

Guidelines for Inquiry Type / Call Level and Empowerment & Advocacy

Updated: April 2025

LEVEL 1

Use Level 1 when responding to a specific request for information where no assessment of need is conducted and clarifying questions are not asked. Very few calls should fall into this category.

Examples:

- I know that Salvation Army has a food pantry today, but what time do they start?
- What does 2-1-1 do?
- I'm a volunteer with the Red Cross and I just need their main number.
- What's the phone to my US Post Office?

LEVEL 2

Use Level 2 when responding to a request for assistance when an assessment (asking questions to help clarify or identify the need) is conducted. Most calls will fall into this category.

Examples:

- I need a food pantry this week.
- I need to schedule a tax appointment.
- I need help paying my rent.
- How do I apply for HEAP?

LEVEL 3

Use Level 3 when responding to a request for assistance when advocacy is conducted. Advocacy is defined as intervening on behalf of the individual by placing a call/conference to a third party on the inquirer's behalf to ensure the caller receives the needed services. Pre-existing arrangements with agencies (such as Bishop Cosgrove) where a call is placed to a third party as a standard course of action to facilitate an appointment are not considered advocacy calls. The advocacy policy for 2-1-1 is further defined on the following page.

Examples of when to record Level 3:

- Caller is transferred to a crisis hotline for assistance.
- The CRNS calls an agency because the caller has a physical or cognitive barrier that prevents him from (easily) contacting the provider directly.
- The CRNS calls to verify a phone number is working for a caller (do not do a transfer).

- The call is transferred to a supervisor for a supervisor to advocate on behalf of the person who needs the service.

Examples of Calls that are not Level 3:

- An internal transfer to other 2-1-1 skillsets (such Help2Vets and MedRefer).
- Bishop Cosgrove referrals

Empowerment & Advocacy

Empowerment and Advocacy are essential principles in ensuring that individuals are not only connected to the resources they need but are also supported in a way that fosters independence and self-sufficiency.

- **Empowerment** refers to providing individuals with the tools, information, and resources to take control of their own situation. It's about guiding people toward solutions that allow them to help themselves, whether it's through acquiring new skills, understanding their rights, or simply knowing where to turn for support.
- **Advocacy** is the process of actively supporting individuals who may face barriers in accessing services or need help navigating systems. This could mean helping someone who faces challenges in understanding or accessing resources or standing up for them when they encounter roadblocks. Advocacy ensures that people who need extra help are not left behind.

Together, empowerment and advocacy aim to strengthen individuals by making sure they have both the autonomy to make decisions for themselves and the support they need when navigating complex systems. Both are essential for promoting greater access to services and enhancing overall well-being.

ADVOCACY POLICY

Advocacy is defined as intervening on behalf of the individual by placing a call/conference to a third party on the inquirer's behalf to ensure the caller receives the needed services. Pre-existing arrangements with agencies (such as Bishop Cosgrove) where a call is placed to a third party as a standard course of action (such as to facilitate an appointment) are not considered advocacy calls.

Advocacy requires that you have their permission to call a third party on their behalf. By selecting Level 3 you have indicated the client has given their verbal permission. This can be verified further by listening to a recording of the call (recordings are stored for 10 days) - CRNS should only advocate without the assistance of a supervisor under the following circumstances:

- To assist a caller who has a physical or cognitive barrier that prevents him from (easily) contacting the provider directly;
- To verify a phone number is working (do not complete a transfer);
- To transfer/conference callers who are in crisis to the appropriate crisis hotline.

In cases where advocacy is necessary, the CRNS should be sure to also explore the caller's own resources and sources of support (family, friends, home health aide, case worker) and should refer the client to organizations designed to advocate on their behalf.

Assistance from a supervisor must be sought if you feel that a caller needs advocacy beyond the situations authorized above.

Examples of advocacy that require supervisor intervention are the following:

- The caller was denied service to which you believe they were entitled;
- There is a system-wide issue preventing multiple clients from accessing service;
- The caller has a complaint about a service when you cannot provide another avenue to direct the complaint.

CRNS are not authorized to call agencies to verify service hours or other resource information. A transmittal should be sent. Depending on the urgency, contact the Supervisor line so that details can be vetted and verified and shared with other team members timely. In some instances, submitting a transmittal may be required. For example, during inclement weather a caller states a food pantry alters their hours.

CRNS may find that many advocacy situations require follow-up calls. Please refer to the Follow-Up Policy for guidance as to when follow-up is suggested.

EMPOWERMENT POLICY

Empowerment is defined as the authority or power given to someone to do something. Within each call or chat handled, CRNS provide enough information to someone so they may take steps to follow through with resources on their own. This builds the client's confidence, strength, and ability to make their own decisions.

Appropriate demonstrations of empowering clients happen when resources found in the database require clients to access services via the internet or websites that present confusion or question; a CRNS may go to the noted website to provide some basic guidance on how to navigate the resource's website.

Inappropriate demonstrations of empowering clients happen when CRNS gather client's personal information to sign them up for services without the permission from a Supervisor or as noted in the Unpublished section in Navigate.

Providing a proper level of empowerment still warrants Level 2 for Inquiry Type.