

## General Information Gathering Procedures

1. Name – Caller’s name is asked so that navigators can use it to help establish a connection and to personalize their interaction. It is also to help the navigator remember that they are helping a real person with a real need and to help them keep the person at the front of the interaction.
  - a. EXAMPLE: May I have your name so that I know how to address you?
2. Identify Need – Delve into the issues. Caller’s will often present either with just one need, their most pressing need or by giving the navigator a lot of information that must be sorted through, separated and prioritized. In either situation, and all in between, it is important that the navigator express empathy and a willingness to help the caller.
  - a. When given only one need, it is important that the navigator ask open ended questions to gain understanding, identify underlying needs that need to be addressed and to continue to build trust.
  - b. When given a lot of information or when a caller tells a lot of their story/situation, the navigator should ask clarifying questions when needed and help the caller to prioritize. It is not for the navigator to prioritize for the caller, but to help them come to conclusions about their own priorities.
3. Zip Code (and if needed address) – the zip code is likely auto-populated by the telephone system into the contact record. Navigators should verify the zip code and explain why it is needed. Zip code information is needed to help find resources as all resources are geocoded to specific service areas. A wrong zip code, city or county could lead to a wrong referral or missing agencies. When a zip code is entered into to the contact record, it will auto-populate city, county and state.
  - a. If one of the SVDP (Society of St. Vincent DePaul) parishes comes up as a potential resource/referral, the navigator must obtain and document the caller’s address before giving out a SVDP as a referral. This is necessary because the SVDP parishes have very small, very specific service areas and addresses are used to search their parish map to locate the correct SVDP parish for the person. It is important that the navigator explain the need for the address (to find the parish that serves their address) and that an address is only asked for and gathered if a SVDP is a possible resource.
  - b. On occasion, a caller will not know the correct zip code and this is okay. If they can give a city or county, that is enough to get resources that may assist, but it does further limit resource available as some are specific to certain zip codes within a city or county. Do not give out resources that only provide services to certain cities or zip codes if you cannot verify the person resides in one of the eligible service areas.
4. Age, Income and Household Size – Age, income and household size are often necessary to determine eligibility for services. Navigator should ask for and explain why the information is needed.



- a. EXAMPLE: To help me see what programs you might you be eligible for, would you mind sharing with me your age, monthly income and how many people are in the home?
  
5. Telephone Number – the telephone number auto-populates from the telephone system into contact record. Phone numbers are important to get for advocacy and follow ups. Phone numbers should be verified whenever a follow up is scheduled or advocacy is to be conducted.
  
6. Language – language should be documented based on what the caller is speaking. If a translation service is used, the language being translated should be documented.

\*The navigator should never give the impression that any information is required. If a person is uncomfortable sharing any information, the navigator should reassure that it's okay to not provide it and reassure the person that help is still available.

***Aggregate Data:***

All of the information above, except names and actual addresses, are used in aggregate for reporting purposes to help inform funding decisions, gap analysis, needs assessment by population, etc.