



**NATIONAL
INFORMATION
& REFERRAL
SUPPORT CENTER**

CRS-A/D Training

**Competencies for the Aging and Disability
Information and Referral/Assistance Programs**

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Introduction

Introduction: The I&R Support Center



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The National I&R Support Center provides training, technical assistance, and information resources to build capacity and promote continuing development of aging and disability information and referral services nationwide.

- Technical Assistance and Training Webinars
- Online training; Inform USA (formerly AIRS) Certification Training; and CRS-A/D Training Resources (train-the-trainer initiative)
- Distribution list for sharing information and resources (to sign up, visit www.advancingstates.org/community-opportunities/stay-informed)
- Knowledge Building: Surveys of the Aging and Disability I&R/A Networks
- Training Events at National Conferences

www.advancingstates.org/initiatives/national-information-referral-support-center

Introductions

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Use the chat to share your:

- Name
- Organization
- State/community
- What is one good habit you want to pick up in the new year?

Content

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1. Introduction
2. I&R/A Fundamentals
3. Exam Details
4. I&R/A Process
5. Communication Techniques
6. Inform USA Standards (Highlights)
7. I&R/A and the Aging/Disability Networks
8. Programs and Services
9. More Exam Information

Learning Outcomes

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- Understand the fundamental components of I&R/A service delivery, standards, history, and programs
- Prepare for the CRS-A/D exam by reviewing key topics for I&R/A professional certification
- Gain insight through activities and discussion with other I&R/A professionals into how to improve I&R/A service delivery techniques
- Understand how I&R/A services and programs fit into the “big picture” of long-term services and supports

Fundamentals of I&R/A and Inform USA Certification

The Nature of I&R

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How do most people feel when they must ask for help?

If there was not an I&R service, how would people find the community or social programs that they needed?



What is I&R/A?

Information and Referral/ Assistance (I&R/A) is the art, science and practice of bringing people and services together. When individuals, families, and communities don't know where to turn, I&R is there for them.



Characteristics of I&R/A Services

The I&R/A service:

- Maintains accurate, comprehensive, **unbiased information** about services available in their community.
- Provides **confidential** access to information.
- Provides **barrier-free** access to information.
- Provides assessment and assistance based on the **inquirer's need(s)**.
- Recognizes the inquirer's right to **self-determination**.
- Assures that inquirers are **empowered** to the extent possible.
- Provides an **appropriate level of support** in obtaining services.
- Assures that inquirers have the opportunity to access the **most appropriate I&R/A service** available in the system.

What is Inform USA?

Inform USA (formerly AIRS)

Provides a professional umbrella for all I&R/A providers in both public and private organizations. Comprehensive and specialized I&R/A programs help people in every community and operate as a critical component of the health and human service delivery system.

Inform USA Certification

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Certification

- Addresses the knowledge, skills, and work-related behaviors of individual specialists
- Focuses on the service delivery and resource database sections of the standards

Accreditation

- Focuses on quality and comprehensive service delivery of I&R/A organizations
- Agencies must meet minimum requirements in all five areas of the standards

Exams

- **CRS:** Certification for Community Resource Specialists
- **CRS-A/D:** Certification for Community Resource Specialists - Aging/Disabilities (formerly CIRS-A/D)
- **CRS-DC:** Certification for Community Resource Specialists - Database Curator

Inform USA Certification Professional Credential Names



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- This training will use the term **Community Resource Specialist** to refer to an I&R/A Specialist. This term aligns with the Inform USA I&R Training Manual, the certification exams, and the certification designations.
- In states and communities, a variety of names may be used to refer to professionals who perform I&R/A functions, such as I&R or I&A specialist, resource specialist, call specialist, navigator...

Why Certify?

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- Demonstrates knowledge, skill, and technical proficiency
- Enhances quality of services
- Shows commitment to the profession
- Validates professional development
- Engenders respect outside the field
- Confirms progression, growth, and leadership
- Many agencies require a percentage of their I&R/A specialists to become CRS-A/D certified
- Provides a shared base of knowledge among all I&R/A professionals in the field

Exam Details

CRS-A/D Exam Format

16

- 100 questions
- Multiple Choice
- 2 hours

Composition of CRS-A/D Exam (approximate % of question types)

- | | |
|--|-----|
| ■ Rapport | 18% |
| ■ Screening/Assessment | 18% |
| ■ Identification of Resources and Preferences | 18% |
| ■ Information, Assistance, Referrals, and Advocacy | 18% |
| ■ Documentation | 11% |
| ■ Follow-up | 5% |
| ■ Disasters and Emergencies | 7% |
| ■ Ethics, Professional and Legal Issues | 5% |

Certification Exam Details

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- A dictionary is provided to look up terms
- Personal notes are not allowed in the exam room
- Phones and other electronic devices must be turned off and stowed with other belongings
- Inform USA uses proctored computer-based testing.
 - ▣ The exam platform gives you the opportunity to mark questions you are unsure of, and go back later to review
 - ▣ A proctor will still be present for the duration of the exam
 - ▣ Certification exams are offered at host sites and through an online option

CRS-A/D Exam Eligibility

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Inform USA Requires:

- 1 full year of employment in I&R for applicants with a Bachelor's degree or higher
- 2 years of employment in I&R for applicants with an Associate degree
- 3 years of employment in I&R for applicants with a High School diploma or GED
- 4 years of I&R employment with no educational qualifications
- A copy of your degree/diploma or educational transcript

Go to: www.informusa.org for the application form

Got Exam Anxiety?

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If you are signed up for the exam:

- Sit back for a moment, take a deep breath and...
 - ▣ Think about your years of experience as a trained I&R/A professional
- You can only sign up for the exam after working for at least one year in the field
- Studying the suggested materials and taking practice tests are just icing on the cake (of your work experience)
- Try not to read too much into the questions

Study Resources

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- **ADvancing States** (www.advancingstates.org)
 - ▣ The IQ Online Learning Center has several courses that address competencies for certification in aging and disability I&R/A
 - ▣ www.advancingstatesiq.org
- **Inform USA** (www.informusa.org)
 - ▣ Standards for Professional Information & Referral (<https://www.informusa.org/standards>)
 - ▣ I&R Training Manuals
 - ▣ Online Training
 - ▣ Online CRS-Aging/Disabilities Practice Test (\$25) through Inform USA (<https://learn.informusa.org/>)

After the Exam

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Exam Results

- You should receive your exam results via email within several business days of taking the exam.

Recertification

- Required every 2 years
- You must document at least 10 hours of I&R-related training and professional development
- A second examination is not required *unless* you allow your certification to lapse beyond the expiration date noted on your certificate.



Passing the Exam

Pass

- You must obtain a score of 75% or above to pass the exam.
- You will not obtain your actual score, or which questions you answered incorrectly

Didn't Pass - Don't Panic!

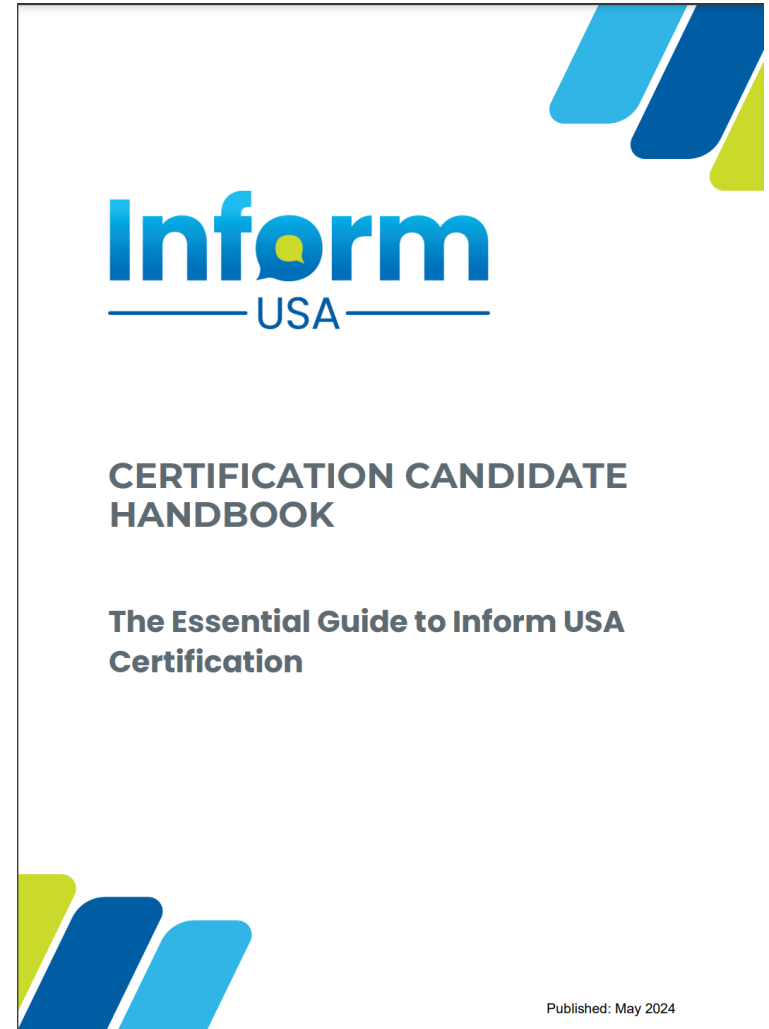
- Retake the exam within 1 year at a reduced fee
- \$90 fee (Inform USA members; \$130 nonmembers)
- Upon request, you may obtain a breakdown of your scores in the various subject areas

For all things Certification...

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See the Certification Candidate Handbook!

www.informusa.org/core-certification



Information & Referral/Assistance Process

The I&R/A process is a semi-structured, person-centered interview procedure that supports and empowers clients' access to health and social support services.

Inform USA Standards Quality Indicators for I&R

Through one-to-one interactions with a Community Resource Specialist, the I&R service engages individuals by building rapport, actively listening, exploring needs and connecting people with appropriate information, referrals, and support.

- The I&R service engages with individuals through interactions that follow the stages of the I&R process
- Regular training is provided regarding the key elements of the I&R process

Inform USA Standards Quality Indicators for I&R

Community Resource Specialists:

- Apply person-centered techniques to identify strengths, needs, preferences...and support the person's choices
- Convey compassion and empathy during the conversation
- Responding to each inquirer in a professional, non-judgmental, patient, culturally-appropriate, and timely manner
- Build rapport by actively listening to the individual

Stages of the I&R/A process

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Opening the call and establishing rapport: Contact

Assessment of the situation

Clarification to ensure an understanding of the situation

Providing appropriate information and/or referrals

Closing the call

Establishing trust and rapport

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- Building trust and rapport allows another person to feel comfortable talking to you.
- The Community Resource Specialist's first words to the client should be an open, warm, and friendly greeting.
- Clients often feel vulnerable and confused when contacting I&R/A services – when you make contact with the client, be sensitive to the possibility of client discomfort and uncertainty.

Welcome and Rapport

Learning about the client's situation

- Community Resource Specialists must assess the client's needs in a natural way, through active listening and good I&R communication techniques.
- Asking questions reveals the client's situation.
- When asking questions, it is important to explain to clients why you are asking them.
- Specialists need only ask questions that are relevant in making an appropriate referral.
- Sometimes, the second question is the key that unlocks the client's situation by giving them another opportunity to answer.

Probing questions

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- In some cases, there may be an underlying issue that the client is not articulating.
- Specialists should tactfully ask questions, probing to explore whether there are underlying issues.

“Can you tell me more about...”

If a client chooses to ignore or otherwise avoid addressing the underlying issue, accept the decision of the client. The exception to this rule is if the Community Resource Specialist suspects abuse, exploitation, or neglect.

Assessment

Understanding the client's situation

- Clarification within I&R/A is the process of ensuring you have an accurate understanding of the problem in order to identify an appropriate solution.
- This stage is important. You may *think* you have understood but during clarification, you will often find out that something was misunderstood or not properly explained.
- Two main techniques used to clarify are paraphrasing and reflection. These techniques let the client know you have been listening and that you understand their situation.

Providing information, referrals, and assistance

- Once you have assessed and clarified the need or needs, you can provide the choice of information, referrals and/or assistance that the client needs.
- Specialists need to pay attention to the eligibility requirements of particular services to make sure the client potentially qualifies.
- Specialists must also ensure a client can access a service. For example, are clients aware of the documentation that is required? Are there transportation needs?

Providing specific information in response to a client's direct request

Information giving is the process of providing specific information such as an organization's name, contact details, address, or accessibility to the inquirer.

- For basic information giving, clients have often defined their needs prior to contacting the I&R/A service.
- Community Resource Specialists should be wary of an underlying, recurring issue that the client is not articulating.

Connecting the client with services that can meet their needs



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Assistance and referral giving involves assessing the client's needs and then matching them to one or more organizations capable of meeting those needs.

Professional TIP

The correct number of referrals is dependent on the client's situation, preferences, and available services. When possible, provide the client a choice of at least three appropriate referrals. However, try to avoid overwhelming the client with too much information.

Assistance and Referral Giving

Problem-solving

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- Sometimes no referrals are available.
- Community Resource Specialists must be honest with clients in these situations.
- Specialists should also problem-solve with the client to see if other solutions are available

Think of a scenario in which you are not able to find a suitable referral for a client's need, how should you tell this to the client ... and how might you begin the process of trying to problem-solve with the client?

Assistance and Referral Giving

Problem-solving

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- Problem-solving requires the Community Resource Specialist to explore roadblocks that may stand in the way of the client taking action.
- The specialist should explore if and how the client has dealt with similar situations in the past.
- The problem-solving process culminates with an action plan.

Assistance and Referral Giving

Finishing the call

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- The I&R/A process comes to an end when the purpose of the contact has been established and the information and /or referrals have been made.
- In ending the contact, the Community Resource Specialist should verify the client's understanding of the situation and the information and/or referrals given.
- Encourage the client to contact the I&R/A service if the information or referral turns out to be incorrect, inaccurate, or insufficient.

Closure

Finishing the call

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- Closure is more than saying goodbye.
- A good I&R closure confirms the client understands their situation, has the referral information provided, is confident of the next steps, and feels comfortable contacting the I&R service again.
- A good closure is important because it may determine whether clients follow through with the referrals, whether they call back if the referrals don't work out, or whether they call again in the future or recommend the service to others.

Closure

What about frequent callers?



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- Many I&R/A services have frequent callers.
- There can be different reasons why frequent callers contact your service: mental health issues, loneliness and social isolation, memory loss/dementia, etc.
- Listen for genuine needs for referrals within these calls, including referrals to telephone assurance programs, talk/friendship lines, etc.
- While patience and empathy are important components of I&R/A calls, it may also be necessary to set clear, easily understood boundaries with some frequent callers.

“I can talk with you for the next five minutes, but you have to agree that this will be your last call today.”

Closure



Resources to address social isolation may be available at the national, state and community levels. Examples include:

- *Front Porch*: programs include Social Call and Well Connected (frontporch.net)
- *National initiatives*: efforts like *Commit to Connect* (committoconnect.org) and *engAGED* (engagingolderadults.org) provide professionals and programs with access to resources, training, tools, peers, and promising practices
- *Telephone reassurance*: state and local programs that provide check in and reassurance calls to individuals on a regular basis

Follow-up: Inform USA Standards

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Follow-up is conducted to benefit individuals and confirm if their needs have been met.

The I&R service has a follow-up policy that addresses populations or situations requiring follow-up, including priority situations.

Quality indicators include:

- Community Resource Specialists adhere to established follow-up protocols
- Follow-up is only conducted with the permission of the individual and never compromises an individual's safety

The Nature of I&R Follow-up

- Within I&R, follow-up is the process of contacting clients to determine if their needs have been met and if not, why not
- It is completed according to the policies of the I&R service
- **For people who are at risk or vulnerable, the I&R service should attempt follow-up to ensure they received the needed support and resources**

Types of Follow-up

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There are two types of after-call contact in I&R and they are both sometimes referred to as “follow-up”:

1. “Follow-up” as according to the Inform USA Standards is conducted primarily for the benefit of the client and is driven by the client’s needs
2. A “follow-up” that is primarily to evaluate the customer satisfaction and service outcomes of the I&R program as part of a quality assurance exercise

These follow-ups (properly called quality assurance contacts) are usually selected as part of a random sample asking clients about the service received and the outcomes of that service.

Reasons for Follow-up

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- Safety check on crisis calls
- Make sure client needs were met
- Measure service outcomes (the “what happens next” after referrals are provided)
- Inquirer satisfaction
- Verifies resource database accuracy
- Collects information on unmet needs
- Asserts the uniqueness of I&R (follow-up has always been part of I&R service delivery)

Follow-up Process

The I&R/A agency should provide guidelines that cover internal follow-up criteria and process

- **Always request and secure permission for follow-up** in a manner that allows the client to provide informed consent (*“Would it be OK if ...”*)
- Specialists should include all the key information in their call documentation so the client can be reminded about the reason for the original call and the Community Resource Specialist making the follow-up has the relevant background
- Generally, avoid leaving voicemail messages

Follow-ups generally take place 3-7 days after the original call to allow the client time to take action (within 1-3 days in cases of endangerment).

Follow-up Outcomes

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Follow-up answers the question: “*What happened next?*” And there are three main possibilities: Client contacted referrals and the need was met; Client did not contact referrals; and Client contacted referrals, but their need was not met.

If the need was not met and the information provided was correct, it is important to document the reasons to see if this is part of a larger pattern. The reasons may include:

- Waiting list too long
- Service proved too expensive
- Client failed detailed eligibility assessment

In all of these cases, **problem-solving and additional I&R may be needed.**

Activity #1

Navigating the I&R Process: Communication Examples Handout (see webinar archive for full handout)

“Good evening, my name is Jane. Thanks for calling Anytown I&A. How can I help you?”

“There is obviously a lot going on right now. What is the part that you really want to concentrate on first?”

“In order to find the right service to help you, I need to better understand...”

“I’m happy to look for resources for you, while I’m doing that, can I go over some demographic questions that will help me find the right resources for you?”

“There are organizations that provide household chore services for older adults. Would you be interested in that kind of help?”

“Would you like me to go over some details about the application process?”

“Thank you for calling Anytown I&A. Please call us back if the referral doesn’t work out or if you need any other help in the future.”

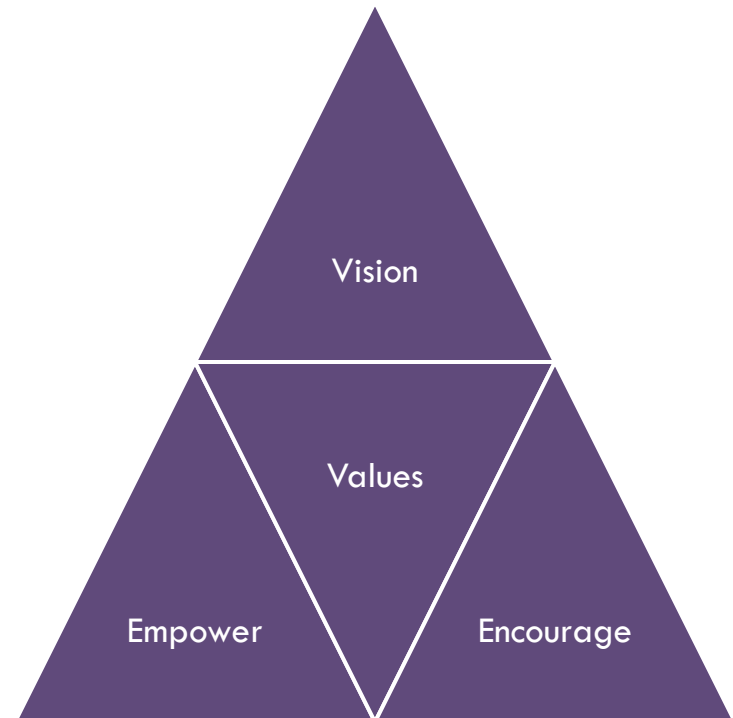
Empowerment and Advocacy

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What might “empowerment” mean to you as a staff person in an organization?

What might “empowerment” mean to you as a client?

In what type of situations might a client need *extra help*?



Empowerment and Advocacy: Inform USA Standards

- To empower informed choice, the I&R service provides non-partisan, non-ideological, and impartial information for available nonprofit, government, and for-profit services
- The I&R service offers advocacy, when necessary, to ensure that people receive the benefits and services for which they are eligible
- All advocacy efforts are consistent with the policies of the I&R service and proceed only with the permission of the individual (i.e., informed consent)

Empowerment within I&R

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- Empowerment helps people help themselves. *It is the essence of I&R*
- The Community Resource Specialist can provide clients with referrals to the programs to contact but also with the details of those services and the questions to ask, as well as the questions that a service might ask of them
- Empowerment involves the client being provided with choices and having the ability/knowledge to make their own decisions
- An empowered client will know how to handle the same situation on a future occasion. They can also serve as advocates for friends and family members

Client empowerment means enhancing an individual's autonomy and competencies.

Community Resource Specialists empower clients by:

- 1)** Supporting the client to identify and articulate their needs;
- 2)** Working with the client to demonstrate the steps they need to take in order to obtain services; and
- 3)** Showing the client how to advocate for themselves.

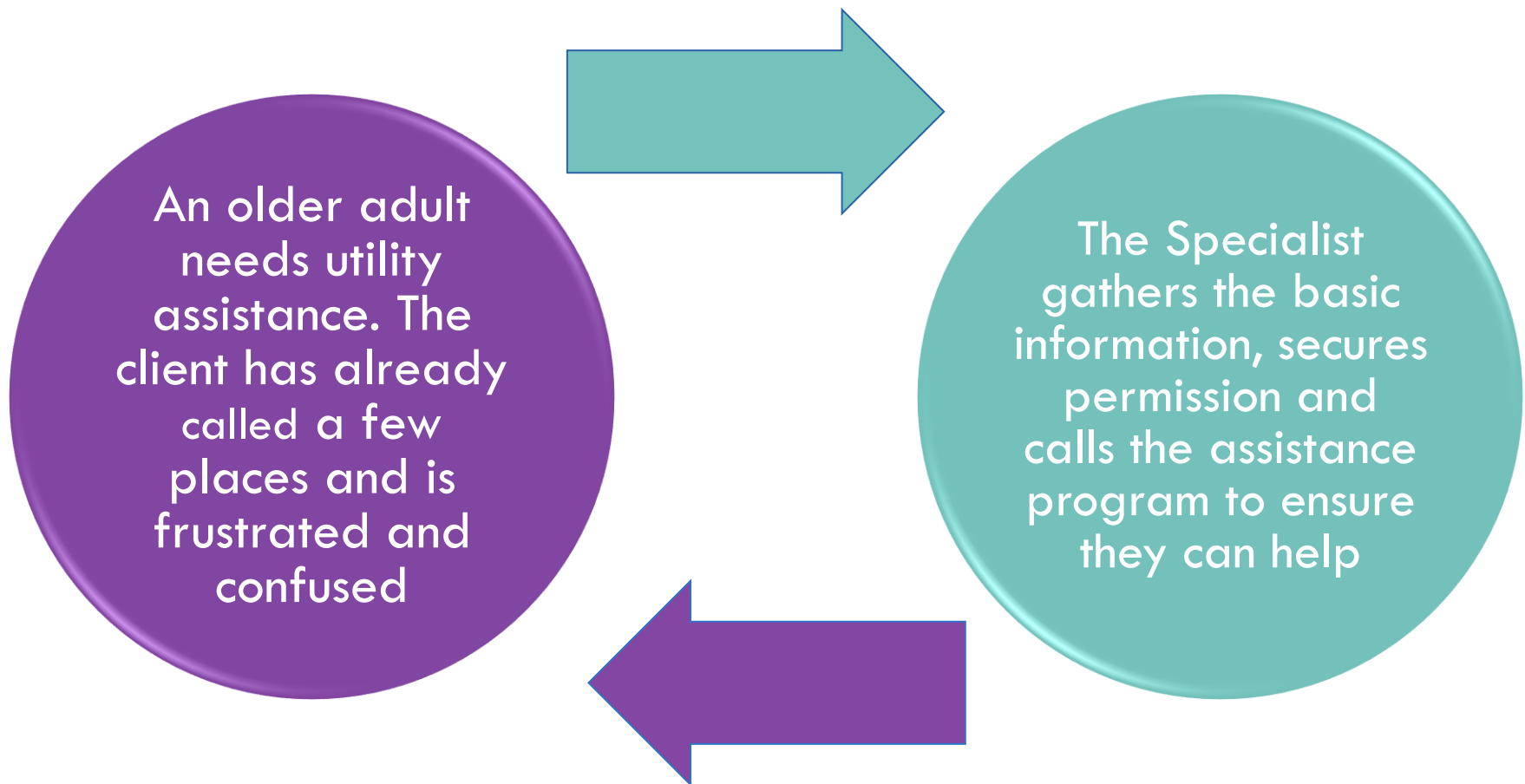
Advocacy within I&R

- Advocacy is what happens when empowerment isn't enough
- Advocacy occurs when, *with the permission of the client*, one or more additional calls or actions are made on their behalf
- Each I&R organization should have their own policies on when advocacy is required or recommended
- Advocacy can only occur with the informed consent of the client. That consent can be verbal and informal (e.g. *"Is it OK if I give them a call to make sure a space is available?"*)
- The act of advocacy and the circumstances/results of advocacy must be documented (including recording that consent was provided)

Advocacy often involves a **warm transfer**: a call transfer situation in which the Community Resource Specialist stays on the line until the caller is introduced and connected to an individual at a referral organization

Client Advocacy

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Types of Advocacy

- 1. Individual advocacy** – is a confidential process to make sure a client receives the help they need. The Community Resource Specialist represents the client on issues that relate directly to that individual; and
- 2. System advocacy** – occurs when the I&R service informs the public and/or decision-makers of a situation affecting a larger group of people. System advocacy works to change attitudes, policies, systems or laws that impact the lives of individuals.

Crisis Intervention

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■ What types of crises might most people experience at some point in their lives?

■ Are there crises that might occur more often to older adults, persons with disabilities, and caregivers?



Crisis Intervention: Inform USA Standards

The I&R service is prepared to address the immediate, short-term needs of individuals who are experiencing a crisis.

The I&R service ensures through training and coaching that Community Resource Specialists have the intervention skills to:

- Facilitate a crisis conversation
- Recognize when an individual is experiencing a crisis
- Recognize the warning signs of people in immediate danger
- De-escalate the situation before referral giving or transfers
- Build rapport by helping individuals talk about their feelings as part of the assessment and problem-solving stages
- Try to keep the inquirer engaged pending referral or rescue
- Document crisis conversations

Role of I&R in Crisis Intervention

- Community Resource Specialists may not be crisis professionals, but they will receive crisis calls and must be able to handle them
- Many of the reasons/situations that cause people to contact I&R services are also potential triggers for crisis feelings
- The basic communication techniques that are used by a specialist in the course of their regular calls, are also the ones used in crisis situations

*A **crisis** is a situation of acute emotional distress in which an individual experiences a temporary inability to cope. Crisis intervention is a means of providing brief and immediate assistance to individuals who are experiencing a situation that overwhelms their ability to cope.*

Objectives of Crisis Intervention within I&R

The objectives of I&R crisis intervention are:

- To immediately assess the situation to ensure the person's safety and the safety of those around them
- To defuse/calm the current emotional trauma
- To offer options and resources which may assist the individual in addressing the situation that triggered the crisis
- To provide referrals either for now or for the future and/or to help them recognize their own abilities to cope with a crisis

The general steps of I&R are a good guide: make contact and establish rapport; focus on and validate feelings; be calm, supportive and reassuring; maintain a warm and personal tone

Crisis Intervention within I&R: Risk Assessment

An I&R service is not a specialized suicide hotline.

However, a Community Resource Specialist may receive suicide calls and needs to be able to handle those situations.

The objectives, as with other crisis calls, are:

- To assess any immediate danger
- To take action to ensure that no one hurts themselves or others
- To work with the individual to defuse/calm the situation, and then
- To transfer them to a specialized service

Crisis Intervention Training

The Inform USA Standards call for specialists to have annual crisis intervention professional development training. A few examples of training programs are:

- Applied Suicide Skills Intervention Training (ASIST)
- SafeTALK
- Mental Health First Aid
- Question, Persuade, Refer (QPR)



Crisis Intervention Handout

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***In Case of Crisis and
I Don't Know What to Say***



Crisis Intervention Handout

In Case of Crisis, and I Don't Know What to Say

This resource offers initial guidance for crisis calls. Aging and disability professionals are welcome to personalize this resource over time.

Reminders to Self

1. Breathe
2. You are OK
3. You don't have to respond right away

Phases that Give People Time and Help People Feel Listened To

1. "Tell me more about the situation, let's figure this out together"
2. "I hear you"
3. "Tell me what's going on"
4. "I'm here"
5. Shake head, say "yes" to show I'm listening

Phases when People Report Suicidality

1. Do you feel safe?
2. Do you have a plan to hurt yourself or others?
 - a. If so, "tell me more about this plan"
 - i. Stay with the individual and determine if this needs to be escalated

See
webinar
archive for
the
handout

Confidentiality: Inform USA Standards

The I&R Service has implemented policies to ensure that the privacy, confidentiality, and security of personal inquirer information is protected and has agreement forms that staff and others with access to confidential information sign to document their compliance. Policies/procedures address:

- Obtaining verbal/written consent to disclose information
- Circumstances where disclosure may be required (release of information is required by law or court order; presence or risk of serious harm to the individual or another person)
- Developing a document retention policy

Confidentiality: Inform USA Standards

- Confidentiality is addressed throughout the Standards
- The principles of confidentiality remain applicable in cases involving independent service delivery methods. (e.g., social media, website)
 - Regardless of the location where services are provided, the I&R service maintains standards of confidentiality and support for staff.
 - In remote work settings, staff ensure an environment that supports the privacy and confidentiality of information.

Confidentiality within I&R

- Confidentiality in I&R is more than a courtesy ... it is an all-encompassing ethical expectation
- A service bound by confidentiality ensures that the gathering of personal information is minimal and only available to those who are authorized to have access to that information
- Authorization (or access) should only be granted on the basis of a clear “need to know”
- When asking for personal information, the client always has the right to refuse and that right should be made clear to them

Confidentiality: Legal Considerations

- There may be legal requirements that an agency must meet regarding the safe storage and eventual destruction of personal information
- If personal information is being shared with another organization, there may be additional federal stipulations that require compliance (*HIPAA Rules, for example*)
- If personal information is being stored, those individuals normally have a right to request information about themselves. The exact requirements will vary between jurisdictions. It is important for the I&R service to be aware of the privacy and confidentiality legislation that applies to them.

Guardianship and other types of substitute decision making

In the context of the I&R/A process, Community Resource Specialists serving older adults and people with disabilities should be familiar with guardianship and other types of substitute decision making. Examples include:

- Guardianship (full; limited or partial)
- Supported decision making
- Powers of attorney (health care; property)
- Representative or substitute payees
- Health care surrogate decision making
- Advance medical/health care directive

Key Communication Techniques for Community Resource Specialists

Effective communication techniques are essential to the I&R/A process – without them, Community Resource Specialists are unable to effectively connect a client with the appropriate health and social support services.

Communication Techniques

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**Active
Listening**

**Minimal
Encouragers**

**Paraphrasing/
Reflection**

Prioritizing

**Focus on
Feelings**

Empathy

Support

De-escalation

**Personable
Approach**

Simplicity

**Effective
Pauses**

Steering

Active Listening

Often, when others are speaking, we do not listen attentively. We are easily distracted and thinking about other things or what we plan to say next.

Active listening is a way of listening and responding to another person that improves mutual understanding. It is one of the most important concepts in I&R.

Active listening is a structured form of listening that focuses attention on the speaker and what is actually being said.

Paraphrasing

Paraphrasing involves providing a summary of what has been said in your own words. It lets you clarify what the client has said in order to avoid any misunderstanding or misconceptions. Paraphrasing lets the client know you have been listening and that you understand their situation.

Paraphrasing is a skill that enables clients to elaborate on their situations. As the client hears their story reflected back, it can help them to clarify whether that is how they are feeling and also if it sounds right.

Minimal Encouragers

Minimal encouragers are verbal encouragers that prompt a client to continue talking, letting them know you are listening, but do not interrupt their story.

“Mmm...”

“Yes”

“I see”

“Oh”

“Uh-huh”

Reflection

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- Reflection involves repeating the key phrases used by the client.
- Reflection restates both the words and feelings of the client.
- A breakdown of a reflective statement will help to frame its use:

Reflective Statement	Qualifier / Intensifier	Emotion	Situation
I can hear	You are very	Upset	With your son

Prioritizing

Prioritizing helps the client break down a complex, multifaceted problem into manageable pieces in order to focus on what is most important.

Ex. “It seems there are a few concerns that you would like to address; however, we may not have time to work on all of these today. Which do you feel is the most important to start working on?”


Focus on Feelings

Focusing on feelings helps clients to get in touch with what they are feeling and lets them know that you have heard them.

Ex. “I hear that you are feeling worried...”


Empathy

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Empathy is understanding the feelings of a client and being able to imagine yourself in their situation.

"I can see how this must be frustrating for you..."



Sympathy is a feeling or an expression of pity or sorrow for the distress of the client.

"I'm sorry about your sadness."

Activity #2

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The Power of Empathy, Dr. Brené Brown

RSA Short



<https://www.youtube.com/watch?v=1Evwgu369Jw>

Activity #2: Empathetic Statements

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- This sounds like a tough situation.
- It sounds like you have been going through a lot.
- That sounds so frustrating.
- I can see how important this is to you.
- I can imagine this might feel...
- That sounds difficult, let's look and see what we can do to assist with...
- It seems like that would be upsetting.
- That sounds like a rough situation to be dealing with.
- That must have been a pretty painful experience for you, you sound...
- Seems like it would be difficult not to feel...
- I can only imagine how overwhelming this feels right now.

Support

Throughout an I&R/A contact with a client it is important to provide them with support. This means reassuring the client that, given the circumstances, their feelings are understandable.

Ex. “It sounds like you have been trying very hard to cope with this.”

Support provides reassurance and gives the client confidence without making false promises.

De-escalation

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Community Resource Specialists will have to deal with difficult and challenging situations, such as a very agitated or angry client. De-escalation includes strategies and techniques to help a client to calm themselves. Techniques for specialists include:

- Remain calm; continue to use active listening
- Respond with empathy
- Use short sentences and simple vocabulary; speak calmly
- Do not be defensive
- Define your role
- Set limits in a respectful manner
- Provide choices

“Please tell me more so I better understand how to help you.”

What about callers who are challenged by their situations?

For some callers, it seems that *nothing works*. Such callers request solutions to their specific situation but reject your input or feel there is no way out of their situation. These callers may be angry, belligerent, or express hopelessness.

- Be polite but firm
- Practice perspective taking (understanding the situation from the caller's point of view)
- Build trust by sharing information
- Be honest; don't make false promises
- Don't argue against resistance
- Offer options; support self-efficacy

Professional TIP
*Use Reflective
Listening*

Additional Communication Tips for Difficult Calls

There is no perfect solution for difficult contacts, but there are strategies to make communication easier.

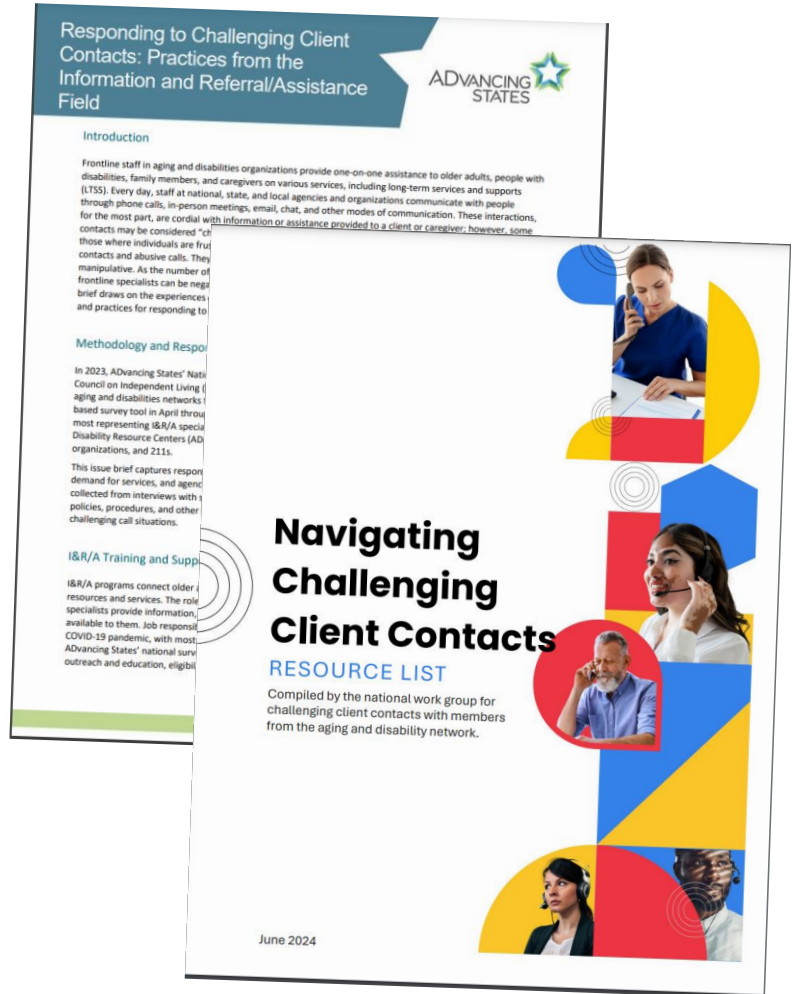
- Listen for clues about what is contributing to the difficult contact. Confirm your understanding by paraphrasing what you have heard.
- Use active listening techniques so that people feel heard: paraphrasing, labeling emotions, effective pauses, open-ended questions, validation to advance the conversation (*“You seem really upset. I’d like to hear more about that...”*).
- Explore options. Acknowledge the person’s reality then ask problem-solving questions to introduce options (*“What would be a first step for you?”*)
- A person is more likely to hear information if you have permission to give it (*“Would you like to know... Would you consider... May I suggest... I could share some things that other people have done in this type of situation...”*).
- Offer positive feedback to reinforce steps/actions that have been taken so far.



Resources for Challenging Client Contacts

➤ [Issue Brief on Responding to Challenging Client Contacts](#)

➤ [Navigating Challenging Client Contacts Resource List](#)

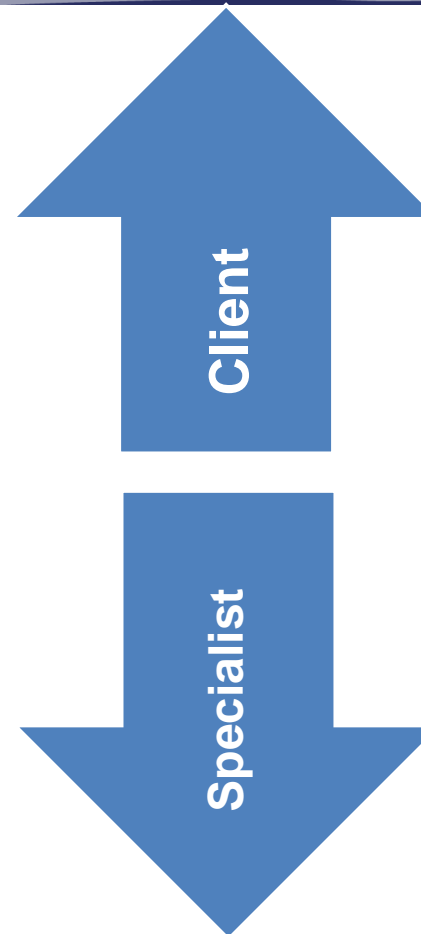


Tone and Speed of Voice

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A Community Resource Specialist should match their own tone of voice and the speed of the conversation with that of the client.

However, when a client seems anxious or upset it is often helpful to use a lower tone of voice and slower pace of speech.



Frenzied tone of voice
– speaking frantically.

Lower tone of voice
– speaking in a calm
manner and slower
pace.

Personable Approach

Keep the conversation personable to give clients the sense that you are a real person making a real connection to their situation.

A Personable Approach means being friendly without being unprofessional. This is a true ‘human-to-human’ conversation.

How to be personable:

- Use your first name or alias
- Briefly relate to the client’s situation with your own similar life example
- Give the client your uninterrupted attention

Simplicity

Simplicity is important. Use the same types of words as your client. Use short simple sentences and avoid jargon.

- Avoid using acronyms and jargon
- Use short and simple sentences
- Use the same vocabulary as the client
- Limit background noise

Effective Pauses

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While long silences can be uncomfortable and should be avoided, effective pauses can be used to help clients gather their thoughts and reflect on what they have just explained.

Effective pauses should:

- Be brief – no more than a few seconds.
- Be used when the client is rushing, seems anxious, or could use time to gather their thoughts.

Sometimes a client's explanation of their situation may become scattered or they may begin speaking about things that are not pertinent to the situation.

Ex. "I wonder if you could tell me a bit more about the situation you mentioned a few moments ago..."

Steering clients back in the direction of the key topics can be useful in understanding their situation.

Open-ended vs. Close-ended Questions

Open-ended questions help the client share their situation.

Allow for longer explanations.

“What brought you here today?”

“What would you like to do about this situation?”

Close-ended questions are used to gather specific information.

Can usually be answered with a “yes,” “no,” or very short answer.

“Are you married?”

“What is your date of birth?”

Avoiding Communication Blocks

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Commanding

- *“You cannot do that.”*

Threatening

- *“If you don’t do this, then...”*

Imploring

- *“I wish you would do this.”*

Giving personalized solutions

- *“What I think you should do is...”*

Lecturing

- *“You should not have done that.”*

Judging / Criticizing

- *“You shouldn’t feel this way about...”*

Tips for Effective Communication with Older Adults

Along with key communication techniques, here are additional tips for effective communication with older adults:

- Use Proper Form of Address
- Be Patient and Avoid Rushing the Conversation
- Be Careful about Language
- Be Aware of Cultural and Generational Differences
- Ensure Understanding

One strategy to check for understanding is the “teach-back” method where the specialist asks the client to say what they understand from the conversation.

Tips for Effective Communication with Older Adults

Older adults may have sensory impairments that can affect communication. These tips can help reduce barriers:

- Ensure that your initial greeting includes the name of your agency or service.
- Minimize background noise as much as possible – for you and the client.
- Talk clearly and, if needed, a little slower than usual. Lower the tone (pitch) of your voice.
- If not being understood, try saying the same thing using different words.
- If the client has difficulty with letters and numbers, give a context for them (*“p” as in “purple” or “two” as in “twins”*).
- If possible, offer to follow up or provide additional information in writing.

Additional Tips For Effective Communication with People with Hearing Loss

Approximately one in three people between the ages of 65 and 74 has hearing loss, and nearly half of those older than 75 have difficulty hearing (National Institutes of Health).

- Don't be afraid to ask *“Are you having trouble hearing me?”*
You can also ask *“What can I do to help you hear me or understand me better?”*
- Be sure you are speaking into your headset/telephone mouthpiece/speaker
- Speak one at a time
- Allow enough time for your listener to respond
- Avoid sudden changes in topic
- Avoid sentences that go on too long

Tips for Effective Communication with Older Adults



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Cognitive impairments can also affect communication. Tips for serving older adults with such impairments include:

- If needed, help orient the client. Explain or re-explain who you are and your role.
- Provide support and reassurance.
- Use simple, direct wording. Present one question or statement at a time.
- If the client hears you but does not understand you, rephrase what you have said, or provide examples.
- Clients with cognitive impairments may have difficulty responding to open-ended questions. In these cases, consider using close-ended types of questions.

Additional Tips For Effective Communication with People with Dementia

Dementia impacts a person's ability to communicate. Patience and good communication techniques can help with understanding. Changes in communication may include:

- Difficulty finding the right words
- Taking longer to speak
- Struggling with decision making
- Relying more on non-verbal cues and gestures
- Losing train of thought easily
- Difficulty organizing words
- Speaking less often

Tips for Communication with People with Dementia

- Allow extra time for conversations
- Speak clearly and slowly
- Avoid correcting
- Use non-verbal cues and gestures
- Write down information
- Patience

Communication and Disability Awareness

- Listen to the person
- Presume competence
- Talk directly to the person (not their family member, interpreter, attendant, caregiver, guardian, friend, partner)
- Ask what the preferred communication style and mode is, and follow it whenever possible
- Be respectful and nonjudgmental
- Be aware of your own biases and work through them
- Ask before offering assistance, and do not touch an assistive device or service animal without permission

Communication and Disability Awareness

- For individuals with speech and language disorders, be patient and respectful as communication may take longer. Do not interrupt or finish the person's sentence. Ask one question at a time, giving the person time to respond before moving on.
- For individuals with cognitive or intellectual disabilities, avoid complex communication. Use short sentences and complete one topic before moving to the next topic. Ask the person if there is anything they would like for you to clarify. Provide step-by-step guidance if needed with information and referral giving.

Communication and Disability Awareness

When assisting inquirers with mental health conditions:

- If a person becomes upset or anxious, speak in a natural, calm tone of voice, repeat necessary information and reassure them
- If a person seems nervous or confused, be willing to break information down step-by-step
- Respect a person's choice of language (how they refer to their own needs)
- Know the local mental health crisis number to contact if needed

Disability Awareness

The Importance of Language

It is important to use appropriate language when speaking to or about people with disabilities. Words have power and using inappropriate or offensive language can have an impact on how individuals relate to you.



Disability Awareness

The Importance of Language

- Two main language styles are generally used to refer to disability:
 - ▣ **Person-first language** (also referred to as people-first language) is based on the idea that disability is only one part of a person. It emphasizes disability as something a person has, rather than something a person is; in other words, disability is seen as one attribute or characteristic of a person. Examples of this include: people with disabilities, individual with cerebral palsy, or child with diabetes.
 - ▣ **Identity-first language** is based on the idea that disability is an inseparable part of a person's identity (much like gender identity or race). It emphasizes disability as a fundamental part of who a person is, rather than an attribute separate from or secondary to the person's identity. Examples of this include: disabled person, blind people, or autistic individuals.

Disability Awareness

The Importance of Language

- When speaking with an individual, it is always best to follow their lead. It is important to let the individual decide what language they are most comfortable with.
- Although many people prefer person-first language, a growing number of people are using identity-first language. If you are unsure of what language to use, *it is generally accepted to start with person-first language.*
- As you talk with the person, *listen to how they refer to their (or a family member's) disability*, and then use the same type of language that the caller uses to describe their disability or health condition.
- If you are referring to a broad community, use the language most commonly used by members of that community.

Person-First and Identity-First Language

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Instead of:

Handicapped

The disabled

Suffers from
Afflicted with
Stricken by
Victim of

Deaf and dumb
Deaf-mute

Wheelchair-bound
Confined to a wheelchair

Say:

Person or people with a disability
Disabled person

People with disabilities
Disabled people

Person with X disability (i.e., person who had a stroke)

Person who is D/deaf or hard of hearing
D/deaf or hard of hearing person

Person who uses a wheelchair
Wheelchair user

Person-First and Identity-First Language



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Instead of:

Crippled; Incapacitated
Invalid; Lame

Midget
(*derogatory term*)

Slow
Retarded (*derogatory term*)

Crazy
Insane
Psycho
Lunatic

Say:

Person with a physical disability
Person with a mobility disability
Physically disabled

Person of short stature
Person with dwarfism
Little person

Person with an intellectual disability

Person with a mental health or
psychiatric disability

Person-First and Identity-First Language



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Instead of:

Normal (*in reference to someone without a disability*)

Differently abled
Handicapable
Special needs

Say:

Non-disabled

Person or people with a disability
Disabled person or people

The Role of Technology in I&R Communication

- For a diverse range of I&R inquirers, including individuals with disabilities, technology can play an important role in enabling effective communication
- The Inform USA Standards emphasize the use of technology to enhance information sharing while accommodating the communication preferences and needs of clients
- I&R services should ensure barrier-free access for individuals who have diverse needs (e.g., people with hearing or speech impairments, language access for individuals who speak languages other than English, and access for people with disabilities)

Activity #3: Pop Quiz!

What does prioritization involve?

- a. Making sure that empathy is the first consideration
- b. Helping the client focus on the issues they find most important
- c. Repeating key phrases used by the client
- d. Ensuring that the Community Resource Specialist's knowledge is followed closely

Activity #3: Pop Quiz!

What is paraphrasing?

- a. A method of ensuring that you have the client's authority to proceed with the referral
- b. A method of restating the client's words back to them to help ensure understanding
- c. A variation of conversation steering
- d. A method to prioritize the client's situation

Inform USA Standards and Quality Indicators for Professional I&R/A

Inform USA Professional I&R Standards and Quality Indicators



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The Inform USA (formerly AIRS) Standards detail the expectations for an I&R service and are the foundation of quality I&R.

- **25 standards** covering all aspects of I&R operation
- First published in 1973
- Entering its 10th edition (July 2024)

**INFORM USA STANDARDS
AND QUALITY INDICATORS
FOR PROFESSIONAL
INFORMATION AND REFERRAL**



Version 10.0

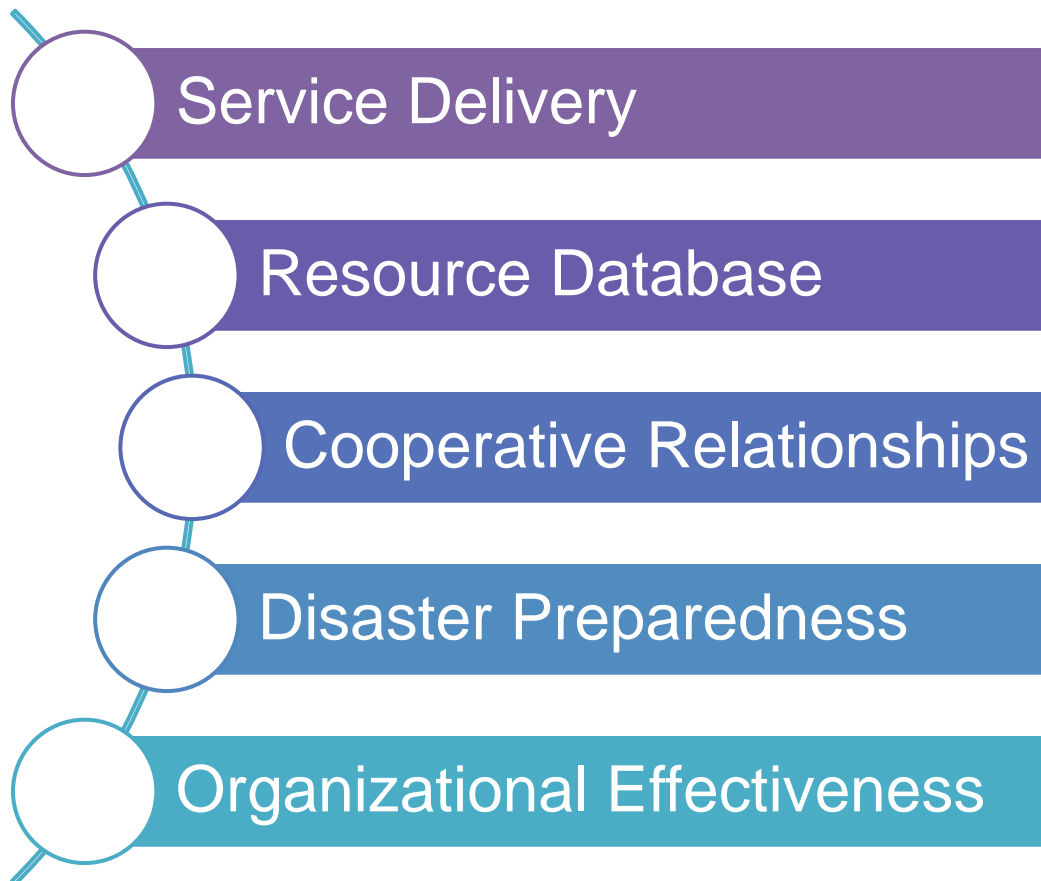
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www.informusa.org/standards

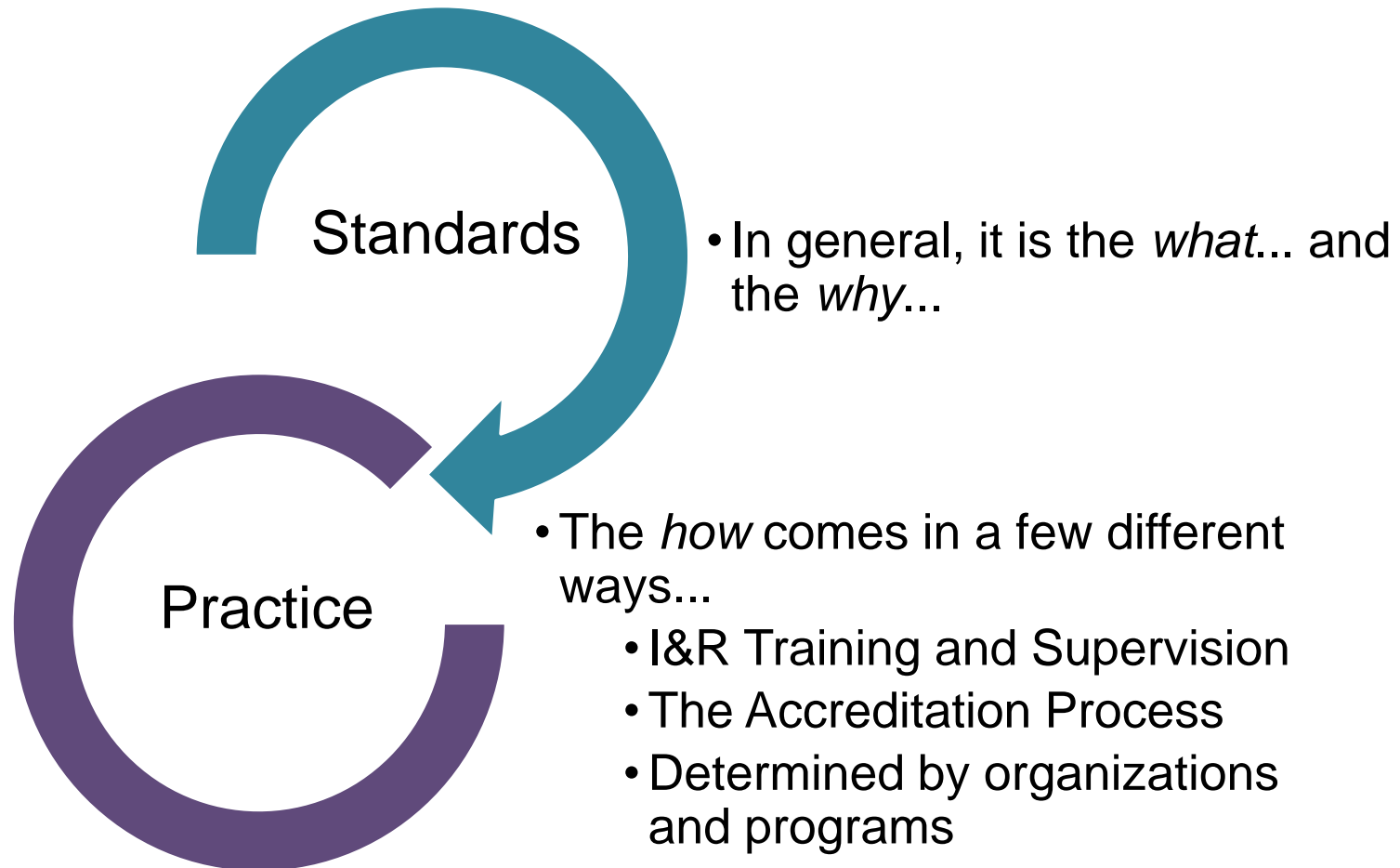
Inform USA Professional I&R Standards and Quality Indicators

Five Core Focus Areas



Each focus area contains standards and quality indicators that define expected practices and provide concrete examples within the field of I&R. These can be used to support program development and quality improvement.

Professional I&R Standards and Quality Indicators



Standards Version 10.0: Structure of the Quality Indicators



Within the Standards, when applicable, Quality Indicators are grouped into three areas:

- Organizational Quality Indicators
 - ▣ Policies/Procedures
- Oversight Quality Indicators
 - ▣ Supervision/Coaching/Training
- Practice Quality Indicators
 - ▣ Staff/Volunteer Expectations

**INFORM USA STANDARDS
AND QUALITY INDICATORS
FOR PROFESSIONAL
INFORMATION AND REFERRAL**



Version 10.0
Published: July 2024
Published by: Inform USA

Information and Referral/ Assistance Provision

Through one-to-one interactions with a Community Resource Specialist, the I&R service engages individuals by building rapport, actively listening, exploring needs and connecting people with appropriate information, referrals, and support.

Quality Indicators

Organizational Quality Indicators (Policies/Procedures)

1.1 - The I&R service engages with individuals through interactions that follow the stages of the I&R process and records the contacts in a data system such as an I&R software.

1.2 - The I&R service provides multi-channel access (e.g., phone, email, chatbot, live chat, text, video relay service, social media, website, or other alternative access methods) to Information and Referral services.

1.8 - The I&R service may engage in enhanced services after the initial I&R contact with the inquirer's permission (e.g., assessments, application assistance, appointment setting).

Oversight Quality Indicators (Supervision/Coaching/Training)

1.9 - The I&R service ensures through training, monitoring, and coaching that Community Resource Specialists follow proper internal contact handling procedures.

Information and Referral/ Assistance Provision

Quality Indicators

Practice Quality Indicators (Staff/Volunteer Expectations)

1.12 - Community Resource Specialists utilize training tools that include these overarching principles:

- applying person-centered techniques to identify the individual's strengths, needs, preferences, goals, values, and support the person's choices.
- using clear, jargon-free language, appropriate tone of voice, and positive inflections to convey compassion and empathy during the conversation.
- responding to each inquirer in a professional, non-judgmental, patient, culturally-appropriate, and timely manner.
- providing an explanation about why the information is being requested and when relevant demographic information is being collected. Additional data (i.e. being collected for funders or other stakeholders) should be collected towards the end of any conversation.
- building rapport by actively listening to the individual so they feel heard and respected.

Resource Database

An I&R service is a provider of information to the public, and individuals using the service have a right to accurate, consistent, comprehensive, and unbiased information. Therefore, the I&R service develops, maintains, and publishes a resource database that contains accurate and updated information about available resources.

Quality Indicators

Organizational Quality Indicators (Policies/Procedures)

7.3 - The I&R service does not charge a fee for the inclusion of any organization in its public resource database.

Practice Quality Indicators (Staff/Volunteer Expectations)

7.10 - Staff follow the inclusion criteria when adding new resources to the database, and a notification process for those who fall outside the criteria.

Oversight Quality Indicators (Supervision/Coaching/Training)

10.4 - The I&R service ensures through training that Database Curators understand the human service delivery system, including the sectors it comprises, as well as the community it serves.

Resource Database

The I&R service uses a system to classify, index, and facilitate retrieval of resource information. (Standard 9: Classification/Taxonomy System)

Organizational Quality Indicators (Policies/Procedures)

9.1 - The I&R service uses a classification system or taxonomy system to organize its resource records.

- Use of the 211HSIS (formerly referred to as 211 LA County Taxonomy) is recommended for 211 providers, but not required by Inform USA's Standards.
- Any classification/taxonomy system used must meet a set of minimally acceptable criteria identified in the Standards.

The I&R service ensures that Database Curators organize information about human services into accurate and concise database records. (Standard 10: Content Management)

Organizational Quality Indicators (Policies/Procedures)

10.2 – The I&R service has documented update verification procedures that ensure the accuracy of each database record.

Cooperative Relationships

I&R services at local, regional, state/provincial, and national levels work cooperatively with one another to establish and maintain meaningful working relationships while also participating in the broader service delivery system in their own community.

Quality Indicators

Organizational Quality Indicators (Policies/Procedures)

12.2 - The I&R service coordinates its service delivery with other programs in the area to avoid duplication of effort and improve access to services.

13.2 - The I&R service works cooperatively with service providers to address issues that have a critical impact on the community as a whole (e.g., disaster relief and disaster recovery, homelessness, and Social Determinants of Health (SDOH)).

Oversight Quality Indicators (Supervision/Coaching/Training)

12.11 - Opportunities for cross-training with other community resources are made available.

Practice Quality Indicators (Staff/Volunteer Expectations)

12.12 - Community Resource Specialists follow established referral processes among collaborating I&R services.

Disaster Preparedness

The I&R service is prepared to meet the needs of their community and has plans to provide services before, during, and after a disaster.

Quality Indicators

Organizational Quality Indicators (Policies/Procedures)

14.2 - The I&R service has a business continuity plan which has provisions for continued operations for the service (e.g., redirection of calls, remote work, continuing to update community resources, training and onboarding temporary staff). This plan may include written agreements with other I&R services.

15.1 - The I&R service understands the emergency management structure within their jurisdiction(s)

Oversight Quality Indicators (Supervision/Coaching/Training)

14.5 - Disaster plans are published, exercised, and staff know where they can access them.

Practice Quality Indicators (Staff/Volunteer Expectations)

14.7 - The I&R service supports and encourages all staff to develop emergency plans for their own homes and families that allow them to better fulfill their organizations' roles in an emergency.

The organization's governance and operational structure enables the I&R service to fulfill its mission.

Quality Indicators

Organizational Quality Indicators (Policies/Procedures)

20.7 - The I&R service has a Code of Ethics that establishes fundamental values and professional standards of conduct for all staff.

21.4 - The I&R service evaluates how different demographic groups in the community access information and creates technology goals for the organization that reflect changing inquirer needs and preferences.

23.2 - Training encompasses the tasks, knowledge, and skills outlined in the Inform USA Job Task Analyses for Community Resource Specialists.

Oversight Quality Indicators (Supervision/Coaching/Training)

22.14 - The I&R service uses established coaching and training methods for effective monitoring and development of staff.

Practice Quality Indicators (Staff/Volunteer Expectations)

23.9 - Certification and recertification are included in the ongoing professional development plans for all staff and volunteers.

I&R and National Aging and Disability Networks

I&R/A is a gateway to state and local aging and disability services



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The primary purpose of aging and disability I&R/A services is to support older adults, people with disabilities, and caregivers in:

- Assessing client needs;
- Identifying the most appropriate services to meet client needs; and
- Linking clients to the agencies providing these services.

I&R/A is a mandatory service under the Older Americans Act



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State and Area Agencies on Aging must develop and maintain I&R/A services within “reasonably convenient access to all older Americans.”

~ 1973 amendments to OAA

I&R is a core service of Centers for Independent Living



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- CILs are grassroots, cross-disability, advocacy-driven organizations run by and for people with disabilities
- Focus on civil rights, the independent living philosophy, and inclusion
- CILs provide five core services:
 - **Information & Referral**
 - Independent Living Skills Training
 - Peer Support
 - Individual and Systems Advocacy
 - Transition

Visit www.ncil.org and www.ilru.org for information and resources, including a directory of CILs.

I&R/A is a function of ADRCs and No Wrong Door systems



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- Aging and Disability Resource Centers (ADRCs) and No Wrong Door systems are intended to provide streamlined consumer access to long-term services and supports (LTSS)
- Provide access to information and offer one-on-one counseling to help people of all ages and disabilities access the full range of LTSS options, person-centered planning, and Options Counseling.
- Work in partnership with other aging and disability human service organizations, including key referral sources

I&R is provided through specialized aging and disability networks

I&R is also a function of specialized aging and disability networks. Examples include:

- The Alzheimer's Association and local chapters
 - 24/7 Helpline: 1-800-272-3900
- The Arc and its network of state and local chapters
 - www.thearc.org
- National Alliance on Mental Illness and its network of NAMI State Organizations, NAMI Affiliates, and volunteer leaders
 - NAMI Information Helpline: 1-800-950-6264

I&R/A programs reflect key trends in aging and disability networks

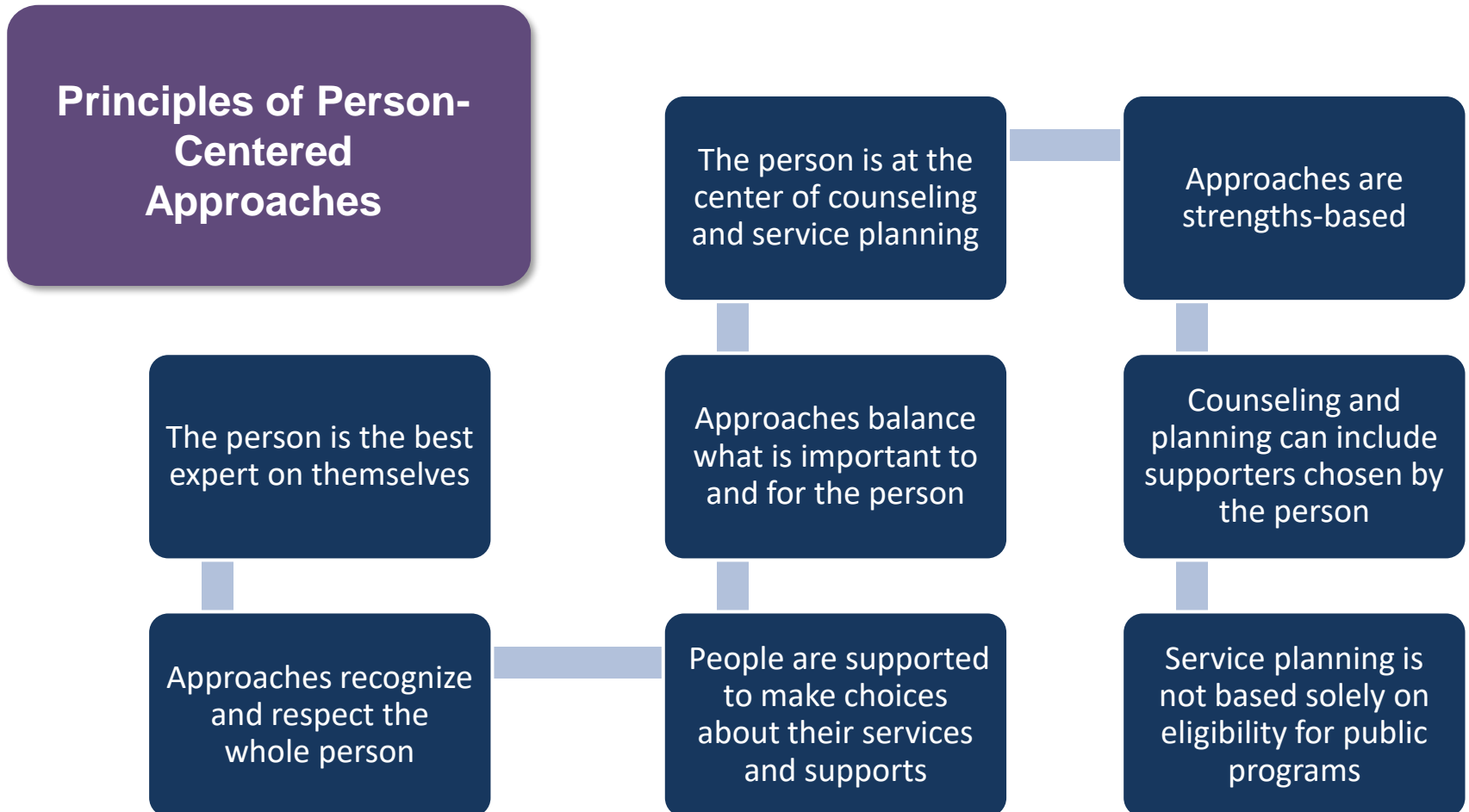
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- As a core component of aging and disability networks, I&R/A programs reflect important developments occurring within these networks.
- One key development is the expectation for **person-centered** approaches.



Understanding Person-Centered Approaches

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Person-centered approaches: Skills and competencies

A range of skills and competencies support person-centered approaches. These include skills used in I&R/A practice like:

- Active listening
- Motivational interviewing
- Strengths-based thinking
- Empathy
- Individual and systems advocacy
- Cultural humility, competency, self-awareness
- Family systems dynamics
- Negotiation, navigating choice
- Customer service

Person-centered approaches: Practice models



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Aging and disability network agencies are using a variety of practice models and training programs to implement person-centered approaches. For example:

- The Person-Centered Counseling Training Program for professionals in No Wrong Door systems
- Charting the LifeCourse™ and LifeCourseTools.com, a project of the University of Missouri–Kansas City Institute for Human Development
- State-developed or agency-specific training
- The Learning Community for Person Centered Practices
- National Center on Advancing Person-Centered Practices and Systems

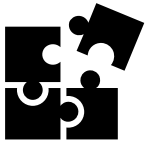
Person-Centered Approaches in I&R/A Practice



Person-centered approaches help each client express or communicate what is important to them



I&R practice emphasizes respecting and prioritizing what is important to the client



Using person-centered approaches allows Community Resource Specialists to support the client's right and ability to make their own decisions

Activity #4

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Create a one-page profile

The one-page profile is a tool that is used in person-centered practice. This type of tool helps to:

- determine personal goals;
- address issues of support, while encouraging empowerment and independence;
- support relationships by identifying what is significant from the person's perspective; and
- recognize strengths and how to work together.

In this activity, you will create a one-page profile about yourself in your role as an I&R/A professional.

Activity #4

One-page profile

What people like and admire about me...

- This needs to be a proud list of your positive qualities, strengths, and talents
- Make it clear and avoid using words such as “usually” or “sometimes” – be positive
- It is often helpful to ask colleagues, friends, and family what they like and admire about you
- Use positive feedback from emails or supervision

What’s important to me...

- This section needs to have enough detail so that someone who does not know you could understand what matters to you
- Add things about your whole life that are important to you (your hobbies, interests, passions), as well as things that relate to what’s important at work
- Add details that will give people an idea of who you are and what you value most

How to support me well at work...

- What is helpful? What is not?
- What others can do to make work time more productive and positive
- Specific areas of development you want to identify for support. For example, you may be working on better time management and have specific things that others can do to support you
- The help you need to create the best environment and outcomes for the people that you serve

See
webinar
archive for
the full
activity

In 1990, the AoA launched its two-pronged National I&R/A Initiative



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Eldercare Locator

A national call center to provide consumer access to aging information resources nationwide



National I&R Support Center

Established to assist state and local I&R/A programs to enhance the quality and professionalism of their services.



Eldercare Locator

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The Eldercare Locator provides a gateway to help older adults, caregivers, and professionals access resources and navigate aging programs and services.

- ✓ Phone/Text: 800-677-1116
- ✓ Email: eldercarelocator@usaging.org
- ✓ Live Chat (website): eldercare.acl.gov
- ✓ ASL Direct Video: 888-677-1199

Searchable directory of local resources
Tools and resources



Connecting You to Community Services

Disability Information and Access Line (DIAL)



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DIAL helps people with disabilities get connected to information about local community resources that support independent living.

Phone/Text: 888-677-1199

Email: DIAL@usaginganddisability.org

Live Chat/Website: dial.acl.gov

ASL Direct Video:

acl.gov/DIAL or 888-677-1199

Hours of Operation: Monday – Friday
8:00 am - 9:00 pm ET

The DIAL logo, featuring a stylized orange and blue 'D' shape to the left of the word "DIAL" in blue, with the phone number "888.677.1199" in red below it.

DIAL
888.677.1199

Disability Information & Access Line

Programs and Services

I&R/A programs connect individuals and families to a broad range of community resources and services.

Examples of Programs and Services

- Adult Protective Services
- Assistive Technology Programs
- Health Promotion/Disease Prevention Programs
- Home and Community Based Services
- Legal Assistance/Protection and Advocacy
- Long Term Care Ombudsman
- National Family Caregiver Support Program
- Nutrition Services
- Personal Care Services
- Senior Medicare Patrol (SMP)/ Medicare Fraud and Abuse
- State Health Insurance Assistance Program (SHIP)
- Veterans Directed Care
- Vocational Rehabilitation

Income & Assistance Programs

- Medicare
 - Medicare Low-Income Subsidies
- Medicaid
 - Home and Community Based Services
- Social Security
 - Retirement Benefits
 - Disability Benefits
- Supplemental Security Income (SSI)
- Supplemental Nutrition Assistance Program (SNAP)
- Low Income Home Energy Assistance (LIHEAP)
- Weatherization Assistance
- Housing Assistance
 - HUD Section 8
 - HUD Section 202
 - HUD Section 811

Medicare Savings Programs

- A set of four different programs that help eligible low-income Medicare beneficiaries with certain Medicare costs. The programs are:
 - Qualified Individual (QI)
 - Specified Low-Income Medicare Beneficiary (SLMB)
 - Qualified Medicare Beneficiary (QMB)
 - Qualified Disabled Working Individual (QDWI)

Medicare Part D Low Income Subsidy (LIS/Extra Help)

- Helps eligible low-income Medicare beneficiaries afford their Medicare Part D prescription drug costs, including:
 - Medicare Part D premiums
 - Annual deductibles; and
 - Prescription coinsurance or copayments

Resources to Promote Outreach

Available **MEDICARE SAVINGS:**



If you are low-income, a **Medicare Savings Program** may help with some of your Medicare costs.

If your monthly income is close to the limits listed below, a **Medicare Savings Program** may help you.

Monthly Income Limit*(single):	Monthly Income Limit*(married):	Programs Pay for:
\$1,715	\$2,320	Part B monthly premium

*Income limits are approximated and vary by state.

If you are a **working person with a disability** and your monthly income is close to the limits listed below, the **Qualified Disabled Working Individuals Medicare Savings Program** may help you.

Monthly Income Limit*(single):	Monthly Income Limit*(married):	Program Pays for:
\$5,105	\$6,899	Part A monthly premium

*Income limits are approximated and vary by state.

FOR ASSISTANCE, CALL:

- Web Banner
- Detailed MSP Poster
- Simplified MSP Poster
- QDWI Poster
- Tip Sheet Targeted for I&R Specialists
- Promising Practices Tip Sheets

To access these resources, visit:

www.advancingstates.org/mippa

Disability Awareness for Programs and Services

- Community Resource Specialists should understand the types of services and resources commonly accessed by people with disabilities
- The I&R/A service should ensure that programs and services for people with disabilities are included in its resource database or directory along with information on physical and programmatic access for people with disabilities
- Community Resource Specialists should recognize that people with disabilities can benefit from programs that serve a range of individuals, not only disability-specific programs
- Many people with disabilities who use I&R services have goals related to increased independence and functioning in a significant life area (e.g. community living, mobility/transportation, employment, information access/technology, community participation, health care, self-care, financial resources, and self-advocacy)

Activity #5

Programs and Services Packets

See webinar archive for hand-outs on programs and services for older adult, persons with disabilities and caregivers

Exam Strategies and Practice Quiz

Strategies for Taking the Certification Exam

- Pace yourself.
- Read each question thoroughly.
- Attempt to answer each question before reviewing possible answer choices.
- Review all possible choices before making a selection.
- If you aren't sure of the answer, use process of elimination before choosing.
- Limit time spent on each question.
- Resist the urge to change your answers.
- Don't forget to go back and answer questions you skipped.

Strategies for Taking the Exam

- All parts of an answer must be true or the entire answer is incorrect.
- Be aware of words like "always," "never," "only," "must."
- Reread all questions containing negative wording, such as "not" or "least."
- Ensure that the answer completely addresses the question.
- In cases where more than one answer choice might possibly be correct, choose the best answer.

Study Resources

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- **ADvancing States** (www.advancingstates.org)
 - ▣ The IQ Online Learning Center has several courses that address competencies for certification in aging and disability I&R/A
 - ▣ www.advancingstatesiq.org
- **Inform USA** (www.informusa.org)
 - ▣ Standards for Professional Information & Referral (<https://www.informusa.org/standards>)
 - ▣ I&R Training Manuals
 - ▣ Online Training
 - ▣ Online CRS-Aging/Disabilities Practice Test (\$25) through Inform USA (<https://learn.informusa.org/>)

Activity #6

Practice Quiz!

Practice Quiz

Which of the following constitutes an unsuccessful referral?

- A. An inquirer became too busy to follow up on the referral
- B. Before contacting the referral agency, the inquirer decided they needed a different service than what they had described to the Community Resource Specialist
- C. The inquirer received the needed assistance at the agency to which the Community Resource Specialist referred them
- D. The inquirer contacted the referred agency, but found that the agency was no longer serving people from the client's area

Practice Quiz

A Community Resource Specialist may empower a consumer by

- A. Explaining the eligibility standards and application process for a service, and providing a phone number
- B. Calling a service provider on behalf of a consumer
- C. Suggesting they proactively ask a family member for assistance
- D. Suggesting they utilize both their problem solving skills and the internet to find the appropriate service provider

Practice Quiz

Which of the following comments is the best way to let older adults know that you are listening without interrupting?

- A. “I’m sure that’s the case.”
- B. “Are you sure that’s the case?”
- C. “I’m listening. Keep going.”
- D. “I see.”

Practice Quiz

How should a Community Resource Specialist first respond when a client does not seem to understand something the Specialist is saying?

- A.** Try repeating the statement but slightly louder
- B.** Ask the individual what they didn't understand
- C.** Acknowledge that the person is facing language and/or cultural barriers
- D.** Try to express the statement in a different way

Practice Quiz

If a Community Resource Specialist has verified that there are no programs that will provide the client with the help they need, the best approach is to:

- A. Advise the client to call back the next day.
- B. Empathize with the client.
- C. Refer the client to other I&R/A programs that might be able to problem-solve.
- D. Clearly explain the situation to the client and try to problem-solve together

Practice Quiz

When an older adult seems to lack focus during the assessment, it is:

- A. The responsibility of the Community Resource Specialist to steer the conversation back on track.
- B. Only natural because older adults take a much longer time to express themselves.
- C. The responsibility of the older adult to empower themselves.
- D. A signal that the Community Resource Specialist needs to move on to the referral provision stage.

Practice Quiz

Active listening can most accurately be described as:

- A. Stopping the individual during particularly interesting parts of the conversation to gather more information.
- B. Showing you are listening through the use of hand gestures and facial expressions
- C. Focusing your attention on what the client is expressing both verbally and non-verbally
- D. Guiding the conversation back to discuss specific needs and issues

Practice Quiz

Which of the following might be a service that is particularly helpful for caregivers of older adults?

- A. Home Delivered Meals
- B. Respite care
- C. Weatherization programs
- D. Prescription drug assistance

Practice Quiz

A Community Resource Specialist receives a call from a client whose area recently experienced a hurricane. The client's home was damaged and needs home repairs, but the client is worried about scams. The specialist can:

- A. Discuss with the client whether moving to a new home is a better option
- B. Provide a referral to the state regulatory agency for consumer resources and contractor license information
- C. Suggest that the client carefully read online reviews of home repair contractors
- D. Provide shelter resources for temporary housing

Practice Quiz

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Which of the following is a reason for a Community Resource Specialist to ask a question?

- A. The need to know everything about the client
- B. A healthy curiosity and genuine desire to help others
- C. The need to know something relevant to the client's situation
- D. The need to ensure that the client is paying attention

Wrap-Up

- Questions
- Comments
- Evaluation

Stay Connected

- Receive Support Center updates
- Receive Advancing States' Friday Update

Visit www.advancingstates.org/community-opportunities/stay-informed or contact Nanette Relave, nrelave@advancingstates.org



**NATIONAL
INFORMATION
& REFERRAL
SUPPORT CENTER**

Project managed by ADvancing States

For more information, please visit:

www.advancingstates.org

Or call us at: 202-898-2578