



# Training: City of Chula Vista

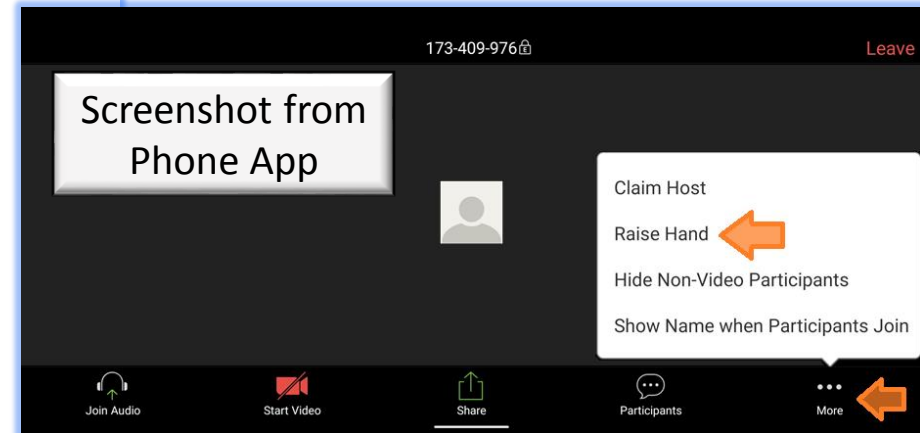
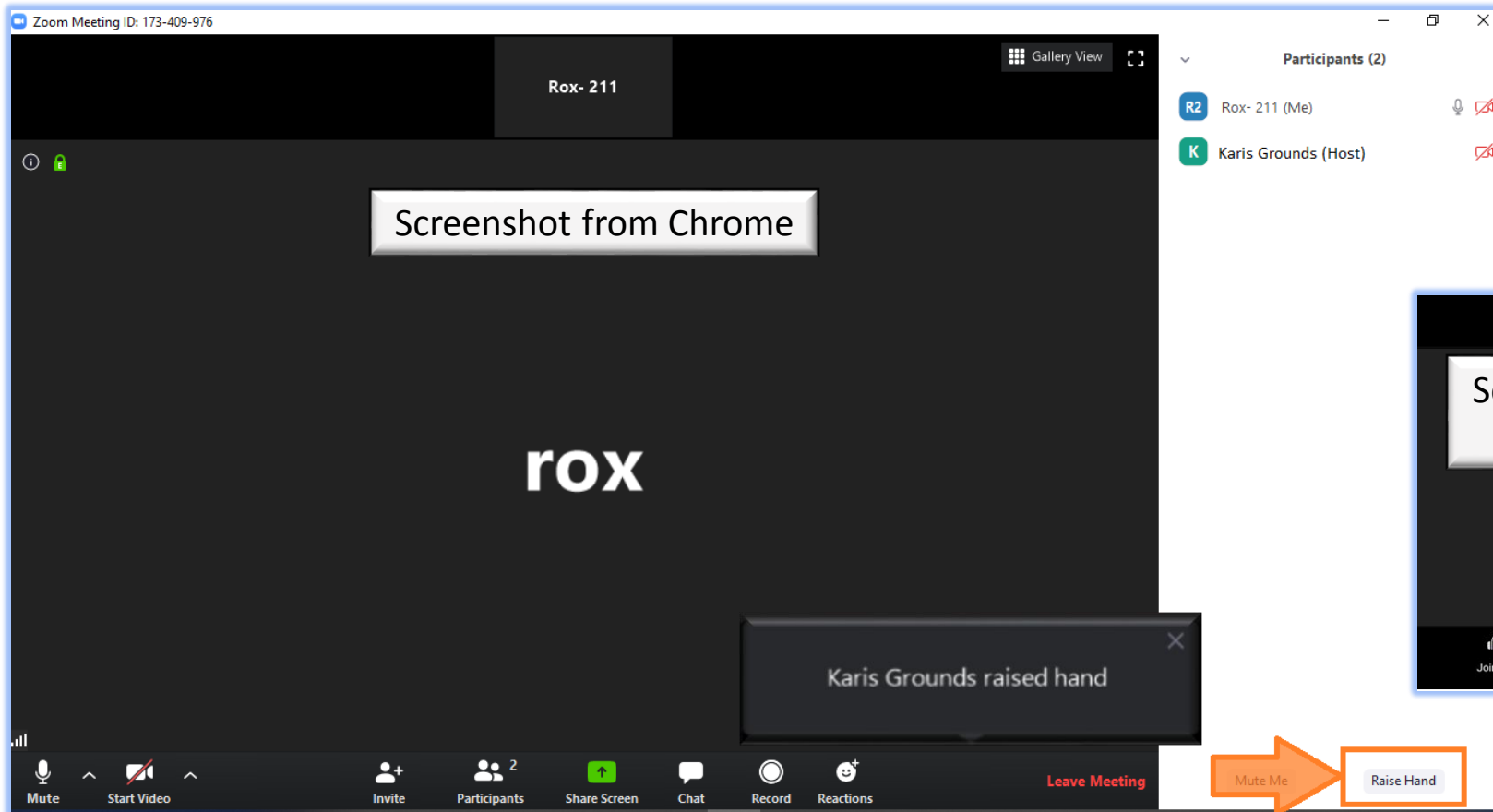
March 30, 2020

# **WELCOME & INTRODUCTIONS**

**THANK YOU!!!**

# Rules of Engagement

If using Internet Browser: Click “Participants”  
If using the Zoom App: tap “More”



# Agenda

## **9:00-9:30 AM**

- Welcome and Overview of 211

## **9:30-10:00 AM**

- Telephony Training (InContact)
- Formstack (documentation & information)

## **10:00-10:50 AM**

- Food Training
- Partner Community (Salesforce)
- Transfers

## **10:50-11:00 AM**

- Report out Rumors and Questions

# Role of 211

# 211 Role and Top Needs

## 211 Role:

- Providing public Information and support navigating community resources
  - In partnership with County of San Diego, updating resources available to community and relying back needs or trends requested by community

## Stats:

- Received over 64,622 calls since March 13 (~70% higher than typical demand)

- **Top Needs:**

- Housing (rental assistance) & Homeless Needs
- Food assistance (8x higher than normal)
- Financial (public assistance programs)
- Utility (1/3 of needs)
- Symptoms, established Nurse Triage Line

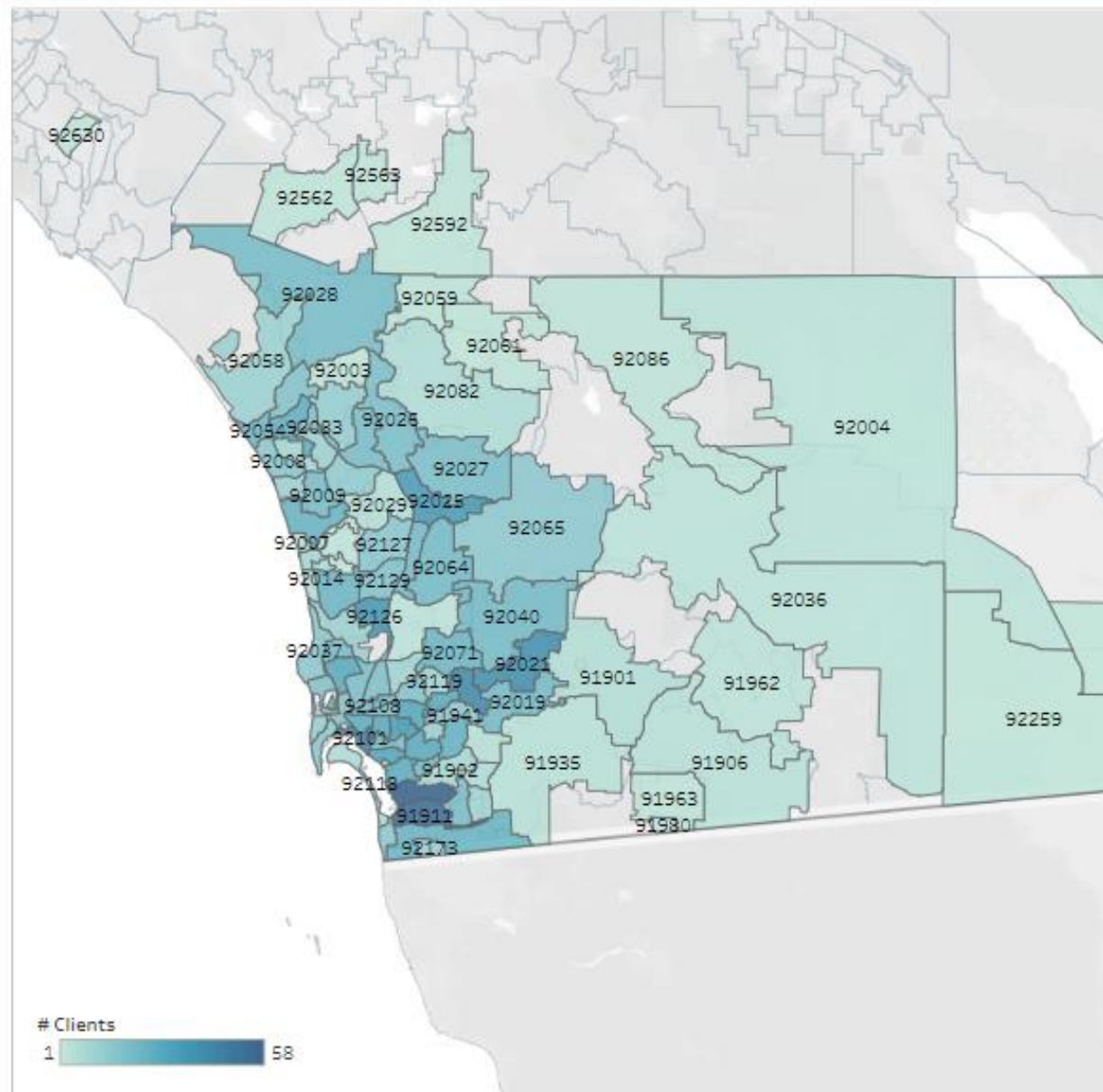
**\*\*Share only vetted information from County of San Diego or valid sources**



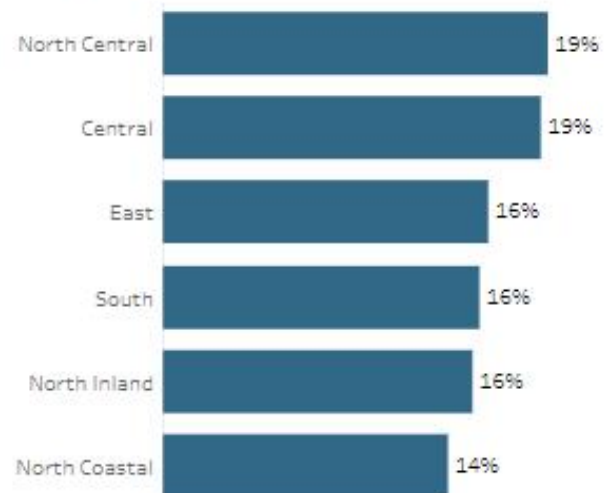
## CALLS SPECIFICALLY FOR COVID-19 (CUMULATIVE)

Clients with needs related to COVID-19, by zip code

January 31 - March 25, 2020



### HHSA Region



### Top 5 Cities

SAN DIEGO	42%
CHULA VISTA	10%
EL CAJON	7%
ESCONDIDO	5%
CARLSBAD	4%







# Community Information Exchange



# Person Centered Model

# Community Information Exchange Core Components



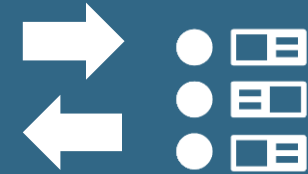
## Network Partners

Collective approach with standard Participation Agreement, Business Associates Agreement and participant consent with shared partner governance, ongoing engagement, and support.



## Shared Language (SDoH)

Setting a Framework of shared measures and outcomes through 14 Social Determinants of Health Assessments and a Risk Rating Scale: Crisis, Critical, Vulnerable, Stable, Safe Thriving



## Bidirectional Closed Loop Referrals

Updated resource database of community, health, and social service providers. Ability to accept/return referrals and to provide outcomes and program enrollment.



## Technology Platform and Data Integration

Technology software that integrates with other platforms to populate an individual record and shapes the care plan. Partners access the system. System features include care team communication feeds, status change alerts, data source auto-history and predictive analytics.



## Community Care Planning

Longitudinal record with a unified community care plan that promotes cross-sector collaboration and a holistic approach.

# Community Information Exchange Partners: 80



## Data Sharing Partners



# Updates & Leveraging 211/CIE Partnership

- **Housing**
  - Partnership: Regional Taskforce on the Homeless & Housing Providers
- **Food (home delivered meals & groceries)**
  - Partnership: County of San Diego (AIS), Jewish Family Services, San Diego Food Bank, Meals on Wheels, Serving Seniors and other food providers

# Your Role

# City of Chula Vista

- Helping community members by answering the phone for those with needs, starting with:
  - Food
- When ready, adding additional skills
  - COVID
  - Others

## **Main Role:**

- Search and provide available vetted or reliable information to community members
- Search and refer to resources in the community (phone number/address) or directly to the agency with client information
- Document inside of our systems
- Provide an feedback to 211 about additional needs or information

# Telephony Training & Tools



# How Can We Support Each Other?

- **InContact**
  - **How you take phone calls**
- **Form Stack**
  - **Basic information and resources about COVID and way to document zip code and type of call (this may change & be a part of Salesforce)**
- **Salesforce**
  - **Searching for resource and referrals to partnering organizations**

InContact

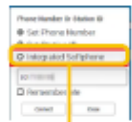
# Opening and Closing

- **Thank you for calling 2-1-1 San Diego, this is \_\_\_\_\_ volunteering from City of Chula Vista, how can I help you?**
- **Is it okay if I ask you a few questions so that I can find the most appropriate resources?**
- **Thank you for calling, call us back if you need anything else. We are open 24/7.**

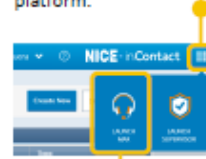
# InContact Deskaid

## PART 1: LAUNCHING INCONTACT MAX AND MAKING OUTBOUND CALLS

1 Visit <https://login.incontact.com/> and log in.



2 Click the grid icon on the right corner of the page within the platform.



3 Select "Launch Max"

4 In the new pop up window that appears, select "integrated softphone" then click "connect"

5 You are now in the Max agent interface.



● **Agent State:** Where the agent can set their state or log out of the system

● **Agent Leg:** Click connect to connect agent leg before initiating a call

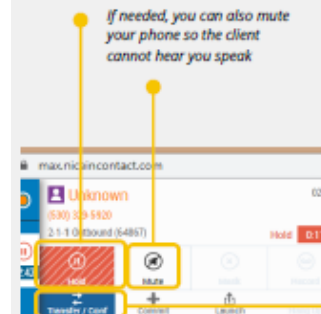
● **Call History:** Displays information on recent calls

● **To make an outbound call:**

1. Click "New" on the bottom left side of the panel
2. A new dropdown menu will appear. Select "Outbound Skill" to dial your client's phone.

STEP 1 FOR BOTH:  
PLACE CLIENT ON HOLD

If needed, you can also mute your phone so the client cannot hear you speak



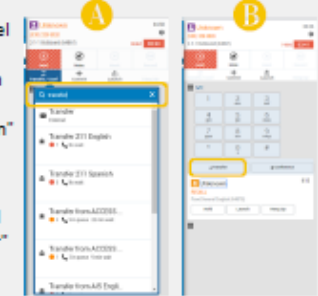
## PART 2: TRANSFERRING CALLS TO GENERAL INQUIRIES AND TO THE NURSE TRIAGE LINE

### GENERAL INQUIRIES

After placing the client on hold, click "Transfer/Conf"

(A) a new window panel with a search field will appear. Use the search field to locate "Transfer 211 Eng/Spn" then select "Call"

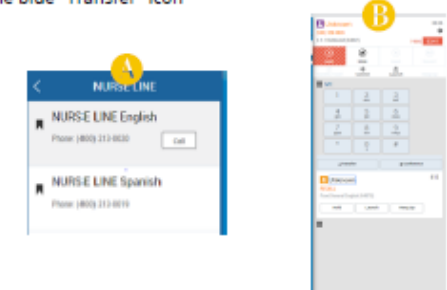
(B) Once the Line or department is selected click the blue "Transfer" icon



### NURSE TRIAGE LINE

(A) After placing the client on hold, select the "Nurse Line" icon listed in the main panel. A new window will appear for language, then select "Call".

(B) Once the Line or department is selected click the blue "Transfer" icon



# Form Stack

# Formstack



## 2-1-1 San Diego COVID-19 Community Response Form

### Client Information Collection

The following fields are demographic information to collect on each call. Zip code and age are important demographics that will help you find relevant resources. Be sure to check all eligibility information in each of the service listings to confirm the appropriate referral. Housing status should only be collected as clients self-disclose this information.

If clients decline to provide demographics, enter "0".

Zip Code - Client zip code helps us understand where needs are in San Diego County \*

ZIP Code

<https://211sandiego.formstack.com/forms/covid19>

# Food Overview and Training



# Types of Nutrition resources



**Food Banks:** Often distributes to charities/organizations



**Food Pantry:** Often distributes to individuals and families in need



**Hot Meals/Congregate Meals:** Meals that are prepared and served hot.



**Senior Meals:** Often distributes hot meal and home delivered meals for the senior population.



**Healthy Eating:** Programs to help individuals and families eat well.



**Home Delivered:** Meals that are prepared and delivered to the older adults and people with disabilities.



**Weight Management:** Classes that focuses on healthy eating, behavioral modification and exercise.



**Calfresh** Supplemental income to purchase food



# CalFresh

Formerly known as “Food Stamps or Supplemental Nutrition Assistance Program (SNAP)”. Entitlement program to low income families and individuals that meet income guidelines. CalFresh helps supplement food budgets and allows families and individuals to buy healthy and nutritious foods.

## Eligibility:

- Based on **Residency Status**, **Household income** and the **number of people** in the household\* (anyone living together and buying and preparing food together).

### HH Size / Gross Monthly Income

1 / \$2,024

2 / \$2,744

3 / \$3,464

4 / \$4,184

5 / \$4,904

6 / \$5,624

7 / \$6,344

8 / \$7,064

Add. Member + \$720

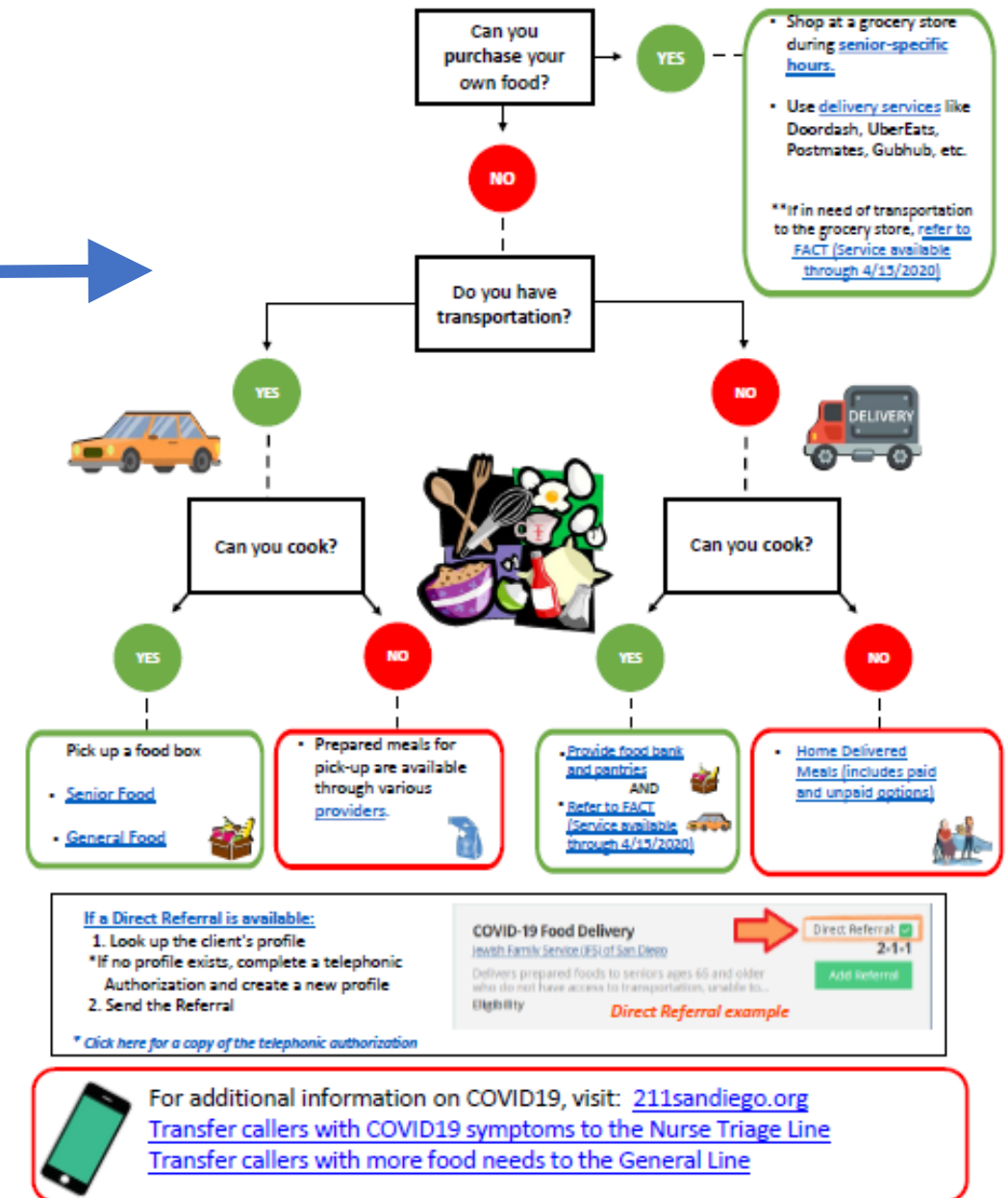
<https://211sandiego.org/resources/enrollment-services/>

# Locating resources

1. For callers 60 and older, use this desk aid

2. For callers under 60, search by keyword or categorically

**Note:** you may need to narrow results by zip code/eligibility as needed



# Partner Community: Salesforce



# Use the Guide to Navigate

1. Shortcut to login
2. How to look up profiles
3. How to collect and upload a consent/create a profile
4. How to send electronic referrals

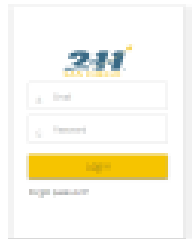
**\*hyperlinks to other resources**

## Chula Vista CIE Volunteer Guide

### Getting Started- [Login to CIE](#)

1. Enter your username (your [chulavistaca.gov](#) email address)
2. Enter your password
3. Click "Log In"

Having trouble? Contact [CIEhelpdesk@211sandiego.org](mailto:CIEhelpdesk@211sandiego.org)



# Transfers

# 211 Support

# Weblinks

- <https://my211.force.com/s/login/?startURL=https%3A%2F%2Fmy211.force.com%2Fs%2Fservice-directory>
- <https://login.incontact.com/>
- <https://211sandiego.formstack.com/forms/covid19>
- <https://211sandiego.org/resources/enrollment-services/>

## Resources

- <https://ciesandiego.org/training-technical-support/>

# We are here to support you!

- Karis Grounds
  - [kgrounds@211sandiego.org](mailto:kgrounds@211sandiego.org)
- Roxanne Suarez
  - [rsuarez@211sandiego.org](mailto:rsuarez@211sandiego.org)
- Alana Kalinowski
  - [akalinowski@211sandiego.org](mailto:akalinowski@211sandiego.org)

**Primary liaison will be shared soon going forward to questions, tech issues or other needs**



**Thank you!**