# Searching in CHC

### First, About Vinculo - What it is/does

• Short Intro to Vínculo

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#### The problems with existing search processes

- Massive taxonomies use complex categorization of related search words rather than just the concepts that social service workers need.
- Technologies used don't seem focused on making searching efficient.
- Search functions work as if designed by tech designers rather than by/for social services workers.
- Most don't allow users to save valuable searches duplicating them later can be frustrating.
- Phone-based helpers rarely seem experienced in social services, don't always understand what they are being asked to find.
- Finding resources is usually all that existing search systems are designed to accomplish.
  - No integration with making or following-up on referrals
  - No capacity to aid in systems-based problem solving whole-person/whole family needs
  - No capacity for expansion into nearby regions or community partnerships

#### Problem: User Oriented Search

- Getting the data
  - Primary source of data
  - Accuracy of data
  - Consistency of data
- Organizing the data
  - Taxonomy is not the only way to group data
  - AIRS is a very complex taxonomy training required
  - Want data that can be shared between systems
- Finding the data
  - Users are more familiar with internet search tools
  - Many different uses: coordinators, clients, research, policy, & more
  - Requirements Intuitive, fast, detail, authoritative searches may conflict
- Maintaining the data
  - Data maintenance is currently the highest cost in a system
  - Data governance and source authority is major concern

## Basic Concepts

### Basic Concepts Overview

- Successful outcome is a search that finds the particular path to services for a client
- The ideal data set is <u>all</u> services in <u>all</u> locations by <u>all</u> providers
- Providers are organizations with programs offering sercives
- Search goal is to narrow (filter) results so that the user is only presented results that are relevant
- There may be more than one way to get to a result
- Users with different needs use different search approach

### Basic Concepts - Client

- Client or patient has attributes that can be used to determine location and eligibility
- Limits the scope of a search
- CHC search uses the term "Population" to identify client groups
- CHC search can limit the results to those available in a location
- We do not identify the client attributes with personal information

### Basic Concepts - Service

- Services are what the client needs
- Either direct support or information about how to find support
- A result is one or more organizations that provide the desired service as part of a program
- When searching a user seeks a service is shown organization/program that offer that service then views the detail of each one
- The same service may be offered in more than one program in an organization
- High level service groups (housing, financal) help define services
- A service can be in more than one group

### Basic Concepts – Location (Geoscope)

- Some organization/programs only offer services in limited locations
- We use the geographic range where a program offers the service, not the actual location of delivery. (Note: this is different from other models)
  - Geoscope (geographic scope ) is our term for the range
- A user can specify a zipcode, city, county or state as the location of the client
- Zipcode searches return results within city, county, state and national
- We organize the results to give the most local results first but including more regional and national results.
- Many results are at the county level

### Basic Concepts - Groups

- Services and Populations (clients) are grouped in overlapping categories
- Groups are not exclusive. Any client or service can be in one or many
- The overlap allows more targeted searches
  - e.g. An abuse shelter is in groups: emergency, housing and victims
- Groups are the course grained search that is so important when learning the resources in an area (e.g. underserved communities)
- There are >30 groups defined at present

### Basic Concepts - Tags

- Tags help users find specialized services
- Each tag is searched from in a similar way to google or other search engines
- Tags are commonly used words/concept in social services, care coordination and community organizations.
- Sometimes tags are put together with an identifier show what kind of concept it represents.
  - Legal-immigration represents the specialty of immigration law to differentiate it from family law, or criminal law.

### Other Concepts - Organizations

- CHC presents whole organizations
- Organization has a homepage and a description
- Organizations provide services within a **geoscope**
- Each organization has 1 or more programs
- Each program has 0 or more sites

### Other Concepts - Programs

- A program is a group of services that go together within a organization
- Sometimes it is a formal program of the organization
- If the organization does not differentiate programs it can be:
  - One program that covers all services offered
  - Several groupings of services that can be described in a paragraph
- Programs may contain a list of services and/or sites
- Programs are individually identified in the search interface
- Each Program has zero or more "links" to webpages

### Other Concepts – Lists & Guides

- Lists and Guides are publications that some organizations maintain to identify services within a geographic, service or cultural community
- They can be used in place (or in addition) to searches of the organizations/programs that provide direct access to services
- Lists and guides may be pdf webpage or even Document files and are maintained by independent entities

### Other Concepts – Sites/Contacts

- Sites are the places that the programs or organizations can be contacted
- One or more Contact can be physical or virtual
- A site may serve several programs but only one organization
- A contact have one or more of the following:
  - Name
  - Address
  - Telephone
  - Email

## The CHC Way

#### A taste of the CHC way

- Understand the users and design it for them
  - The language used throughout is taken from social services providers
  - Functionality is straight-forward and and often evident.
  - Searches are alterable one element at a time.
  - Results are repeatable and savable for future need.
  - Clicks are minimal and paths to other pages and fields should be direct.
  - Screens are visually simple and "gentle" on the eyes and the mind.
  - Results should come quickly.
  - Searching is designed to offer ideas for more questions to ask the client, more needs to consider and services to offer.

#### What's different about searching with CHC?

- Simple and intuitive search mechanisms replace complex taxonomies
  - Seven types of search tools, 5 are completely new. Most operate independently but all work in concert.
  - Overlapping Services Groups help to focus results
  - Tag words allow social services helpers to search using top-of-the-mind terms
  - Geographic "scope" allow searches by the area type; zip code, city, county, statewide or national.
  - Population Groups further narrow searches to services particular to population groups
  - Communities' own resource guides are catalogued and get updated for use in back-up searches and until all community organizations are online and the data base is complete.
  - And much more.

#### Supporting the Social Determinants of Health

- CHC is designed to support Social Determinants of Health
  - CHC uses systems-based thinking about what a single life, or the life of a family, requires to remain healthy, stable and productive.
  - The Social Determinants recognizes that seemingly simple individual and family health issues often call for a parallel non-medical diagnosis and multiple non-medical supports.
  - Human health isn't just a physical concern. It exists in the context of fully integrated lives, which exists in the context of social systems; their demands, stresses AND their remedies!

#### CHC also Supports Systems Thinking

- Health is finally recognized as a global description of a person's functioning, as an individual and in the context of their history, family, circumstances and community.
  - Brain, eyes and teeth not just "neck-down"
  - Mental, emotional not just physical
  - Experiences of support and abuse
- Community is now recognized as a loose but effective support bank including financial, housing, dependency care, in-home services, legal protections and issue resolutions, basic needs, and much more.
- But finding and coordinating them can be hard.
- We envision networking information to build community-coordinated care.

#### CHC also Supports Systems Thinking (alt 2)

Social Determinants of Health is underlined by systems thinking which emphasizes the relationships between things over the things themselves. For example, we know financial, emotional and physical health are intertwined. For example, poor people are physically and emotionally sicker and housed people are healthier even if otherwise desperately poor. We even recognize that people with obviously poor dental health have much more difficulty finding employment. Remaining unemployed and poor, their dental issues worsen. And around, and around they go, endlessly shuffling chronically insufficient resources to manage a spiral of mutually re-enforcing vulnerabilities.

So, CHC is built to support basic relational analysis by allowing the user to easily see the full range of search criteria and fully define the client's stated needs on a single, integrated screen. From that point, the user can plot how those needs relate to each other, derive follow-up questions, recognize other issues and discuss potential solutions, a solid first step in helping the client build stability and resilience.

#### Searching in terms of Systems

Because all things in our lives are inter-related in one way or another, one can make big problems manageable by minimizing *seemingly* unrelated peripheral ones.

• Finding free or discounted services can provide as much extra money at the end of the month as a pay raise, or a better job. So, use free and reduced-price services like low-cost banking, utility assistance, home repairs and financial planning to make other needs affordable; needs like paying for health care and buying healthier foods, fixing the family car to make sure they can get to work, and even saving for further education and training.

Generally, to find everything in CHC to help a client, think beyond their presenting issues and more about who the client is and what their circumstances suggest about other potential destabilizers in their lives.

#### Who the client is. Systems are Relationships.

The easiest examples of service cross-over involve finances. But there are others.

- Seniors / Veterans / Disabled
- Medical / Dental / Vision / Behavioral
- Basic Needs / Clothing / Housing / Vision / Respite / Financial
- Respite / Senior / Disabled / Family / Mental Health / Behavioral /
- Family / Victim / Abuse / Emergency / Health / Medical / Counseling

#### Search Categories Make Relational Searches Possible

- Location
  - New! Searching for programs or agencies by their service area allows lots of new options. Zip, City, County, State, National
- Lists & Guides
  - New! An amazing back-up plan: The State's community resource lists & guides at your fingertips.
- Population Groups "Container"
  - New! "What's available for Native folks in our county? Get to the point quickly by using common client identifiers.
- Service Groups Container
  - New! The stuff our clients need a manageable list of categories that can be searched alone or in combination.
- Service Tags Container
  - NEW? Key words you can use to focus your search or "Hail Mary" it.
- Program
  - If you know the name of the program you want, just ask for it.
- Organization
  - If you know the name of the agency who has what you want, you can all up all their programs and services here.

Let's get into the details.

#### Where Relationships show up in CHC

- CHC uses Lists & Guides, Population Groups, Service Groups and Tags in two ways.
  - 1. To help the user find the resources they set out to find for the client.
  - 2. To stimulate thinking about other services that could help stabilize the client family and help illuminate new opportunities in the future.

#### Moving on to the search itself...

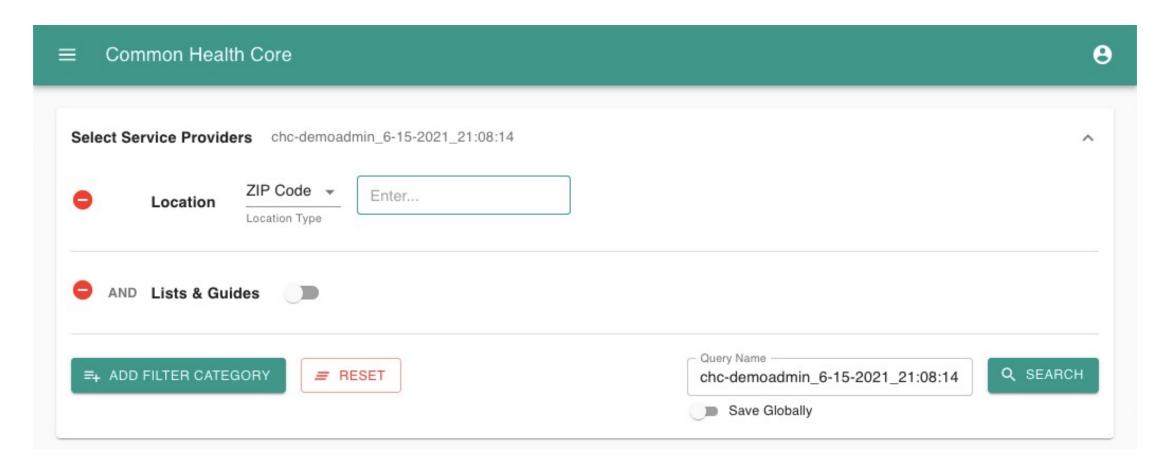
- 1. To help coordinate service delivery effectively between providers
- 2. Stimulate the conversation about the client's needs and progress
- 3. Ultimately, bring the needs events to a successful close

### Web Interface

#### The Search Screen

- The Search screen
- Layout and Functions
- Results
- Narrowing the search with And, Or and But Not

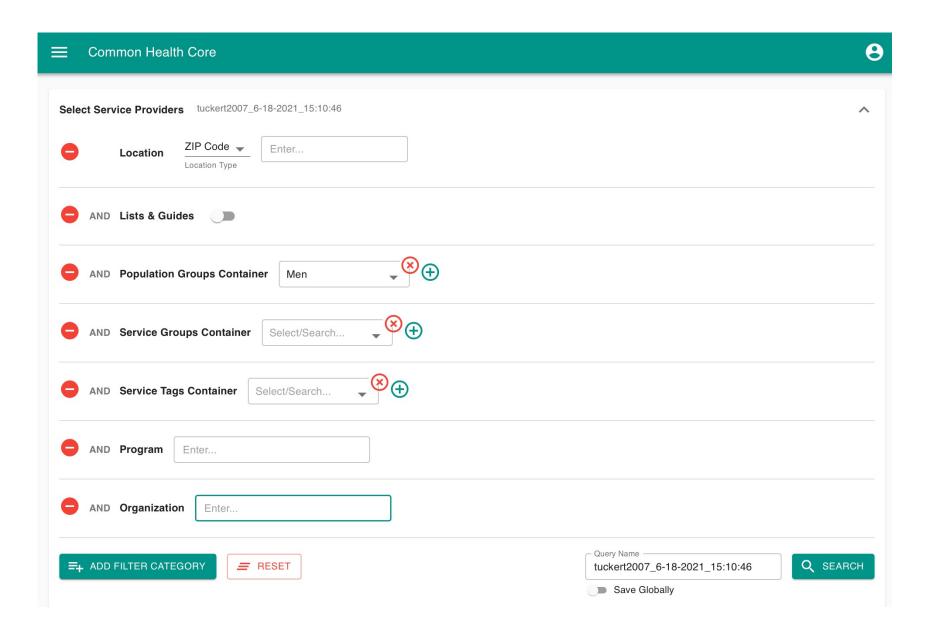
### The Search Screen Opens Looking Like This



This is the default page. It asks for a Location. Lists & Guides is not yet selected.

Fully open, the Search screen looks like this.

Let's take all this apart for a look.



#### Functions common to every search page

You don't have to look at all the search categories at once. To remove one from your search page, click on this \_ and it will disappear.

To get it back, or add a new search category, click on... and choose from the options that appear.

To start a new search? Click = RESET and begin again.

Pretty simple.

#### Search Results – the order they appear

- Explaining that every list of search results is ordered search that city or ZIP
   Code, which ever is smaller, are at the top of the list and resources at the federal or a nationwide level or the bottom
- The benefit of this is that you may not find the resources you're looking for locally but there may be a county level resource office for what you want, or a state office. Maybe what you want can only be found by contacting the head office in the other Washington. They can all be found on your results list. Just scroll down a bit.

#### Another way to narrow your search fast

Scenario: Let's say you get a new client who is a veteran. His career was successful, but PTSD has tipped his world over and he's now homeless and has an addiction. He wants off the streets but says he isn't ready to begin therapy. So, you want to find all services for homeless persons and everything for addiction/recovery. And you want to find the veterans service office. But there is no reason to create an unnecessarily long results list if the client isn't willing to consider counseling. (Besides, everywhere he goes he will be encouraged to begin counseling. You don't need to be the one to press the issue.)

What does that search look like in CHC? It's simple.

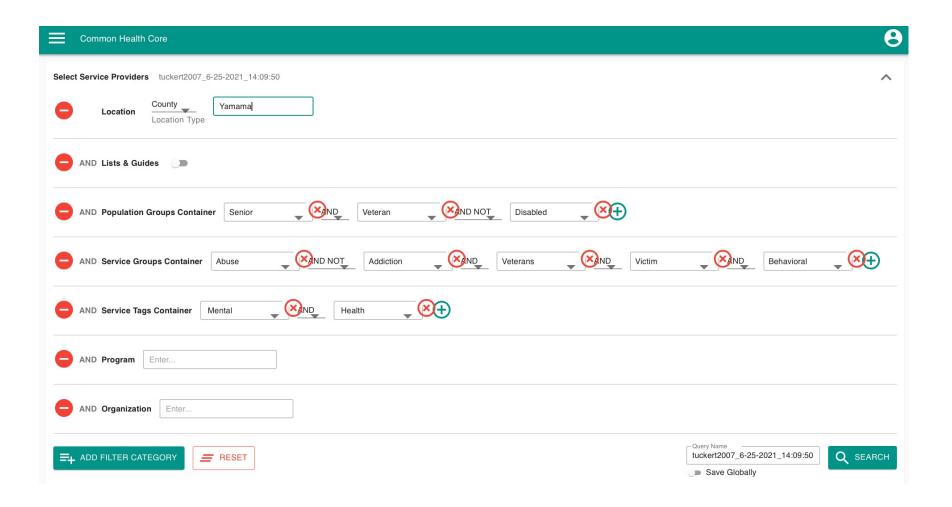
Homeless AND Addiction OR Veteran BUTNOT Behavioral

Now lets see how that works.

#### Relational Service Groups

- Inter-relational Service Groups in relation with other groups
- Intra-relational Service Groups in relation with each other.
  - Overlapping (And) vs
  - Additional (Or) vs.
  - Exclusive relations (And Not or But Not)

#### Search Using Multiple Services and Population Groups



Now, let's talk about how the search terms within containers interact with each other.

# Exploring "And"

#### Multiple agency results

- Choose Housing, (30 Results) CHC will present topics like shelters, senior housing, supportive housing, transitional, permanent, emergency, winter and safe housing. <u>Types of housing</u>.
- Choose Education (29 Results) and you get topics like troubled youth, vocational, parenting, business, life skills, homeowners/buyers, financial education.
- Choose Housing AND Education. What do you get?

# "And." The Venn Intersection of Categories

<u>10</u> results.

Housing

Everything an unhoused person needs to learn about being a housed person, and where to go to learn it.

Saving for, Financing, Building, Buying,
Maintaining, Keeping, Caring for
and Fighting for
your house

Education

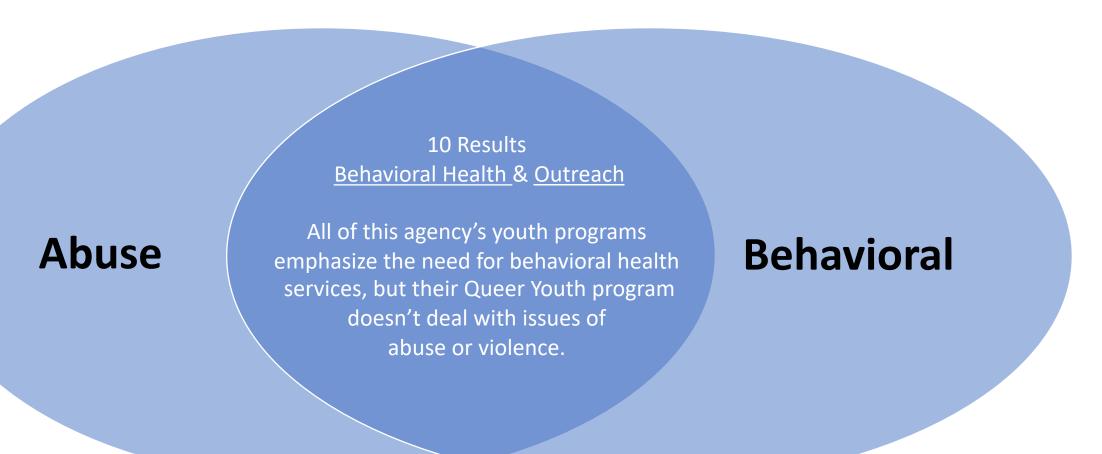
### Analysis of single agency results –

#### Northwest Youth Support Services

"And" Example 2

- Choose Abuse, NWYS has 2 programs: <u>Homeless</u>
   <u>Youth</u>, <u>Behavioral Health</u> & <u>Outreach</u>.
- Choose Behavioral, NWYS shows 4 programs:
   <u>Behavioral Health</u>, <u>Outreach</u>, and the <u>Queer Youth</u>
   <u>Project (QYP)</u>
- Choose Both Abuse & Behavioral gives you 3
   programs: <u>Homeless Youth</u>, <u>Behavioral Health</u>, and
   <u>Outreach</u> again!

# "And." The Venn intersection of categories

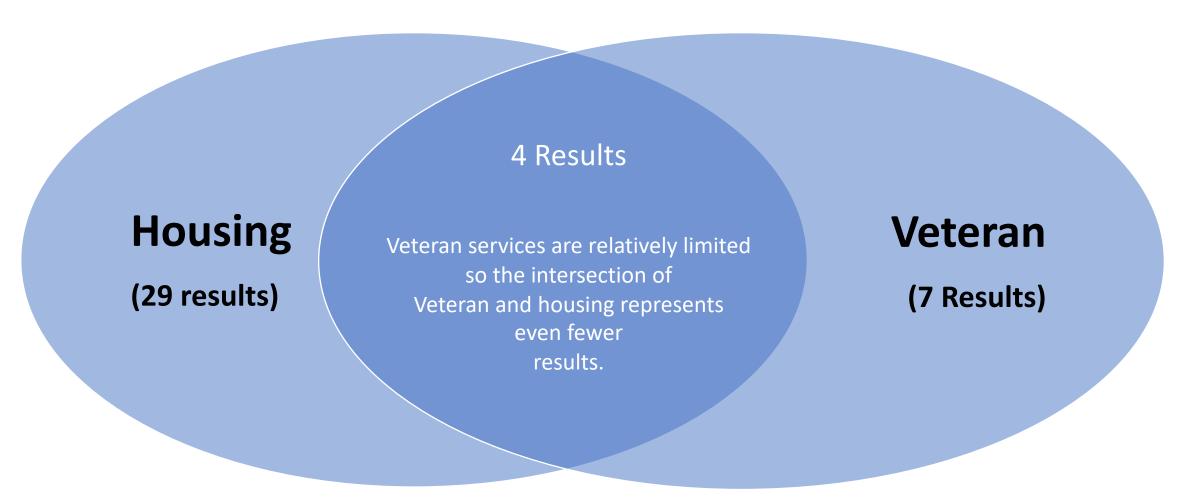


# "And" Example 3

#### Multiple agency program results –

- Choose Housing, 29 programs because there are housing programs, housing support programs, housing finance programs, veteran housing programs, youth housing programs, home ownership education programs and more.
- Choosing Veteran gives 7 programs: veteran housing, local veteran benefits specialists, veteran service centers, independent living for disabled persons (including veterans), veteran transport and veteran therapy animals.
- Choose Housing and Veteran and you get 4 programs because veteran housing is a very particular things;

# "And." The Venn intersection of categories



### What Your Search Will Show You

- Organizational Description
- Up to 4 Links from the Agency's web site
  - Home page obvious.
  - Program page the we page with information about the program you searched for. It may have several or all the agency's programs. But yours will be among them.
  - Quick Links Use this button in two situations.
    - When the page with the program information you are looking for also provides contact information for that program or the agency as a whole.
    - Sometimes the website will provide summarizes their programs on one page and the
      details of each program on separate pages. In that case the Program button will take you
      to the summaries page and the Quick Links button will take you right to the page with
      details of the program you want.
  - Contact page contact information for the agency, sometimes all the offices and their locations and, periodically, a map of office locations.

# "Or"

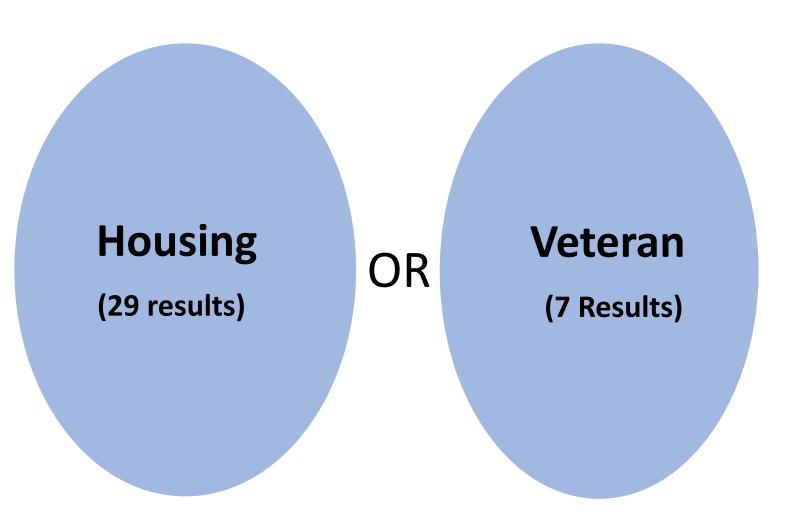
We just learned that "And" gets you programs for clients who are in multiple need categories. In the last example, the overlap of Veteran programs "And" Housing programs = veterans housing programs. A subset of both.

"Or" will get you all Veteran's programs and all Housing programs in the same list – which is a much *larger* number than either.

#### One more time:

"And" shows only veterans programs - for vets who are homeless - while "Or" will show you all homeless programs and all veterans programs.

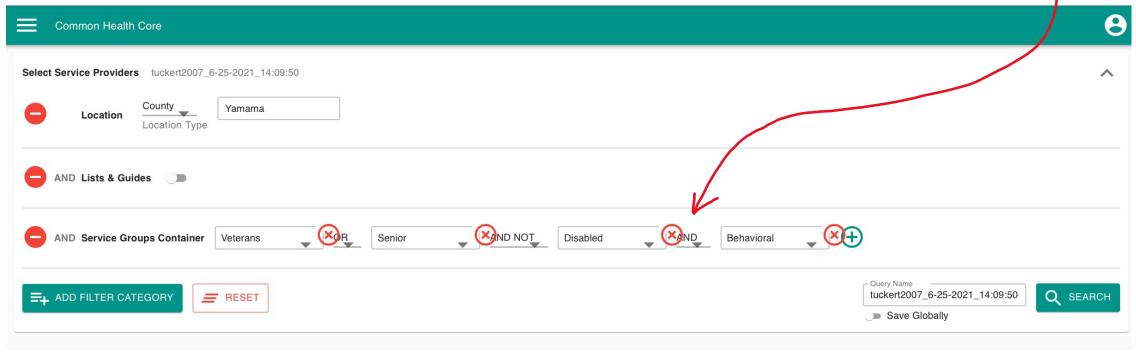
# "Or." The Sum of Categories



When shown together as a single list = 36 Results

# The "And Not" Option

"And Not" removes subsets of program categories which focusses the search population
This "And Not" that. More accurately, this but not that



A new client moves into the area. He's a vet so you want to look at programs for veterans. But he's also older so you could use "And" and peruse programs for elders who are vets. Or (alternately), you can use the "OR" function and review all veteran programs and all senior programs since they are often just as useful for older vets as for older civilians. BUT the client isn't Disabled and he doesn't have Behavioral Health issues. So let's rule those out of the search.

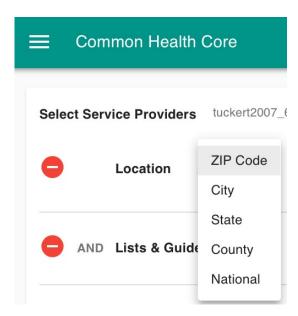
# Search Process

# Let's get down to specifics

- Search Criteria Part 1
  - Location
  - Lists & Guides
  - Population Groups

# Location – The Scope of Geography

- Multiple geographic levels make searches complete AND manageable
  - Zip Code A common way to search in existing online resource guides
  - City For agencies and offices with service areas defined their city limits
  - <u>County Our default</u> setting for agencies that don't define their service boundaries but clearly operate within their home county.
  - Statewide Agencies, services and programs that are available to WA residents regardless of the address of the home or field offices, if any. Some resources only exist online.
  - National agencies, services and programs that are available to folks throughout the US, which may include non-residents, residents and/or citizens. Again, some resources only exist online.



## **Using Location**

- Each Organization has a geographic scope, or range, within which they provide services.
- Before searching, choose the scope in which you want to search by choosing first the Location
   Type (City or County, etc.) then the Location Name (Dear Park or SPOKANE, etc.)
- Results will be displayed from the smallest scope (a small city or town) to the largest (nation-wide service availability).
- CHC allows you to choose all the elements for a complex search, then go back and change any one of them and Search again. CHC won't "reset" the entire page. This capability is much more efficient for expanding the radius of your search when you don't find what you need locally. You can search in your town first, for example, then simply change the Location Name to the next town over. Nothing yet? Then, easily search the whole county by changing the Location Type to County and the Location Name and hit Search. You're welcome.

# Location – Default to "County"

When asked where we live, we don't generally respond with a zip code. We live in a city and town, or just outside of one. Some of us live "in the county." Zip codes are bigger than some towns and many of them are needed to cover most cities. They cross all city and county lines unpredictably and divide both into irrational shards. With the exceptions of Seattle and Tacoma, community resources most often make their services available county-wide. For those reasons we felt that the most efficient way to structure searches for you is to use County as the default Location Type.

Resource offices that specify a town or city as their service area will be listed as such and will be found by specifying "City." Location City Cle Elem The same is true for Statewide and National organizations. By far, however, most resource organizations are shown as County-wide agencies. Agencies that don't specify are defaulted to County.

### About "Lists & Guides"

We all use resource lists and guides. Mostly we take what we think we need from them, update our Rolodex or contacts list when the newest edition comes available and then shelve them, or even toss 'em completely. Some of us make our own resource lists from the golden bits of various published ones, or from what we glean at community meetings or stumble across during our work with colleagues or other avenues into the grapevine. We readily hand out "mobile" versions and our clients lose them with reliable immediacy. We know the guides that we know but we don't look for the ones that we don't. And we rarely read the ones from communities down the road. We have interacted with resource guides so cavalierly, for so long, that we haven't imagined their greater value.

Resource lists and guides are our communities' road map to their own sources of help and support for the struggling folks who reside therein. They list agencies and offices that are so small that they have no website. When our clients face difficult and complex new struggles, the regions' resource guides remain reliable catalogs of potential solutions.

### About "Lists & Guides" - continued

Though clients often live in places where solutions are not at hand, nearby areas may harbor available alternatives in their own guides. While your own regional resource guide may not get updated again for a year (or two), a smaller and more manageable local guide may get an update or two next week. And, honestly, do we really know everything that is available from state-wide or national offices, offices that have no presence in local towns and cities? Honestly, the answer is, no.

Now you have access to all that information and more because CHC has many of the resource guides from across Washington State and will soon ("soon") have them all.

To find them, simply choose the Location Type and Name in which you need new resources, toggle the List & Guides button to the on position (it will turn green) and hit Search.

Whether because you are out of ideas or you just want more, Lists & Guides is an amazing research tool...one that takes no shelf space and collects no dust.

## Lists & Guides - Summary

- Provides access to communities' own resource guides
- "Lists & Guides" a toggle switch:





- Find small, valuable providers that have no web presence
- Quickly scan what is available in other cities or counties
- Help with problem-solving when new ideas are needed
- Search for resources that might not yet be detailed in CHC
- Get a sense of the characteristics of unfamiliar cities and counties nearby

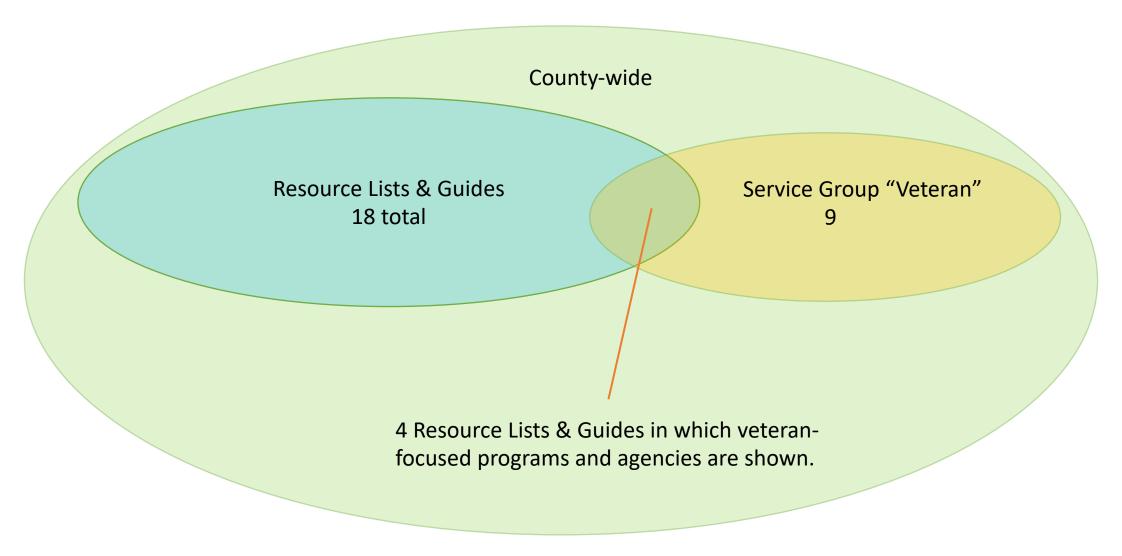
## What Toggling L&G Gets You

- The toggle switch is set in the off position by default, but resource guides still show up in other searches. So, what does toggling it on do?
- If you then specify nothing else besides a chosen location,\* toggling L&G on will give you a list of all the resource lists and guides in your chosen search area. \* \*
- If you then add the Services search criterion Veteran, the total list of L&Gs will be filtered to only those resource guides that include veteran agencies or programs. In an actual example, one county has...
  - 18 total resource guides
  - Nine programs or agencies that focus on veterans
  - Four resource guides that list veteran-focused agencies or programs.

<sup>\*</sup>No matter what your search entails, you will always be required to choose a Location Type and Name.

<sup>\* \*</sup> In a later version of CHC, when you choose the area that you wish to search and turn on L&G, you will see all the L&Gs in that search area that are in the system, at <a href="everylevel">everylevel</a>. But, within that list, you will be taken to the Location level you chose. City guides will be at the top and the National-level guides at the bottom. The list may be long but changing the Location level in your search criteria will move you to a new place in that list. (is all this correct?)

### Lists & Guides – A visual



# Population Groups

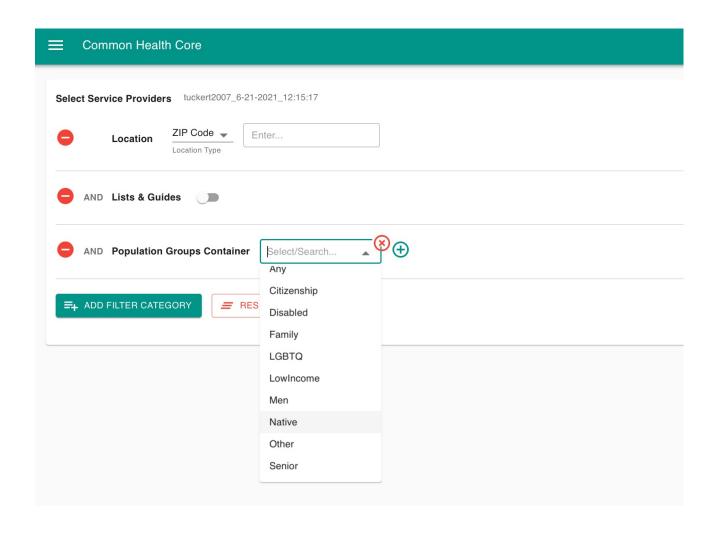
- We mentioned previously that you can sometimes find what you are looking for more quickly by using Population Groups. "What's available for Native folks in our county? Get to the point quickly by using common client identifiers in Population Groups."
- With that Population Group and a Location, program options will appear in the results, depending on the Location you chose.

# Using Multiple Population Groups

- You can also choose multiple Population Groups and connect them with the And/Or/And Not options to help zero-in on needed benefits and services.
- Then add a Service Group to the mix and watch your options grow, change or become more focused.
- The And/Or/And Not options are critical. Remember that "And" and And Not act as two types of filters while "Or" adds together the results of two or more Groups.

# Population Groups Container

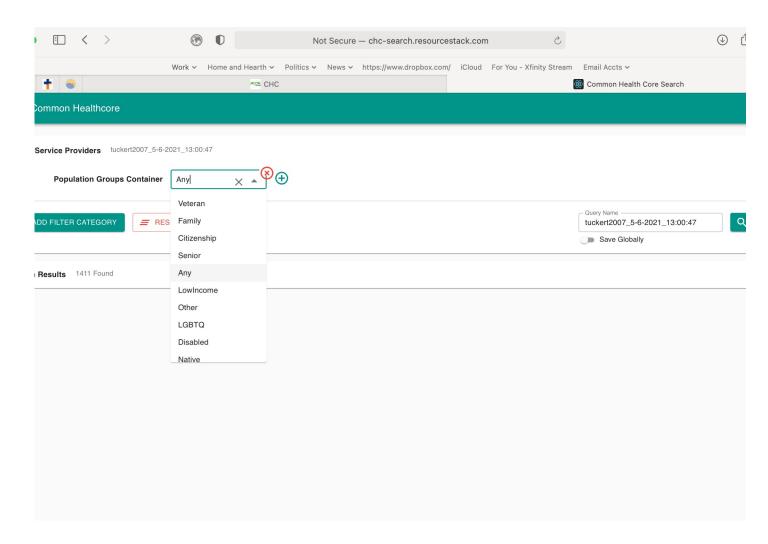
Population Groups contains a small selection of broad client characteristics that act as categories under which certain benefits and/or support services fall. Choose "Senior" to get programs for seniors, and so on. Yes, there are others. Youth & Teens will be added soon.



# Population Groups - Any

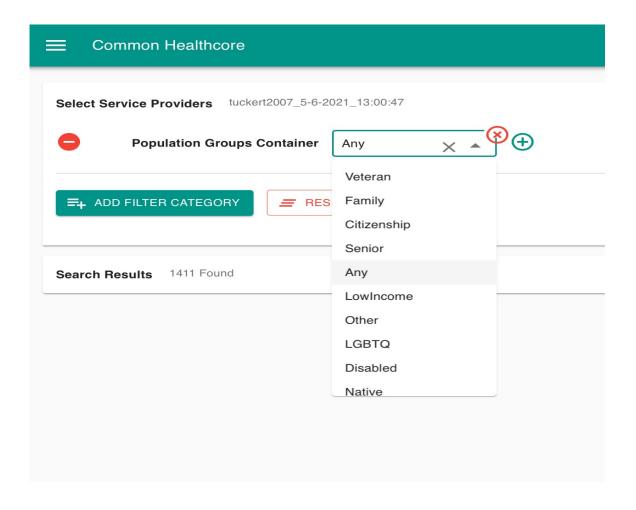
Most of the other options are very specific. Any is not. It means that the provider's program description did not specify who the programs is designed to serve.

and another of the groups wouldn't make sense. But searching using Any doesn't always narrow things down much, either, since so many programs are generally available.



# Population Groups – Any (cont.)

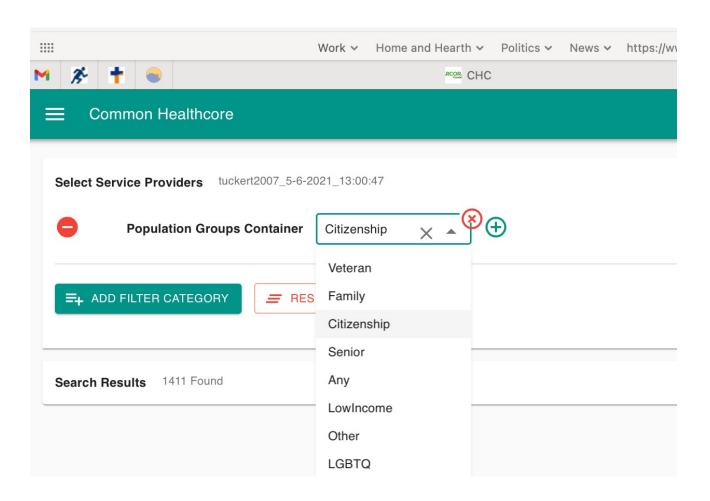
In contrast, the paths to achieving common human goals like health and financial stability and, simply, living peacefully can manifest differently in the lives of the folks in the other groups. Those other Population Groups are designed to facilitate the search for population-specific assistance.



# Population Groups - Citizenship

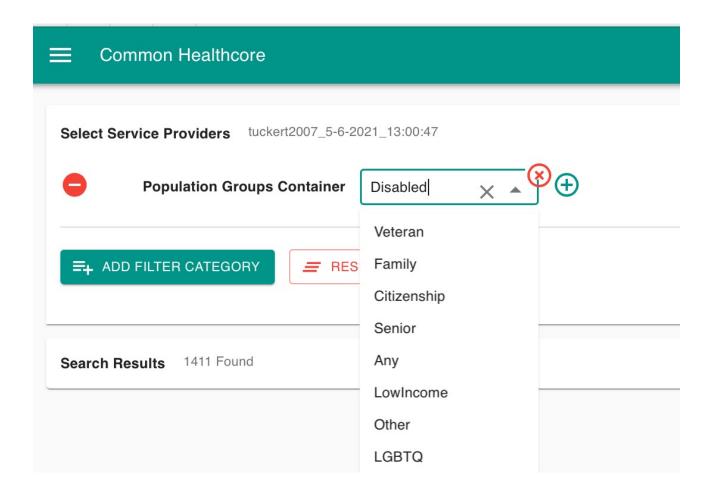
Use the Citizenship group to find services for any person for whom citizenship or, more generally, residency status, presents barriers to common goals, or dangers.

Programs and agencies that provide aid in such cases will appear in the results.



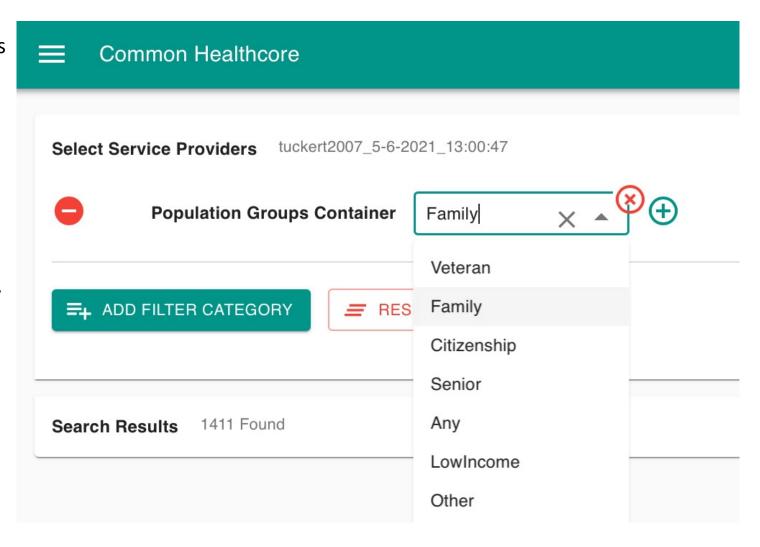
# Population Groups - Disabled

Disabled folks are, of course, of every age. So, services for "abled" children, adults and seniors may also be applicable. Also, Seniors and disabled folks are both frequently Medicare eligible. The point? An area lacking certain services for one of these groups may nonetheless provide applicable services for the other.



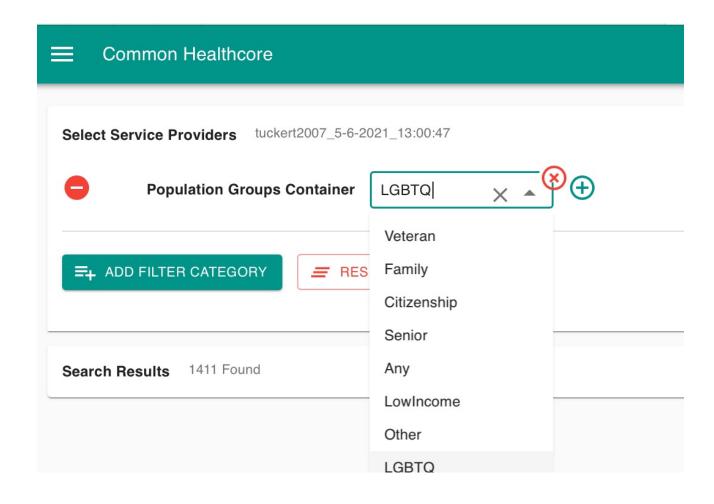
# Population Groups - Family

Use this Population Group to find programs and services designed to support families, adults or children or both and help mitigate the issues faced by one or more persons in the context of that family, Family programs and services help family members cope when issues threaten the stability and well-being of the entire family and help families coordinate their support when the family situation weighs heavily on a single member. Family may cover a broad collection of benefits that are difficult to generalize. But they are easy to recognize when you see one.



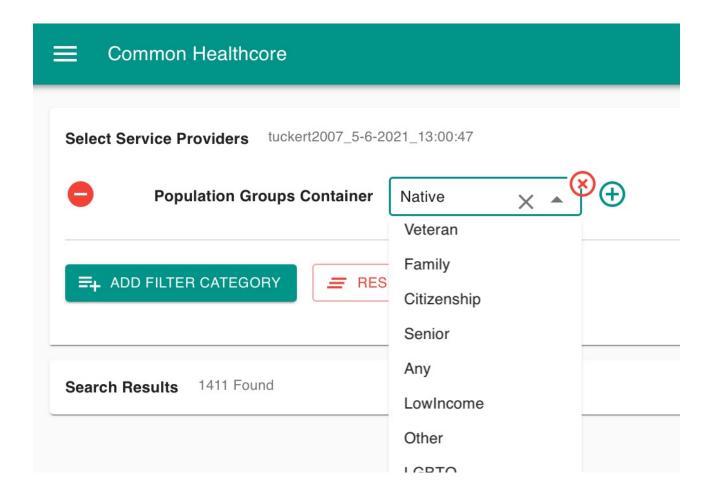
# Population Groups – LGBTQ(IA2+)

Use this to find services for any person for whom sexual and/or gender identity present needs, barriers, dangers or other complicators.



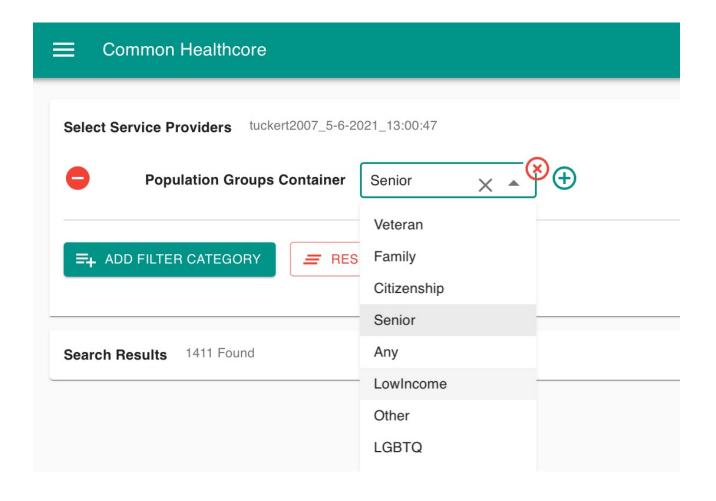
# Population Groups - Native

The specifics of who is native and who isn't is something we don't need to tackle. The client's word on the matter is what goes. If a client says they have enough native blood to influence the benefits they can receive, then use this group term, along with others that may potentially broaden the client's options.



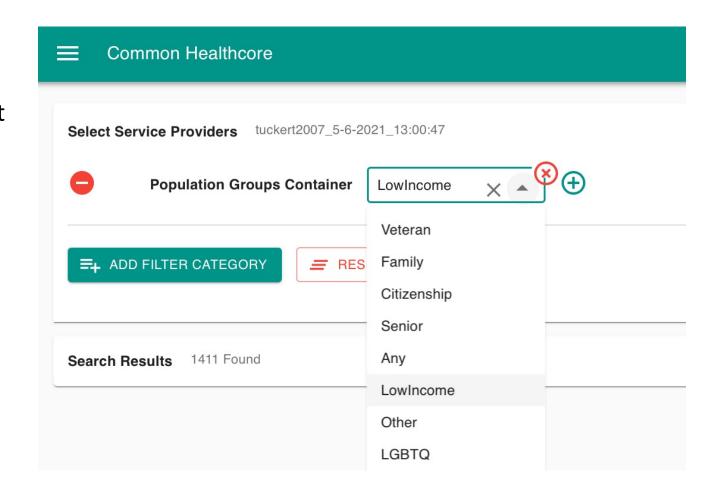
# Population Groups - Senior

If the client you are searching for is over age 65, choose this Population Group. Also, know that some services that are available for seniors, such as Medicare, are also available for formally disabled persons.



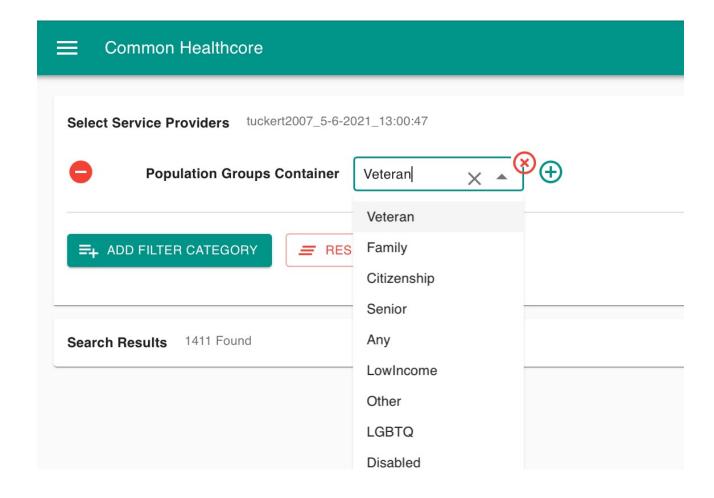
# Population Groups – Very Low income

Low-Income is a characteristic of most of the clients we work to serve. In our context, it's not a helpful descriptor. Very Low-Income, on the other hand, refers to homeless, near homeless and "hardest to serve" folks.



# Population Groups - Veteran

Veterans' benefits is a huge collection of services, access to which is provided through federal, state, and very local offices. Benefits are not always provided to veterans equally. If a client says he or she is a veteran, it can be wise to use the Population Group and leave the distinctions to the benefits specialists.



# Population Groups - Men

# Population Groups - Women

# Examples of "And/Or/And Not" in Population Groups

- Seniors <u>And</u> Veterans (Seniors who are Veterans) <u>And [who are] Not Disabled = healthy old vets makes sense as a search.</u>
- LGBTQ <u>And</u> Teen/Youth <u>And</u> Very Low-Income makes sense. Programs for homeless queer kids living on the streets would be on the list. There are such programs!
- LGBTQ <u>And</u> Teen/Youth <u>And Not</u> Very Low-Income might also make sense if there are programs for gay kids in schools, for example. And there are!
- Most Population Group intersections make sense. Even "Any" And Not "Other" makes sense in the nationalist/racist context. Applicable programs can't be found in CHC.

- Search Criteria Part 2
  - Service Groups Container
  - Service Tags Container
  - Program
  - Organization

#### Search Criteria Part 2

- Service Groups Container
  - Returns all entry that match <u>each and every</u> selection
  - Choose two services for the center of the Venn overlap Ex: home finance
- Service Tags
  - Tags are words to describe what a client is, wants, is threatened by or etc.
  - They are also used as descriptors of programs and services. In this use, they are chosen because they are
    - used by the agencies in their program description,
    - are reasonable choices to describe the program you are looking for or
    - are commonly used in the social services world to describe the program you are looking for.
  - Tags are words that you won't find in service or population groups but are useful to help find what you want for the client.

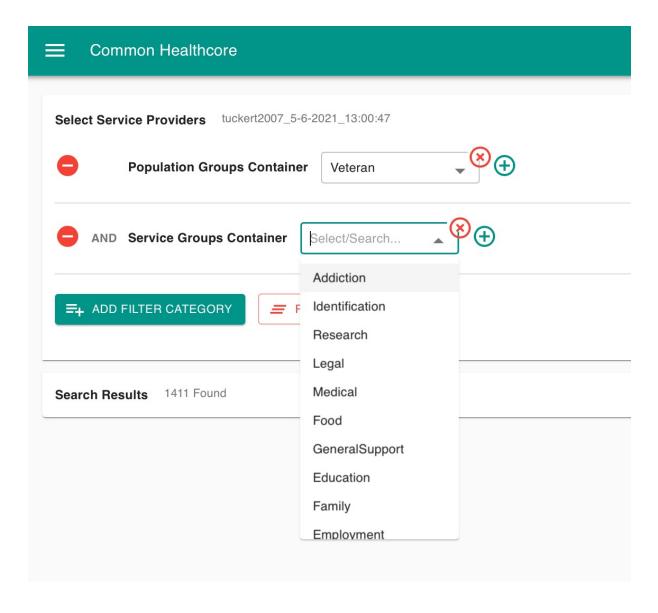
### Service Tags, Another Simple and Intuitive Tool

- Tags are single-word descriptions of some element of the services
  you're after or the client or the client's circumstances. The Tag,
  "Free," may describe the type of Medical service you need for your
  client. And the Tag, "Homeless," may be the situation you are trying
  to remedy.
- Type in three or more letters of each in the Tags box. The Dropdown will show you options we have provided. To use other tags, use your experience and your imagination.
- More on this later.

### Service Groups Container

- Addiction
- Identification
- Research
- Legal
- Medical
- Food
- General Support
- Education
- Family
- Employment
- Covid-19
- Abuse
- Resources Victim

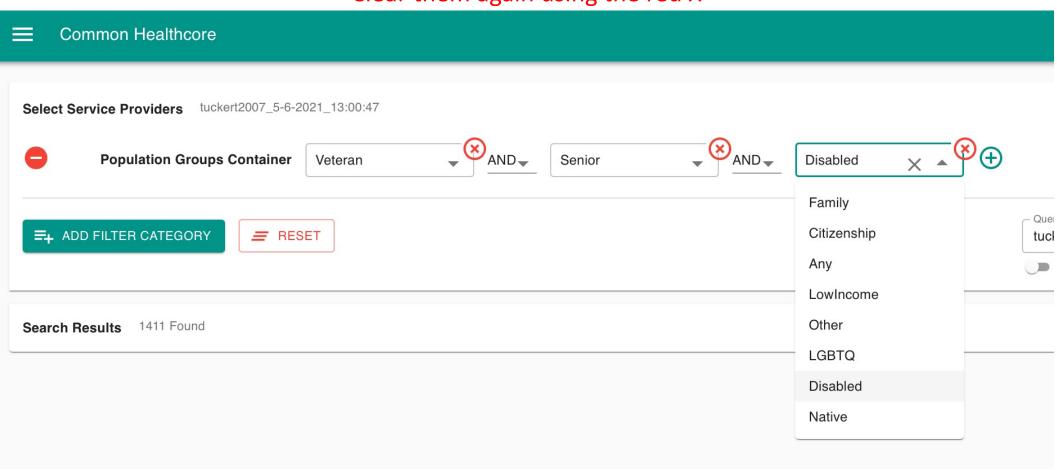
- Basic Needs
- Disabled
- Financial
- Clothing
- Vision Respite
- Independent Living
- Case Management
- Senior
- Emergency
- Day Care
- Transportation
- Behavioral



# Service Groups Container

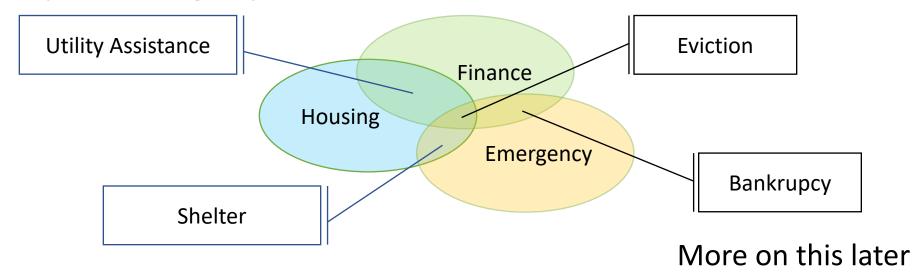
Search using multiple Service Groups by using the green crosshair button.

Clear them again using the red X



# Simple, intuitive mechanisms Location and Service Groups

- Location identifies the client's Zip, City, County, State, National
  - Returns results at all levels, from City/town to National.
- Service Group dropdown (31)
  - Using multiple service groups further focuses results.



# Services Groups terms can be applied to characterize:

- The client
- Something the client needs,
- Something to support the need,
- Something to be paid for, or
- Something that the client needs to learn about.

- Whatever it is
  - I am it
  - I need it
  - I need something that supports it
  - I need to pay for it
  - I need to learn about it
- Housing an example
  - Find a house or apartment,
  - Find money for a house,
  - Learn about upgrading a house, But also...
  - Everything about Home<u>less</u>ness
- Disabled another example
  - The client is disabled
  - Apply for disability
  - Problem-solve disability benefits loss or hang-ups
  - Find accommodations for a disability
  - Research a disability and agencies that support it

# Service Groups - Important details.

- Like Population Groups Container, once open, you can click on the green cross to open another, and another.
- Between each Service Group Container text box you have another option: "And," "Or," & "And not."
- Example: Social & Security
  - Use Social "And" Security to find services about Social Security
  - Use Social "Or" Security to find social programs and security systems but definitely NOT anything about Social Security.
  - Use Social "And not" Security if you want social programs but particularly not anything about Social Security or anything having to do with security systems, which would naturally show up, otherwise.

# Definition of Groups

# Abuse. It's a matter of who or what one is abusing

**Abuse** - Can refer to substance abuse as well as the physical, psychological or other forms of abuse of another person. Use abuse when you look for addiction services and you might get something more.

**Addiction** - Can mean services to help people with addictions or support those who have been dry for a while. Families with an addicted member can find support searching for this service type. Use Addiction when you look for abuse services and you might get something more.

### Basic Needs – a practical definition

Basic Needs is a category of things and is defined variously. There is a generally accepted collection of Basic Needs that includes Food, Clothing and Shelter. But there are numerous categories of help that seem very basic but are not always considered to be such, like utilities cost assistance, child-care and dental care. The broad acceptance in the social services world of the Social Determinants of Health creates a new conversation about what is and what isn't a basic need. But for the purposes of working within the social services standards, Basic Needs will remain vaguely defined and very, very basic, indeed. Food, some articles of clothing, shelter and minimal housing and a couple others, on occasion.

### **Behavioral**

In casual Social Services language, Behavioral Health is generally interchangeable with Mental Health. Actually, Behavioral Health has subsumed Emotional & Mental Health and Substance Abuse along with the latter's spectrum of treatment and recovery, and for our purposes, "Behavioral" encompasses all those things. But it gets slippery because behavioral "guidance" is available for children or adults who need "tools" or "strategies" to help them operate effectively in society and, in some cases, learn to have appropriate relationships. These behavioral issues might be thought of as regarding basic learning rather than emotional or psychological repair. And CHC accommodates this broader consideration of what drives behavior.

### Case Management

Case management is about clients with multiple needs. It is a set services some agencies specifically mention and offer. Generally, it seem to mean that they can help their clients navigate medical and social services benefits systems by showing them where to go, who to talk to, or by teaching them how to use certain tools.

When you put it all together you have a client more prepared to take on their life in a larger sense. And that is really the point. Case management is about helping to ensure that a person or family succeeds in a larger sense, such as building a new life on the basis of sobriety, developing a life of self-sufficiency and independence despite developmental disabilities, or moving from generational poverty to a generalized stability.

# Clothing

This is pretty-straight forward. But the categories are fairly specific.

- Regular clothing commonly for kids in very low-income families but also for struggling or homeless adults.
- Winter clothing often a matter of survival, one can find coats and heavy socks (though, rarely wool, which is baffling to me)
- Work clothes may mean clothes for laborers but also business clothing, often for women returning to the workplace after difficult years.
- Interview clothes Often for men as well as women.

Most of what is available is free.

# Day Care

Daycare refers to childcare. The term *day center* is used by agencies that provide a safe environment during the day for seniors who may, or may not, need oversight as much as a child would. But *daycare* is maybe a bit diminutive in the context of senior care, so they call them day centers.

Regarding children, next-day or immediateneed day care is available for parents who are saddled with a can't-miss

available for parents who are saddled with a can't-miss appointment on short notice; an appointment at which the presence of a small child is would be inappropriate or unwelcome. A job interview, for example. There are only few agencies that can help find day care on very sort notice. Many others can help steer a parent to regular, long-term daycare. In CHC, Daycare may also refer to a service or benefit that makes daycare services affordable.

#### **Dental**

Also pretty straight forward. Specifically?

- Denturists
- Mobile dental, vans and busses
- Reduced cost dental programs and coverage
- Dental for special needs persons, mostly kids.
- Low-income and free community dental clinics

#### Disabled

The list of stuff provided for folks with disabilities is impressive. But many services available to disabled folks are also available to seniors, and vice versa. Utility cost assistance programs, for example.

The same is true for Medicare recipients because Medicare is specifically for seniors over age 65 and disabled folks.

It's important to remember, however, that disability determination can be different in the eyes of the federal government (Social Security) and the state and the military services and the Veteran's Administration and corporate America and your own family physician and, of course, your mom.

# Education

Generally, our clients aren't looking for high schools and colleges, but rather GED certification and ESL classes. We also use Education to cover things like "Worker Retraining," "Vocational Assistance," "Skill Building," "Maintaining Stable Housing and Increasing Self-Sufficiency," "guiding and instructing Refugees and Immigrants," and "Supporting Seniors."

Seniors may need to learn about Medicare or online security while Refugees and immigrants may be learning about safety and how to respond to ICE. Adults in families may be learning about finances, small business creation or parenting. Developmentally disabled people might be learning valuable workplace and relationship skills.

In CHC, education is a good Service Group to deploy if you think a client needs to learn about something rather than just get something.

# Emergency

Remember when I said that needs can be regular needs or basic needs depending on the client. When the client is very Low-Income, struggling with not enough of anything - clothes, food, a roof over their heads - then virtually every need is considered a basic need. Similarly, some agencies use the term Emergency Food for such folks and Emergency Housing when a person has none. Within the scope of the Service Groups, virtually everything becomes an Emergency category if the client has no access to that thing. In those situations, use the word Emergency.

# Family

Family programs and services are those that operate for the sake of household members and their children, grandchildren and sometimes foster families, to the degree that program guidelines allow. Parenting classes fall in that bucket. So do Housing programs for single parents.

If you are looking for help for a person in the context of being a parent or guardian, you can use the Service, Family, to help maximize your options.

### **Financial**

You can use Financial for situations in which your client needs basic financial support – free or heavily discounted items or services. I have tried to mark free or heavily discounted items or services with the Financial service group because they allow them to use that money on other sometimes more important things like food and rent and medications.

We have also used Financial to describe any training on handling money more wisely (in which case, use Education, you would also use the service group Education.)

And any program that helps a client find a job, prepare for the work environment or advance one's profession skills gets that service code since the purpose of all such programs is either to find a job (money) or to find a better one (more money).

### Food

Food is hot, cold, served, distributed, delivered to your home or waiting at the local food bank (or pantry). Food is not nutrition. Nutrition often refers to education about food, though it's also used as a descriptor when discussing health value vs. basic sustenance. But if an agency says they provide hot nutrition, they are saying they provide healthy food. I say this because if you are searching for food, you can expand your results by using the tag "nutrition." Also use it if you want to find a nutritionist or cooking classes where the emphasis is healthfulness.

# **General Support**

Some agencies that do a lot of different things for clients. Many will do things that don't really have categories. Agencies that go above and beyond the normal list of tasks and services to make sure their clients are comforted, cared for, coached, assuaged and otherwise prepared are usually providing a level of support that doesn't have a name. It's just general support. So, we call it that.

Organizations that do case management will sometimes say they provide other support, or general advocacy. We have usually marked that as General Support.

Some providing organizations offer problem-solving or trouble-shooting. If they don't specifically break that out as a service, we've called it General Support.

If a client needs a protection order and a safe place to hide, they are probably emotionally stressed and mentally scattered. Connecting that person to a "peer" case worker, someone who has gone through the same turmoil and dangers, will undoubtedly provide lots of General Support.

We use General Support to mean "...and other potentially really important ways of helping," or "helping any other way possible."

# Housing

There is voucher-based housing, Income-based housing, Supportive housing, Transitional housing, Emergency housing, Wet housing, Dry housing, Safe housing, HUD project-based housing, Section 8 housing, Mixed housing, Rent-controlled housing, USDA rural development housing, Public housing, Congregate housing, Federal, State and City-funded housing, Senior housing, Section 42 tax credit program housing, Assisted living housing and more.

Some of these terms describe similar things. Some are subcategories of others. Some are commonly provided in struggling communities. Others, less so.

It's messy. But we've also applied the Service Group "Housing" to programs that help families or individuals pay for house and home related stuff like furniture. If you are looking for home-related cost assistance, housing financing, or rental assistance, add "Financial" to "Housing" to narrow your search to those services. And use tags like Utility, Assistance, Cost, Reduce, Payment, Heating, Improvement,, and so on to narrow the search further.

# Identification

This is a very specific thing. If you are homeless but would like one, the first thing you are going to have to do is prove who you are. If you have been homeless for a while, you may not have photo ID or a birth certificate or a social security card. The problem is that you often need one of them to replace each of the others. Identification will give you the places that can replace these three items. They won't solve all the possible problems involved with replacing ID. But the problem is always solvable, and these sites may get you closer.

# Independent Living

Seniors and and more functional disabled folks who are dependent on the help of others in order to continue living in their own home are often getting those services through agencies that are supported to some degree by the federal government. Federal money is provided because seniors who live at home are lot less expensive to support than those in full-care senior living facilities which the government, and therefore the rest of society, also support. Independent Living is, therefore, a big deal these days.

Independent Living is used to describe a collection of services, a category of living, a type of housing and a collection of prevention and maintenance strategies – anything having to do with keeping folks in their own homes.

So, use this term if your client needs help to arrive at their door. Food and supplies, medical support, assistance for daily living, modification to the home or car to allow for wheelchair access, and so on.

# Legal

Legal assistance for our client population is often pro-bono; provided at no cost.

Low-cost services are also available though seem less prevalent in the social services world. The help can come in the form of online or phone-based advice and information, community legal clinics or directly from attorneys who meet with clients in their offices.

Like other attorneys, pro bono legal providers will tackle a range of issues while others are topic-or population-specific in areas like immigration, sexual abuse, housing, seniors & disabled folks, women & children.

For specific referrals, consult the advocacy organizations that are reputable in the fields that describe your client or their issue. For example, in cases of senior financial abuse, start with the Washington State Attorney General's office. For senior physical, emotion or phycological abuse, contact the local Area Agency on Aging.

#### **Lists & Guides**

Some Resource guides and lists cover the full range of social services supports and the community-based organizations that manage them and make them available to local clients. Specific guides and lists are issue- or population-focused like developmentally disabled, veterans, immigrants, LGBTQ, unemployment folks and guides for folks who are incarcerated or recently released, which are called re-entry guides. There are also guides for seniors, students, teens, toddlers and new mothers. For now, CHC holds the general ones.

We have not tried to log every resource in the state. Instead, we keep the resource guides as a discrete research avenue for users. We do this because for a couple reasons. ....continued on next slide.

#### Lists & Guides – cont.

Because so many resources are small and have no web presence, having each one listed for us by their communities is as good as it gets, for now. Having all the major agencies and their programs represents everything that is known in the state.

The issue then becomes whether the resource guides themselves are regularly updated. For the most part, that is out of our control. But CHC is designed to know when new versions of most guides get updated. When we get notice of an update, we can exchange the new versions for old with just a few clicks.

Use the guides and lists in CHC when you can't find what you want in any particular area. Just click the Lists & Guides on switch in the Search screen and you will have access to everything that every community in the state knows about itself.

### Medical

We weren't being particularly literal when we created the Medical service group. We didn't intend to list hospitals, most clinics nor any practitioners. It is designed to get you to affordable and free clinics, prescription assistance programs, and basic medical care in the context of multi-services offices. Medical care includes prevention programs, medication management in recovery centers, maternity courses, chronic disease management programs and, of course, family planning. Medical can get you health-care education (So, also choose "Education" to make sure you get them all) and training on health insurance (be sure to choose "Financial" to get those, too). So, like most of the other service groups, Medical is a very specific thing and a ton of stuff to support it. Just remember to mix and match your Service Groups and Service Tags to get them all.

#### Research

While they are not common, some community resource providers pride themselves of being places of learning as well as providers of services. Libraries. Legal websites. Immigrant support agencies. Any office that states that it keeps and provides materials on topics related to their work and services is potentially valuable as a place to do research. For example, the needs and histories of certain populations struggles. If your client wants a place to learn on a topic that is pertinent to their population group, a particular health issue, available legal remedies or etc., use the Research service group.

#### Referrals

Agencies will often state that they help clients find other resources that the client might need but which they don't offer. Essentially, they are saying they will refer them as needed. Other agencies clearly state that they provide referrals to resources. Sometimes the difference is a matter of style. A warm hand-off vs. "Here's their phone number." In either case, we have given those agencies the "Referrals" service group and tagged each with "Resources."

### Respite

This is a place or a service that seeks to relieve a person of their responsibilities related to the care of very difficult family members, allowing them to rest and recharge from the continual physical, emotional and psychological stress. Two good examples are single mothers with multiple developmentally disabled children and family members who act as caregivers for Alzheimer's-stricken relatives. If your client needs to get away from whatever it is that has them stressed and emotionally drained, searching for Respite may be an option.

#### Senior

If the client you are searching for is over age 65, choose this Service Group. Also, know that many services that are available for seniors are also available for formally disabled persons (SSA), like Medicare, and that Veterans are frequently both.

### Transportation

With the exception of taxi services, the Transportation Service Group includes all types of publicly accessible transport including ferries and trams and the occasional group van to to take seniors to event. Be sure to see review the Transportation Service Group at the National level.

#### **Veterans**

A conversation about what is available for veterans can be expansive

In CHC, search using the Service Group "Veterans" first. Then, where appropriate, search for the same needs using the related population groups of Senior and Disabled, etc., because veterans can be these things, too.

Also, much of the benefits and services vets need is available at the local levels.

But most of it derives from the State and Federal Governments. Search there, too, to make sure your searches are complete.

#### **Victim**

This category refers to victims of violence, Ponzi schemes, online bullying and etc., rather than medical issues. Vulnerability is high among lower-income folks, immigrants, seniors, women and children, young people who are out on their own for the first time and others. Networks of public and private agencies across the state work to protect, educate, defend and support as many as possible while smaller community-based agencies work to fill in gaps. From small cities to national non-profit organizations and federal agencies, support for victims and protection for potential victims throughout the database.

#### Vision & others

The collection of vision-related resources is greater than one might think. If you know your community well then you will know that some optometrists offer free screenings for children. Others save and provide refurbished frames to give to low-income families. Still others specializes in special needs kids and commit to except Medicaid. And free eye exams come and go like seasonal sales

Companies exist nationally, like Vision USA & the Knights Templar, to help families afford glasses, lenses, and frames. And of course, local Lion's Clubs help families with the costs of vision, hearing exams and hardware. Other groups focus on diabetes-related issues, burn victim assistance and children's specialty care. Search for the latter groups, issues and services using Service Groups and tags.

We have added Vision to the list of service groups only recently. As a result, not a lot of resources have been entered so far. This will change over time.

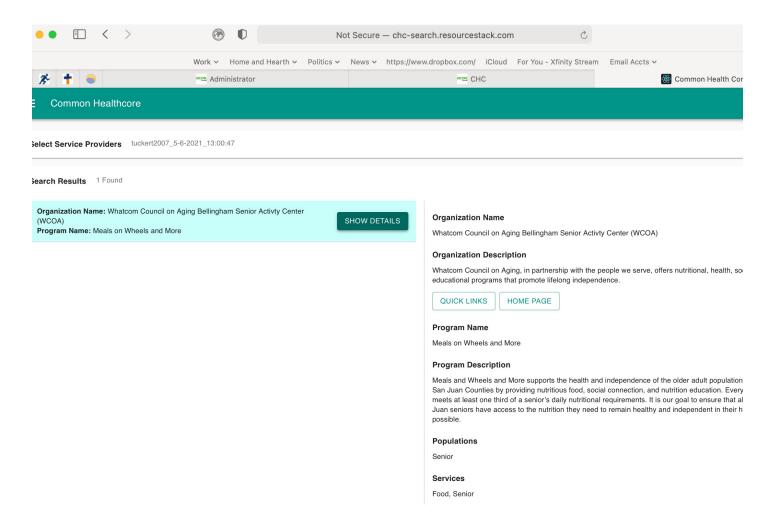
# **About Tags**

Tags are an alternate way of asking your question. The question being, "What's out there for this person who is struggling with these issues." Tags allow you to ask more specifically and to use your own words to describe the client, characteristics of the client, the client's issues or the products and services to serve them. Specifically:

- 1. Tags can describe an aspect of the client (Youth), his/her predicament (Homeless, At-Risk), a needed service (Shelter) or a benefit of a service (Safe), or needed items (winter coat, heavy socks).
- 2. If this at-risk homeless youth would like to learn how to handle his/her money, start with the Services Groups *Financial* and *Education*. If that doesn't get you what you want, try using just the tag Budget, or the tags Money + Management.
- 3. Or, instead of looking for help with a protection order by starting with the Services Groups *Legal* + *Education*, try the Tag, "Protection."

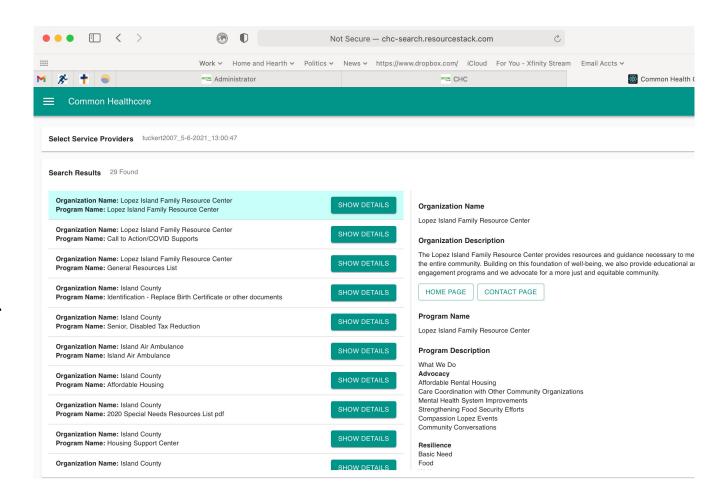
# Program (name) searches

- Use the Program option when you know the name, or words in the name, of the program you want.
- Capitalization isn't needed.
- When using a partial name doesn't work, you may be shown names from previous searches in which you used those words. In that case you can make a choice or try new words.
- In this search I searched for agencies with "wheels" in the name
- Uncommon words work best



# Organization (name) searches

- Use the Organization option when you know the name, or words in the name, of the organization you want.
- Search terms are not case sensitive
- If using a partial name doesn't work, you may be shown names from previous searches in which you used those words. In that case you can make a choice or try new words.
- In this search I searched for agencies with "Island" in the name



#### Quick Links, Program Page, Home Page, Contact Page

Usually, agency contact information will be on separate pages. But agency or program contact information may be different and one or both may also be listed on other pages. If the programs information and contact information are on the same page, then use the Quick Connect button. It's "Quick" because it gives you both the what and the where information with one click. If only one of the three or four buttons is active, it will be Quick Connect. If the program page has only program information, then use the Program Webpage button.

# FAQ

### **FAQs**

If we're going to be inclusive, why not use "Medical" to describe Vision and Dental also.

Because being inclusive and being efficient are often different things. Dental has been thought of as very different thing than medical for various reason. Different histories and struggles for legitimacy. Later, they preferred different coverage models with dental hesitant to succumb to "managed care." Also, the enormous effects of healthy and unhealth teeth and gums have only recently been recognized. The same is true of Vision. In CHC, we break out the different professions for efficiency and to give the user more specificity in their searches.

# FAQs

# Tags