

# NY Connects: Information & Assistance



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# Objectives

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- Review philosophy of I&A
- Define Information and Assistance
- Discuss the key I&A competencies for the people who answer the calls
- Provide a model for I&A communication
- Discuss resources for continued PoE development



# Welcome NY Connects



Philosophy of Information & Assistance

# Philosophy of I & A\*...

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Respect consumer right to:

- Accurate and comprehensive information
- Confidential/anonymous access
- Incorporate and respect consumers and their value system
- Self-determination and empowerment
- Access to the most appropriate service

\*Standards for Professional Information and Referral, 5<sup>th</sup> Edition, Revised August, 2005 and published by Alliance of Information and Referral Systems

# ...Philosophy of I & A\*...

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Information & Assistance Professionals will:

- Seek to understand consumer issues
- Offer immediate assistance to a consumer in crisis
- Empower consumers to understand and solve their own problems
- Assist consumers to prioritize needs and build a plan of action

\*Standards for Professional Information and Referral, 5<sup>th</sup> Edition, Revised August, 2005 and published by Alliance of Information and Referral Systems

## ...Philosophy of I & A\*

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- Assist consumers to identify resources, including personal resources, considering a strength based perspective
- Balance options and choices without overwhelming the consumer
- Advocate for consumers needing extra support
- Follow up when appropriate

\*Standards for Professional Information and Referral, 5<sup>th</sup> Edition, Revised August, 2005 and published by Alliance of Information and Referral Systems

# Who Will We Serve?

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- Older Adults
  - Adults aged 60 and over
- Persons with disabilities of all ages
  - Persons with disabilities aged 18 and over
  - Children under aged 18 with disabilities
  - And caregivers

# What is Information & Assistance?

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- Comprehensive, objective information and support (as necessary) for individuals and their caregivers/families about:

- all medical, non medical (e.g. social adult day care, housing) and other community long term care services;
- institutional services;
- eligibility criteria, etc.

...to link individuals and families with the opportunities, services and resources available to help meet their particular needs.

(NYSOFA/NYSDOH RFA)

# What is *Information*?

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- Knowledge of the comprehensive set of services, access points and related resources available within the POE system including a working knowledge of:
  - The information system(s)
  - Available services
  - Eligibility guidelines
  - Provider contact information
  - LTC Insurance, legal assistance and payor sources

# What is *Assistance*?

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- “*Listening*” to the consumer to understand what the need actually is before responding to the question asked or the concern raised
- Providing information to consumers that is accurate and objective and addresses their expressed need
- Providing access to information in a variety of useable formats
- Providing a range of viable service and support options for consumers to choose from that address their expressed need

# What is *Assistance*?

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- Making a direct connection with services/supports
- Beginning a process to understand the needs of an aging person or person with a disability and/or their caregiver
- Recognizing the call as an initial step for consumers in building a relationship with NY Connects POE staff in ways that will facilitate meeting both current and future needs

# What is *Assistance*?

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- Following up with the consumer and/or the service resource to determine if:
  - Referrals resulted in connection with services
  - Consumer feels that need is being met
  - Additional or different assistance is needed
- Providing additional information, and/or connection to needed supports and services



# Information & Assistance Service Delivery



Core Competencies



# Let's Consider...



## Knowledge and Skills for I & A Professionals

What you need to know and do?

What you need to train your staff to know and do?

# Three General Categories

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- General Knowledge of Information, Service and Delivery Systems
- Attitudes and Behaviors representative of I & A professional staff
- Skills and abilities needed to carry out the mission and goals of NY Connects

# General Knowledge of Systems\*

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- Mission, goals, policies and procedures of your local NY Connects POE
- Scope of available services
- Legislative authority on the local, state and federal level
- Current demographics of the community you serve
- Process issues of consumers your community serves

\*Adapted from the Study Guide of Performance-Based Competencies: CIRS-A, developed by Alliance of Information and Referral Systems

# Attitudes and Behaviors\*

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- Demonstrate an ability to understand and support differing perspectives
- Demonstrate an ability to self-manage stress
- Demonstrate ability to increase knowledge and skills

\*Adapted from the Study Guide of Performance-Based Competencies: CIRS-A, developed by Alliance of Information and Referral Systems

# Skills and Abilities\*

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- Utilize effective communication skills
- Effectively utilize and maintain resource systems
- Effectively manage consumer need

\*Adapted from the Study Guide of Performance-Based Competencies: CIRS-A, developed by Alliance of Information and Referral Systems



# Consumer Choice



How to work with consumers to develop  
choices: First Steps

# Active Listening

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- Active listening is a structured form of listening and responding that focuses the attention on the speaker
- Active listeners build rapport, understanding and trust with consumers using a number of different techniques
- These techniques serve to create a respectful dialogue that encourages the speaker to discuss issues and to begin prioritizing and problem solving solutions

# Techniques to Help You Become an Active Listener\*

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- Restating
- Summarizing
- Minimal encouragers
- Reflecting
- Feedback
- Emotional labeling
- Probing
- Validation
- Effective Pause
- Silence
- “I” messages
- Redirection
- Consequences

\*Taken from the Tip Sheet: The Art of Active Listening, National Aging Information & Referral Support Center

# Benefits of Being an Active Listener

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- Helps us to listen attentively to consumers
- Helps us to avoid misunderstandings
- Helps to open consumers up and get them to say more which will help identify issues and needs



Let's Try it Out...



Small Group Activity

# Instructions...

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- Break into groups as directed
- Elect a group reporter who will record responses using the handout provided
- Elect a group caller who will be given a caller profile and will role play the call with other group members

# Instructions...

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- Each group will attempt to discover and achieve the following goals with the caller:
  - Determine presenting issue
  - Determine underlying issues, if any
  - Summarize and prioritize the callers concerns
  - Review resources and options
  - Create an action plan with the caller

# Debrief...

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- To the caller:
  - How did you find the interaction?
  - Do you feel that your needs were met? That you were respected and listened to?
- To the staff:
  - Did you find the interaction productive, frustrating or something else?
  - What types of questions did you ask your caller?
  - Do you feel this was a successful interaction?



Pulling it all together...



A Call Mapping Approach

**Greet the caller**

**Determine the caller's presenting problem or need, and desired goals**

**Use Emergency Protocol!**

**Explore beyond the presenting problem**

**Summarize problems/needs and help caller prioritize**

**Explore resources and options, and begin To develop a plan of action with the caller**

**Review plan of action with caller, offer assistance and conclude conversation**

**Assist when necessary**

**Concluding the contact**

**Do post call work**

(NY Connects), this is (your name).  
How may I help you?

Can you tell me a little bit about your situation?

**Follow Emergency Protocol of your organization!**  
Can you tell me what you might need help with?

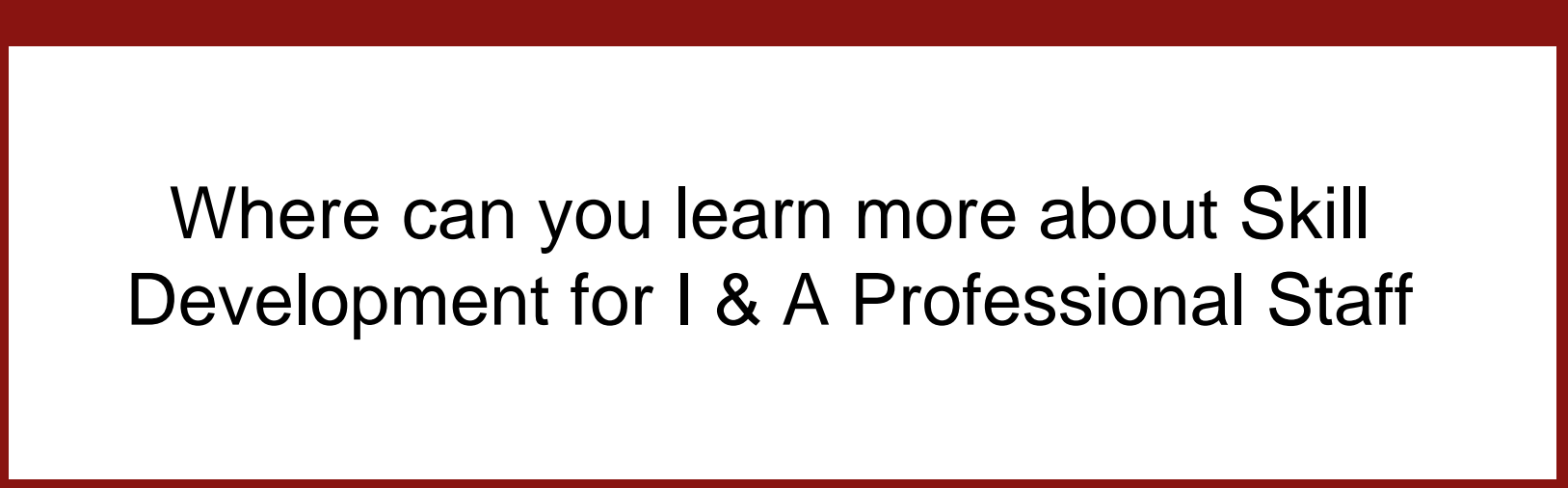
I'd be happy to discuss resources with you, From what you are telling me, it appears that you may need help with (name the concern).  
Is that correct?

What have you tried so far? Let's talk about what resources you might have available to help meet your needs (private financial resources, insurance benefits, family, friends, etc.)

See how this information can help you, and 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.



# Resources



Where can you learn more about Skill  
Development for I & A Professional Staff

# Where can you find more information...

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## ■ Handouts

- Tip Sheets
- Call map
- Resource Listings

## ■ Websites

- Aging & Disability Resource Center at:  
<http://www.adrc-tae.org>
- National Aging I & R Support Center at:  
<http://www.nasua.org/informationandreferral/index-ir.cfm>
- Alliance of Information & Referral Systems at:  
<http://www.airs.org/>
- New York State Alliance of Information & Referral Systems at: <http://www.nysairs.org/>

# More Training?

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Consider in-depth future trainings related to:

- Principles of I & A
- Strategies to help develop choices
- Strategies to provide unbiased information t addressing both medical and non-medical needs
- Where assistance ends and case management begins
- Risk assessment vs. consumer preference
- Populations served by the POE



And finally...



Your Questions and evaluation feedback  
forms

# Presenter Contact Information

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Thank you!



Enjoy the rest of your day!