

VIA LINK Resource Department
Policies and Procedures

Introduction

The primary purpose of the VIA LINK Database Project is to develop, manage, and maintain one consistent, comprehensive and accurate collection of social service resources providing assistance to residents of Southeast Louisiana. Segments of this database may be regularly published electronically or in print format for public access.

Included in our resource database are the following:

1. Non-profit agencies providing services to the residents of Southeast Louisiana.
2. Federal, State, Parish or Local governmental entities that may provide information or services to the community.
3. Organizations (such as churches or social clubs) which offer a service to the community at large—not just their own members.
4. Private companies which provide a community service either free or with a sliding scale of fees (see Eligibility Notes below).
5. Hospitals, health clinics, and personal and intermediate care homes.
6. Organizations outside of our geographic parameters which provide a service not available locally, but available to residents of Southeast Louisiana.
7. Professional organizations (especially those organizations in the social service field).
8. Advocacy groups.
9. Toll free lines, if they can be accessed by residents in our catchment area, and if they offer some sort of social or community service (e.g., FEMA teleregistration).

Eligibility

Included entities must:

1. be operating legally, with both facilities and staff that are licensed and credentialed to provide the services offered,
2. have been in operation under a set of written documents of governance (policies, procedures, etc.) for at least one year,
3. offer social services that are available to the general public of Southeast Louisiana and are not limited to members of specific groups or organizations,
4. be legally organized as a 501-c-3 organization, a government provider (federal, state or local), or a for-profit entity (LLC or Inc.) that offers a unique social service with a documented policy of offering that service at a significantly reduced fee for those who would otherwise be unable to afford that service. Supporting documentation must be provided to VIA LINK.

Eligibility Notes:

- The listed service must generally be affordable. Accessibility implies a sliding fee scale (negotiable to \$0) ensuring that services can be obtained by people who cannot afford private sector services.
- Organizations which provide services in health, welfare, support, recreation, education or advocacy and are not-for-profit corporations (with Internal Revenue Service 501(c)(3) status), or do not charge fees for service are welcome additions to VIA LINK's resource database.
- Government agencies (federal, state, parish, city) which provide services in the areas of health, welfare, recreation, or education may also be included. *No attempt will be made to list all governmental agencies or departments.*
- For-profit organizations are considered on an individual basis. Inclusion is based upon affordability, uniqueness of service, lack of comparable services available through not-for-profit agencies or groups, and the degree of need for the service.
- VIA LINK reserves the right to edit resource data to meet format, AIRS guidelines, and space requirements (see Appendix B).
- Agencies or organizations that have been in existence for a minimum of one year and are expected to continue operation may be considered for the VIA LINK resource database.
- Grounds for exclusion may include, but are not limited to: service non-delivery, fraud, misrepresentation, discrimination, violation of federal, state, or local laws or regulations, or criminal activities.
- VIA LINK reserves the right to refuse or discontinue listings for organizations that have had serious complaints lodged against them with any regulatory body or with VIA LINK staff.
- Entities that do not respond to requests from VIA LINK for annual verification or updates of profile data will be excluded from publicly accessible data products.
- *Inclusion of an agency or organization does not imply endorsement by VIA LINK*

Profile Additions

Entities eligible for inclusion must apply electronically or complete a paper application (Appendix A). Exceptions to the application process are government entities. An application is necessary to document profile information accurately and completely, to establish a foundation for assigning appropriate AIRS Taxonomy, and to encourage a culture of partnership which is one of the foundations of a successful database maintenance protocol.

Shortly, electronic application may be accomplished through a web interface. Instructions will be provided through the web site and written instructions may be requested by e-mail, post, or fax. Eligibility criteria are published on the web interface. New applications are assessed and added or rejected based on the eligibility criteria listed above. Requested changes to existing profiles are assessed and added or rejected based on suitability and consistency with overall database goals.

Application may also be made by completing a paper application form. These can be requested to be sent out by e-mail, post, or fax and completed forms can be returned by e-mail, post, or fax. New applications are assessed and added or rejected based on the eligibility criteria listed above. Requested changes to existing profiles are assessed and added or rejected based on suitability and consistency with overall database goals.

Incomplete applications are returned with a request for completion.

Maintenance

Maintenance involves securing regular official verification/changes of profile information from the profiled entity, systemic and profile-specific taxonomy changes, and purging of entity profiles that are no longer eligible, duplicate profiles, and other deletions. There shall be at least one "official update" for each profile on an annual basis with changes, deletions, and taxonomy change notes occurring during that verification.

Verifications for government entities are accomplished through their own web sites. Where web sites do not exist or are not themselves current within one year, direct phone calls are placed to the numbers listed in the entity profiles. Each data field is read to the entity contact person and asked for verification. Changes are made directly to the profile. Where service changes have occurred, taxonomy changes are made based on the most current taxonomy scheme. Entity changes affecting eligibility requirements may necessitate deletion of profiles.

For entities other than government profiles, methods for *annual* verification begin with fax technology. A request is faxed to the profiled entity using the fax number listed in the profile. Responses from the entity are entered directly into database profiles and any documentation provided by the entity is filed. Entities not responding to a faxed request for profile verification are then sent a request through the U.S. Postal Service to the address listed in the profile. Responses from the entity are entered directly into database profiles and any documentation provided by the entity is filed. *Those entities that do not respond to faxed or posted requests for verification may be inactivated from the publicly accessible segments of the directory. Non-*

responding entities ranked as low priority usage for both the call center and the UNITY HMIS project are deleted from the directory.

Maintenance regarding more immediate, unofficial changes is made via phone and communication between the call center and the database project staff.

Records Keeping

Pertinent statistical records are maintained electronically. Paper records are maintained for each organization. The complete record for each organization includes the original signed application document or printout of electronic signature, supporting documentation such as a photocopy of the 501-c-3 status letter for non-profit organizations or a photocopy of the reduced fee policy for for-profit organizations, and any post or fax correspondence.

Structure

The structure of the resource database is multi-level. An entity is structured as an Agency and an identical Site if no other entity has governance or responsibility over it. Multiple Site records are distinct programs, satellites, branches, etc. within or under the governance of an Agency. Multiple Site records under one Agency must have either a unique addresses, unique phone numbers, a distinct program director responsible for the overall functioning of that entity, and/or other significant “program-defining” characteristics. Offering multiple services is not sufficient distinction to qualify for multiple Site listings.

Taxonomy

VIA LINK uses the Alliance of Information and Referral Systems (AIRS) taxonomy to classify each profile. AIRS is the international professional society for groups involved in community information and referral, and therefore sets the standard for service-based categorization of organizations. One or more taxonomy classifications are assigned to each site in a systematic, standardized manner based on primary services offered, modality or facility type (where applicable), and target populations (where applicable).

The AIRS Taxonomy consists of a six-level, hierarchical categorization scheme. The general level of taxonomic detail required by the database project is defined in part by the needs of the VIA LINK Call Center and the UNITY HMIS Project. The call center includes a comprehensive information and referral program as well as more specialized help lines. The taxonomy scheme is designed to be flexible, meeting the changing needs of the call center as well as the UNITY HMIS project. The scheme is assessed on a monthly basis and adjusted to accommodate service trends.

A taxonomy usage map is maintained in IRis (our I&R software application). It includes the entire complement, numbering at almost 8,900 unique taxonomy codes/terms, and is arranged in hierarchical format. The maintenance of this map is of prime importance to the internal

consistency and integrity of the data. The goal is to assign codes/terms from only taxonomy level IV or VI although some branches in current use terminate at higher levels (e.g., 'general medical care' is a level II terminus). In the spreadsheet, each of the main taxonomy 'trees' occupies its own page with all branches of that tree represented in that sheet.

In addition, the AIRS taxonomy is in constant flux. New terms are added, codes are changed, and entries are deleted on a consistent basis as necessary. Since IRis can manually import these updates, our taxonomy is updated as regularly as AIRS releases updated versions and addenda. VIA LINK subscribes to the AIRS Taxonomy online and has access to the most up to date information on the taxonomy. The taxonomy usage map created and used in-house should always reflect the most current information as provided by AIRS.

All taxonomy indexing shall be performed by Resource Specialists strictly following AIRS Standards. Taxonomy indexing shall be reviewed via IRis report by the Resource Coordinator or Information Systems & Technology Director on an ongoing basis.

Data Standards & Styles

Data standards/styles are extensive and are included in Appendix B.

Relationships with other VIA LINK programs

The resource database is an essential piece of VIA LINK programming: both for UNITY HMIS and the Call Center. Cooperation and communication are essential between these programs and the resource database project.

UNITY ServicePoint HMIS houses the VIA LINK resource database in the ResourcePoint section of that software. The resource database project works with the HMIS program to enter, maintain, and update profiles of member agencies and programs that are using the HMIS. This communication is facilitated through the HMIS Coordinator and maintained by resource database staff. HMIS participant agencies and programs phone the resource database directly with changes to profiles. Changes to listings, additions of profiles, etc. that directly effect HMIS are discussed with the HMIS Coordinator to ensure smooth transitions and explore options.

The relationship between the resource database project and the call center is well-established through daily, regular communication between call center counselors and a designated liason (our 2-1-1 Field Specialist) and the resource database staff. Call center counselors use the IRis to locate services for callers based on identified needs. Call center counselors, through their work linking callers to resources, are an excellent avenue for quick updates or noticed changes in agency profiles. In addition, call center counselors have the requisite background in understanding distinctions between various social services and are properly equipped to talk with agencies about the primary services offered. Communicating this information to the resource database staff reduces duplication of efforts. The tools developed by the resource

database staff can also reduce frustration of call center staff in their efforts at finding resources.

Emergencies & Disaster

Please see the VIA LINK Emergency Operating Manual for further details.

APPENDIX A

Application for Programs

Please complete this form in its entirety, either typing or printing legibly. Do not forget to sign the application in the space provided. If you have any questions regarding completion of this form, you may call 504-896-2002 or email mjones@vialink.org.

1. Parent Agency Name: _____

2. Site Name: _____

2. 501c3 Number (for Faith-based and Community-based non-profits): _____

3. Parent Agency Type (check one):
 Non-Profit Faith-Based Non-Profit* For-Profit
 Federal Government State Government Parish/City Government

***Photocopy of parent provider's 501c3 letter must be on file.**

4. Person in Charge: _____ Position Title: _____

5. Physical Address of Organization (complete a separate page for each additional branch/satellite location):

Address: _____ Parish: _____

City: _____ State: _____ Zip Code: _____

Is physical address confidential? Yes No

Mailing Address of the Organization (if different than physical address or if physical address is confidential):

Address: _____ Parish: _____

City: _____ State: _____ Zip Code: _____

6. Telephone: _____ Fax: _____

You may list up to three additional phone lines with descriptions (example, "Helpline, 111-111-1111"):

(1) _____

(2) _____

(3) _____

7. Program Website: _____ Program Contact Email Address: _____

8. Regions / Areas Served (example, "Slidell and surrounding areas"): _____

Zip Codes Served: _____

Parish(es) Served: _____

Directional Landmarks (example, "across from Lee Circle"): _____

9. Regular Office Hours of Operation: Su Mo Tu We Th Fr Sa from _____ am or pm To _____ am or pm

10. **Eligibility** (example, 'homeless men', 'battered women and their children', 'HIV+ adults', 'visually impaired', etc):

11. Required **Documentation**: None Required Picture ID Social Security Card Proof of Residence Other

12. **Accessibility**: Designated Parking Indoor Wheelchair Access Outside Ramps Elevators No Access

13. **Intake Procedure**: Walk-In Telephone Appointment Only Referral Required: by whom?

14. **Fees**: No Fees/Charges Straight Fee (specify): _____
Sliding Fee Scale (specify eligibility and range): _____

15. **Description** of agency/program as you would like it to read in the profile (note: this description will be edited for consistency):

16. **Primary** services offered to the public: _____

16. Services are consistently provided in the following **languages**:

English Spanish Vietnamese American Sign Language Other (specify):

17. **Volunteer** Opportunities with your organization (list position titles): _____

The above described organization is operating legally, with both facilities and staff that are licensed and credentialed to provide the services offered. We offer services that are available to the general public of southeast Louisiana and are not limited to members of specific groups or organizations. This organization meets all federal, state, and local laws, requirements, and regulations including fire, health, and zoning codes. We will respond in a timely fashion to VIA LINK'S periodic requests for profile information updates to information supplied in this application. To the best of my knowledge, all of the preceding information is true and correct.

Signature: _____

Date: _____

Printed Name: _____

Title: _____

Fax Completed Application and Any Attachments To: **504-708-4024**