United Way of Greater Cleveland 2-1-1

FOLLOW-UP POLICY AND PROCEDURE

Revised September 2025

Follow-Up is defined as making an attempt (currently by phone) to reach someone who has recently contacted 2-1-1 for information and/or referrals. Follow-Up is done for the primary purpose of ensuring the person in need has received the services originally discussed and/or to check on the person's well-being. Follow-Up requires the person's verbal permission as noted in the 2-1-1 scripts.

Follow-Up is generally considered a one-time event, to be conducted at the inquirer's convenience, but is generally done within 1-3 days for immediate concerns and within 7-10 days for other issues. The critical element is that Follow-Up MUST be conducted when promised, otherwise 2-1-1's credibility is lost.

It is expected that a 2-1-1 Specialist will try 3 times to reach someone before registering the Follow-Up as complete due to the person not being reachable. When a re-schedule is needed, it is suggested that it be attempted fairly immediately (e.g., the next day the Specialist works).

FOLLOW-UPS OCCUR IN THE FOLLOWING CASES:

- There is an immediate health and safety concern. However, the I&R Specialist has not conferenced in a 3rd party, called 9-1-1, or told the person to dial 9-1-1 with reason to believe the person will do so. Examples: baby has no formula, older adult has no insulin, older adult high rise has no power, no heat or cooling in extreme weather when no other plan of action can be suggested and acted upon.
- The inquirer has a barrier impacting their ability to understand or follow through on referrals, the result of which would be detrimental to the inquirer or the inquirer's family. Example: inability to read/write, under extreme stress, functional disability. In these situations, the 2-1-1 Specialist should also consider advocacy on behalf of the inquirer.
- Giving a referral when the I&R Specialist has doubt it will fit the specific special situation of the client (using the resource "off-label"). Example: case management.
- Giving a referral that is not in the database, but which a supervisor has suggested or is generally accepted protocol. Example: contacting a pediatrician for baby formula.

- There is a resource availability question or unmet need that has been sent to the Resource Department for investigation.

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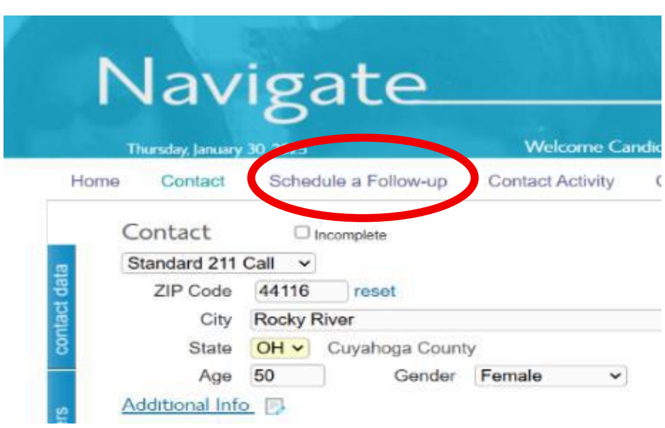
FOLLOW-UPS DO NOT OCCUR IN THE FOLLOWING CASES:

- If the inquirer has not provided verbal permission for a follow-up call. Inquirers have the right to self-determine and make that choice. Contacting someone without their consent violates 2-1-1's commitment to confidentiality and anonymity.
- If conducting a follow-up could jeopardize the inquirer's safety. The Specialist must give this careful consideration and discuss potential risks and alternatives with the inquirer before proceeding (e.g., domestic violence situations).
- If resources have been provided and the situation does not meet any of the outlined criteria for when follow-ups occur. Information and Referral (I&R) Community Resource Navigation Specialists are not case managers and do not provide ongoing case management services.

SCHEDULING FOLLOW-UP

Use the 2-1-1 script for the language used to request Follow-Up. In Navigate, while still in the active transaction you wish to set the follow up for, select the "Schedule a Follow-Up" tab from the top menu bar.



- Select either Call the Client or Call the
- Enter the name (clients are not required to give a last name).
- Enter their preferred phone number; this may not always be what is listed on caller ID, always verify their preferred call back number.
- Select any services you will be inquiring about during follow-up.
- Select a date that is mutually agreed upon between you and the client.

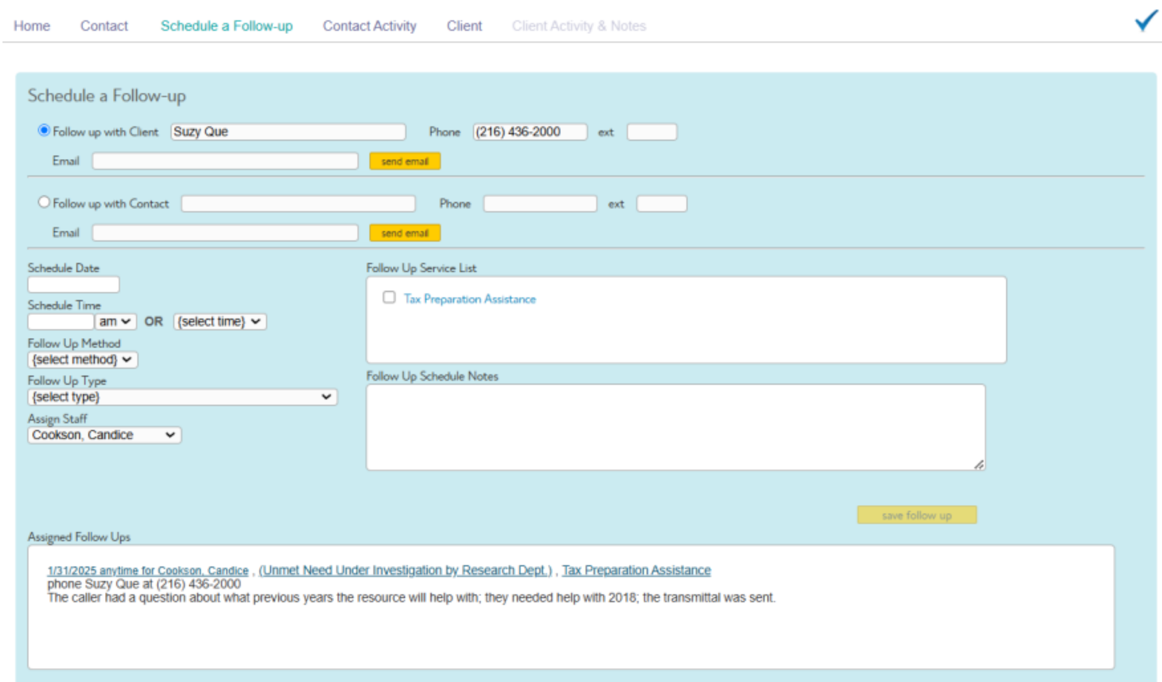
- Selecting a time is optional and should be based primarily on the preferences of the client. It's preferred that Specialists use the more general options such as “morning,” “afternoon” and “evening.” Picking an exact time is not recommended because it is difficult to call exactly when promised.
- Choose a Follow-Up Method.
- Choose the Follow-Up type that best fits the situation.

If you feel you need to schedule an immediate Follow-Up, but you will not be working for several days, you may schedule the follow up for the Supervisor selecting “**211, Supervisor”** from the staff list. Send an email to 211supervisor@unitedwaycleveland.org alerting them of the need for follow-up. Unless directly instructed by a Supervisor, follow-ups should never be saved for anyone other than either the Specialist scheduling the follow-up or, as in the situation described in the prior sentence, 211 Supervisor.

Place notes in the Follow-Up Schedule Note section. It is in this section that you should note whether it is acceptable to leave a message. If you are scheduling the follow-up for the Supervisor to complete, please try to leave as detailed of a description of the client's situation as possible.

Once the details have been filled in, click on the gold Save Follow-Up button. Note that the information typed in the Follow Up Schedule Notes area now displays below in the Assigned Follow Ups area.

To end the transaction, the user must return to the Contact tab. Click on Contact on the top menu bar to return to the usual screen with the demographic and search fields.



PERFORMING FOLLOW-UP

SCRIPT

Use the 2-1-1 Follow-Up Script for the language used to perform Follow-Up.

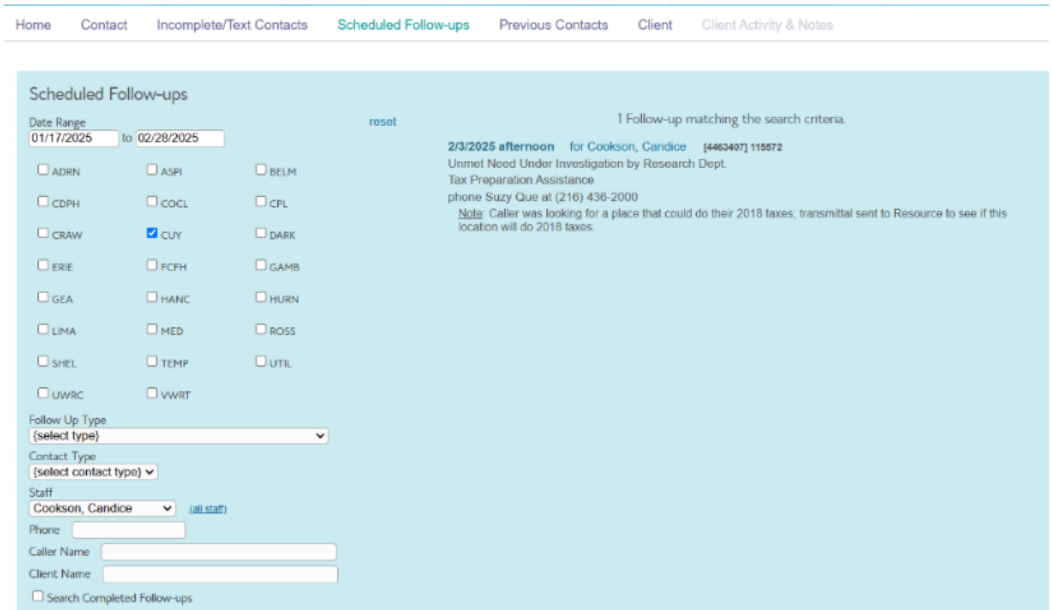
TIME OFF THE PHONE

You do not need to notify a supervisor when performing a single Follow-Up. If you need to do several at a time, please consult the Supervisor. You must place yourself in the Outbound-Follow-Up state in InContact before placing the Follow-Up call.

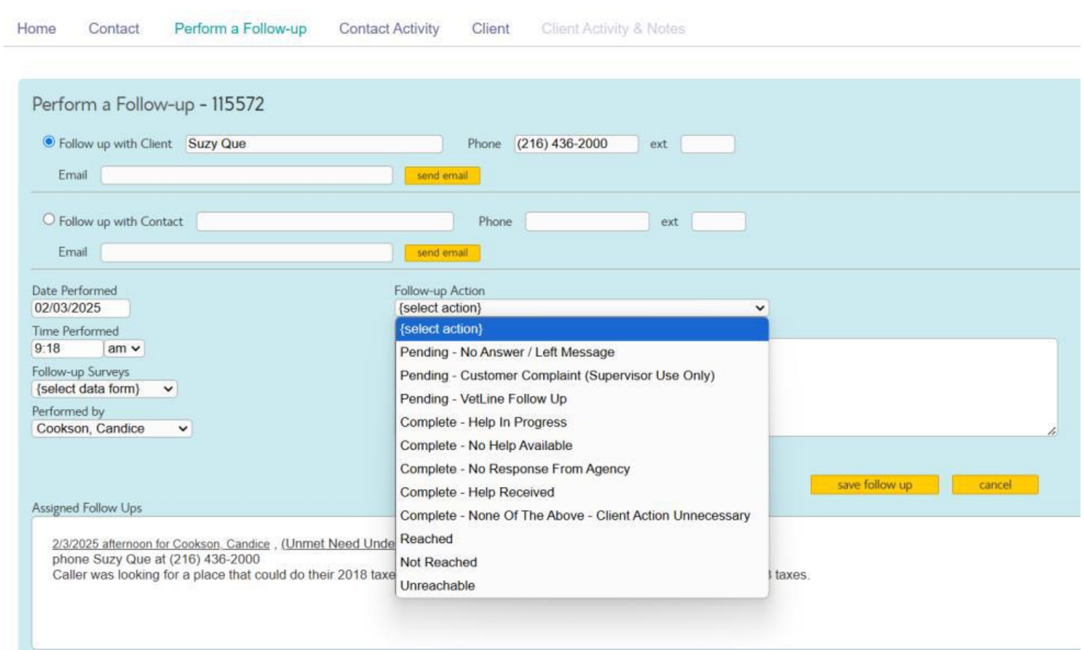
RECORDING FOLLOW-UP IN NAVIGATE

To perform Follow-Up in Navigate, you must be in Stand By mode.

- Click on the top menu tab labeled "Scheduled Follow Ups."
- Be sure to select the necessary filter options on the left of the screen to locate the desired Follow-Up transaction. Most notable filters to change are the date range, the access site and staff.
- Once the appropriate filters are selected, the right side will list the scheduled follow-ups that meet the filter criteria. Find the desired transaction listed on the right, click on the blue text with the date and the name of the Specialist to open the transaction.



- The client's information will be displayed. Use the telephone number listed to make an outbound call to the client using the telephony application.
- Choose the Follow-Up Action type that best fits
- to call the person back. Choosing the Pending option will require you to re-schedule the Follow-Up. "Complete" means that you do not need to call the person back.



- If you need to make more referrals, do so within this transaction. While performing a follow up, you can fluidly move through different tabs in the top menu. Do not start a new transaction.

- To end the transaction, be on the Contact tab, as usual, and click on End Contact.