

Information and Assistance Follow-Up Policy

Aging and Disability Resource Centers (ADRC) are expected to follow-up with the people who contact them for information and assistance, to determine outcomes and to provide additional assistance in locating or using services as appropriate. The ADRC contract also requires ADRCs to have a written policy describing when and how follow-up to information and assistance service will be provided. The following are best practice examples and ideas about what to include in such a policy.

Purposes of Follow Up

- To check on the safety of the customer.
- To find out whether the customer received the information that was sent.
- To ask “Is more assistance needed?”
- To see if the customer has more questions. Often people don’t know what to ask for in the initial conversation.
- To provide more help when the person is unable to do it himself.
- To develop rapport with a customer who is likely to develop a need for additional assistance.
- To provide coordination of services and/or referrals.

In General

- Use the AIRS *Standards for Professional Information and Referral* as a starting point. These are available at <http://www.airs.org/>.
- Use professional judgment regarding when to follow up.
- Follow up doesn’t do any harm, so it’s better to err on the side of overdoing it.
- Encourage discussion and review of customers’ situations by I&A Specialists, supervisor and/or colleagues to support appropriate follow-up.
- Keep records of follow-up activity.

When to Follow Up

- Collateral contacts need to be made.
- An application needs to be submitted by or on behalf of the customer.
- Information has been sent to the person.
- The person making the inquiry has multiple concerns.
- The amount of I&A may overload the customer.
- There has been a history of problems with the organization to which you are making a referral.
- When dealing with new or unfamiliar services or providers.
- In situations involving crisis, emergencies or endangerment. (The ADRC should have a separate policy for this.)

When to Follow Up cont...

- A home visit has occurred.
- Basic needs of food, clothing and shelter were identified as primary issues.
- A person appears to be unable to proceed with the information independently.
- The person is unsure, upset or disappointed.
- The person is starting through a long process that is complex.

When Not to Follow Up

- The conversation is brief and specific, as in a request for a phone number or a simple referral.
- When the customer has indicated that he or she does not wish to have a follow up contact.

Additional Considerations

- Ask permission to follow-up.
- Make sure you are talking to the right person during the follow-up call.
- Avoid disclosing sensitive information or violating confidentiality.
- ADRCs may consider blocking the ADRC phone number for Caller ID depending on the circumstances of each particular call.
- Consider using software to prompt staff to follow-up on customer inquiries.