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*Memorandum of Understanding  
United Ways of New Hampshire and ServiceLink  
Resource Centers Network*

***Effective November 1, 2007***

The purpose of this document is to create a shared understanding of roles and services and to outline best practices for referral principles and processes between United Ways of New Hampshire (UWNH) 2-1-1 NH, New Hampshire ServiceLink Resource Center (SLRC) Network, and the New Hampshire Department of Health and Human Services, Bureau of Elderly and Adult Services (BEAS). This document is intended to outline guidelines to be used by SLRC Network Specialists and 2-1-1 NH Specialists when it is determined that a referral from one to the other is required to meet the need(s) of the caller. All parties agree to the following:

**1. Vision for information and referral for or on behalf of NH citizens who are older adults, adults with disabilities and chronic illness, caregivers, and their families:**

This population faces a complicated array of decisions about long-term care, health care, pensions/finances and insurance. In order to stay independent and live in their homes, older adults and their families need to find services and know what choices they have available to get the help they need (transportation, appropriate housing, help with housekeeping and companionship just to name a few). At the same time, in an effort to provide more choices while becoming more fiscally responsible, public and private programs are adopting system changes that make it increasingly difficult to understand and access programs.

Information, referral and assistance are keys to connecting this population to services they may need to remain independent and age in place. A primary objective of the DHHS, BEAS and the New Hampshire SLRC Network is to maintain a quality information, referral and assistance system for older adults and adults with disabilities and their caregivers. The SLRC Network provides assistance through a single point of entry that is easy to find and has a high level of community recognition.

The New Hampshire SLRC Network is an essential service providing specialized information and individualized assistance to older adults, adults with disabilities and chronic illness, caregivers, and their families who need health insurance counseling, assistance completing forms and applications, and personal assistance with finding and accessing needed services. 2-1-1 is an easy to remember number

that connects people to information about critical health and human services available in their community. 2-1-1 NH provides comprehensive information and referral services to all ages and all populations.

## **2. Definitions, Scope of Services, and Eligibility:**

United Ways of New Hampshire and New Hampshire SLRC Network adopt the following definitions of “service” to guide our daily decisions and the provision of information, referral and assistance to consumers of each service.

### Comprehensive Information and Referral (I&R) provided by 2-1-1 NH:

Comprehensive I&R services provide information and referrals to people on the full range of health and social services from all levels of government, the non-profit sector, the private voluntary sector, by individuals in the community, and selectively from the business sector.

Consumers of a comprehensive I&R service such as 2-1-1 NH include: the general public, particularly people who may have challenges with locating and/or accessing needed services related to health care, financial assistance, employment, education, etc.; human service providers, such as social workers, health care professionals, crisis intervention workers, and personal advocates; and private and public sector organizations, such as HR professionals assisting employees in need; churches seeking services for their parishioners; and school personnel working with families in crisis. When a caller has a need for specialized assistance or more in-depth service, a comprehensive I&R makes appropriate referrals to providers like the SLRCs to allow for them to receive population or issue specific assistance and follow-up.

Comprehensive information and referral is FREE, ANONYMOUS and AVAILABLE TO EVERYONE. Services are provided by trained and nationally certified Specialists by telephone, through written correspondence, through email, or on a website through a searchable database available to the general public. Services are provided in languages and formats that meet the need of the caller.

### Specialized Information, Referral and Assistance (I&A) provided by the SLRCs:

Specialized I&R/A services focus on target populations based on individual, or issue specific, criteria. The SLRC Network provides assistance to older adults, adults with disabilities and chronic illness, caregivers, and their families, in order to help them access services that promote independent living in the community. SLRCs provide more than a referral to a service. I&R/A Specialists are nationally certified, complying with national and state standards established to guide role and skill level. They provide one-to-one assistance, often in person, that involves an informal needs assessment and guidance in accessing services. Assistance may also include connecting consumers or their family members to the appropriate agencies through supported referral, arranging for transportation or visiting them in their home. SLRCs provide long-term support options counseling; referrals for people who need informal services and/or help with Medicare; long-term care insurance counseling; prescription drug program information; assistance understanding and completing forms; and caregiver planning, support and training.

Access to services is the primary focus and may involve filling out forms on behalf of a client or other direct advocacy services, such as assisting with a Medicare appeal or gaining access to prescription drug patient assistance programs and follow-up.

Referrals to the SLRCs are made by human service providers including case managers, health care professionals, business people, NH Department of Health and Human Services, BEAS, and other government officials. In addition, the NH SLRC Network also works with the Long Term Care Ombudsman's Office, Adult Protective Services, and NH Legal Assistance to ensure that consumers get the service and advocacy to which they are entitled. In addition to the above services, the SLRC Network serves as the single point of entry for all Medicaid funded long term care programs for the state of NH.

Specialized information, referral and assistance is FREE, CONFIDENTIAL and AVAILABLE TO EVERYONE. Information, counseling and assistance may be done through the phone or in-person, it may take place in the community or a person's home depending on the needs and preference of the individual receiving services. BEAS and SLRCs conduct outreach to find older adults, adults with disabilities, and Medicare beneficiaries who may be part of underserved populations due to language barriers, poverty, lack of education, lack of transportation, illiteracy, fear of violence or be generally disenfranchised from the target population as a whole.

### **3. Marketing of Numbers:**

The BEAS, and the NH SLRC Network will partner with the 2-1-1 NH to market the 2-1-1 number to older adults, adults with disabilities and chronic illness, caregivers, and their families. Regular planning sessions around the development of messaging that can be used to market the service to these consumers will take place between staff of BEAS, the SLRC Network and the 2-1-1 NH. A minimum level of referral tracking will occur and be reported to BEAS in exchange for resources provided for marketing efforts. United Ways of New Hampshire will be primarily responsible for the regional and statewide marketing of 2-1-1. Availability and Transfers:

In the initial phases, 2-1-1 NH will be available Monday through Friday from 8:30 am to 5:00 pm. It is expected that by the end of 2009, 2-1-1 services will be available statewide and 24 hours a day, 7 days a week. NH SLRC offices are open Monday through Friday, generally between 8:00 am and 5:00<sup>1</sup> pm.

The technology to allow for direct phone transfers between 2-1-1 NH and the SLRCs is not currently available. Therefore, until this capability exists, appropriate referrals to each service will be made and callers will be given the numbers and hours of operation.

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<sup>1</sup> See ServiceLink Resource Center directory for individual office hours  
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#### 4. Call Handling and Referrals:

This section lays out the principles for call handling and referrals between the 2-1-1 NH and the SLRCs.

When a 2-1-1 NH I&R Specialist is serving a caller identified as an older adult, adult with a disability or chronic illness, a caregiver, or a family member, he or she will make a referral to the SLRC either at the caller's request or if they are unable to provide the specialized service that the caller needs and believes that a Specialist from the SLRC would be a more appropriate resource.

- A caller from the above target population should be referred to their local SLRC office when the they:
  - a. Require assistance completing forms or want more in-depth information about a particular service (e.g. Prescription Drug Program);
  - b. Seek assistance with topics related to long-term care (including housing assessments), options counseling, Prescription Drug Assistance, long-term care insurance, caregiver support and assistance and senior and disability related health insurance counseling (Medicare) questions;
  - c. Require assistance navigating the service system or assistance from multiple agencies; or
  - d. If the caller indicates, or the 2-1-1 NH Specialist believes, they may need assistance following through with referrals given.
    - SLRC will take some form of action within 48 hours or by the next business day.
    - 2-1-1 NH should refer a caller directly to the SLRC for long-term support options counseling or other assistance when it is clear that the caller is frail and needs to immediately access public benefits or assistance or if it appears the caller may be in need of a formal assessment.
    - 2-1-1 NH should refer a caller directly to the appropriate entity if it is clear that there is a risk or reality of elder abuse or maltreatment involved, 2-1-1 NH should strive to make a three-way call to the appropriate adult protection or Long Term Care Ombudsman office.
  - e. Want to apply for Medicaid funded long term care programs.

It is recognized that families are comprised of people with multiple ages, needs and strengths and that specialized providers are not able to provide comprehensive information and referral to all members of a family. Many times, caregivers are referred to as a "sandwich generation" because they may be juggling an array of challenges (e.g. the special needs of children, marital challenges or the needs of an aging parent).

SLRCs should refer calls to 2-1-1 NH when the person requires information on services that go beyond the scope of informal or formal caregivers, aging and long-term care services.

Different populations have different needs that may require intervention by multiple systems, including other specialized information and assistance providers.

2-1-1 NH and the SLRC Network should strive to assist callers in coordinating access to resources and to help reduce the incidents of service “bouncing” for people who have multiple needs.

**5. 2-1-1 NH and SLRC Regional Relationships:**

Collaborative relationships are critical to the success of NH SLRC Network and 2-1-1 NH. Therefore, both should strive to meet regularly to review principles, service quality, system changes, and resolve challenges. It is important that the systems recognize where they have common needs, can mutually plan for performance, can jointly monitor performance, and improve communication, leverage resources, and share training opportunities. United Ways of New Hampshire and the Department of Health and Human Services BEAS will provide leadership and promote activities that will engender these values.

**6. Data Collection and Reporting:**

Comprehensive I&R services and specialized information, referral and assistance services have different data needs. 2-1-1 NH seeks to minimize the personal data collected from callers in order to maintain their anonymity. In contrast, the SLRC Network requires the obtaining of personal caller data in order to provide the individualized assistance needed by most callers. Often times, this means collecting data that is categorized as protected under state and federal law. Therefore, data collection must be meaningful, be used to promote an advocacy agenda, meet the needs of a funder or promote some purpose. Data collection standards by 2-1-1 NH will be guided by obtaining only the information needed to provide an appropriate referral to a caller. NH SLRC Network data collection standards are governed by the contract and policies adopted by BEAS. SLRC Specialists will use their discretion and provide the appropriate level of information consistent with SLRC program guidelines to 2-1-1 NH Specialists when making a referral.

- **Data Sharing and Integrity:** 2-1-1 NH and the NH SLRC Network share responsibility for ensuring that the data in each party’s database is accurate. To this end, it is expected that the SLRC Network Database Manager will make the 2-1-1 NH Database Manager aware of any agency, site, program, or service updates. In addition, BEAS and 2-1-1 NH have agreed to the following:
  - Exploring opportunities to regularly cross reference data;
  - Exploring opportunities to move to a shared database and/or database manager; and
  - Discussing opportunities for shared on-line searchable database

**8. Technology:**

It is recognized that the SLRC Network and 2-1-1 NH have similar technology needs and these shared needs allow for the best use of public resources. Consistency will promote quality service by establishing standards through the use

of similar tools. In order to maintain this consistency, 2-1-1 NH, BEAS, and the NH SLRC Network will strive to:

- Use complimentary referral software;
- Access a statewide resource database; and
- Have adequate support systems with strong infrastructures that have flexibility.

**9. Best Practices in Training and Communication:**

NH 2-1-1, the Department of Health and Human Services, BEAS will strive to create a network of information, referral and assistance for older adults, adults with disabilities and chronic illness, caregivers, and their families, and people on Medicare that ensures they have access to services. The network will be built and maintained by:

- Having regular contact between the Director of 2-1-1 NH and the SLRC Network Program Manager to discuss the status of 2-1-1 NH and the NH SLRC Network, including staffing and/or programmatic changes;
- Having regular contact between the Database Manager for 2-1-1 NH and the SLRC Network Database Manager regarding changes in services that each should be aware of;
- Having ongoing communications through e-mail and telephones to resolve issues or concerns within the programs or with consumers of either service; and
- Providing opportunities for cross-training and shared training for the staff members of both 2-1-1 NH and the SLRC Network.

This Memorandum of Understanding will be considered a working document and will be reviewed by the parties every 6-months for the first two years of 2-1-1 NH operation.

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Signature

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Date

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Printed name  
Director, 2-1-1 NH

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Signature

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Date

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Printed name  
Administrator, Bureau of Elderly and Adult Services

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Signature

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Date

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Printed name  
NH SLRC Program Manager