

NY Connects: Choices For Long Term Care
Information and Assistance (I&A) Call Map

Greet the Caller

From the moment you answer the phone, the consumer is forming an impression about your competence and helpfulness. Begin to build a positive rapport by answering in a warm, yet professional tone of voice and giving the caller the name of your organization and your first name. Remain respectful and non-judgmental.

Sample Greeting:

- (County name) NY Connects. This is (your name). How may I help you?

Determine Presenting Problem

Allow the caller to provide you with a short explanation of the reason/purpose for the call. Explain the need to ask questions and why these questions are necessary; then question the caller to clarify the nature of the problem/need. Restate what the caller says to show you are listening.

Sample Questions:

- Can you tell me a little about your situation?
- Can you tell me what you might need help with?

Assess for Emergency / Crisis

Your organization likely has an emergency protocol to follow in the event a caller is in need of emergency care or assistance. At times it will be very clear that the caller is in crisis; at other times it may not be as clear, but you may suspect that there may be an urgent need. In both cases, you should follow the emergency protocol of your organization. It is important that you develop the ability to recognize a crisis and skills to provide short term assistance to the caller in crisis.

Explore Further

Begin by assuring the caller that you will provide information to assist them in addressing the issues they have presented and, where appropriate, obtain additional information to identify underlying issues/concerns and/or to determine if additional services are needed. Assure the caller that he/she can remain anonymous, if they so choose. At this point you should refer to your New York Connects screening elements to determine the data to be collected.

Support Statement:

- I'd be happy to discuss resources with you, but first I'd like to ask a few more questions to make sure I understand your situation.

Summarize and Prioritize

Review the issues with the caller. This provides an opportunity to verify that you understand the caller and validate the caller's concerns; providing assurance that you want to help. Help the caller prioritize so the most urgent needs can be addressed first. It is important to understand that the caller's priority may not match with what you perceive to be the priority.

Sample Questions:

- From what you are telling me, it appears that you may need help with (name the concern). Is that correct?
- Of the issues we have discussed so far, which should we discuss first?

Discuss Resources and Options

Brainstorm ideas and options with the caller; what ideas are being considered now; what has been tried so far; etc. Help the caller identify and explore resources and assistance he/she already has available but may not be fully utilizing (*i.e., private financial resources, insurance benefits, family, friends, church, etc.*).

Suggest and explore appropriate community resources, services, and public benefits. Provide resource information, suggest alternatives, and discuss pros and cons of each. Some situations may require a call back if there is a need to research resources and alternatives. Once these options are discussed, you should have enough information to determine whether a face to face assessment needs to be completed.

Sample Questions:

- Do you have any ideas? What have you tried so far? Let's talk about what resources you might have available to help meet your needs (*i.e., private financial resources, insurance benefits, family, friends, etc.*)
- Let's talk about community resources that might meet your needs. I'd like to give you some ideas of resources that might be helpful.

Review Plan

Sum up the call by reviewing the plan of action with the caller. Give guidance and instruction on executing the plan. Review what else you will do for the caller, (*i.e., send out brochures, contact next week to follow-up*); thank the caller for contacting NY Connects and encourage the caller to contact NY Connects in the future with further questions or needs; advocate where necessary and appropriate.

Assist When Necessary

When appropriate, offer to help the caller get connected to programs/services/resources. This includes encouraging the caller to contact the resource at his/her convenience, or offering the caller the option of you contacting one of the resources given. If you have determined that a face to face assessment needs to be completed, indicate to the caller that you will need to make the appropriate linkages for them in order to obtain the additional assistance that they need.

Sample Statements:

- Here is the contact information for (*name of resource*) if you would like to call them later at your convenience, or I can contact (*name of resource*) for you. I can give them information about what you need and ask them to get in touch with you.
- In order for me to link you with the most appropriate resources, I will need to do some research and call you back. (*If the need for a face to face assessment is indicated.*)

Concluding the Contact

Once the assistance is provided you will conclude the call by thanking the caller for contacting NY Connects and encouraging them to contact NY Connects in the future. This could be done at various points during the call.

Complete Post-Call Work

After the call concludes, complete post-call work (*i.e., sending out information, making contacts on behalf of the caller, etc.*). Document the call and its outcomes according to established procedures. The circumstances presented and your professional judgment should dictate when/if a follow-up call needs to be made.