MONTANA 2-1-1
ICAROL STYLE GUIDE

June 2014

PURPOSE

The 2-1-1 Program at the District XI Human Resource Council, in Missoula, Montana, developed this style guide. It is designed for use by Montana 2-1-1's who utilize the iCarol system. Its intention is to provide guidance for the development and maintenance of regional I & R resource record databases in a clear and consistent manner.

The benefits of utilization of a style guide include:

- Clarity and consistency of records both within each Montana 211 database.
- Clarity and consistency of information provided by each 211 to the shared Montana211.org website.
- Ease of record sharing and utilization between Montana call centers when needed.
- Guidance in the creation of new resource records for managers and staff.
- Guidance for updating resource records.
- Consistency in the organization and language of resource records to facilitate an efficient and thorough referral process by I & R Specialists.
- Compliance with AIRS requirements regarding database elements.

PRINCIPLES

The intention of this style guide is to provide a consistent but flexible framework for the development and organization of resource records. This guidance is intended to provide resource information that is:

- Clear & concise.
- Accessible and understandable to community members.
- Understandable and user-friendly to I & R Specialists and staff in the course of the call-taking process.
- Written in clear, natural language that avoids jargon.
- Accurate and sufficiently informative to facilitate informed decisions, but not overwhelming or confusing.
- Readable and understandable by the public when accessed in its public website form.
- Appropriate to its community context and use.

- Respectful and responsive to the needs of the agencies and programs included. Examples of this include, confidentiality of certain contact information, preferred intake process and changing availability of services.

Database Review and Updating

It is the expectation that 2-1-1 providers update each resource record in their database at a minimum of once per calendar year. However, the maintenance of an accurate, efficient database often requires ongoing updating and additions. This is needed when the availability of services change, new agencies and programs become available and existing agencies and programs close or change pertinent information.

Information Provided By Agencies

Information for all required fields is generally provided by agencies. In cases where information cannot be provided, recommended 'place holder' language should be employed until complete information can be obtained:
"No information has been provided by Agency"

Taxonomy

Montana 2-1-1 providers have coordinated a customized taxonomy that limits the level and terms utilized. Individual call centers may choose to further customize their databases to allow for regional and community requirements. Examples of this are call centers located in areas where tribal or specialize federal services play are extensive role in providing community services, versus areas where such entities do not exist.

Inclusion/Exclusion Criteria

The suitability of inclusion of records is guided by the inclusion/exclusion criteria established by the 211 centers in Montana and is made available for public viewing on the Montana 211 website.

Montana Call Center Association (MCCA)
Resource Database Inclusion/Exclusion Policy
Information & Referral/2-1-1

The mission of the Montana Call Center Association (MCCA) is to provide Montana residents with a single, easy-to-use system to obtain information on health and human services, volunteer opportunities and giving.
MCCA is currently comprised of the four Regional Call Centers in Bozeman, Great Falls, and Missoula. Each Call Center maintains a Resource Database, which includes

a comprehensive listing of non-profit and government agencies, and related organizations.
Inclusion in the Resource Database of any the Regional Call Centers is a privilege and not a right. MCCA reserves the right to include or exclude any agency or organization. Inclusion in the Resource Database shall not be deemed an endorsement of an agency or organization by the MCCA and shall not be presented to the public as such by either the MCCA or the agency or organization.

To be included, an agency or organization must establish:

1. evidence of an established service site;
2. demonstrated provision of service through feedback from public agency representatives and regulatory agencies;
3. evidence of community involvement in or oversight of program (e.g. Board of Directors, advisory committee, etc.)

Inclusion Criteria:

1. Non-profit organizations that provide, coordinate and advocate for health and human services in the state of Montana.
2. Health and human service programs offered by state, county or municipal governments that have offices in or serve residents of Montana.
3. For-profit organizations may be included if they provide critical or necessary service not offered by a non-profit or government service in our coverage area. These include but are not limited to mental health care private practitioners who offer support groups that are open to non-clients and are affordable or sliding fee scale, etc)
4. Organizations, clubs and civic groups offering a service to the community at large, not restricting services to their own members, that serve Montanans.
5. Public resources and services such as libraries, free or low-cost support groups, etc.
6. Professional organizations that provide a public service.
7. Community groups.
8. Specialized information and referral services.
9. Faith-based organizations offering aid to anyone, not just members of the congregation.

Not eligible to be included:

1. Agencies, organizations or businesses not meeting one of the above criteria.
2. Agencies or organizations not providing any information or services for Montanans.
3. Agencies whose services are illegal.
4. Agencies that misrepresent themselves.

Exclusion Appeal:

If an agency or organization feels it has been unfairly excluded from any Resource Database, it may appeal the decision to that Call Center by sending a letter of appeal, stating the reasons it believes the exclusion to be unfair, to that Call Center's Board of Directors within 60 days of the exclusion. The decision of the Board is final.

The inclusion and scope of records in individual 211 databases should also be guided by:

- The specific needs of the community and scope of locally available services or entities. A large university with a large student population might make inclusion of numerous records for university based programs and organizations desirable, whereas a local college in another community might appropriately be confined to one or two resource records.
- The access/intake process and organization of programs within an included agency. Participation in a particular program offered a mental health center, for example, might be offered only after intake by the agency. In the case, it would be confusing and inappropriate to provide a referral to that specific program rather than the main agency that might provide the service if appropriate.
- The limited or 'one-time' nature of a service or event offered by an agency or program which would not warrant temporary inclusion in the resource database.

Data Elements

Included data elements are guided by AIRS standards (Section 8). Resource records should include all of the AIRS required elements and applicable recommended elements in a consistent manner, as follows:

UNIQUE ID NUMBER

This is assigned automatically by the iCarol system.

RECORD OWNERSHIP CODE

This is assigned automatically by the iCarol system.

AGENCY

The full, legal name of the agency should be included. Abbreviations should not be used except where commonly employed (Inc., for example.) In cases where an acronym is routinely used in agency materials and the organization is known as such by the public, (such as WORD- Women's Opportunity Resource Development) The agency should be named using the most commonly used name and the other placed in the 'Alternate Name' field.

AKA, 'ALTERNATE NAME'

In addition to the above instances, former names still recognized by the public and alternate, commonly used names can be placed in this field if it is deemed useful in a search of resources.

STREET NAMES/PHYICAL ADDRESS

Street names and addresses should be entered utilizing the following format:

ADDRESS LINE 1
Address Line One is used for the actual street address.

ADDRESS LINE 2
Address Line Two can be used when there is an additional component such as the apartment, suite or unit number. The following is an example of an address that uses both lines:

2677 Palmer
Suite 100

ADDITIONAL INFORMATION

Use full spellings where possible.
When using an official abbreviation, there is no need to use periods, as in 'Blvd' rather than Blvd.

If the street name incorporates a "direction" such as 'Highway 10 West' it should be spelled out in full. Addresses that reflect a larger grid can be designated with the abbreviation.
(i.e., '625 NW 22nd Street')

MAILING ADDRESS

Mailing addresses should be added when different from street address. Typically, these are PO Boxes and should be written as in, 'PO Box 2115' with care taken to be certain that zip code is correct as it may differ from the street address zip code.

WEBSITES/URLs

Website addresses should be written as in 'www.socialsecurity.gov' except in rare cases where the URL format specifically differs, such as in, 'rc.mt.gov/publichealth'.

EMAIL

The main contact email address for the agency or program should be included. Email addresses for coordinators or directors should not be used in cases where there is no main email address unless specifically requested by the agency.

PHONE NUMBERS

Phone numbers should be added using this format: 406-555-1212 for in-state numbers and 1-800-555-1212 for toll free or out-of-state numbers. Extensions should be denoted with an 'X' followed by the extension number. Three-digit numbers such as '9-1-1' should be written in that format for clarity. Numbers such as '1-800-HELPNOW' should be written in the correct number format with the spelled version in parentheses.

Care should be taken that numbers listed are the correct and preferred intake number rather than those of specific personnel of the agency or program. Numbers provided by coordinators and directors for agency to agency contact should be placed in the 'Agency Main Contact Person' and 'Agency Director or Coordinator' fields with privacy boxes checked.

NAME & TITLE

Name and title of director or administrator is required and should be placed in appropriate fields.

AGENCY DESCRIPTION

The description of the agency or program should be written clearly and concisely, avoiding jargon and abbreviations which may be confusing to both staff and the public accessing information on the website. In creating an agency or program description, the following should be considered:

- Is the information sufficiently concise to facilitate an efficient and appropriate referral by the I&R Specialist during the call process?
- Does it contain sufficient information to facilitate an informed decision by members of the public?
- In the information, in the case of agencies, sufficiently broad to indicate the scope of available services?
- In the case of multi-program agencies, are attached program records sufficiently utilized to provide specific program information rather than attempting to contain detailed information for numerous programs in the agency record?
- Is the agency or program description acceptable to the agency or program represented, while taking into consideration its function in both the call taking and website access?

MAIN SITE DESCRIPTION

Because the communities we serve have a relatively low population, site descriptions are not typically useful. In cases where appropriate, site description should be clear and useful, with avoidance of abbreviations and jargon that may be confusing.

HOURS/DAYS OF OPERATION

Hours and days of operation should be placed in the appropriate fields of the grid provided on the iCarol screen, as for example, '8:00 am' in the 'Open' field and '5:30 pm' in the 'Closed' field. In cases where a program operates 24 hours or has other, more unusual hour/day information that would be difficult or confusing utilizing the grid format, the space below can be used to provide more detailed information. An example of this is a food pantry, for example that is only open during specific days of the month.

LEGAL STATUS

Legal status of an agency should be verified and the appropriate description selected from the drop-down on the agency screen. Note that the legal status field only appears on agency records and does not appear on the program records in the iCarol system.

ACCESS FOR PEOPLE WITH DISABILITES

Information regarding access and access limitations should be clearly stated in the appropriate field.

APPLICATION PROCESS/DOCUMENTS REQUIRED

In the fields provided in the Program' section of the iCarol resource screen, fields such as 'Application Process', 'Wait Times', etc., should be used when accurate, timely information is available and likely to remain stable. In cases where more complicated intake processes or documentation is required or the availability of services changes frequently, 'Contact Agency For More Information' should be used.

UPDATING

When updating is completed, all fields in the 'Agency Verification' or 'Program Verification' section at the bottom of the record should be completed. Verification fields are to be used for the name, title and information of the person at the program or agency providing the information. The 2-1-1 staff member and the date the record was physically updated will be noted automatically by the iCarol system.

GEOGRAPHIC AREA SERVED

Geographic area is assigned utilizing a dropdown. Statewide program can be selected as such. Due to the size and nature of Montana communities, services areas are usually most appropriately defined by county. Programs that only serve residents of a specific

city should indicate this by using the city dropdown. Care should be taken that selections are made based on service area and not program site or agency location alone.

OTHER LANGUAGES SPOKEN

Languages spoken should be indicated in the 'Languages Offered' field utilizing the menu of world languages provided.

TAXONOMY TERMS

Taxonomy terms are selected and assigned to the resource record employing the most appropriate term for the services provided. The iCarol taxonomy has been customized to facilitate appropriate assignments.

TARGET TERMS

Target terms are not used. Due to the size and nature of the majority of available services, target terms have very limited application and have been eliminated form the customized taxonomy used.

RECOMMENDED ELEMENTS

The following are AIRS recommended elements and should be included where possible. Federal Employer Identification Number (EIN/FEIN)

- Year of Incorporation
- Licenses or Accreditations
- IRS Status
- Travel Information
- Other Addresses

ADDITIONAL FIELDS

The iCarol resource screens also provide fields for additional, useful information and these should also be included where possible and appropriate. When providing additional information, the same style considerations outlined for AGENCY DESCRIPTION should be employed.

Fields such as 'Search Hints', 'Temporary Messages', and 'Internal Notes' can be employed to provide internal information. These appear to 2-1-1 staff only, and should be utilized in a manner that is helpful to 2-1-1 staff members accessing the resource database.

APPROPRIATE LANGUAGE

Care should be taken to employ non-discriminatory, gender-neutral language that shows sensitivity to all members of the public. Using plurality ('helping people meet their needs' vs. 'help the individual meet his or her needs' eliminate the need for gender pronouns, for example.

Avoid labeling people based on an experienced condition (homeless, blind, disabled, wheelchair-bound) in favor of experience descriptions (people experiencing homelessness, people who are sight-impaired, people with disabilities, uses a wheelchair.)