Vision Services](#)/School for the Blind will transcribe materials into large print or Braille for a minimal fee, ~~and will also read materials onto tape.~~ If consumers are registered with the North Dakota State Library, materials will be transcribed into alternative formats at no charge to the consumer. Consumers may register with the library by contacting:

ND State Library
604 E Boulevard
Avenue Bismarck, ND
58505
~~1-800-582-8032~~ [1-800-472-2104](tel:1-800-472-2104)

Caller [Consumer](#) Data Collection 650-50-85-50

4. Data collection reports should facilitate the gathering of the following information, as available from the caller [consumer](#):
 - c. Name of individual for whom services are sought if other than caller [consumer](#)
 - d. Problems presented by caller [consumer](#) and problems as assessed by staff
 - f. Organizations to which caller [consumer](#) was referred
 - h. Method of contact with I & R service (letter, telephone, ~~walk-in~~ [online](#), e-mail)
 - i. How did the caller [consumer](#) find out about the I & R service
 - j. Follow-up results, including ~~whether or not~~ [whether](#) the caller [consumer](#) received services

Data Collection and Reporting 650-50-85-55

I & R service activity is collected in the Department's designated web-based data collection system ~~SAMS computerized record~~. The data collected in this system consists of documentation of service referrals and consumer characteristics.

Provision of I & R services by the Regional Aging Services Program Administrator (RASPA) is submitted to the Division office in the Monthly RASPA Report. RASPA I & R data ~~is contained in the Monthly RASPA Report~~ and is incorporated into the report of I & R service activity ~~on a monthly~~ basis monthly.